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## **GREATER LAKE CATHIE – BONNY HILLS VILLAGE CENTRE PLANNING STUDY**

### **STAGE 1 – ASSESSMENT OF POTENTIAL**

PREPARED FOR THE OWNER,  
ST VINCENTS FOUNDATION PTY LTD,  
ON INSTRUCTIONS FROM  
TIERNEY PROPERTY SERVICES PTY LTD,  
DEVELOPMENT MANAGER  
RAINBOW BEACH ESTATE

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## EXECUTIVE SUMMARY

1. This report was commissioned by Tierney Property Services Pty Ltd, development manager for St Vincents Foundation Pty Ltd, the owner of some 180 hectares at Rainbow Beach which lies between Lake Cathie and Bonnie Hills.
2. The planning for the development of the land for residential purposes calls for the establishment of a “village centre” which is intended to develop into the principal business centre for the Lake Cathie/Bonny Hills district.
3. Currently, that district has a population in the order of 5,400 and the Port Macquarie/Hastings Council envisages it expanding to a maximum of about 10,000 by 2021.
4. This is the first of two reports on the village centre. It sets out when it might begin to be developed, what its initial components might be and what it might expand to be about 2021. A second report will address the layout of the centre and discuss appropriate urban design controls for it.
5. At the outset, the fact that the population of the district is likely to be limited to a maximum of about 10,000 will have implications on the development of the village centre as it may deter investor interest by capping the size of the market.
6. Chapter 3 of this report sets out the past and projected future growth of the population in the district. It notes that earlier studies by the Council identified some small areas of land which might be suitable for development beyond those currently contemplated for development. It appears it may be necessary for those additional areas to be rezoned and developed if the district’s population is to reach about 10,000 by 2021.
7. Chapter 4 examines the demographic character of the district’s population in 2001 and 2006. About 50% of the occupied dwellings in it appear to house only adults. The remaining houses accommodate about two-thirds of the population which appears to consist of families, many of them, it seems, containing young children. That dichotomy has some implications for retailing since households consisting of adults and those consisting of families have different patterns of retail expenditure.
8. For reasons set out in Chapter 3, it appears likely that the district – which provides coastal home sites (an increasingly scarce resource) – may increasingly become an enclave for the wealthier in society, most of whom are likely to be older retirees.
9. Many of the families who are living in the district – particularly in Bonny Hills – appear to be dependant on employment in Port Macquarie, making a round trip of some 40 kilometres each day. They were drawn to the district because land prices were lower than in Port Macquarie. If future residents tend to be from the wealthier section of society, the attraction of the district for future family settlers may be reduced. Even workers employed in the district may be forced – by raising land prices – to live elsewhere.
10. If that scenario unfolds, the village centre may develop with more emphasis on restaurants, cafes and the like than on traditional convenience shopping.

11. Chapter 5 outlines the recent development history of the district and considers its likely course over the next few years. It appears that the village centre site is unlikely to be available for development until about 2012. At that time, the population of the district is likely to be in the 5,500-6,000 range having plateaued after about 2008 due to land shortage.
12. Chapter 6 examines what the initial components of the village centre (under that scenario) might be. It assumes that Port Macquarie/Hastings Council will provide a branch library/administrative office and a community centre at the outset and suggests the Police and NSW Fire Bridge might also be interested in establishing there. The private sector's contribution to the initial village centre has been severely prejudiced by the opening of a Woolworths supermarket in Lake Cathie and the approval of an IGA supermarket at Bonny Hills.
13. After surveying possible candidates for inclusion in the village centre, at or near its inception, the report concludes that the private sector's contribution may be confined to a sales and display centre for the Rainbow Beach Estate, a small tavern, a small medical centre and some limited retailing such as a coffee shop, general store and a pharmacy.
14. The table below sets out what is considered to be an optimistic listing of the businesses and facilities which might be established in the village centre when the site becomes available or shortly thereafter.

Sector	Component	Approx gross floor area in square metres
Public	Branch library/administrative centre	1,200
	Community Centre	1,000
	Police Station	400
	Fire station	400
Private	Project site and sales office/display centre	300
	Tavern	500
	Retail:	
	General Store/Convenience store	200
	Coffee lounge/Café	100
	Other:	
	Child care centre/kindergarten	200
	Service station	200
Total floor space <i>circa</i>		4,500
Total retail floor space <i>circa</i>		300

15. If there is further development of retail or commercial premises elsewhere in the district before the village centre is established, its development would face even greater difficulties.
16. It may be necessary for St Vincent's Foundation Pty Ltd to accept some of the risk by building some of the first buildings and offering them at subsidised rentals.

17. If amply protected and encouraged, by 2021, the village centre could become the principal business centre for 10,000 people. Its composition will reflect the character of that population. However, prudence suggests that adopting a figure of, say, 15,000 square metres of built space and about the same amount of parking space (to accommodate around 530 cars) as targets for planning purposes.
18. After allowing for roads and green space, the Concept Plan's proposal to set aside about 4 hectares for the site of the village centre appears reasonable. Later stages of the planning process should proceed on that basis.

## **1. INTRODUCTION**

- 1.1 St Vincent's Foundation Pty Ltd (*StVF*) owns some 180 hectares of broadacre land, zoned for residential development (Residential 2A1) lying between the coastal townships of Lake Cathie and Bonny Hills in the Port Macquarie/Hastings Local Government Area (*the LGA*). Under the *Greater Lake Cathie and Bonny Hills Urban Design Master Plan 2003 (the Master Plan)* about 4 hectares of StVF's land was identified as the site for a "village centre". The village centre site is isolated, vacant and surrounded by undeveloped land but abuts Ocean Drive, the road linking the townships.
- 1.2 Luke and Company Pty Ltd, engineers, surveyors and planning consultants, have lodged a Concept Plan for the development of the StVF land with the Department of Planning seeking approval, under the provision of Part 3A of the Environmental Planning and Assessment Act 1979, to commence developing the land. The village centre is shown only indicatively on the *Concept Plan* submitted to the Department.
- 1.3 StVF require the likely role and future land requirements of the village centre to be resolved so that it can be incorporated into the future development proposals in accordance with the *Concept Plan*. Port Macquarie/Hastings Council (*the Council*) wishes to include provisions relating to it in a development control plan.
- 1.4 Tierney Property Services Pty Ltd (*TPS*), development manager for StVF, retained Design Collaborative Pty Ltd (*DC*), planning and development consultants, to undertake the work involved. The director of DC responsible for the work is George Smith whose curriculum vitae appears in **Annexure 1** together with some information about DC.
- 1.5 This report is the first stage in the process of preparing a plan for the development of the village centre in conformity with the principles set out in the *Master Plan*. The plan is intended to guide the development of the village centre from being part of a grazing property to the viable and vital major centre in a community with an ultimate population in the order of 10,000 as envisaged in the "*Hastings Urban Growth Strategy, 2001*" (*HUGS*) and confirmed in the *Master Plan*.
- 1.6 This first stage of the process is confined to a demand analysis directed at establishing what the village centre may contain as it develops. A subsequent stage in the process will advance a physical framework within which the village centre can develop.
- 1.7 The first edition of this report was prepared in May 2007. This second edition was prepared in December 2008 to take into account the results of the 2006 Census.

