



5.0 ECONOMIC AND RETAIL CONTEXT



5.1 Economic context

In 2014 Tweed Shire Council in a joint venture with Destination Tweed undertook the Tweed Shire Economic Development Strategy. The aim of the Tweed Shire Economic Development Strategy is to identify practical actions for the enhancement of the Tweed Shire economy, responding to the opportunities and constraints to economic and business growth in Tweed Shire and the values of the Tweed Shire community. The key outcomes of that strategy include the following seven pillars:

1. Continue to develop Tweed Heads as the regional centre.
2. Promote the Tweed as the Creative Cauldron.
3. Promote resilient and innovative agriculture.
4. Promote location and lifestyle benefits for business and investment.
5. Promote Tweed tourism especially nature based tourism.
6. Leverage opportunity from strategic location to airport and south east QLD.
7. Diversify business and industry base for a sustainable economic future.

Whilst the Tweed Shire Economic Development Strategy focussed largely on the continued growth and development of Tweed Heads and Murwillumbah as the regional centres, there is a need to explore these key economic drivers and pillars within the Kingscliff context.

5.1.1 Kingscliff economic and industry context

In combination, Kingscliff has a total labour force of 4032 people with 3745 people employed. Of those employed 1975 people or 49% are in full time employment and 1716 people or 42.6% are in part time employment.

An analysis of the jobs held by the resident population in Kingscliff in 2016 shows the most dominant industry sectors were:

Healthcare – Healthcare, aged care and social assistance account for 559 people or 15.2% of the locality's employment. This employment is focused on the Tweed Heads, Murwillumbah. With the construction of the new Tweed Valley Hospital and other supporting health consultancy, clinics and support services it is anticipated the number of locally based health care workers will substantially increase. This industry also has a major flow on effect to other sectors of the economy including retail, offices and housing.

Construction – Driven by the release of residential subdivisions, construction provides employment for 449 people or 12.2% of the local workforce. Despite many of the larger development consortium who are managing and carrying out the primarily residential subdivisions and housing development are based outside of the Tweed (Gold Coast, Brisbane, Sydney), many of the employees, particularly trades are locally based. This industry will continue to grow in step with the future release of additional residential release areas, particularly the larger future release areas of Kings Forest to the south west of the locality and Cobaki Lakes to the north.

Education and training - Those employed in education and training accounted for 405 people or 11.0% of the local workforce. Kingscliff has a higher proportion of education and training facilities than other surrounding settlements with two primary schools, a high school and TAFE. With the construction of the new Tweed valley Hospital it is likely there will be a future demand for additional teachers and trainers particularly relating to health care. This could be further bolstered if a university campus were to be established within the Business and Innovation precinct.

Retail and Trade - Those employed within the retail and trade sector accounted for 391 people or 10.6% of the local workforce. This in part relates to the existing function and popularity of the Kingscliff town centre for both the weekly shop and more recreational shopping but also reflective of Kingscliff's proximity to .

Accommodation and Food Services – Those employed in tourism, food and beverage industries account for 400 people or 12.6% of the local population workforce. Employment in these sectors is largely centred on tourist developments within the SALT precinct as well as the strengthening food and beverage niche within the Kingscliff town centre. There are direct links between the tourism industry supporting local retailers and other service based industries. There is the opportunity to expand tourism accommodation both within the Salt precinct and within the town centre in the format of shop-top housing increasing seasonal population densities within the core of the existing town centre. This needs to be supplemented with improvements to the town centre public domain and surrounding open space and recreation opportunities.

Other key industry employment sectors included professional, scientific and technical services (225 people / 6.1%), public administration and safety (175 people / 4.8%), manufacturing (133 people / 3.6%), transport, postal, warehouse (110 people or 3%), renting, hiring, real estate (96 people / 2.6%), financial and insurance (67 people / 1.8%), arts and recreation (58 people / 1.6%), agriculture, forestry and fishing (50 people / 1.4%), information, media, telecommunications (41 people / 1.1%), wholesale trade (39 people / 1.1%), Electricity, Gas, Water and Waste Services (35 people / 1.0%), Mining (19 people / 0.5%).

5.1.2 Emerging economic issues

Whilst the Kingscliff locality has seen recent growth of residential development and the construction industry sector, there has not been similar parallel growth in employment generating land uses with many residents seeking employment opportunities within the Gold Coast and beyond. In addition, anecdotal evidence collected during Public Workshop 01 suggests there is concern that Kingscliff's economy is too narrow and reliant on the seasonal tourist trade.

An issue which presented during various consultation sessions included the frequency and scale of some events, such as the Kingscliff Triathlon and various markets, which have an impact usual business practice. This impact is either limiting access to shops during event times and/or temporary market stalls imposing additional competition for existing local businesses. Whilst many of the events within the Kingscliff events calendar provide community and cultural value, the impact on existing businesses and overall 'value' to the local community has raised mixed responses. Establishing an appropriate balance between temporary and permanent uses that will bolster economic development and enrich a sense of community overall will undoubtedly be an ongoing challenge within the Town Centre Precinct.

Aside from the above mentioned issues, there are limitations in analysing the 'health' of existing business within Kingscliff aside from comparing trade from year-to-year and monitoring population growth. This information void is somewhat compounded by land use zones applying throughout the locality and Shire, enabling a variety of uses which may not be complimentary or deliver the synergies desired within their immediate application context. In this regard, an ongoing stewardship of employment land within the locality will be required and championed by stakeholders other than Council.

5.1.3 Economic opportunities

Kingscliff has the opportunity to play a stronger transformative role to expand its functions beyond providing local services and leverage economic and employment generating land uses from its existing industry pillars servicing the sub-regional catchment. Employment and economic growth in this regard has the opportunity to 'play to existing strengths' and focus on diversifying opportunity within these existing industries including:

Health - New Tweed Valley hospital will provide state of the art health care substantial employment opportunities for health care professionals. As a key economic driver, there are substantial opportunities for new allied health services and a vast range of business which will have a support and servicing role in both the construction and on-going operation of the hospital.

