



Socio-Economic Impact Assessment

Proposed Supermarket – Seagulls Club

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Summary

At one point Seagulls was a heavily patronised club (driven by poker machine patrons from Queensland) with a national rugby league side. The club has contracted significantly since that time due to changes in legislation in Queensland reducing visitor numbers and the loss of the football team. The land abutting the club to the north was once the playing fields and stadium but has subsequently been redeveloped for residential.

The site is now occupied by a modest club operation with entertainment, gym and indoor sporting facilities. Redevelopment of the club to include a 1,965 Sq M supermarket (Supa IGA) is required for the club to remain viable.

Catchment

The proposed SupaIGA on the Seagulls site will be the first full line supermarket (albeit a small footprint full line supermarket) on the western side of the Pacific Motorway in this part of Tweed Shire. As such it will trade to a wide area that utilises the Kennedy Drive, Gollan Drive, Scenic Drive corridor. The Primary Trade Area is defined as those parts of Tweed Heads West to the west of the Kennedy Drive Bridge, Bilambil Heights and surrounding areas. Tweed Heads West between the motorway and the Kennedy Drive Bridge will form the secondary trade area (STA). The subject site will be the closest and most convenient supermarket for these residents. The new supermarket will enable local residents to more easily conduct regular and bulk weekly supermarket shopping.

Demand

The population of the total catchment at capacity is projected to be over 17,400 people and these residents will generate in the order of \$78 million of supermarket related expenditure. This expenditure will be distributed amongst full line supermarkets, convenience supermarkets, convenience (general) stores and a range of specialty shops that carry the same product lines as supermarkets (e.g. fruit and veg, butcher, deli).

The future 17,400 residents of the trade areas will generate demand for over 10,000 Sq M of supermarket (and related) floorspace. This is sufficient to support two full line supermarkets in the order of 3,000 Sq M each and 4,000 Sq M of smaller supermarkets and specialty retailers distributed through a number of centres.

The implication of the population capacity assessment of the Bilambil Heights urban expansion area is that the primary and secondary trade area as currently defined will have the future capacity to support two full line supermarkets: the first to be located at the Seagulls site and the other to be located on a yet to be identified site central to the future Bilambil Heights urban expansion area. It is noted that at 1,965 Sq M the subject site can be considered a small format full line supermarket.

Tweed Retail Strategy

The intent of the Retail Strategy principles is to develop supermarket anchored shopping centres throughout the Shire to service the needs of the population while directing development of higher order and specialised retail to the district centres of Tweed Heads and Tweed Heads South. Where possible, these supermarkets should be integrated with existing centres and towns. The development of a Supa IGA at the Seagulls Club fulfils these requirements (without impact the role and function of the district centres at Tweed Heads and Tweed Heads South) and provides for the needs of the local community.

Impact

Any impacts on existing centres in Tweed Shire are expected to be alleviated over time as the population of the total catchment (Bilambil Heights urban expansion area) continues to grow. As such, the proposed supermarket development on the subject site is not expected to affect the viability of any current centres with all centres maintaining the opportunity to operate at viable levels.

The proposed supermarket also has the potential to impact on the trading performance of local retail centres. While most local retail centres currently serving the trade area will likely see a reduction in trade in the vicinity of 4% to 7%, the impact on the nearby Panorama Plaza could potentially be greater. Individual stores located in this centre will need to rely on convenience (exposure, parking and accessibility), a response to new competition (price, product range etc) and marketable points of difference in order to avoid a significant impact on turnover.

Conclusion

The establishment of a small format full line supermarket at the Seagulls Club is considered to be a good fit with the needs of the community. The development (the supermarket in conjunction with the revitalised club) will offer a range of economic and social benefits to the community. A supermarket will also benefit the community through a greater level of convenience and an increase in choice, local jobs, competition (resulting in lower prices) and product offer.

The proposed supermarket will fulfil an established need of the local community. Local residents are currently required to travel four or five km to the larger centres at Tweed Heads and South Tweed Heads in order to undertake what is their regular shopping activity. The redevelopment of the club will also provide 20 equivalent full-time (EFT) construction jobs with the ongoing workforce being approximately 80 EFTs. The operational workforce will consist of a large number of part-time and casual staff which will provide employment opportunities for people entering or re-entering the workforce.

The redevelopment of the Seagulls Club will also allow this facility to remain viable and continue to service the community and entertainment needs of local and regional residents.

1.0 Introduction

This report was commissioned by Luke Simmons of North Sydney Leagues Club in October 2012. The client has requested RPS prepare a Socio-Economic Impact Assessment (SEIA) for the proposed supermarket to be located at the Seagulls Club.

It is intended to refocus the club operations and add a supermarket is the on-site range of uses.

1.1 Objectives

The objectives of this report have been derived by RPS on the basis of experience in similar matters. The objective of this report is to address the following:

North Sydney Leagues club has requested RPS prepare an Economic and Social Assessment for a supermarket to be included at the Seagulls Club. The Socio-Economic Impact Assessment will be prepared in response to Council's requirements addressing the retail component.