## 2. THE GEOGRAPHIC CONTEXT

- 2.1 Lake Cathie and Bonny Hills are two distinct townships on the coast, separated by open land behind Rainbow Beach, most of which is owned by StVF. By road, the two townships are about 3.5kms apart. They lie along Ocean Drive, the coastal road linking Port Macquarie to Camden Haven where Laurieton is the main centre. By road, the southern edge of Port Macquarie (Lighthouse Beach) is about 10kms from the northern edge of Lake Cathie and the southern edge of Bonny Hills is about 5kms north of the northern edge of North Haven, the closest urban area in Camden Haven. In this report, the area encompassing the two towns and their hinterland is referred to as “*the district*”.
- 2.2 The only other road linking the district to another place is Houston Mitchell Drive which runs from Ocean Drive, adjacent to the StVF land, to join the Pacific Highway some 5kms to the west. For most of its length, it passes through a State Forest and it meets the Highway in a State Forest.
- 2.3 Each of the towns is essentially a residential enclave. They have a comparatively limited hinterland due to their being surrounded by land with limited development potential. That land includes National Parks and State Forests and large tracts of low lying, flood liable land as well as Lake Cathie and, at some distance, Queens Lake.
- 2.4 In 2000, the HUGS identified Lake Cathie – Bonny Hills as one of the principal areas for urban expansion in the LGA over the 20 years to 2021. That expansion envisaged development of land already zoned for urban purposes as well as land yet to be zoned. The latter was identified in the *Master Plan*. That *Plan* was prepared following the preparation of *Environmental Study for the Stage 1A Urban Land Release (the ESSIA)*. These studies concluded that those two categories of land would be sufficient to accommodate some 10,000 people in the district by 2021 as envisaged by the HUGS but that conclusion may be optimistic (see 3.5 below). Whether or not more land could become available for urban development in the district after 2021 is unclear. **However, what may happen in the district after 2021 has significant implications for the village centre since a critical question will be whether or not investors (particularly, retailers) will establish in a district where the long-term growth prospects are finite and limited.**
- 2.5 At present, Lake Cathie contains considerably more retail floor space than Bonny Hills. The largest retail centre in the district is on Ocean Road, south of the bridge over Cathie Creek, in Lake Cathie. It consists of three parts – an older block of nine small businesses, a tavern<sup>1</sup> and a recently developed “*supermarket dominated primary convenience centre*” with a Woolworths supermarket as its lead store. **Annexure 2** sets out the businesses in that group and elsewhere in Lake Cathie.
- 2.6 In Bonny Hills, there is a tavern, one centre of five small businesses and a few scattered shops along Ocean Road as set out in **Annexure 3**. However, in the last year, a consent has been given for an IGA supermarket to replace the five small

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<sup>1</sup> The term “tavern” is used to describe premises licensed with a hotelier’s licence which do not provide residential accommodation for the public.

businesses. At the time of writing no construction work has been commenced on that supermarket but four of the five businesses on the site have closed in preparation for its development.

### 3. POPULATION GROWTH: PAST AND PRESENT

- 3.1 **Table 1** sets out the growths of the enumerated populations of Lake Cathie and Bonny Hills since 1976. It is interesting to note that, in 2006, the populations usually resident in Bonny Hills and Lake Cathie each exceeded the numbers of persons counted by 76 and 39, respectively. This suggests that tourism is not a significant factor in the district's economy.

**Table 1: Historic Population Growth**

Year	Number of persons			Average Annual Increment
	Lake Cathie	Bonny Hills	Total	
1976	493	261	954	-
1981	941	538	1479	105
1986	1,153	873	2026	109
1991	1,474	1,204	2678	130
1996	1,774	1,469	3243	113
2001	2,098	2,195	4,293	200
2006	2,697	2,464	5,161	173

Source: Australian Bureau of Statistics: Census of Australia

- 3.2 The *HUGS* projected the growth of the district's population as set out in **Table 2**.

**Table 2: Projected Population Growth of the District**

Year	Population*
2001	3,900
2006	5,400
2011	6,900
2016	8,400
2021	9,900

Source: *Master Plan*,

\*Based on the results of the 1996 Census.

- 3.3 The *HUG'S* projection for 2001 was about 400 too low while that for 2006 was over 300 too high. The Council has, subsequently, estimated the population in the towns to have been in the order of 4,670 in 2004 and 5,600 in 2006 but the latter estimate was about 10% too high.
- 3.3.1 If growth has continued at the average 2001-2006 rate, by the end of 2008, the district's population should be in the order of about 5,600 although – as discussed below – land shortage and the national decline in the housing market may have resulted in that figure not being attained.
- 3.4 In both the 1996-2001 and 2001-2006 intercensal periods the average annual increase in the number of occupied private dwellings in the district was about 80 but, in the later period, average household size declined.
- 3.5 The *Master Plan* envisages parts of the expanded towns being developed at what are, by current standards, quite high densities, e.g. 25 dwellings/hectare for the quite extensive areas identified for medium density residential and 12 dwellings/hectare in the ordinary residential areas. Whether or not these densities might be feasible on broadacre sites in a relatively small urban enclave could be

questioned due to factors such as the marketability of the small lots required in the ordinary residential areas to achieve the nominated density and the feasibility of having a significant amount of medium density housing built in a comparatively short time in what will be a relatively small community. In addition, there will inevitably be some broadacre land withheld from the development or developed lots held vacant for speculative purposes. That is to say, the land currently zoned and proposed to be zoned under the *Master Plan* may not be sufficient to support the population of about 10,000 envisaged.

- 3.6 The *ESSIA* identified some relatively small areas, lying beyond the areas recommended for rezoning in the short term, for future investigation. It may be necessary for some of that land to be rezoned to accommodate the *HUGS* target of 10,000 people in the district by 2021.
- 3.7 The population structure of the *LGA* has been skewed by the influx of retirees over the past 15-20 years. Port Macquarie has grown rapidly because of that influx and it now has a sufficiently large population to have become, clearly, the dominant urban economy in the *LGA* and in the adjoining LGAs of Taree and Kempsey. Its growing economy is supporting an increasing workforce. However, the influx of retirees and sea-changers has increased land prices in Port Macquarie (particularly, near the coastline because that area offers the most attractive residential location) to levels where some workers, engaged in ordinary occupations, find it difficult to afford housing in it. As a result, outlying towns such as Wauchope and, it seems, Bonny Hills (where land has been more readily available than in Lake Cathie) have become places where those workers have found affordable housing despite incurring higher travel costs.
- 3.8 Those parts of urban Port Macquarie close to the coastline are now approaching full development. The next major area for development at Port Macquarie is the so-called Area 13 at Thrumster. It is well-removed from the coastline and may not be as attractive to retirees and thus it may provide lots more affordable to the town's workforce. By contrast, the district will provide the increasingly-scarce, near-coastal lots. Consequently, it seems probable that land prices in the district will escalate as wealthier retirees and the like bid for that scarce resource.

#### 4. DEMOGRAPHIC CHARACTERISTICS

- 4.1 **Annexure 4** sets out some relevant characteristics of the populations of the two towns – in 2001 - (which differed quite markedly) and compares them to those of their two nearest urban neighbours – Port Macquarie and Camden Haven – and to NSW. **Annexure 5** sets out the same data from the 2006 Census. They reveal the following:-
  - In terms of median ages of the populations, while those of Camden Haven, Port Macquarie and the State increased between 2001 and 2006, those of Lake Cathie and Bonny Hills decreased marginally. However, all four places in the *LGA* have median ages well above the State's.
  - The percentages of the population aged under 15 years decreased between 2001 and 2006 in all five areas. However, Lake Cathie and Bonny Hills had higher percentages than the State and the difference between the two towns increased



slightly with 22.5% of Bonny Hills' population being under 15 compared to 19.7% in the State.

- The percentages of the populations aged 65 or over increased in all areas except Camden Haven. Those in Lake Cathie and Bonny Hills remained above the State level but were substantially below those of Camden Haven and Port Macquarie.
- In all areas in the LGA except Lake Cathie, the level of masculinity of the population was lower than the State's. In Lake Cathie, masculinity rose between 2001 and 2006.
- In 2001, all the areas in the LGA had lower median weekly individual incomes than the State. In 2006, that remained the situation. That in Camden Haven remained the lowest. Bonny Hills' exceeded Port Macquarie's marginally and remained above Lake Cathie's.
- Unemployment rates fell in all areas between 2001 and 2006 although all the places in the LGA had levels above the State's. Bonny Hills experienced the largest fall and was that closest to the State level.
- The percentage of unoccupied private dwellings rose in all areas with Lake Cathie recording the highest level. The figures suggest that all four areas in the LGA contain some holiday homes.
- Median monthly housing loan repayments across the LGA remained well below the State levels. That in Camden Haven was markedly lower than in the other three places in the LGA. Those places had medians that were fairly uniform with Lake Cathie being the highest.
- In 2006, median weekly rental in Camden Haven was significantly lower than elsewhere but the medians in Port Macquarie and Lake Cathie rose to close to the State level and, in Bonny Hills, exceeded it. This represents a significant change since 2001.
- The percentages of homes fully owned fell in Lake Cathie and Bonny Hills and the State but remained stable in the other two areas. All places in the LGA recorded higher levels than the State with Camden Haven recording the highest. The level of home ownership was 5% higher in Bonny Hills than in Lake Cathie.
- All areas experienced significant increases in the percentages of homes being purchased. In Bonny Hills, it rose from 24% to 35% while in Lake Cathie the increase was from 19% to 31%.
- Similarly, the percentage of dwellings being rented rose in all areas. However, only in Port Macquarie did it exceed the level in the State. In Bonny Hills, the percentage rented was little more than 50% of the State level.
- The percentage of lone person households fell in Lake Cathie and Bonny Hills with that in the latter being well below the State level. By contrast, the levels in Camden Haven rose while that in Port Macquarie remained constant.