Tourism - The Tweed Coast continues to grow as a holiday and day-tripping destination. The combination of coastal lifestyle and agricultural hinterland provides substantial opportunities for new tourism and boutique food and beverage ventures. Greenfield development sites provide opportunity for the further development of tourist accommodation. In addition to catering for increasing tourism numbers, there will be a need for short term accommodation in association with the Tweed Valley Hospital.

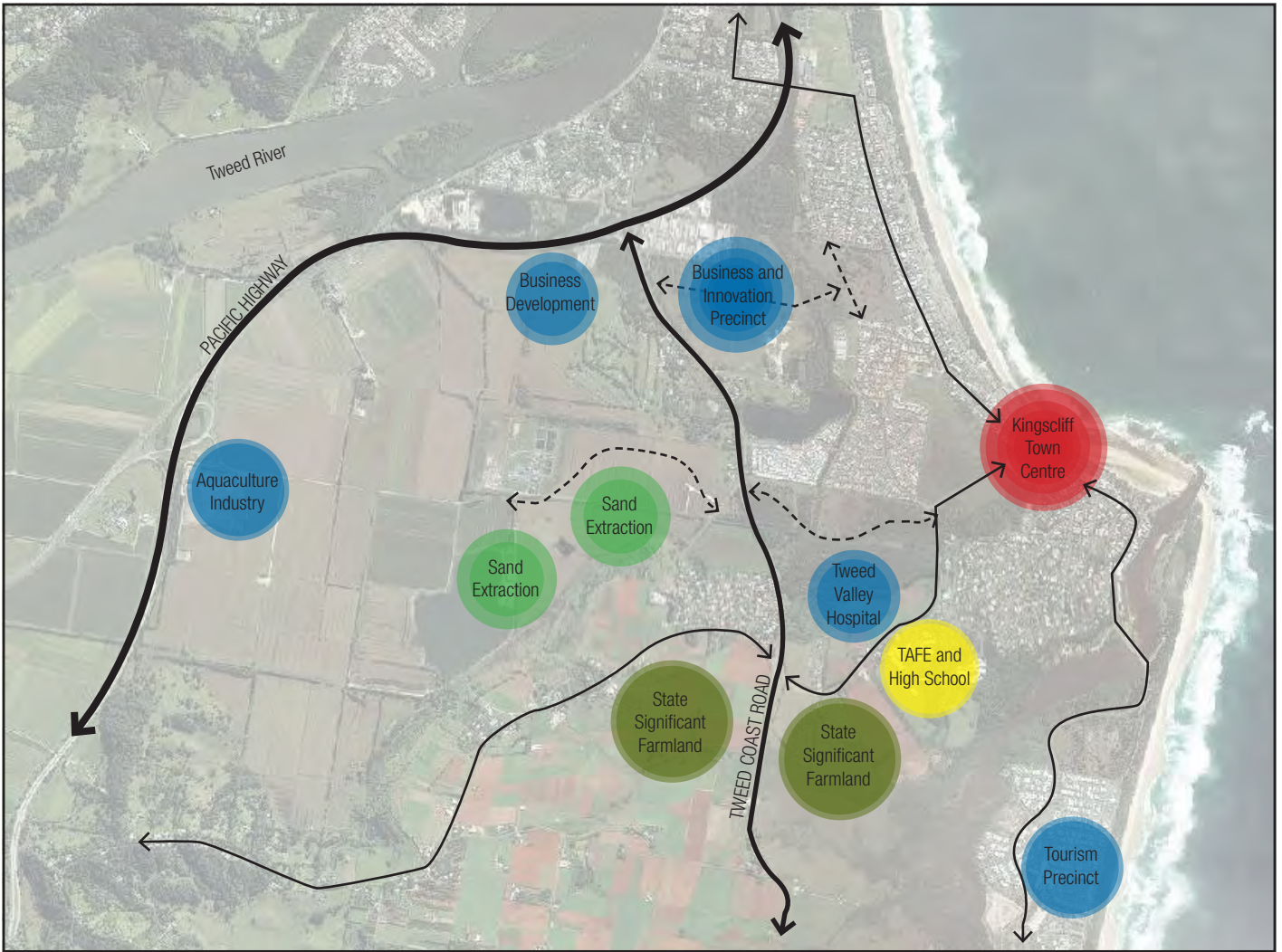


Figure 5.0 Opportunity to further promote employment generating land uses within the locality



Innovation Campus is part of Wollongong University focus's on establishing collaborative relationships between research and business communities by co-locating commercial and research organisations within an open campus typology.

Creating symbiotic relationships between tertiary education and business provides opportunity for diversity, future job creation outside of more traditional light industrial estates.

There is opportunity within the Kingscliff to establish or create a specific business niche especially in areas that are well connected to existing settlements and infrastructure.

Agriculture - The Cudgen Plateau is renowned for its rich red soils and agricultural history. In addition to continued agricultural operations, there is opportunity to diversify and value add to agricultural food production processes. Creating business niches which take the raw produce and refine into more diverse food products would build on an existing local industry strengths and create new local food production businesses. To diversify agricultural activities there is also a more recent trend of farms to look for alternate sources of revenue through food stalls, 'paddock to plate' food and beverage offer, cellar doors and agri-tourism. All of these ventures retain the agricultural primacy of the region but also add to the area as a 'destination' with many locals and day-trippers in search of fresh food and produce and amenity associated with the beautiful hinterland setting. Further, with the relative more recent development of the Morton Bay Bug Farm to the west of the settlement, there is also an opportunity to expand the aquaculture industry within the local area and leverage off existing infrastructure.

Education - The combination of industry with education uses could thereby provide a strong economic driver for the future. Creating symbiotic relationships between tertiary education and business provides the opportunity for diversity, future job creation outside of more traditional light industrial estates. One example could be coupling a tertiary education facility to leverage off existing agriculture, health, tourism, environmental management and the construction sectors. There is future opportunity for tertiary based courses supplemented by on job training and research. In turn the coupling of industry with education could then generate a number of economic opportunities typically associated with larger scale tertiary institutions including accommodation and service and retail based land uses.