1.2 Terms of Reference

The terms of reference for this report have been with reference to Clause 17 of the Tweed Local Environmental Plan; which in part states:

- (3) *The socio-economic impact statement that the consent authority considers must do at least the following:*
- (a) *identify the likely future impacts of the development on the affected community,*
 - (b) *analyse the impacts in terms of magnitude, significance, duration, effect on current and future conditions and community services, and the like,*
 - (c) *determine if the impacts will cause a loss of amenity within the locality due to a net reduction in community services and facilities,*
 - (d) *determine and assess possible measures for the management or mitigation of likely impacts.*

The methodology of this report has been derived by RPS from the Tweed Shire Council Development Control Plan A13 – Socio-Economic Impact Assessment, Requirement for the Assessment of Socio-Economic Impacts of Developments.

Tweed Shire DCP Section A13.6

The Socio-Economic Impact Assessment will address the following points:

- (1) *State the objectives of the development or activity proposed*
- (2) *Analyse any feasible alternatives to the carrying out of the development, including the consequences of not carrying out the development*
- (3) *Identify the likely impacts of the development, their nature and extent, in terms of issues identified in the Matrix for the specific development*
- (4) *Evaluate the social and economic impacts by;*
 - (a) *Scoping – identify issues and affected groups.*
 - (b) *Profiling – data collection, historic trends, assessing current social and economic context.*
 - (c) *Predicting – identifying possible future impacts.*

- (d) *Assessing – analyse the impacts.*
- (5) *Consult with the community and other local agencies to determine the acceptable limits of impacts associated with the development.*
- (6) *Justify the carrying out of the development with respect to social and economic considerations.*

1.3 Definition of Social and Economic Impact

Effective social impact assessments (SIA's) involve an understanding of demographics, economic and social indicators, and the values of communities and cultures.

By "social impacts" we mean the consequences to human populations of development that alter the ways in which people live, work, play, relate to one another, organise to meet their needs and generally cope as members of society. The term also includes cultural impacts involving changes to the norms, values, and beliefs that guide and rationalise their cognition of themselves and their society. In this instance, however, we define social impact assessment in terms of efforts to assess or estimate, in advance, the social consequences and community impacts that are likely to follow from proposed specific development.

The purpose of an SIA is to provide an indication of the ability of a community or group to adapt to changing conditions; define the problems or clarify the issues involved in a proposed change; anticipate and assess impacts on the quality of life; illuminate the meaning and importance of anticipated change; identify mitigation opportunities or requirements; and advise communities and other stakeholders on how to comply with regulations and policies.

The social and economic impact of any development is the effect it has on people. Such effects include changes to peoples way of life (how they live, work, play and interact), their cultural traditions (shared beliefs, customs and values), economic issues (employment, financial and business impact) and their community (population structure, cohesion, stability and character).

A Socio-Economic Impact Assessment can be defined as "the systematic appraisal on the day to day quality of life of persons and communities whose environment is affected by the development or policy change." (Burdge 1985:1).

1.4 Methodology of Assessment

The methodology for undertaking this Social-Economic Impact Assessment (SEIA) includes:

- A description and analysis of the existing economic and social environment;
- Predicting the economic and social changes that may result from onsite redevelopment; and
- An assessment of the positive and negative impacts.

This report takes an issues oriented assessment, which concentrates on the analysis of particular social and economic aspects considered to be most significant by RPS, and as determined by the Tweed Development Control Plan.

2.0 Site and Concept Assessment

2.1 Introduction

This section provides an assessment of the characteristics of the subject site and its surrounding land uses from a market and economic perspective to determine the most relevant locational considerations of the proposed supermarket.

2.2 Urban Growth Patterns

The site sits in close proximity to the Bilambil and Bilambil Heights urban expansion area. Together with Cobaki Lakes and Terranora (including area E), Bilambil Heights will provide urban growth capacity for the closely settled portion of the Tweed Shire surrounding Tweed Heads.

While Bilambil Heights is in close proximity to the Seagulls site there is a degree of uncertainty as to how quickly this area will develop. Fractured land ownership, uncertain local economic conditions and the cost of development all play a role in restricting the development of this identified urban expansion area.

2.3 Proposal

Address

- The site is located on Gollan Drive, Tweed Heads West

Location

- The site is bounded by Boyds Bay Drive to the west, residential to the north and east, and the Terranora Broadwater to the south.

Site Uses

- At one point seagulls was a heavily patronised club (driven by poker machine patrons from Queensland) with a national rugby league side. The club has contracted significantly since that time due to changes in legislation in Queensland reducing visitor numbers and the loss of the football team. The land abutting the club to the north was once the playing fields and stadium but has subsequently been redeveloped for residential.
- The site is now occupied by a modest club operation with entertainment, gym and indoor sporting facilities.