- As in 2001, the dominant family or household type in all places in the LGA was “couple without children” whereas in the State it remained “couple with children”.
  - Mean household sizes did not vary between 2001 and 2006 except in Camden Haven where it fell slightly. In the district, that size was similar to the State’s.
- 4.2 In 2006, in Lake Cathie, 396 families consisted of couples without children and 207 were lone parent households. Thus about 55% of occupied private dwellings contained no children. In Bonny Hills, the figures were 322 and 138, respectively, so that 49% of occupied private dwellings contained no children. By comparison, in the State, the percentage was about 43%, in Port Macquarie, 59%, in Camden Haven, 71%.
- 4.3 It would appear that of the 1,655 occupied private dwelling in the two towns in 2001, 293 were occupied by lone person households and 541 by couples without children. In 2006, the equivalent figures were 2,022 occupied private dwellings, 345 were occupied by lone person households and 718 by couples without children. That is to say, 52% of those dwellings at each Census were occupied only by adults and they housed about 32% of the population in 2001 and about 35% in 2006. It would appear most of those adults are elderly. The remaining 48% of dwellings housed 68% of the population in 2001 and 65% in 2006 suggesting their average household size was about 3.55 persons in 2001 and 3.44 in 2006. That is to say, about half the housing stock is occupied by adults in small households (averaging 1.6 persons in 2001 and 1.7 in 2006) and the other half by couples with families.
- 4.4 These demographic characteristics have implications for retailing. The almost equal division between households containing children and those without children is particularly relevant because
- i) households consisting only of older adults have a different pattern of expenditure to households consisting of families;
  - ii) households consisting of older adults spend less on convenience goods (especially, food) than households consisting of families;
  - iii) older adults tend to spend less on common comparison goods, eg, clothing and footwear, than families with growing children; but
  - iv) older adults may spend more on medical and health-related services.
- 4.5 Another key factor is the levels of income of households. However, older people on higher incomes do not spend a great deal more on food lines than those on lower incomes because a person can only consume so much food. The wealthier may, however, spend more by buying higher priced/quality comparison goods lines and more exotic foodstuffs. Families are less likely to purchase those types of goods unless they are on high incomes. If the families in the towns are on modest incomes they are unlikely to have much surplus income to spend on higher priced foods and the like given the likelihood they may face considerable travel-to-work costs.
- 4.6 This dichotomy in the towns’ demographic characteristics may affect, for example, the character of the retail food shops required with the likelihoods that the wealthier may elect to travel to Port Macquarie for specialty foods while the local outlets cater more for lines popular with families.

- 4.7 Families in the towns probably now provide the greater part of the local expenditure on convenience lines. If wealthier retirees begin to settle in larger numbers, the balance could swing in the other direction with more retailers catering for more expensive lines. That could make the district less attractive to families. If, as posited in 3.8, the district begins to attract wealthier residents, the demographic characteristics of its population are more likely to tend towards those of, say, Port Macquarie than towards that of the State. That is to say, it will become one where older households dominate, median income rises, the median household size falls, there will be more lone person households and housing costs will rise.

## **5. GROWTH – HISTORIC AND PROJECTED**

- 5.1 **Table 1** goes some way towards explaining the history of the two towns. They emerged as appreciable population centres in the late 1970s and have grown steadily since then. However, the annual rate of growth decreased slightly in the 2001-2006 intercensal period.
- 5.2 What is now the StVF land was zoned for residential development in 1984. Subsequently, approval was granted for its development as an international sports resort including a golf course. As a result of that consent, a man-made lake was created and other works undertaken but the resort did not proceed beyond what is known as the Rainbow Beach Estate, a conventional residential land subdivision, which commenced on the southern edge of what is now the StVF land, i.e. at the northern end of Bonny Hills.
- 5.3 The company promoting the international sports resort failed and the land passed into the hands of an administrator in the late 1980s.
- 5.4 StVF acquired the land in the earlier 1990s. It elected to re-design those parts of the Rainbow Beach Estate which had not been sold and 18 lots which were registered but unsold. The first stage of the re-designed estate came on the market in July 2003. Since then, 121 lots have been sold and the last stage of the Estate is now selling. To date, some 106 houses or dual occupancies have been built on the Estate and there are some 18 lots yet to be built on.
- 5.5 The towns are sewered, the treatment plant (STP) being located at Rainbow Beach. It has a design capacity of 6,000ep. In 2000, after operational problems at the STP, the Council imposed a moratorium on all new developments which would increase the load on the plant.
- 5.6 In 2003, the moratorium was partially lifted to permit some limited forms of development subject to the availability of capacity in the STP. In 2004, there was a further relaxation when the Council agreed to permit up to 200 yet to be connected to the STP. (That additional capacity has not yet been fully taken up). In 2006, the Council agreed to consider rezonings of land as the problems with the STP were seen as being resolved.
- 5.7 Work on expanding the STP's capacity is underway. It is anticipated that, by mid-2009, its capacity will be increased to 9,000ep, ie, halfway to its planned ultimate capacity of 12,000ep. If that happens, the STP is unlikely to curb the growth of the towns over the next few years as it has in the recent past. However, further

- expansion will be required in a few years if the district's population is to reach 10,000 by 2021.
- 5.8 One effect of the moratorium has been that there have been relatively few new lots created in the towns in recent years. The largest contributor has been the Rainbow Beach Estate which has sold some 120 lots in the last five years.
- 5.9 Another effect of the moratorium appears to have been that the considerable supply of vacant lots in the towns has been reduced which may slow growth in the near future when coupled with current economic circumstances.
- 5.10 A recent survey estimates that there are about 160 vacant lots in the towns, made up of 18 in the Rainbow Beach Estate, 82 elsewhere in Bonny Hills and 60 in Lake Cathie. Overall, there has been a decrease of about 60 lots in the number of vacant lots in the last 18 months. If those remaining vacant lots were developed, they would probably support some 400 persons.
- 5.11 If the population has been growing at about 170 per annum in the period 2001-2006, that equates to about 65 dwellings per annum. Equating dwellings to lots, if that rate of consumption continues, there may be a little more than two year's supply of vacant lots in the towns. However, it is improbable that all lots would be developed or sold and developed so that the reality may be that growth may practically cease in the short term.
- 5.12 With a population of 5,161 in the towns in 2006, it may have increased to around 5,500 by late 2008 and it may expand to around 5,600 over the next 12 months – say, by the end of 2009.
- 5.13 There are unlikely to be any new lots coming onto the market until rezonings have been effected and new estates developed. That process – although underway – is unlikely to yield lots for some years. The best prospect for that is the StVF land which is already zoned. As noted in 1.2 above, StVF has submitted a *Concept Plan* to the Department of Planning as the first step in seeking approval for the development of its land under Part 3A of the Environmental Planning and Assessment Act. Various studies required by the Director General have now been completed to complete the Part 3A application which is still to be determined.
- 5.14 StVF's objectives are to obtain the necessary approvals, to prepare detailed plans and to begin bulk earthworks for the first stage of the development in 2010. The first lots would thus be likely to become available late in 2011 or early 2012 with residents beginning to arrive a few months later.
- 5.15 While the StVF's project is the largest in the district, other smaller land-owners may be able to bring land onto the market more quickly. However, it would be surprising if they could do so more than, say, 12 months before StVF does. Even then, it would be unlikely that many residents would live on any such estates before 2012.
- 5.16 It seems probable that the population of the towns may plateau somewhere around 5,600 in 2009, 2010, and, possibly, in 2011 and 2012 before beginning to grow again.

- 5.17 The program for StVF's land development suggests that the village centre site may not be available for development until about late 2011 provided the present financial crisis does not disrupt and delay that program.