Construction - The timely approval and release to market of new greenfield development sites will result in steady construction employment within the locality. This is particularly pertinent to the release of the Kingsforest development area where 4500 new dwellings, a town centre, two neighbourhood centres, land nominated for employment uses and open space areas will generate a substantial number of construction jobs over a relative long term. In addition to Kingsforest, the 2000 new dwellings across the greenfield development sites within the Kingscliff locality, staged increases to the existing town centre and the new Business and Innovation precinct will similarly generate a substantial number of new construction jobs over a sustained period.

Local Business - There is an ability to further consolidate retail and commercial opportunities within the existing business footprint of the town centre. The smaller allotments within the existing town centre lends itself to the strengthening of additional smaller business and 'recreational retail' opportunities and build upon the existing food and beverage niche. Additional lane ways and back of house areas could open up new micro business ventures. Increasing small business opportunities within the town centre will in turn add to the richness and diversity of the town centre and strengthen its vibrancy. An additional retail centre within the Business and Innovation precinct will also open up new local retail and trade opportunities providing additional local employment.

Regional Business - The large tract of land to the north of the Kingscliff settlement holds significantly potential to develop a range of employment generation land uses including a business park, new retail centre, education campus as well as additional housing and open space facilities. The site has the potential to meet land use demand for multiple industries including new businesses, research and education facilities which may service or support the Tweed Valley Hospital. This greenfield development site is strategically located close to the Pacific Highway which is 15mins from Coolangatta Tweed Airport and is well serviced by infrastructure.

Diversity of land use typically leads to a more diverse demographic structure which in turn provides for more advantageous economic development. This is especially the where new business opportunities expand or value add to existing industry pillars. Establishing collaborative relationships between research and business communities by co-locating commercial and research organisations within a business park / open campus urban structure provides opportunity for diversity, future job creation outside of more traditional light industrial estates.

5.1.4 Economic strategies

- 1. Kingscliff town centre expansion** - Lands to the west of the existing centre would provide an opportunity for the development of additional retail, commercial, community and residential floor space. There is also opportunity to cater for additional tourist accommodation within the town centre precinct which typically works with shop top housing configurations. This town centre expansion requires the provision of effective traffic, parking and movement strategies with built form controls focussed on strengthening the coastal character and public domain opportunities.
- 1. Tweed Valley Hospital as a key economic driver** - The new hospital will be a regional referral hospital delivering state-of-the-art health services to the Tweed region. As a major new land use and key economic driver, the hospital will present significant employment opportunities not only for health care professions but the myriad of ancillary and support businesses which will be created or benefit from its construction and ongoing operation into the future. In the context of the creation of a health and education precinct the KLP recognises the synergies which can be established between both the TVH site and Kingscliff TAFE located on the opposite side of Cudgen Road. Both sites have substantial future development opportunity to meet additional future growth without needing to rezone any adjoining state significant farmland. .
- 1. Business and Innovation Precinct to facilitate regional economic development and employment generating land uses.** Landuses across the site could include a corporate business park, new retail centre which could accommodate larger floor plate businesses. The existing light industry area could over time transition into business park, food production and/or creative industries hub which could have more of a public interface. The B&I site could also accommodate a university campus and associated student housing. Course work could relate to the existing industry pillars of health, construction, education, information technology, sustainability and agriculture. This precinct is of sufficient size and area to accommodate a wide range of new business and land use opportunities which could be associated with or in support of the new hospital. The site will also include a range of residential housing types (medium density), open space and community facilities.
- 2. Release of new residential development areas** - Residential greenfield development sites will meet the housing supply needs for the next 30 years. The focus will be on diversifying housing types to meet Kingscliff's demographic and affordability profile. This includes shop top and multi-unit development within a walkable catchment of the town centre, full range of low rise medium density housing types (row house, terraces, multi-unit, small lot etc) as well as low density development.
- 3. Expanded tourism development** - Tourism and tourist development will continue to be encouraged centred around the Salt precinct and within the expanded Town Centre precinct to provide a range of accommodation types, retail and dining, open space and recreation opportunities. New tourism opportunities can be created with stronger links to the Cudgen agricultural areas with paddock to plate, cellar door and agri-tourism initiatives.
- 4. Construction industry** - The development potential across each of the greenfield development sites and Kingsforest to the south of the locality will provide ongoing employment generating opportunities for the construction industry. The timely and staged release of development sites is imperative to both residential housing supply and industry employment.
- 5. Aquaculture and sustainable agricultural industry** - Lands to the west of the Kingscliff settlement provides opportunities to expand and build upon a burgeoning aquaculture industry initiated by the recently established Morton Bay Bug Farm. Given this area is flood prone, further flood modelling analysis needs to be undertaken to determine the impacts of site filling to establish required infrastructure and aquaculture ponds.
- 6. Promotion and coordination of events** – Council will continue to work collaboratively with relevant stakeholders to ensure a co-ordinated events calendar. Amongst the objectives of the events calendar will be:
 - Supporting platforms for youth-based and start-up businesses.
 - Supporting appropriate methods to strengthen the Kingscliff economic base.
 - Build the Kingscliff brand as a tourist, recreation and cultural destination.
 - Ensuring that temporary events do not saturate the use of public land and ancillary services including car parking for such purposes.
 - Limit direct competition between temporary and permanent retail uses and provide permanent retailers the opportunity to participate in temporary and market events.

5.2 Retail and commercial centres context

The historic growth of Kingscliff was centred around a small string of shops along Marine Parade which by the 1880's had a post office, police station, general store, two hotels, a butcher, baker, school and church. Over the last 20 years Kingscliff has grown from coastal village to now meeting the description of a coastal town as defined by the NSW Coastal Urban Design Guidelines (3,000 – 20,000 residents). The expansion of the Kingscliff settlement has seen the locality continue to assert itself as the sub-regional centre meeting many retail, commercial, health, education and other service needs for the network of Tweed coastal villages including Fingal Head, chinderah, Cudgen, Casuarina and as far south as Cabarita, Hastings Point and Pottsville.