Surrounding Land Uses Include:

- **Residential Uses:** Tweed Heads West has a general residential character shaped by the landform and extensive frontage to Terranora Broadwater and Terranora Creek.
- The site is adjacent to birds by oyster farm.
- **Road Infrastructure:**
- The area is accessed by the Kennedy Drive, Gollan Drive, Scenic Drive corridor.
- Scenic Drive provide access to the west and south-west including Bilambil Heights.

Proposed Concept

A 1,965 Sq M (GLA) SupalGA supermarket. A supermarket of this size has the capacity to cater to the bulk weekly shopping trips undertaken by most households.

2.4 Retail Trends

RPS has conducted numerous consumer surveys in relation to people's supermarket shopping behaviour. Each one of these surveys found that respondents were more likely to conduct their supermarket shopping trip at a more proximate centre than one that is further away. In general terms the surveys have produced the following:

- The majority of respondents (50% to 60%) listed the main reason for shopping at their supermarket was because it was 'closer to home'.

- Other reasons given were because a certain supermarket was cheaper (15% to 20%), easy to get to (about 10%) and had a greater product range and variety (7% to 9%).
- 25 to 30% of respondents shopped at their local supermarket 'about 2 to 3 times per week'.
- A further 55% to 60% shopped at their local supermarket 'about once per week'.
- As such at least 83% of respondents conducted their supermarket shop at least once per week.

These results are expected to be reflected in the Tweed Heads West / Bilambil Heights community. As such conducting supermarket shopping is part of consumer's weekly lives and they require convenient and proximate locations to conduct this shopping. A network of retail and activity centres that closely integrate with the needs of the community will encourage access by modes other than car. These include walking, cycling and public transport.

The way the public (as consumers) use supermarkets is well known and capable of being predicted with a high degree of certainty. Valid consultation of a commercially sensitive project is very difficult to undertake properly prior to the details of the proposed development being made public.

It should also be noted that consumer trends are constantly changing. This has led to an increased provision of supermarkets from what was the norm 20 years ago. In the early 1990's there was approximately one supermarket for every 15,000 to 20,000 people whilst the average planning rate of provision for a supermarket in today's current retail environment is approximately one supermarket for every 8,000 to 10,000 people. This has resulted in new supermarkets being developed in existing residential areas as consumers conduct supermarket and top up shopping on a more regular basis and demand proximate and convenient facilities in order to conduct this shop. Therefore future growth areas (such as Bilambil Heights) must plan accordingly and take into account current retail trends as well as be able to adapt to changing consumer patterns. Planning for a number of supermarket anchored centres to service the designated growth areas will help to ensure the local retail network will successfully cater to residents retail needs in the short, medium and long term.

2.5 Site Analysis

Cobaki Lakes has a population capacity of about 12,000 people and will be serviced by a supermarket anchored shopping centre.

The Motorway is a major divide between the populations of Tweed Heads and Tweed Heads West.

Tweed Heads and South Tweed Heads are major shopping centres that are anchored by discount department stores and supermarkets.



A major planned growth area is located to the west of the site. Development of this area (hosting 7,000 to 10,000 new residents) is likely to take decades.

Site – surrounded by residential and proximate to Bilambil Heights. This area is not well served by everyday retail with residents required to travel to Tweed Heads and South Tweed Heads to patronise a full line supermarket.

Supermarket anchored local centres serving Banora Point.

2.6 Objectives of Development

Point 1 of the Terms of Reference requires a statement of the objectives of the development or activity proposed.

The Seagulls Club, as a long-standing (privately owned) community facility needs to be redeveloped in order to remain relevant to the current and future residents of the local area and Tweed Shire. The inclusion of a

small format full line supermarket will ensure that the club and all of its future services and facilities will remain viable in the medium to long-term.

In line with desired planning outcomes and leasing requirements, the objectives of the redevelopment are to provide a quality club operation, with a range of associated facilities for public use, in addition to a full line supermarket that will cater to the everyday food and grocery needs of local residents.

2.7 Implications

The subject site's location along the Scenic Drive corridor is considered to be suitable for the proposed supermarket use as it provides the site with the required degree of accessibility and exposure.

The suitability of the site and desirability as a supermarket location is further reinforced through the pre-commitment of SupalGA. The pre-commitment also indicates that there is demand for a supermarket in the local area.

The site has the capacity to service the existing communities of Tweed Heads West and Bilambil Heights and the future residents of the urban expansion area (Bilambil Heights). The urban expansion area has the potential to add 7,000 to 10,000 new residents to the area (depending on densities and area developed). A supermarket at Seagulls will therefore service the existing local residents and future residents of the Bilambil Heights expansion area.