## **6. POTENTIAL COMPONENTS OF THE INITIAL VILLAGE CENTRE**

- 6.1 The village centre will have two broad categories of components – those provided by the public sector and those provided by the private sector.
- 6.2 Council's *Community, Cultural and Emergency Services Development Contributions Plan* suggests that it could initially contribute three "public sector" components to the village centre – a branch library/administrative office, a community centre and a Rural Fire Service station.
- 6.2.1 At the outset, it is questionable whether or not the last is a suitable use for the village centre. A town of 10,000 should have a fire station controlled by the NSW Fire Brigade rather than being dependant on a RFS fire brigade. A fire station could be an appropriate component of the village centre.
- 6.2.2 The *Master Plan* suggests that the community centre be sited outside the village centre.
- 6.2.3 Due to the difficulties its establishment will face, if the village centre is to fulfil the role envisaged for it by the Council, it must contain the branch library/administrative office and the community centre as well as any other suitable, publicly funded, facility it can attract.
- 6.3 The *Contributions Plan* suggests that these three components could be established by 2009. However, it is unlikely that sites would be physically available for them by that time. Nevertheless, if the Council is anxious to provide these components, StVF may need to phase its development program to make sites in the village centre available very early in that program and, possibly, ahead of any residential lots. However, the funds for their construction may come largely from Section 94 contributions paid – principally - by St VF as the largest private land developer in the district. It may be necessary to use innovative financing to achieve their early establishment.
- 6.4 Some State Government organisations may be interested in establishing in the village centre, eg, the NSW Fire Brigade, NSW Ambulance Service and the Police Service, each of which might occupy a building designed for its purpose. Others – if they were minded to establish in the village centre – may opt for space leased from another, probably private sector, organisation. However, the State's finances do not bode well for investments in such facilities in the short term.
- 6.5 The public sector's contribution towards the establishment of the village centre, while it would assist, particularly, if it is made at, or shortly after, its inception, would not create the viable village centre of the kind envisaged in the *Master Plan*. Achieving that will depend upon the private sector.

- 6.6 Most new centres of the kind envisaged in the *Master Plan* are anchored, or are planned to be anchored, by a substantial retail component<sup>#</sup>. The *Master Plan* acknowledges that by its reference to a supermarket as a major element in the village centre. However, the *Master Plan* was prepared in 2003. Since then, the supermarket dominated primary convenience centre at Lake Cathie has been developed. It epitomises – in content, at least – what should, ideally, have been the initial component of the village centre. While the LGA is experiencing a rash of such developments, e.g. at Lakewood, Lighthouse Beach and Lake Innes Village as well as at Lake Cathie, it is questionable whether or not a second supermarket could be established in the district given the presence of the Lake Cathie centre, the approved IGA project and its present and anticipated future population.
- 6.7 **Annexure 6** examines towns in NSW with populations between 5,000 and 15,000 in 2001 to assess what they contained by way of supermarkets. There were 42 such towns. Thirty-two had one national chain\* supermarket, nine had two and 10 had none. Of the nine with two, seven had populations in excess of 9,000 and seven were located in inland NSW, i.e. they were old established centres with substantial rural trade areas. The two coastal towns with two national chain supermarkets were Sawtell and Batemans Bay with populations of 13,733 and 10,181, respectively, each of which was growing in 2001. (The latter serves a very large district which adds greatly to the population its retailers serve.) The district does not benefit from having a large hinterland.
- 6.8 In recent years, the two national retail supermarket chains have sought to maximise their shares of the national market. This led to the establishment of supermarkets in areas which, previously, would have been considered to contain too few people to justify their establishments. Examples in the LGA include Lakewood, Lake Innes Village and Lake Cathie. Other rural examples are Harrington Waters, Cameron Park and South West Rocks and, in the Sydney metropolitan area, Ropes Crossing.
- 6.9 Coles is still struggling despite its recent change of ownership. Whether or not it will continue to try to maximise market share or retreat to a policy of ensuring the profitability of individual stores remains to be seen. The outcome has relevance to the proposed village centre. The data in **Annexure 6** does not suggest that Coles would seek to establish a second major supermarket in the district. If it adopts a more conservative policy of only opening supermarkets where they will trade profitably (if not upon opening then in the foreseeable future), the prospects of a second national chain supermarket in the district are very remote. Also affecting that decision would be its commitment to replacing the former Bi-Lo supermarket in Laurieton with a full-line Coles supermarket and the recent opening of a Coles supermarket at Lighthouse Beach, i.e. it would have supermarkets in the closest shopping centres outside the district.
- 6.10 If a national chain did decide to establish in the village centre, it would be unlikely to do so until the district's population has expanded, i.e. its establishment could be

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<sup>#</sup> The anchor tenant in a centre is the store which attracts shoppers in sufficient numbers to ensure that any smaller (specialty) shops can survive. To attract those numbers, the anchor tenant must draw trade from a wide area – in this case, at least – the whole district as the Woolworths supermarket at Lake Cathie does.

\* National chain supermarkets are those operated by Woolworths and Coles.

some years away. It should not be considered to be a prospective tenant at the inception of the village centre.

- 6.11 There are, of course, other supermarket chains such as Franklins, IGA, ALDI Stores and Foodworks which could be interested in establishing in the village centre. However, the IGA project at Bonny Hills would appear to stifle the prospects of another sizeable store under that banner being established in the village centre in the short term.
- 6.11.1 Franklins, now owned by the South African Pick 'n Pay interests, have not been very aggressive in opening new stores in recent years and should probably be discounted as a potential developer/operator in the village centre.
- 6.11.2 Similarly, ALDI Stores would be unlikely to be interested as it seeks a larger minimum trade area population than the district is likely to contain even in 2021.
- 6.11.3 In addition, as both Franklins and ALDI Stores tend to offer “discounted” lines, the dichotomy in the local market, referred to above might be a further deterrent to them establishing in the village centre.
- 6.11.4 IGA and Foodworks are essentially privately operated shops supplied by buying groups trading under a common banner. Those groups determine what discounts they will offer the individual shop operators based on factors such as shop size and turnover. In other words, most of the risk lies with the owner and operator of “the supermarket”, not with the buying chain.
- 6.11.5 Any effects that may arise from the recent Australian Competition and Consumer Commission inquiry are – as yet – unknown. They could change the situation but are likely to take some years to be manifested, particularly, in small towns.
- 6.12 Thus in casting around for an anchor tenant for the village centre, the situation with supermarkets may be summarised as follows:-

Woolworths	already established in the district and unlikely to open a second store in such a small market.
Coles	unlikely to commit due to uncertainty about its future policies and its commitment to upgrading its representation in Laurieton and its existing representation at Lighthouse Beach.
Franklins	a possibility but, given the presence of Woolworths and the size of the market, unlikely to commit.
ALDI Stores	market too small to attract interest.
FoodWorks or IGA	unlikely in view of approval granted at Bonny Hills.
Other small independent	may be interested but would appear to be dependant on others building the supermarket.

- 6.13 In these circumstances, it seems unlikely that the initial development of the village centre will be based on it containing a supermarket or even a large grocery store as its anchor.

- 6.14 If the village centre has to be launched without a supermarket, it becomes necessary to consider whether or not any other retailer might act as its anchor.
- 6.15 There are three broad classes of retailers which might contain candidates that could be a possible anchor, viz:
- higher order retailers,
  - bulky goods retailers, and
  - specialty retailers.
- 6.16 The first class is essentially limited to discount department stores, i.e. K-Mart, Big W and Target, although Myer stores may also spread into that market. All of these stores all require trade area populations well in excess of 10,000 to warrant their establishment so that the district is unlikely to be considered a viable location for one of these stores. Moreover, they are established in Port Macquarie.
- 6.16.1 The one exception to this could be the so-called Country Target chain of stores (formerly Fosseys) which are much smaller than Target discount department stores. They can operate successfully in smaller markets but Coles is committed to establishing a Country Target store in Laurieton. It would be unlikely to consider establishing another in the district, at least, until the populations of both the district and the Camden Haven have expanded substantially.
- 6.17 Bulky goods retailers now offer a wide range of products including furniture, pool supplies, landscaping material, hardware (usually associated with timber and other building products), whitegoods and so on. They are essentially “big box shops” which seek to occupy large spaces built at low cost with large parking areas immediately adjacent to them. Most occupy free-standing buildings but there are some “big box” centres, e.g. Glendale (in the City of Lake Macquarie) and the Homemaker’s Centre at Tuggerah. The market available at the village centre is not large enough to attract most potential big box retail chains and, in any event, the style of building they occupy may not be suited to the character of the village centre espoused in the *Master Plan*. Moreover, many are already represented in Port Macquarie which provides a much more attractive location.
- 6.18 Speciality retailers occupy, in the main, small premises. Few speciality retailers can survive outside a shopping centre – either planned or unplanned – as they depend on an aggregation of shops, usually with an anchor tenant, to attract shoppers in sufficient numbers to support them. That is because most are not visited frequently by any individual shopper: they survive by being exposed to a large number of potential shoppers in a cluster of retailers.
- 6.18.1 Some specialty retailers which offer convenience goods or service can be exceptions to that scenario. They could include butchers, bakers, greengrocers, liquor stores, pharmacies, milk bars/coffee lounges/snack bars, ladies hairdressers, newsagencies, video rental shops and the like. Theoretically, the village centre could be initiated as a retail centre by creating an aggregation of such retailers, particularly, if one trader had outstanding qualities capable of attracting custom from the whole of the district. However, experience suggests that such aggregations do not usually establish on “greenfield sites” until the area nearby houses a substantial population. Observations in the Sydney metropolitan area



indicate that usually occurs five or more years after the first houses are built. That could well be the case in the district since there are already a number of established specialty retailers which provide for, at least, part of the local market. Furthermore, district residents are accustomed to visiting either Port Macquarie or Camden Haven fairly frequently for convenience goods. These factors would detract from the village centre as a location for a cluster of speciality retailers.