Today the Kingscliff's retail centre is located around Marine Parade, Seaview, Pearl and Turnock Streets, however two distinctly different town centre character areas have emerged:

Marine Parade - The Marine Parade retail area is more typical linear 'High Street', (albeit single sided), whose character is underpinned by the narrower shopfronts and low set buildings. In more recent years this shopping strip has evolved into a food and beverage niche with multiple outdoor dining areas being constructed along the street edge. The built form contains a mix of architectural styles reflective of the different eras which adds to the overall streetscape and built form character. More recent development (Azure, Nor Nor East and Paradiso) are much larger mixed use developments which incorporate shop top housing.

Kingscliff Shopping Village - Contrasting with the open high street of Marine Parade, the Kingscliff Shopping Village is an internalised shopping mall constructed in the 1980s which is anchored by the Woolworths supermarket and contains multiple smaller tenancies located on the corner of Pearl and Turnock Streets. The Shopping village site is dominated by a large at grade car park which doesn't provide any activation or pedestrian amenity to the Pearl Street and Turnock Street frontages.

5.2.1 Existing and planned retail and commercial centres

The core of Kingscliff's retail and commercial activities area are centred around Marine Parade, Pearl Street and parts of Turnock Street. This town centre is then supported by a number of other existing and planned neighbourhood centres which when combined constitute the network and hierarchy of retail and commercial centres. These existing and planned centres have been represented in Figure 5.1 and Table 5.1. In the context of discussing retail and commercial centres the following definitions are provided to rationalise the intents and definitions of the Tweed LEP 2014 and Tweed DCP 2008 Section B9 Tweed Coast Strategy:

Town Centre - To provide a range of higher order retail, commercial, business, health, community, entertainment and community uses. Town centre typically involve >10,000 sqm of retail floor space to serve both the local resident population as well as a subregional population by servicing the higher order needs of surrounding smaller settlements.

Local Centre – To provide a range of retail, business, entertainment and community uses that serve the needs of people who live in, work in and visit the local area. Local Centres typically involve 1,500 – 6,000 sqm of retail floor space to serve a population catchment of 10,000 people.

Neighbourhood Centre – To provide a range of small-scale retail, business and community uses which serve the needs of people who live and work in the surrounding neighbourhood. Neighbourhood Centres provide approximately 1,000 sqm of retail floor space to serve a population catchment of 500 – 1,000 people.

To date existing and future retail needs have largely been shaped by some high level Council adopted retail principles and provisions of Tweed DCP Part B9 Tweed Coast Strategy. Key components of those strategies include:

- Where appropriate, Council will support the incremental expansion of existing retail centres in such a way as not to threaten or fracture those existing centres, rather than building new ones.
- Limit the scale of new large scale retail centres in the coastal region to a level which caters for the majority of chore type shopping needs. This concept to reflect the need to reduce fuel consumption and to support sustainability within each centre through discouraging vehicle use and encouraging walking and cycling.
- Encouraging 'active neighbourhoods' by placing commercial nodes at 800 m intervals (allowing residential development to be contained within 400 m walking distance of a commercial node).



Figure 5.1 Kingscliff Town Centre Core is centred around Marine Parade, Pearl and Turnock Street with two difference character areas; the open 'high street' character of Marine Parade and the Kingscliff Shopping Village which is an internal shopping mall.



Marine Parade has a distinct high street retail experience with a restaurant and cafe niche.



Kingscliff Shopping Centre is an internalised task focused shopping experience anchored by a supermarket.

Town centres		
T1	Kingscliff Town Centre	Kingscliff Town centre currently includes approximately 57,690 sqm of land zoned B4 mixed use (though an additional permitted use is available to Lot 13 DP 871753 which would enable further 'Shop' development). Current services include (but not limited to) Woolworths supermarket, pubs, clubs, restaurants, cafes, take away food, speciality retail stores, fruit and vegetable stores, office space, banks, medical facilities and entertainment uses including a cinema.
Local centres		
L2	Business and Innovation Precinct	Opportunity for the development of a new retail centre within the Business and Innovation precinct. This site has the potential to include a range of larger floor plate retail land uses. The new retail centre would be supported by a range of other land uses including a retail main street, corporate business park, light industry precinct and range of residential land uses. This retail centre would likely meet retail needs of local residents as well as surrounding Fingal Head and Chinderah residents.
Outside of Kingscliff locality plan footprint		
L3	Kingsforest	Kings Forest masterplan identifies a mixed use Town Centre and two Neighbourhood Centres with building heights of 2-3 storeys with a combined land area of approximately 10 hectares.
L4	Casuarina	Approval has been granted on a 16,380 sqm site for a local centre comprising 4,881 sqm of retail space, 200 sqm of ancillary office and 148 sqm of restaurant. At the time of writing, the centre is anchored by 3,300 sqm of supermarket supported by 1,581 sqm of speciality shops and an additional retail and commerce building constructed on the northern side of Grand Parade. A further 43,174 sqm of land on the periphery of the approved site is zoned B2 Local Centre and is yet to be developed.
Neighbourhood centres		
N1	Wommin Bay	Two lots comprising 5,097 sqm of land which are zoned B2 Local Centre. A service station was previously located on the site which has since been demolished. The site is currently vacant.
N2	Marine Pde Wommin Bay Rd	Whilst identified as an opportunity within DCP B9, there are no specific site identified or land zoned for business uses. R3 Medium density zone could enable a shop top development.
N3	Pearl St	Whilst identified as an opportunity within DCP B9, there are no specific site identified or land zoned for business uses. R3 Medium density zone could enable a shop top development.
N4	Pearl St – Small retail frontage	A small retail unit at 140 Marine Parade. The lot is not zoned for nonresidential purposes, limiting the ability of the site to perform a neighbourhood centre function.
N5	Tweed Valley Hospital	Potential for retail uses (convenience store, newsagents, florist, cafe, food and beverage) to be developed across the site to be used by hospital staff, visitors, TAFE students and local Kingscliff Hill residents.
N6	Salt Village	Current approvals in place for the Salt village include a total of 1,905 sqm of retail floor space, 2,047 sqm of Office floor space, 3,380 sqm of Food and Drink (including Tavern) floor space, 2,041 sqm of recreation-based floor space (gymnasium, health spa, surf lifesaving clubhouse etc) and 757 sqm of Function Centre floor space. Despite approvals being in place, a significant amount of retail (1,390 sqm) and office (1,686 sqm) floor space has not yet been constructed.
N7	Seaside City	Four lots comprising 4,032 sqm of land zoned B4 Mixed Use. Two large mixed use buildings have recently been developed over these sites which includes a number of retail units at the street level.
N8	Cudgen Village	Opportunity over Lot 101 DP 1056576 to investigate a rezoning or additional permitted uses to enable retail, food and beverage, tourism uses associated with agricultural activities / farm produce.
Outside of Kingscliff locality plan footprint		
N9	Kingsforest	2(c) Urban Expansion zoning (Tweed LEP 2000), Kings Forest masterplan identifies a mixed use Town Centre and two Neighbourhood Centres with building heights of 2-3 storeys with a combined land area of approximately 10 hectares.
N10	Casuarina	The Casuarina Rec Club, which includes gym, pool, tennis courts, wholesale bakery, restaurant/function centre and office facilities. The Rec Club previously included a small general store, however the majority of these functions now operate ancillary to the restaurant. The Rec Club is zoned R1 General Residential so it's ability to evolve over time as an ongoing 'Neighbourhood Centre' may be limited to its current facilities.