3.0 Highest and Best Use

The principles of Ecologically Sustainable Development (ESD) require a 'best use' approach for the site, with the proposed use being a reasonable compromise between the sometimes conflicting needs of social, environmental and economic outcomes. In order to determine what is the best use for the site, a series of alternatives have been addressed which may be established on site (this complies with point 2 of the Terms of Reference). Potential alternate uses have been defined based on the site attributes and planning intent. The outcome of this section will indicate why the proposed uses for the site are considered the most appropriate.

3.1 Alternative Uses

The following alternative uses have been assessed to determine the best use for the site. These uses are detailed in the following table:

- A larger retail centre
- A club facility of the scale that previously operated on-site
- Low and/or medium density residential
- Open Space and/or community facility

3.2 Implications

All of the above development options are considered to be unviable or do not provide the same level of community and social service that will be delivered by the redeveloped Seagulls Club and Supa IGA supermarket.

The site could easily be converted to a fully public use (such as open space) provided the land and buildings are purchased from the current owners at market rates and that suitable remediation and development works are undertaken. While an open space or larger club option would no doubt be popular with members of the public, the financial circumstances surrounding each mean that they are highly unlikely to occur.

A private development option (such as a larger retail centre or a residential development) would see the community and entertainment focus disappear. While these outcomes are likely to be viable in a market or financial sense, they would result in a reduction of the social and community services offered at the site.

Consequently, the redevelopment of the current club to include a 1,965 Sq M supermarket is considered the best outcome for the community as it allows for the continued operation of the facility while providing for local retail needs.

Table 1 Alternative Sites Uses Evaluation

Characteristic	Larger Scale Retail Centre	Large Scale Club	Residential	Open Space / Community
Description	<p>A larger retail presence than currently planned which may include:</p> <ul style="list-style-type: none"> ▪ One or Two full line supermarkets ▪ Comparison retail anchor tenant (eg discount department store) ▪ Specialty stores and related uses ▪ Commercial Office space 	<p>This option would attempt to recapture the former market of the Seagulls Club by expanding the services and facilities.</p>	<p>This could include low, medium or high density residential uses built on the site of the current club and car park.</p>	<p>Redevelopment of the site as an open space area potentially with some small-scale community facilities.</p>
Site Assessment	<p>The site is suitable for such a use but a larger retail footprint would require the reduction or negation of club activities.</p>	<p>The site is suitable for such a use.</p>	<p>The site is suitable for such a use.</p>	<p>The site is suitable for such a use.</p>
Market Assessment	<p>Likely to be successful with the scale of the retail matched to the needs/demand of the catchment.</p>	<p>Would likely result in the failure of the club due to changes in the competitive and market environment that have occurred since its heyday.</p>	<p>Likely to be successful with the scale of the residential matched with the needs of the market and the potential for planning approval.</p>	<p>Would require the Tweed Shire Council to purchase the land presently occupied by the club at market rates.</p>
Risk Assessment	<p>Likely to be successful as this use would occupy the site instead of the club (as opposed to in addition to the club).</p>	<p>Considered to be an extremely risky development option.</p>	<p>Likely to be successful and would occupy the entire site instead of the club.</p>	<p>Likely to be successful and popular with the community.</p>
Socio-Economic Assessment	<p>The provision of a larger retail centre would be a good match for the needs of the community, depending on the scale of the retail footprint.</p>	<p>The provision of privately owned services and facilities would be a good match for the needs of the community.</p>	<p>Would replace the community club with residential but does not have any community focus.</p>	<p>Would replace the community oriented club with a significant parcel of open space that would benefit a broad range of community.</p>
Evaluation	<p>Considered to be a suitable option for the site albeit with greater potential impact than the current retail option.</p>	<p>Not considered a suitable option for the site.</p>	<p>While residential development is a suitable developmental consideration, it is not considered to be the optimal use of the site, nor the most viable for economic and social vitality in the local area.</p>	<p>Unlikely to proceed as this option requires the purchase of the site at market rates from the current owners.</p>

4.0 Existing Retail Infrastructure

4.1 Introduction

This section provides an assessment of the current and expected retail and centre patterns in the surrounding area and the role and function of these facilities.

4.2 Existing Infrastructure

Table 1 provides a list of the existing retail infrastructure in the surrounding area.