6.19 There are, of course, other private sector businesses which could be expected to feature in the village centre. These include medical, dental and allied health services, estate agencies, professional and business offices, health and beauty services, credit unions, building societies, refreshment rooms and a tavern. Two of these warrant closer consideration as potential initial establishments, viz:-

- i) When StVF develops its land, it will require a **project and sales office**. That could be one of the earliest components of the village centre and could be housed in a building suitable for conversion to another use when StVF no longer requires it which might not be until 2021 or later; and
- ii) Lake Cathie and Bonny Hills each has a tavern. Under the Liquor Act 2007, another hotelier's licence could be obtained for a site in the village centre. The process of obtaining a licence under this new Act is expected to be shorter and less costly than was previously the case but the process, after a site is settled, could take, say, 2 years. Thus, if a tavern was to be one of the centre's initial components, serious planning for it should begin almost immediately.

If a tavern could be established in the village centre say, by 2012, it would mean that there would be three taverns serving a population of about 5,500. While it is not unusual for towns of that size to have three or more hotels, most of those towns that do are older inland centres where the hotels are small and represent relatively small investments. Only Byron Bay among the coastal towns in NSW with populations between 5,900 and 6,900 has three hotels, the third licence having been granted to a "resort" development in 2007. (This unequal distribution can be seen in the LGA where Wauchope has four hotels for an urban population of less than 5,000 but Camden Haven only has one for a population of about 6,500.) Consequently, it may not be easy to attract an investor willing to build and operate a tavern in the village centre until the district's population has increased.

6.20 The likelihood of a medical centre being established in the village centre in its early stages has receded – if not disappeared – with the opening of a medical centre near the existing Lake Cathie business centre. Without a medical centre, the probability of the village centre attracting a pharmacy is also reduced. A medical centre, doctors' surgeries and related health facilities may still establish in the village centre if and when it becomes a recognised centre in the district.

6.21 To summarise, potential initial components of the village centre are identified in **Table 3**.

**Table 3: Potential initial components of the village centre.**

Sector	Component	Approx gross floor area in square metres
Public	Branch library/administrative centre	1,200
	Community Centre	1,000
	Police Station	400
	Fire station	400
Private	Project site and sales office/display centre/estate agency	300
	Tavern	500
	Retail:	
	General Store/Convenience store	200
	Coffee lounge/Café	100
	Other:	
	Child care centre/kindergarten	200
	Service station	200
Total floor space <i>circa</i>		4,500
Total retail floor space <i>circa</i>		300

- 6.22 The general store could be expected to offer a limited range of grocery lines, confectionary, soft drinks, tobacco and cigarettes, etc somewhat in the manner of convenience stores such as Food Plus or 7-Eleven and it might incorporate the café. It might even take the form of a convenience store with fuel pumps in a forecourt similar to those outlets.
- 6.23 In addition, it might be possible to attract one or more specialty retailers which have the confidence that what they offer would attract shoppers from across the district despite the paucity of other outlets in the village centre. For example, a hot bread bakery operated out of premises alongside the sales and display office at Harrington Waters when there were very few occupied homes in that development. A large green grocery/fruit barn might be another since there does not appear to be one in the district with most fresh produce being offered by Woolworths. The key is to find the right operators.
- 6.24 There are other potential candidates for inclusion in the initial centre. One could be child care centre/kindergarten but its establishment might be influenced by the progress made in establishing schools close to the centre and by whether or not similar facilities are established elsewhere in the district. Another is a service station although that would depend upon the policies for such establishments being pursued by the major fuel companies when the village centre is being established.
- 6.25 **The only firm conclusion that can be drawn from the above discussion is that initiating the proposed village centre will be difficult. In addition, if – over the next three or four years before its initiation seems possible – there were to be further developments for retail or commercial premises in the district, the task of initiating the centre would be made even more difficult.**
- 6.26 **There will be a significant level of risk attached to the establishment of most of the potential private sector contributions to the initial village centre. Whether**

**or not individual investors or business owners would be prepared to accept those risks will not be known until closer to the time of its commencement. However, it would be prudent for StVF to recognise that it might have to accept part of that risk by building some components and leasing them, possibly at very low rates of return, for a period until the village centre is firmly established.**

## **7. WHAT MIGHT THE VILLAGE CENTRE DEVELOP INTO?**

- 7.1 Assuming that, about 2012, the village centre was established with the components suggested above, how might it develop thereafter given that the ultimate population of the district – at the upper end of projections about its future population – appears likely to be about 10,000?
- 7.2 If it is assumed that, by the time the village centre is initially established, the district's population has reached, say, 6,000 and, if it is to reach 10,000 by 2021, it would need to grow at an average rate of about 300-400 persons per annum or somewhere in the range of 120-150 dwellings per annum if the current mix of older persons and families is maintained. That is a significantly higher rate of growth than previously experienced in the district.
- 7.3 If the character of the future population tends towards that of Port Macquarie rather than say, of the State (or of Lake Cathie rather than of Bonny Hills), that will have implications for the likely expansion and character of the ultimate village centre. There is also the likelihood of rising fuel prices to consider.
- 7.3.1 If the district's future population consists of wealthier retirees and sea-changers, it seems likely that they would tend to associate more with Port Macquarie than with Camden Haven simply because of their likely closer affinity with the former's population than with the latter's in terms of income and social status (although Camden Haven's character may change as the shortage of coastal land in the face of increasing demand could make it a more acceptable residential location for the higher-income than it has been in the past). Nevertheless, it seems reasonable to expect future residents of the district to patronise facilities in Port Macquarie comparatively frequently. That will be because Port Macquarie will not only provide wider varieties of shops and services but also because its "social life" will be more attractive.
- 7.3.2 Against that, the centre of Port Macquarie is 19kms from Lake Cathie and 23kms from Bonny Hills. No one can predict with any certainty what may happen with fuel costs over the next decade or so but it seems certain they will rise. It is possible that conventional fuel may not be readily available and personal transport (by private motor vehicle) may have to rely on alternate fuels which are unlikely to be less costly.
- 7.3.3 That could have effects on the district. For example, it could become a less attractive place for ordinary workers (i.e. those who have to commute daily to Port Macquarie) to live simply because the cost of travelling 40 or more kilometres a day could be excessive. In turn, that could make more accommodation available in the district for those who do not have to commute. While that group could be expected to retain strong ties to Port Macquarie, they could seek to create a more self-contained community in the district. That would probably be manifested in a

greater emphasis on places for socialising, i.e. cafes, restaurants and the like; increased personal services, e.g. beauty salons, health spas, hairdressers; and more specialist retailers, e.g. fashion boutiques.

- 7.3.4 It is possible that the district could emerge, over the longer term, as a fairly exclusive enclave for the wealthier in society. While the internet and telecommunications may mean that some residents could be in full-time employment while based in the district, the majority are likely to be older people who are free (or relatively free) of work obligations.
- 7.3.5 Such a community would require workers for all manner of services ranging from domestic help to professionals with the bulk likely to be on lower incomes than those engaging their services. That may result in many in the district's workforce living elsewhere in cheaper locations, e.g. Camden Haven, Lakewood or even Kew or Kendall, and commuting to the district – possibly – by public transport.
- 7.4 **If the district followed that pattern in its development, a potential threat may exist to the village centre from the “coastal hill-top village” envisaged in the *Master Plan* to the east of the village centre simply because it could offer a more physically attractive location. Consequently, if the Council is serious about the creation of the village centre as advanced in the *Master Plan*, it needs to protect it by curtailing or delaying the development of the coastal hilltop village as well as any other retail or like development anywhere else in the district.**
- 7.5 There is no basis upon which the future size of the village centre can be accurately assessed. There are, for example, suburban centres serving populations in the order of 10,000 which contain as few as 15 small shops, the largest of which is a 300-400 square metre “supermarket”. On the other hand, there are country towns of about 10,000 which have extensive retail and commercial centres, e.g. Batemans Bay, Bowral, Cowra or Inverell. Those towns were established many years ago and to serve significant rural hinterlands containing populations approaching, if not equalling, those of the towns themselves. That is not the situation in the district. Retailing and associated facilities in the district are being developed in an LGA where there is already a hierarchy of centres three of which – Port Macquarie, Laurieton and Wauchope – already contain larger centres than the village centre is likely to become. That probably implies, for example, that the village centre will have fewer of what might be called “marginal” businesses than the older established centres, it will not have any businesses based on primary industries and it may not have many – if any – government offices or banks because they are already in the established centres.
- 7.6 The simplest method of making an estimate of what retail space a population of 10,000 might support, is to base it on floor space per person, a parameter which varies by place and over time. When first investigated in Australia in the 1960s, the generally accepted figure was about 1 square metre/person. In 1986, PLI in its *Retail Update Study – Hastings Municipality 1990*, estimated the LGA had 1.75 square metres/person. In 1994, DC, in a submission on the proposal to develop Port Central, by extrapolating from earlier surveys and taking into account floor space built in the interim, calculated that, in 1991, there were nearly 2.3 square metres/person of retail floor space in the LGA (42% more than the non-