Table 5.1 Kingscliff and surrounds existing and planned retail and commercial lands (Referenced with Figure 5.2)

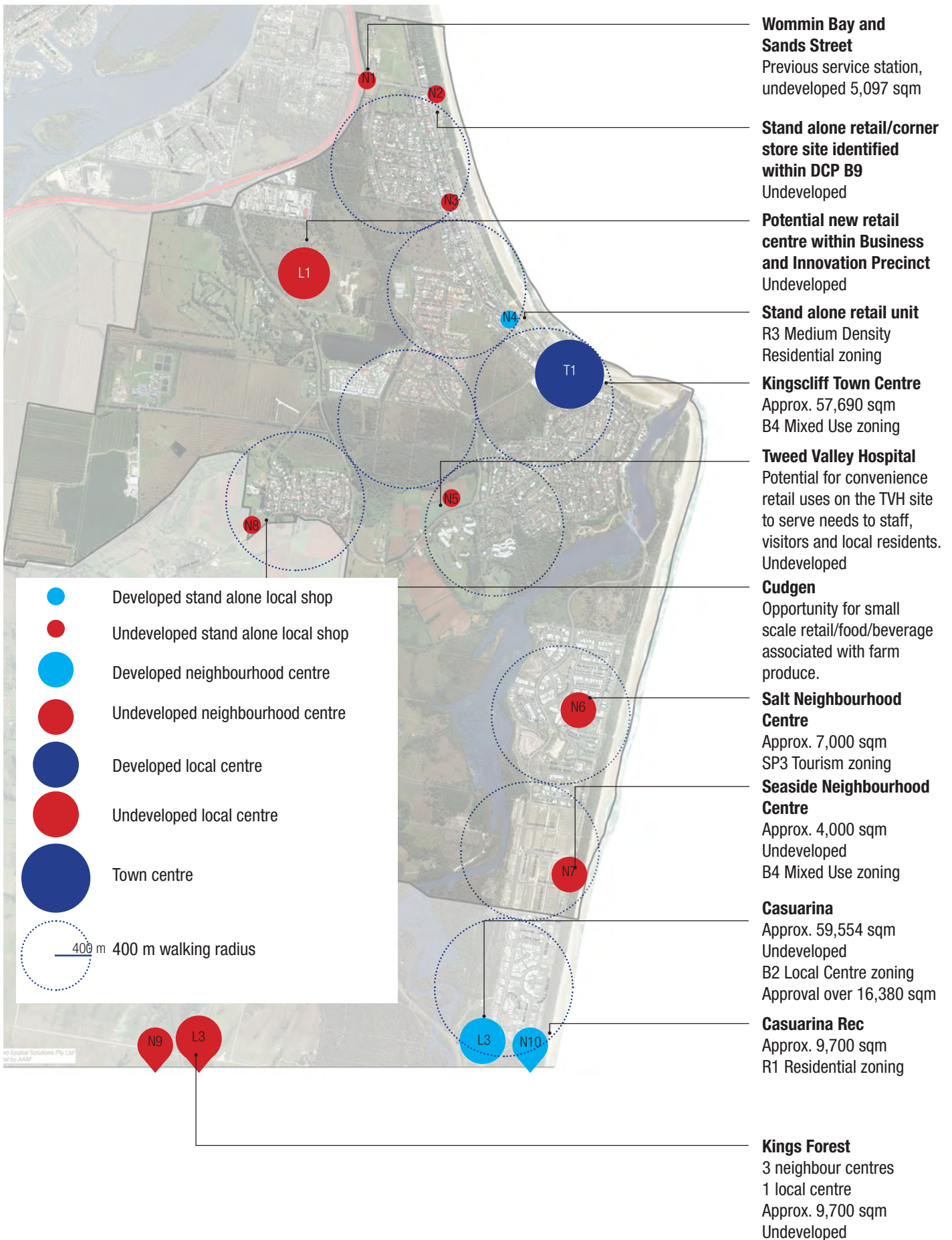


Figure 5.2 Distribution of Local and Neighbourhood Centres within the Kingscliff Locality

5.2.2 Retail and commercial floor area benchmarks

Retail and commercial floor space needs are determined by establishing an understanding of current floor space supply against projected local and subregional population increases. The NSW Department of Planning Draft Centres Policy 2009 identified that in the absence of an area specific floor space demand analysis, a base rate of 2 sqm of retail floor area per capita with annual increases can be used as a guide for the planning of future retail and commercial floor areas. The purpose of applying this rate is to understand if there is a current under supply or oversupply of retail and commercial floor areas; also known as a floor space supply and demand assessment (FSDA).