Table 1: Existing Infrastructure

Centre	Location	Size	Major Tenants
Showcase on the Beach	72-80 Marine Parade, Coolangatta	19,019 Sq M	Aldi (1,589 Sq M) and 61 specialty stores.
Banora Central	Corner of Leisure and Fraser Drives, Banora Point	5,000 Sq M	Coles and specialty stores
Centro Tweed	Corner of Wharf and Bay Streets, Tweed Heads	18,727 Sq M	Target (5,592 Sq M), Coles (4,054 Sq M), Woolworths and 87 specialty stores
Banora Point Shopping Village	Leisure Drive, Banora Point	4,416 Sq M	Bi-Lo (1,992 Sq M) and 25 specialty stores
Bilambil Heights Shops	75 Simpson Drive, Bilambil Heights	Approx. 400 Sq M	6 Specialty stores (inc convenience store)
Panorama Plaza	Scenic Drive, Tweed Heads West	Approx. 800 Sq M	Convenience Store (230 Sq M) and 9 specialty stores.
The Palms Shopping Village	Philp Parade, Tweed Heads	Approx. 300 Sq M	Convenience Store (110 Sq M) and 3 specialty stores
Tweed Heights	21-25 Amaroo Drive, Banora Point	Approx. 800 Sq M	IGA and specialties
Kennedy Plaza	97 Kennedy Drive, Tweed Heads	Approx. 1,500 Sq M	IGA (est 800 Sq M) and specialties
Kennedy Drive Shops	212 Kennedy Drive, Tweed Heads West	Approx. 600 Sq M	Seafood Market, Fruit and Vegetables
Piggabeen Road Shops	3 Piggabeen Road, Tweed Heads West	Approx. 300 Sq M	Lucky 7, Bottle Shop
Terranora Village	Corner Tarranora Road and Henry Lawson Drive, Terranora	Approx. 800 Sq M	Spar and specialty shops
Tweed City	54 Minjingbal Drive, Tweed Heads South	44,568 Sq M	Kmart (7,381 Sq M), Big W (7,033 Sq M), Woolworths (4,527 Sq M), Coles (3,708 Sq M), Best & Less (1,154 Sq M) and 136 specialty stores
Aldi Tweed Heads	9-11 Machinery Drive, Tweed Heads	Approx. 1,300 Sq M	Stand alone Aldi
Kingscliff Shopping Village	22 Pearl Street, Kingscliff	Approx. 6,000 Sq M	Woolworths and specialties

Source: PCA Shopping Centre Directory, RPS

4.3 Proposed and Planned

A series of centres are planned to service the urban expansion areas of Cobaki Lakes and Bilambil Heights. Of particular relevance to the subject application are the following:

- A full line supermarket anchored centre is to be established at Cobaki Lakes that will service the future 12,000 residents of that area. The majority of the Cobaki Lakes expansion area is controlled by a single developer and it is understood that plans for this centre are well advanced.
- A full line supermarket anchored centre is included in the planning for the Bilambil Heights expansion area. It is understood that no site has been selected and that the centre may not be established for decades due to the absence of residential development in this area. Until this centre is established, the proposed supermarket at Seagulls will be the most proximate supermarket to the future residents of Bilambil Heights.
- A series of smaller centres (anchored by small convenience supermarkets and stores) are also planned for the Bilambil Heights expansion area. Centres of this scale offer a complimentary function to the larger full line supermarket anchored centres as they cater to small-scale and impulse shopping.

4.4 Implications

Local residents are currently required to cross the Pacific Motorway in order to access their nearest full line supermarket. This involves a four or five kilometre trip to Tweed Heads or South Tweed Heads and can be time consuming and inconvenient. The Seagulls Supa IGA will be the first full line (albeit a small format) supermarket to be established on the western side of the Pacific Motorway. As such, the site will trade to an extended urban and rural catchment that includes Tweed Heads West and Bilambil Heights.

This area is presently serviced by a series of convenience shopping centres are generally include a small convenience supermarket or store, the closest being Panorama Plaza on Scenic Drive. Small convenience supermarkets and stores cater primarily to passing traffic and impulse shopping and offer a different shopping experience to the larger full line supermarkets. Consequently, the proposed Supa IGA at Seagulls will be complimentary to all centres currently located in the local area.

5.0 Trade Area Delineation

5.1 Introduction

This section provides an analysis of the trade area for the proposed development on the subject site. The delineation of the trade area will be based on the competitive analysis, as well as the site's features such as accessibility and exposure, as well as any natural or artificial barriers that will affect local usage patterns.

5.2 Trade Area Delineation

The proposed Supa IGA on the Seagulls site will be the first full line (albeit a small format) supermarket centre on the western side of the Pacific Motorway in this part of Tweed Shire. As such it will trade to a wide area that utilises the Kennedy Drive, Gollan Drive, Scenic Drive corridor. The Primary Trade Area is defined as those parts of Tweed Heads West to the west of the Kennedy Drive Bridge, Bilambil Heights and surrounding areas. Tweed Heads West between the motorway and the Kennedy Drive Bridge will form the secondary trade area (STA). The subject site will be the closest and most convenient supermarket for these residents. The new supermarket will enable local residents to more easily conduct regular and bulk weekly supermarket shopping.

The PTA will reduce in scale when a supermarket anchored shopping centre is established in the Bilambil Heights urban expansion area.

Figure 1 provides an illustration of the trade areas for the subject site.