metropolitan State average of 1.6). Since 1994, in terms of larger projects alone, some 30,000 square metres have been added to the LGA's stock, those projects being Port Central (15,000sqm) Lighthouse Beach (say 3,000sqm) and about 4,000sqm each at Lake Cathie, Lakewood and Lake Innes Village.

- 7.6.1 At present, it seems there is in the order of 125,000 square metres of retail floor space in the LGA but that figure excludes the large area of space occupied by the bulky goods retailers in the industrial area at Port Macquarie. Given a 2006 population of 68,000, that represents around 1.8 square metres per person plus the bulky goods space.
- 7.6.2 While no detailed survey of floorspace in the district has been conducted, it would appear to total in the order of 5,000 square metres, i.e. about 1 square metre/person. This will increase when the approved IGA supermarket opens.
- 7.6.3 After allowing for the use of floor space in Port Macquarie and Laurieton by residents of the district and for their use of existing minor retailers in the district, it seems reasonable to suggest that the floor space/person likely to be supported in the three centres serving the whole of the district, (i.e. the village centre, Bonny Hills and Lake Cathie), could fall in the range of say, 1.0-1.3 square metres/person. That is to say, with a population of 10,000, those centres might support between 10,000 and 13,000 square metres of retail floor space. With the district already containing some 5,000 square metres with more approved and, if other neighbourhood centres (as envisaged in the Master Plan) are developed, it would appear that the most that the village centre might support would be between 4,000 and 6,000 square metres of retail floor space, i.e. it may be not much be larger than Lake Cathie is now.
- 7.6.4 The village centre should also contain non-retail space. In addition to those initially built, it should become the location for most of the district's professional practices, various agencies, offices and the like. It is difficult to assess what the floor space this miscellany of uses might occupy but, for prudence, it should be assumed that it could occupy about as much space as the retail activities.
- 7.6.5 As well, some of the facilities originally established could be expected to increase in size as time elapses and the population grows.
- 7.6.6 Thus in 2021 or thereabout, the total floor space in the village centre including the public sector facilities, could be in the order of 8,000-12,000square metres plus that in public facilities. To be conservative for planning purposes, say 15,000 square metres. Some of that space would not need to be located at ground level. If space is provided at first floor level, it would require disabled access which would add to the capital cost of building it and which could render such space economically unattractive.
- 7.7 While it is intended that many residents live within walking distance of the village centre and while rising fuel costs might curb the use of cars (and encourage the use of cycles), the likelihoods that the average wealth and age of the district's inhabitants may rise, may offset that trend. Consequently, adequate provision, by today's standards, should be made for carparking. Due to the mixture of uses in the projected 15,000 square metres of floor space, it seems reasonable to adopt an average parking requirement of, say, 3.5 spaces per 100 square metres of built space, i.e. to provide for some 530 spaces or – at 30 square metres per space –

about 16,000 square metres of carparking although some of those parking spaces would be on-street.

- 7.8 Thus in terms of built space and parking, the likely ultimate requirements of the village centre might occupy about 30,000 square metres of land less any upper floor space that might be provided.. To that should be added circulation space and landscaping.
- 7.9 Consequently, if the village centre can be developed successfully, the *Concept Plan's* suggestion of it covering about 4 hectares appears reasonable and, certainly not, over-generous. Later stages of the planning process should proceed on that basis.

## **ANNEXURE 1**

# **GEORGE SMITH**

## ***PRESENT POSITION***

Director, Design Collaborative Pty Ltd.  
(Design Collaborative Pty Ltd formerly traded as Wellings Smith & Byrnes)

## ***ACADEMIC QUALIFICATIONS***

1958            Bachelor of Surveying, University of Queensland.  
1967            Master in City Planning, Massachusetts Institute of Technology.

## ***PROFESSIONAL QUALIFICATIONS***

Fellow, Royal Australian Planning Institute;  
Member, Royal Town Planning Institute;  
Fellow, Property Institute of Australia;  
Member, Institution of Surveyors, Australia;  
Surveyor Emeritus, Queensland; and  
Environmental Planner.

## ***PAST HONORARY POSITIONS***

Chairman, New South Wales Division,  
    Australian Institute of Urban Studies.  
Member, Board of Management,  
    Australian Institute of Urban Studies.  
President, Association of Consulting Planners.  
Secretary, Brisbane Division,  
    Royal Australian Planning Institute.  
Member, Planning Course Advisory Committee  
    Mitchell College of Advanced Education.  
Councillor, State Chamber of Commerce (New South Wales);  
Member, Advisory Committee on the preparation of  
    a Plan for Central Sydney, 1986-1987  
Chairman, Civic Affairs Policy Committee, State Chamber of Commerce.  
Chairman; Sydney Policy Committee of the State Chamber of Commerce.  
Member, Reference Group, City of Sydney Draft Local Environmental Plan,  
    1995.



## GEORGE SMITH

### *PROFESSIONAL POSITIONS HELD*

- 1981-present Director, Design Collaborative Pty Ltd.
- 1976-1981 Director, The Urban Collaborative Pty Ltd,  
Architects, Engineers, Planners.  
(NSW Exporter of the Year Award, 1977)
- 1972-1981 Director, Wellings Smith and Byrnes Pty Ltd,  
Planning and Development Consultants, and  
Byrnes Smith and Associates Pty Ltd, Architects.
- 1968-1972 Principal, George Wellings Smith and Co.,  
Planning and Development Consultants.
- 1965-1967 Attended Massachusetts Institute of Technology.  
(Part-time work with Town of Needham, Mass, as  
Acting Planning Director).
- 1964-1968 Managing Director, Urban Planning and Research Centre Pty Ltd,  
Sydney.
- Partner, Clarke Gazzard & Partners, Architects/Planners.
- 1963-1964 Director of Research, Urban Planning and Research Centre Pty Ltd,  
Sydney.
- 1959-1963 Planning Officer - Research, New Town Plan Section,  
Brisbane City Council.
- 1958-1959 Planning Draftsman, Planning and Building Department,  
Brisbane City Council.

## **GEORGE SMITH**

### ***PROFESSIONAL EXPERIENCE***

As the founding director of one of the longest established planning practices in New South Wales, Mr Smith has been responsible for a very wide variety of commissions in the areas of statutory, environmental, policy, development, economic and retail planning. He has special interests in the planning aspects of retail development and in liquor licensing matters and has made numerous appearances as an expert witness at planning and other tribunals in various States. Much of his present work concentrates on the para-legal aspects of planning and development

From 1975 to 1981, as director of The Urban Collaborative Pty Ltd - a consortium of Sydney planners, engineers and architects working in South Asia and the Middle East - he was responsible for the preparation of a master plan, management advice and co-ordination of investigation and design of urban infrastructure systems for a new city in Iran. [The Urban Collaborative was named NSW Exporter of the Year in 1977 for its work on that project.]

His work at Massachusetts Institute of Technology between 1965 and 1967 included evaluation of retail models and development of a conceptual dynamic model of urban growth.

Between 1964-1968, at Clarke Gizzard and Partners, he was involved in research and planning for new towns, industrial parks and shopping centres; preparation of statutory planning schemes and urban redevelopment projects.

At the Brisbane City Council in the late 1950s and early 1960s, Mr Smith was responsible for design and supervision of surveys and analyses required for preparation of a Town Plan for the City of Brisbane; population forecasts; estimation of industrial land requirements; assessment of appropriate planning standards for retailing; liaison with government departments and others on such matters as protection of extractive resources and good agricultural land; co-ordination for site selection of schools and hospitals, etc.