In the context of population projections, the FSDA provides a general indication of the likely retail and commercial floor area needs. Rather than being used to determine particular retail and commercial development floor space requirement, the assessment provides a base benchmark to assist in making strategic decisions and pro actively forecast likely future floor space demand. The intent is to understand demand and provide retail and commercial development opportunity for future growth.

To ensure place and centre vitality it is important to provide variety and retail affordability by ensuring adequate land availability and a range of retail and commerce floor space areas. This is opposed to limiting the supply of retail and commercial floor space, and therefore opportunity.

For the purposes of this analysis, the Kingscliff locality population census and population projections utilises Forecast Id which is based on an average locality growth rate. The following commercial and retail/commercial floor area benchmarks and projections have been identified:

Table 3.2 Kingscliff Locality Population projections

Year	Population (projection)	Base commercial retail floor area benchmark* (sqm)
2016	9,611	19,222
2026	10,305	20,610
2036	10,998	21,996

* Based off a rate of 2 sqm per capita as identified within the NSW Draft Centres Policy

5.2.3 Existing retail and commercial floor areas

At present, the Kingscliff locality includes one town centre and two neighbourhood centres which are located within the Salt and Seaside Precincts. A new retail centre within the Business and Innovation Precinct would likely serve a 'local centre' role however the range of other business and employment generating landuses would meet a local as well as subregional role.

The existing Kingscliff town centre precinct includes approximately 57,690 sqm of land (excluding roads) which is zoned B4 Mixed Use, which comprises the predominate footprint for retail and commercial development. Based on a desktop analysis, approximately 27,800 sqm of commercial and retail floor area is provided within this footprint.

The Salt Precinct includes appropriately 17,077 sqm of land for retail and commercial purposes. To-date much of the approved commercial and retail floor area has not been constructed, though approximately 2,280 sqm of floor area is provided for retail, commercial, food and drink and function centre purposes. The Seaside Precinct to date has two mixed use building which have been completed with several smaller scale retail tenancies however additional business zone allotments remain undeveloped.

Combined these retail centres currently provide approximately 30,000 sqm of floor space. Based on existing supply of retail and commercial land against existing population numbers, Kingscliff locality has a rate of approximately 2.94 sqm per capita which would represent equilibrium of supply and demand, when considering Kingscliff's wider catchment and sub regional role.

As described in Section 3.2.7 Population Projections the population of Kingscliff locality based on the density yields of residential release areas has the potential to reach 10998 by 2036. This would generate the need for up to an additional 7,500 sqm retail and commercial floor area if local population increase alone was the only measure. It is likely that any future FSDA would need to consider a much wider sub-regional catchment which could include a population of approximately 30 000 people. In this scenario FSDA would also need to consider the role and function of other smaller local and neighbourhood centres which typically meet the day-to-day needs of the local population catchments.

In terms of town centre expansion opportunity, there is a significant tract of available land to the west of the existing town centre along Turnock Street which would enable the continued retail, commercial and residential growth as required. This town centre expansion requires the provision of effective traffic, parking and movement strategies with built form controls focussed on strengthening the coastal character and public domain opportunities. Expansion areas require rezoning to facilitate the full range of town centre uses and services.

The amount of available 'zoned' land does not often translate directly to the availability of retail and commercial development opportunity. Nor does it provide an accurate understanding of whether future demand will be sufficiently catered for. These areas are often significantly discounted due to constraints, road, car parking, public domain, the economics of multiple storeys, service infrastructure and back of house uses. A more detailed design investigation of key development sites is therefore required to gauge how much of a development site can be translated into usable net retail and commercial uses.

5.2.4 Emerging retail and commercial trends

The benchmark FSDA rates need to be contextualised in terms of Kingscliff's wider catchment as well as calibrated to a smaller coastal settlement, as opposed to a metropolitan context, which is subject to significant seasonal spikes in patronage and expenditure. There also needs to be an understanding and consideration of general shifts in retail, commercial and shopping trends and the potential influence they have on the built environment and land use planning.

Generally, people undertake a variety of shopping trips at different frequencies ranging from regular fresh food trips through to occasional furniture or white good trips, alongside sporadic trips to access services such as banks or post offices. There is also an increasing trend towards recreational shopping trips where people meet friends or go window shopping.

Of significant consideration and one difficult to quantify in terms of future floor space needs in a built environment sense is the influence of online shopping. Online shopping has the ability to contract the traditional high street footprint. Many high street retailers with significant overheads and operational costs find it difficult to remain cost competitive with online counterparts. This trend is likely to also lead to an increased demand for well-located warehouse and distribution centres.

Another emerging trend originating from the evolution and rollout of improved information technologies is an increase in people choosing to work from home. While there have always been home workers in the Australian labour market, advances in information technology, as well as the introduction of family-friendly policies and flexible working arrangements have made working from home an increasingly attractive option.

In parallel, an increasing trend is co-work spaces. Co-work spaces are shared office arrangements where freelancers, self employed professionals, work from home businesses and small businesses can rent a desk space for flexible periods of time; from a few hours, months or more permanently. One of the benefits is the reduced risk and financial burden of taking on a lease over a larger commercial floor area and ability to work collaboratively with other small businesses. Within Kingscliff, there is a good opportunity, especially for smaller and start up businesses to have a town centre address with co-work spaces.

The development of the Tweed Valley Hospital, a regional referral hospital will also have a future influence on retail and commercial floor space needs. Whilst it is anticipated the hospital site itself will contain a limited retail and food and beverage offer, the number of staff and visitors will likely generate an increase demand for retail and commercial services within the locality.