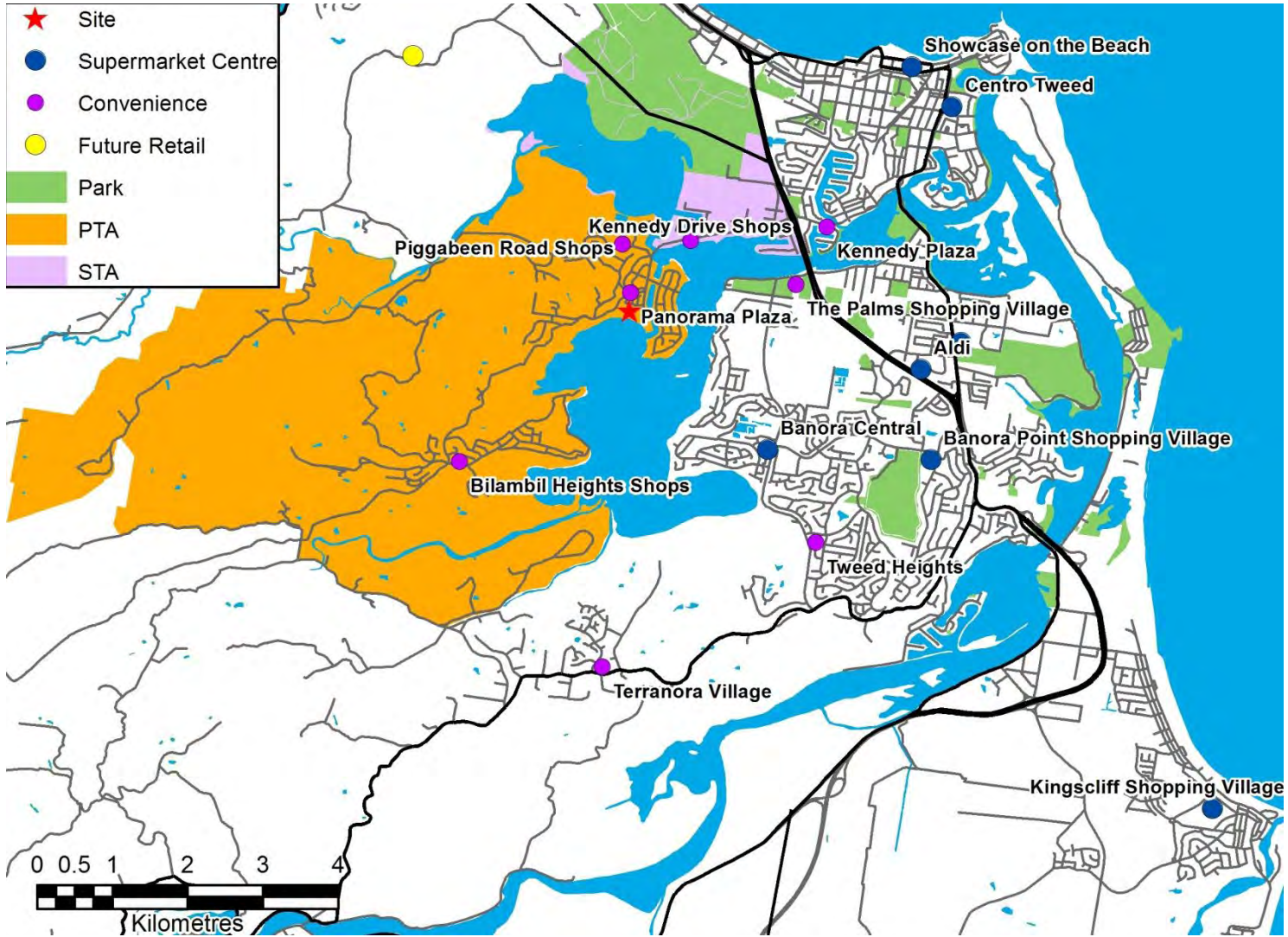


Figure 1 : Trade Area Delineation

6.0 Population and Demographic Characteristics

6.1 Introduction

This section provides an analysis of the key demographic features and population projections for the defined trade areas as well as average annual household convenience expenditure.

6.2 Population Projections

Table 2 provides estimates of the population and household projections for the primary and secondary trade areas. The current 2012 population projections have been based on the 2011 Australian Bureau of Statistics (ABS) Census. The PTA has the capacity for high levels of population growth with a number of lots zoned for future residential uses. The Tweed Urban Land Release and Employment Lands Strategy identifies 370 Ha of residential zoned land that remains vacant in Bilambil Heights which is in the PTA. This would see a total of approximately 2,500 additional dwellings be developed in this area. This area includes the proposed RISE development which is comprise of 1,804 residential dwellings at completion.