Mr Smith has appeared as an expert witness in the Licensing Court of New South Wales on a regular basis for over 30 years as well as before the Land and Valuation Court, the Local Government Appeals Tribunal and the Land and Environment Court in relation to proposed hotels throughout NSW. As part of the work, he has conducted many surveys of hotels dealing with parking, patronage, patterns of departure, effectiveness of security and like matters. He is consulted regularly by prospective hotel developers as well as existing hoteliers faced with environmental planning problems.

Since 2000, Mr Smith has prepared a number of social impact assessments – mainly for proposed licensed premises or for the installation of gaming machines in such premises – under the Environmental Planning & Assessment Act, the Liquor Act and the Gaming Machines Act.

## GEORGE SMITH

### *SELECTED PAPERS AND PUBLICATIONS*

- 1992        `Central Sydney's Future', a discussion paper published by the State Chamber of Commerce (New South Wales).
- 1987        `Some Basic Concerns in Formulating Development Standards', University of New South Wales, Planning Law and Practice Course.
- 1986        `Rural Residential Subdivision', University of New South Wales, Planning Law and Practice Course.
- 1972        `Regional Development: Strategies and Opportunities' 15th Congress, Institution of Surveyors, Newcastle, 1972.
- 1970        `Hotel Location and Development', Australian Planning Institute (New South Wales).
- 1970        `The Planning of Port Stephens. The prelude to a Port'. Port Stephens Conservation and Development Conference.
- 1970        `The Surveyors' Responsibility to Society' 13th Congress, Institution of Surveyors, Adelaide, 1970.
- 1969        `The Role of the Surveyor in the Community: As a Town Planner', Institution of Surveyors, Newcastle.
- 1969        `The Market Place: Progress or the Erosion of a Social Institution?' **Architecture in Australia**, February, 1969 pp. 74-79.
- 1968        `Surveyors, Suburbs and Society'. **South African Survey Journal** (reprinted, Journal of the Institute of Surveyors Australia)
- 1964        `The Standardisation of Land Use Codes in Australia'. **Australian Planning Institute Journal**, October, 1964.
- 1959        `A Method, Suitable for Adaptation to Planning Purposes, of Forecasting the Future Population of any Area'. **Journal of the Australian Planning Institute**, June, 1959.



DESIGN COLLABORATIVE  
Pty Limited  
ABN 36 002 126 954  
ACN 002 126 954

Planning and Development Consultants

## *An Introduction to the Company*

- *The Company*
- *Services Offered*
- *Clients*
- *Professional Staff*

## ***THE COMPANY***

**Design Collaborative Pty Limited** (ACN 002 126 954 and ABN 36 002 126 954) provides a broad range of professional services in the fields of environmental planning and real estate development.

The company is dedicated to producing environmentally-responsible, but practical, solutions for multi-faceted design, development and research problems. Much of its work is concentrated at the interface of the private and public sectors where decision-making must often find acceptable compromises between the diverse interests of client requirements, statutory controls, local and State government policies, market constraints and public opinion.

The practice that now trades as **Design Collaborative** was founded by George Smith in 1968. It is an independent, Australian company, owned by its directors *viz*:

George Smith, BSurv(Qld), MCP(MIT), MISAust, FPIA, MRTPI, FAPI, CPP  
Harvey Sanders, MPhil (Lond), MSc (Reading), FPIA, MRTPI, MRICS, CPP  
James Lidis, BTP (UNSW) MPIA, CPP

The directors are responsible for all work undertaken by the company. Being involved in the day-to-day management of commissions, they can ensure the highest professional standards are maintained.

**Design Collaborative** has a total professional and administrative staff of about twelve. The varied qualifications and experience of the professional staff is conducive to cross-fertilisation of ideas and innovative problem-solving.

**Design Collaborative** has established working relationships with a wide range of consultants in other disciplines including architects, surveyors, engineers, valuers, geologists, economists, ecologists, quantity surveyors and market analysts. While it works mainly as an independent consultant, it is frequently called upon to join, or to manage, larger teams of consultants assembled to undertake complex tasks such as negotiating zoning changes, gaining project approvals and the preparation of complex environmental impact statements.

Most of the company's clients are from the private sector. They range from some of Australia's largest corporations to individuals. However, the public sector has provided some of the company's largest commissions with a considerable amount of local government work being undertaken.

## **SERVICES OFFERED**

- **Preparation of Development Applications and Statements of Environmental Effects** *to meet statutory controls, policies and environmental constraints.*
- **Social Impact Assessments** *as required by the Gaming Machines Act, 2001 and the Liquor Act, 1982.*
- **Expert Advice** *on planning, licensing and related issues and the interpretation of relevant statutory controls.*
- **Expert Testimony** *in a variety of jurisdictions and other forums dealing with planning, licensing, development and similar issues.*
- **Development Project Management** *of proposals from inception to development application/approval stages, including acting as co-ordinator of specialist consultants and as adviser to applicants.*
- **Urban Development Strategies** *for developments ranging from those on individual sites to advising public authorities on urban policy formulation and implementation.*
- **Urban Design and Master Planning** *ranging from developing broad policies for local authorities to detailed planning for individual sites.*
- **Local Environmental Studies, Environmental Assessments, Environmental Impact Statements** *as required under the NSW Environmental Planning and Assessment Act, 1979.*
- **Drafting of Local Environmental Plans and Development Control Plans** *including the preparation of written planning instruments.*
- **Project Feasibility Assessments** *for use and development.*
- **Real Estate Portfolio Analysis** *entailing examinations of general market conditions, monitoring of statutory controls and local government policies and advising on actions which should be taken to protect investments or returns.*
- **Assessments of Existing or Proposed Shopping Centres** *including evaluation of market potential and trade area research.*
- **Demographic, Socio-economic and Other Research** *into urban, commercial, governmental and planning trends, etc.*

## ***CLIENTS***

### ***Recent and current corporate clients***

ALDI Stores Pty Ltd	Merivale Group
Beville Group	MID Sydney Pty Limited
Carlton and United Breweries	Mirvac Homes Pty Ltd
Coles Liquor Group	MK International Property Management
CSR Pty Ltd	Multiplex Constructions (NSW) Pty Ltd
Deerubbin Local Aboriginal Land Council	NSW Aboriginal Land Council
Gandangara Local Aboriginal Land Council	Primelife Pty Ltd
GBS Group Pty Ltd	Shimizu Corporation
Historic Houses Trust	Solotel Pty Ltd
Inghams Enterprises Pty Ltd	Sydney Antique Centre
Ipoh	The Church of Jesus Christ of Latter Day Saints
Laservision	2KY Broadcasting Pty Ltd
McConaghy Holdings Pty Ltd	Woolworths Ltd
Various marina interests, e.g. - Rose Bay, Gladesville Bridge, St George Motor Boat Club, Fenwicks, Royal Sydney Yacht Squadron, Dolphin Boat Shed	Telstra

### ***Public sector clients***

#### ***Local Governments:***

City of Albury	Ku-ring-gai
Baulkham Hills	Lane Cove
City of Blacktown	Manly
City of Blue Mountains	North Sydney
City of Botany Bay	City of Parramatta
Burwood	City of Penrith
Camden	Pittwater
City of Campbelltown	Rockdale
Coffs Harbour	City of Sydney
Drummoyne	Sutherland
Eurobodalla	Warringah
Great Lakes	Waverley
Hornsby	City of Willoughby
Hunters Hill	Woollahra

***Government Departments:***

AirServices Australia  
Australia Post  
Australian Property Group  
Crown Solicitor's Office  
PlanningNSW  
Department of Housing  
Department of Land and Water Conservation

Department of Administrative Services  
Department of Defence  
Landcom  
Roads and Traffic Authority  
State Rail Authority  
Sydney Ports Corporation

***Solicitors regularly instructing the Company***

Allens Arthur Robinson  
Back Schwartz Vaughan  
Blake Dawson Waldron  
Clayton Utz  
Conditsis & Associates  
Corrs Chambers Westgarth  
Deacons  
Freehills  
Gadens  
Gwynne Thompson  
Henry Davis York  
Houston Dearn O'Connor  
Hunt & Hunt  
JDK Legal  
Lands Legal

McKees Legal  
Maddocks  
Mallesons Stephen Jaques  
Mavrakakis & Associates  
D McDougall  
Michell Sillar  
Minter Ellison  
DLA Phillips Fox  
Pike, Pike & Fenwick  
Pricewaterhouse Coopers  
Slater & Elias  
Storey & Gough  
Tress Cox  
Watsons  
Woolf Associates



## ***PROFESSIONAL STAFF***

Design Collaborative currently has a professional staff with a broad range of experience in New South Wales, interstate and overseas. That variety of qualifications assists in understanding and advising on complex and multi-faceted problems.