5.2.5 Major retail district centre for Kingscliff

One of the key strategies identified Tweed Coast Strategy adopted in 2003 is the provision of a District Centre in Kingscliff servicing the Tweed Coast. This District Centre was envisaged to:

- Cater for a population catchment of 40,000 people.
- Provide 10,000 – 20,000 sqm of retail floor space inclusive of one major supermarket and a discount department store.
- Provide district level government and private services.
- Ideally, include a central bus interchange, hospital, community facilities, medical centre, police station, employment agencies, banks and places of worship.

Whilst a specific site to accommodate a major retail centre was not directly identified within the Tweed Coast Strategy, a number of design concepts have been prepared by a private landowner over the large site adjoining the Chinderah Industrial area included over 70,000 sqm of district, retail and industrial uses (refer Figure 5.11). Whilst the landowner sought community feedback over the scheme, the concept was never formally endorsed by Council given the availability of land directly adjoining the existing town centre which at the time, was envisaged to meet floor space retail and commercial growth needs without requiring a new additional retail centre. Further, whilst this scheme was being considered Council's adopted strategic retail policy at the time focussed on pursuing South Tweed as the major retail centre. Post adoption of the Tweed Coast Strategy, Council resolved in 2005 the following as one of the seven principles as the retail strategy for the Tweed Shire:

Principle 3: Reinforce Tweed Heads south as the major district retail centre by encouraging the expansion and when Tweed's population demands that increased range and level of shopping.

Since this resolution, the creation of a new district centre at Kingscliff has been considered in contradiction to this principle and not pursued further by Council. Despite the superseding resolution of 2005, the Tweed Coast Strategy has not been reviewed or amended since.

In the intervening period the South Tweed Retail Centre has expanded, with approved staged plans to expand retail and commercial floor space even further. This will undoubtedly assert the South Tweed as the regional retail centre fulfilling the higher order regional city role. In doing so there will be a need to revisit the seven retail strategies and provide recommendations in order to reconcile the applicable planning framework to guide Tweed Retail Centres hierarchy.



Figure 5.3 In 2007 and 2016 Gales Holding produced a masterplan for discussion and consultation over key development sites in Kingscliff. This north Kingscliff site explored a mix of district centre functions, (30,000 sqm) light industrial and bulky goods uses (40,000 sqm) with open space and residential land uses.

It is envisaged that undertaking a *Retail and Centres Strategy* across the Shire will not only address the existing and future retail and commercial floor space needs relevant to different settlements, but also identify the preferred location, scale and nature of future retail development.

In the context of pursuing additional retail and commercial land uses within Kingscliff, there will be a need to identify existing and future need based on detailed retail needs analysis to determine size and scale. It is expected that the analysis would determine:

- The established need for the retail and commercial development with Kingscliff.
- Identification of the catchment and service area.
- Identify the potential impacts on other retail and commercial centres including South Tweed as the identified major district retail centre.

As part of these investigations, it is important to review the constraints of the existing South Tweed retail centre. Specifically, an understanding of available space to expand in the context of population and expenditure projections, land use implications of potentially reallocating existing land uses, or transitioning to more intensive land uses. It is also important to understand the economic implications of the flood constraint which place significant restrictions on the provision of residential accommodation, a key centre component in promoting active, vibrant, walkable and sustainable centres.

Existing and future planned growth along Tweed Coast gives rise to the need to facilitate a range of employment generating land uses across the Business and Innovation Precinct to meet subregional needs. This precinct would operate in support of rather in competition with the existing Kingscliff town centre. Kingscliff town centre could continue to evolve towards a more pedestrian centric, fine grain retail character with a strong food and restaurant niche. The Business and Innovation Precinct could include a mix of business park, education campus and new retail centre capable of accommodating larger floor plate and higher traffic uses. These larger floor plate development site area requirements would be preclusive within the existing town centre precinct and ultimately detract from its character and amenity.

5.2.6 Kingscliff locality retail and commercial centres land use

The introduction of the Standard Instrument (Local Environmental Plans) Order 2006 required Council's to prepare LEPs that included state-wide standardised zones. Tweed has since adopted the Tweed LEP 2014 in accordance with these provisions, which saw the removal of the 2(c) Urban Expansion zone, which was a commonly used in greenfield areas, particularly the vacant land on the periphery of the existing town centre. The advantage of the urban expansion zone was the breadth of permitted land uses, which enabled detailed site investigations and structure planning to occur in a fluid manner. The Standard Instrument Order 2006 does not include a zone which enables this degree of flexibility within the statutory framework, rather, specifically provides for more clearly delineated residential or business zones.

In light of the above, the size and placement of business zoning is increasingly critical to ensure their development and ongoing sustainability.

When considering the land use composition of the existing and proposed centres, it is considered critical to couple retail space with complementary uses. An audit of the Kingscliff village indicates that approximately 30% of the stores (note: number of stores, not the size of floor space) are 'retail premises' by definition. Approximately 25% comprised Food and Drink and the remainder predominately medical or health-based premises (15%) and professional services (30%).

Likewise, approvals at Salt village indicate a relationship between uses where office and retail floor space possess a 1:1 ratio, with food and drink premises being the predominant land use (ratio of approximately 1.5:1 with retail or office).

Accordingly, for strategic planning purposes, should 1,000 sqm of retail floor space be required, a total zone or site area of 4,000 – 8,000 sqm may need to be 'zoned' to support the sustainability of the site.

5.2.7 Kingscliff Locality Retail and Commercial Centres Issues

Feedback from the various community consultation processes identified a number of issues which relate directly to the retail and town centre experience. These include:

- The experiential qualities of the town centre are now car dominated.
- There is currently no recognisable town centre or town heart which defines the retail centre. It is currently dispersed between the lineal Marine Parade shopping strip and the internalised Kingscliff Village Shopping centre.
- The town centre is generally looking tired and run down with many buildings in need of maintenance and improvements.
- There is a general lack of legibility and connectivity especially for pedestrians and a lack of unifying public domain elements.
- In terms of land uses, survey respondents identified additional preferred uses included a new supermarket offering competition, a hardware facility, delicatessen and additional health services and doctors as the priorities.