Table 2: Population Projections

	2012	2013	2014	2015	2016	2021	2026	2031	Capacity
Population									
PTA	7,701	7,804	7,906	8,009	8,111	10,168	12,382	13,363	15,201
STA	2,334	2,329	2,323	2,318	2,312	2,284	2,257	2,230	2,225
Household Size									
PTA	2.42	2.42	2.41	2.41	2.40	2.37	2.34	2.32	2.32
STA	1.95	1.95	1.94	1.94	1.93	1.91	1.89	1.86	1.86
Households									
PTA	3,177	3,227	3,277	3,328	3,378	4,286	5,283	5,771	6,552
STA	1,196	1,196	1,196	1,196	1,196	1,196	1,196	1,196	1,196

Source: 2011 ABS Census, Tweed Shire Council, RPS

The population of the PTA is projected to increase from approximately 7,701 people in 2012 to approximately 8,111 people by 2016 and 13,363 people in 2031. This represents an increase of approximately 74% over this time. The population of the PTA at capacity will be approximately 15,201 people. With the STA already having reached capacity, the population is projected to slowly decrease due to declining average household sizes.

As the population of the PTA increases so too does the demand for additional convenience retail floorspace.

6.3 Demographic Characteristics

The demographic characteristics of the PTA and STA are compared to the Tweed Local Government Area (LGA).

Age Distribution

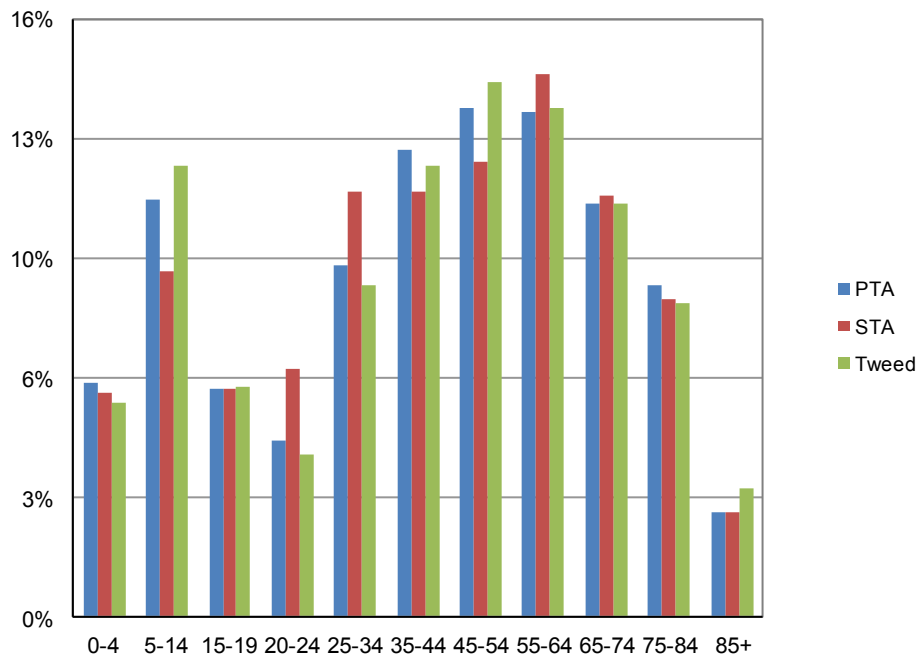


Figure 1: Age Distribution

- The proportion of children aged 0 to 19 years within the PTA (23.5%) is higher than the STA average (21.4%) but lower than the Tweed LGA average (23.9%).
- The proportion of people aged 20 to 34 years within the PTA (14.1%) is lower than the STA average (18.0%) but higher than the Tweed LGA average (13.2%).
- The proportion of people aged 45 to 64 years within the PTA (27.1%) is higher than the STA average (26.7%) but lower than the Tweed LGA average (27.9%).
- The proportion of people aged 65 years and older in the PTA (27.1%) is significantly higher than the STA average (22.5%) and Tweed LGA average (22.9%).
- This indicates the PTA has a large proportion of elderly residents. A supermarket on the subject site will provide a high level of convenience to these elderly residents and others as they are often restricted by the amount they travel.

Dwelling Type

- The proportion of separate house dwellings in the PTA (81.2%) is higher than the STA average (23.1%) and the Tweed LGA average (65.0%).
- Regardless of the mix of dwelling types, all residents will benefit from the increased choice and proximity to a supermarket on the subject site.

Household Structure

- The PTA average of couple with no children (45.5%) is higher than the STA average (41.6%) and the Tweed LGA average (44.8%).
- The PTA average of couple family with children (36.0%) is higher than the STA average (23.9%) and the

Tweed LGA average (35.4%).

- The household structure is reflective of the higher number of families within the PTA when compared to the STA. Families are often constrained by time and will benefit from the proximity and convenience of a supermarket anchored centre being developed on the subject site.

Household Ownership

- The proportion of dwellings that are either fully owned or being purchased directly in the PTA (76.9%) is higher than that of the STA average (46.5%) and the Tweed LGA average (67.8%).
- The PTA has a lower proportion of dwellings that are rented (20.4%) in comparison to the STA and Tweed LGA averages of 47.7% and 28.3%, respectively.
- Irrespective of household ownership, residents of the trade areas conduct weekly and/or fortnightly supermarket shops and will benefit from the price competition that a supermarket on the subject site will provide.