### ***Directors***

#### **George Smith, BSurv MCP MISAust FPIA MRTPI FAPI CPP**

Founding director of the company, George Smith has over 45 years experience in statutory, environmental, policy, development, economic and retail planning in both New South Wales and interstate. He has special interests in the planning aspects of retail development and in liquor licensing and gaming matters and has made numerous appearances as an expert witness at the Land and Environment Court and other tribunals.

#### **Harvey Sanders, MPhil MSc FPIA MRTPI MRICS CPP**

Director of the company since 1985, Harvey Sanders has over 35 years experience in local government and private practice in both New South Wales and overseas. He has expertise in all areas of statutory planning, the preparation of planning controls and environmental assessment. He is also an experienced expert witness.

#### **James Lidis, BTP (UNSW) MPIA CPP**

James Lidis has over 18 years experience in local government and private practice in New South Wales. He has expertise in all areas of statutory planning, the preparation of planning controls, environmental assessment and as an expert witness at the Land and Environment Court. Other specialisations include preparation of social impact assessments including those pertaining to the Liquor Act and Gaming machines Act. He also has experience as a Manager within Local Government. He has special interest in social and cultural planning.

## **ANNEXURE 2**

## Businesses in Lake Cathie - 2007

Ocean Drive, north of Cathie Creek  
Service Station/general store

Ocean Drive, south of Ernest Street

Bakery

Australia Post

Fish and Chips

Fishing tackle

Butcher

Real Estate Agent

Bargain shop

Hairdresser

Credit Union

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Tavern

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Fuel Outlet (Food Plus)

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Café

Florist

Real Estate Agent

ATM

Pharmacy

Woolworths supermarket (10 checkouts)

Woolworths Liquor

Newsagent

Video hire

new centre

## **ANNEXURE 3**

## **Businesses in Bonny Hills - 2007**

Tavern

General store with off-licence (retail) and fuel pumps (opposite Graham Street)

### **Bonny Hills Shopping Centre, Jingarra Crescent**

Real Estate Agent

Beauty Salon

Australia Post

Café

Ladies hairdresser

Businesses closed in 2008

in preparation for redevelopment

for IGA supermarket

## **ANNEXURE 4**

## Comparison of Demographic Characteristics – 2001 Census for Lake Cathie, Bonny Hills, Port Macquarie and NSW

Characteristic	Lake Cathie	Bonny Hills	Camden Haven	Port Macquarie	NSW
Population enumerated	2,098	2,195	6,479	38,288	6,371,745
Median age of population	44	40	57	43	35
% of population under 15	24.3	24.1	13.7	18.9	20.7
% of population 65 or over	17.2	15.4	37.7	23.3	13.1
Masculinity of the Population	48.7	49.3	48.4	47.6	49.8
Median weekly individual income \$	274	288	252	297	386
Unemployment rate among those 15 years and over	12.3	11.1	15.2	10.2	7.2
Total no. of dwellings	979	912	3,396	17,262	2,578,042
No. of occupied private dwellings	840	815	2,987	15,587	2,343,677
No. of unoccupied private dwellings	139	97	403	1,608	227,863
% of unoccupied private dwellings	14.2	10.6	11.9	9.3	8.8
Median monthly housing repayments (\$)	878	874	822	906	1,049
Median weekly rental (\$)	154	165	138	158	177
No of dwellings fully owned.	429	435	1,819	6,949	963,231
% of dwellings fully owned	44	48	54	40	37
No. of dwellings being purchased	188	216	330	3,086	546,195
% of dwellings being purchased	19	24	10	18	21
No. of dwellings rented	169	123	592	4,337	645,319
% of dwellings being rented	17	13	17	25	25
No of lone person households	169	124	860	4,089	522,487
% of population living in lone person households	8	6	13	11	8
Mean household size	2.5	2.7	2.1	2.3	2.6
Dominant household type	Couple without children	Couple without children	Couple without children	Couple without children	Couple with children

## **ANNEXURE 5**



**Comparison of Demographic Characteristics – 2006 Census for Lake Cathie, Bonny Hills, Port Macquarie and NSW**

Characteristic	Lake Cathie	Bonny Hills	Camden Haven	Port Macquarie	NSW
Population enumerated	2,697	2,464	6,850	40,335	6,585,737
Median age of population	43	42	59	45	37
% of population under 15	21.5	22.5	12.4	17.2	19.7
% of population 65 or over	17.9	16.3	36.6	24.1	13.7
Masculinity of the Population	49.5	48	47.9	47.4	49.3
Median weekly individual income \$	369	382	301	379	460
Unemployment rate among those 15 years and over	8.8	6.7	12.5	8.2	5.9
Total no. of dwellings	1,262	1,050	3,754	18,921	2,728,719
No. of occupied private dwellings	1,092	930	3,289	16,819	2,470,451
No. of unoccupied private dwellings	170	120	465	2,102	258,268
% of unoccupied private dwellings	13.5	11.4	12.4	11.1	9.5
Median monthly housing repayments (\$)	1,391	1,300	1,083	1,300	1,517
Median weekly rental (\$)	200	220	170	200	210
No of dwellings fully owned.	444	420	1,794	6,588	820,540
% of dwellings fully owned	40.7	45.2	54.5	39.2	33.2
No. of dwellings being purchased	340	334	458	3,985	745,336
% of dwellings being purchased	31.1	35.9	13.9	23.7	30.2
No. of dwellings rented	268	146	707	4,898	700,654
% of dwellings being rented	24.5	15.7	21.5	29.1	28.4
No. of lone person households	207	138	1071	4,584	562,626
% of population living in lone person households	7.7	5.6	15.6	11.4	8.5
Mean household size	2.5	2.7	2	2.3	2.6
Dominant family type	couple without children	couple without children	couple without children	couple without children	couple with children

## **ANNEXURE 6**

Towns in NSW in 2001 with Populations between 5,000 and 15,000 and national chain supermarkets

Town	Population	Area	Coles	Woolworths	Bi-Lo	IGA	Other
Sawtell	13,733	Coastal	Yes	Yes			
Singleton	12,495			Yes		Yes	Franklins
Raymond Terrace	12,482			Yes(2)	Yes		
Kurri Kurri-Weston	12,317				Yes	Yes	
Kiama	12,241	Coastal	Yes			Yes	
Lithgow	11,023		Yes	Yes			ALDI
Bowral	10,325		Yes	Yes			ALDI
Batemans Bay	10,181	Coastal	Yes	Yes			ALDI Franklins?
Lawson-Hazelbrook	10,127						
Muswellbrook	10,010			Yes	Yes		Franklins
Parkes	9,789			Yes			
Ulladulla	9,583	Coastal	Yes		Yes	Yes	Franklins, ALDI
Inverell	9,525		Yes	Yes			
Moree	9,247		Yes	Yes			
Casino	9,151			Yes	Yes		
Cowra	8,693			Yes	Yes		
Mudgee	8,603			Yes	Yes		
Kempsey	8,444		(Coming)	Yes		Yes	Franklins?
Wangi-Rathmines	8,358	Coastal				Yes	
Nelson Bay	7,968	Coastal			Yes		
Gunnedah	7,855			Yes	Yes		
Deniliquin	7,781		Yes			Yes	
St Georges Basin-Sanctuary Point	7,604	Coastal	Yes		Yes		
Murwillumbah	7,543			Yes			
Forbes	7,094		Yes	Yes		Yes	
Cooma	6,914			Yes			
Leeton	6,900			Yes		Yes	
Young	6,821			Yes		Yes	
Moss Vale	6,601				Yes		
Camden Haven	6,461			Yes	Yes		
Medowie	6,286				Yes		
Mittagong	6,257			Yes			
Narrabri	6,235			Yes	Yes		
Tumut	6,195		Yes	Yes			
Nambucca Heads	6,121	Coastal		Yes		Yes (2)	
Byron Bay	5,919	Coastal		Yes			
Lennox Head	5,810	Coastal					
Glen Innes	5,706				Yes	Yes	
Yamba	5,622	Coastal			Yes		
Lemon Tree Passage	5,490	Coastal	Yes				
Cootamundra	5,482			Yes		Yes	
Helensburgh	5,062				Yes		