5.2.8 Retail and commercial centre opportunities

Town centre development

- Retain the existing Marine Parade character as a low scale high street with fine grain retail frontages and outdoor dining areas. Resist multiple block amalgamation which would enable larger development. Limited residential accommodation is achievable within this part of the town centre precinct due to limitations of access and on site car parking.
- Encourage the Kingscliff Shopping Village site to be progressively improved to multi-storey car park and built form edge providing greater definition to Pearl and Turnock Street. Site staged redevelopment could include a landscaped public square.
- Provide growth opportunity along Turnock Street for the expansion of the town centre to include boarder and expanded range of 'task based' goods and services.
- Strengthen the pedestrian amenity and streetscape character of Marine Parade and Pearl Street as predominantly 'pedestrian priority' areas including widened pedestrian spaces, more landscaping and street furniture implemented through a public domain and streetscape masterplan which can be progressively developed.
- Promote additional accommodation within the town centre which will provide more opportunity for tourism and low cost accommodation.
- Opportunity to investigate building design provisions to enable retail and commercial uses above the ground floor level and, where appropriate, potentially in a roof-top format (e.g roof top restaurants).
- Provide a more complimentary relationship between uses in a mixed use buildings and ensure appropriate building heights are permitted to provide for retail, commercial and residential targets.
- Town centre expansion requires a more integrated consideration of traffic movement and car parking opportunities to service the town centre precinct. This will include the need for a combination of basement and/or multi-storey car parking configurations within the Kingscliff Shopping Village Centre site to meet increasing car parking needs.
- Investigate opportunities to co-locate community services within or directly adjoining the town centre to foster greater accessibility, town centre presence and community relevance to these services.
- Coastal hazard protection seawall has been integrated into the design of the Rowan Robinson Park which will mitigate further coastal erosion providing more certainty to businesses and development opportunities which fall within the coastal risk area.

Out of centre uses

- Facilitate the Business and Innovation Precinct as a new 'activity centre' to provide a range of business, education, retail, residential and open spaces uses to complement the existing town centre. There is an ability to locate larger floor plate development and land uses with greater traffic generation where traffic management and car parking can be effectively integrated.

Other small retail centres

- Facilitate opportunities to encourage smaller local centres which meet the day-to-day needs of surrounding residents within a walking and cycling catchment of residential precincts. This may include reactivation of the local centre business zone allotment on Wommin Bay Road opposite the Cudgen Leagues Club, investigate opportunity for a small local centre / farmers market in Cudgen and continued encouragement of mixed use development within Seaside City. There is also an opportunity for the Tweed Valley Hospital site to accommodate a small scale retail / convenience stores to meet the needs of the hospital staff, patients, visitors, TAFE students and potentially Kingscliff Hill Precinct residents.
- Investigate land use opportunities to explore a fuller range of local centre uses within the Salt precinct whilst supporting and continuing to encourage tourism based land uses and support service. This could include the option of zoning the remaining development site within Salt village a 'B' zone, enabling the provision of office space and permanent accommodation options.

5.2.9 Retail and commercial centres strategies

1. Retain the existing Marine Parade character as a low scale high street with fine grain retail frontages and outdoor dining areas. Resist multiple block amalgamation within Marine Parade which would enable larger development. Noting that limited residential accommodation (shop top housing) would be achievable within this part of the town centre precinct due to limitations of access and on site car parking.
2. Encourage the Kingscliff Shopping Village site to be progressively improved to multi-storey car park and built form edge providing greater definition to Pearl and Turnock Street. Site staged redevelopment could include a landscaped public square.
3. Promote the expansion of the existing Town Centre land uses (B4 Mixed Use) west along Turnock Street to accommodate a range of retail, commercial, service and residential uses. This town centre expansion requires the provision of effective traffic, parking and movement strategies with built form controls focussed on strengthening architectural design outcomes and public domain opportunities.
4. Implement the Kingscliff Development Control Plan which will identify desired precinct character objectives, planning and design principles and controls guide future development. Built form character should reflect the subtropical coastal context.
5. Strengthen the pedestrian amenity and streetscape character of the Town centre including the Marine Parade and Pearl Street town centre block as a 'pedestrian priority' area which would include widened pedestrian spaces, more landscaping, shade and street furniture implemented through a Town Centre Public Domain Masterplan which can be levied through s.7.11 funding and progressively developed.
6. Provide opportunity through land-use zoning to create an additional business, retail and commercial centre over part of the Business and Innovation precinct. The size and scale of business land uses should be underpinned by a retail and economic feasibility study as part of a masterplanning process. The key heads of consideration for preparing economic feasibility study is to address but not be limited to:
 - Establish strategic justification and need for the additional retail and commercial development within Kingscliff based on existing and future projected retail floor space needs based on its local and foreshadowed subregional catchment
 - Identify an appropriate size and land use breakdown of proposed retail, commercial, business and light industrial uses.
 - Identify potential impact on other retail and commercial centres including South Tweed as the identified major district retail centre.
7. Continue to promote infill development within the existing town centre envelope with a focus on active ground floor uses, street engagement and range and scale of floor space opportunities. Promote additional accommodation within the town centre which will provide more opportunity for tourism and low cost accommodation where site access and onsite car parking can be achieved.
8. Continue to encourage the provision of neighbourhood shops providing convenience goods and services within a walkable catchment of all residential areas including North Kingscliff, Cudgen and Kingscliff Hill Precincts which currently do not have access to a local convenience store. This includes opportunity for the Tweed Valley Hospital site to accommodate a small scale retail / convenience stores to meet the needs of the hospital staff, patients, visitors, TAFE students and potentially Kingscliff Hill Precinct residents.
9. Encourage a hail and ride and/or call service ride mini-bus which connects the residential precincts with Kingscliff town centre and the future Business and Innovation precinct to reduce local car travel. This could be a chamber of commerce run initiative.