Average Household Income

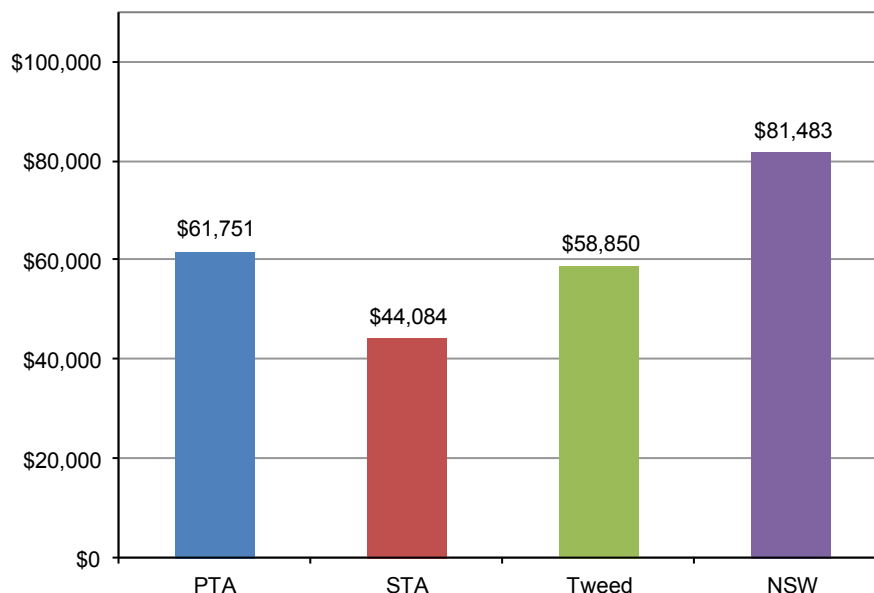


Figure 2: Average Household Income

- Whilst the average annual household income of the PTA of \$61,751 (in September 2012 dollars) is higher than the average income in the STA (\$44,084) and the average income in the Tweed LGA (\$58,580), it is significantly lower than the average household income in NSW of \$81,483.
- This indicates that households in the PTA will therefore benefit from increased competition, choice and other market factors which influence pricing.

6.4 Expenditure Characteristics

Average household convenience expenditure is derived from the 2008/09 ABS household expenditure survey relative to the average income of the trade areas. The demand for convenience retail floorspace has been calculated on an industry average turnover of \$7,500 per Sq M.

Table 3: Average Annual Household Supermarket Expenditure and Floorspace Demand

	PTA	STA							
Average Annual Supermarket Expenditure	\$10,235	\$9,060							
Supermarket Expenditure Potential (\$m)									
	2012	2013	2014	2015	2016	2021	2026	2031	Capacity
Primary Trade Area	\$32.52	\$33.03	\$33.54	\$34.06	\$34.58	\$43.87	\$54.07	\$59.07	\$67.06
Secondary Trade Area	\$10.84	\$10.84	\$10.84	\$10.84	\$10.84	\$10.84	\$10.84	\$10.84	\$10.84
Total	\$43.35	\$43.86	\$44.38	\$44.90	\$45.41	\$54.71	\$64.91	\$69.91	\$77.90
Floorspace Demand (Sq M)									
Primary Trade Area	4,335	4,404	4,472	4,541	4,610	5,850	7,210	7,876	8,942
Secondary Trade Area	1,445	1,445	1,445	1,445	1,445	1,445	1,445	1,445	1,445
Total	5,780	5,849	5,917	5,986	6,055	7,295	8,655	9,321	10,387

Source: RPS, all figures September 2012 dollars

The current estimated total supermarket retail expenditure potential in the trade areas is \$43.4 million. This is estimated to increase to approximately \$45.4 million in 2016, to \$69.9 million in 2031 and to approximately \$77.9 million at capacity (when Bilambil Heights is fully developed). This increase will see supermarket floorspace demand increase from approximately 5,780 Sq M in 2012 to approximately 6,055 Sq M by 2016, to approximately 9,321 Sq M by 2031 and to approximately 10,387 Sq M at capacity.

6.5 Implications

The local residents will benefit from the proximity and accessibility of a full line supermarket.

The population of the total catchment at capacity is projected to be over 17,400 people and these residents will generate in the order of \$78 million of supermarket related expenditure. This expenditure will be distributed amongst full line supermarkets, convenience supermarkets, convenience (general) stores and a range of specialty shops that carry the same product lines as supermarkets (e.g. fruit and veg, butcher, deli).

The future 17,400 residents of the trade areas will generate demand for over 10,000 Sq M of supermarket (and related) floorspace. This is sufficient to support two full line supermarkets in the order of 3,000 Sq M each and 4,000 Sq M of smaller supermarkets and specialty retailers distributed through a number of centres.

The implication of the population capacity assessment of the Bilambil Heights urban expansion area is that the primary and secondary trade area as currently defined will have the future capacity to support two full line supermarkets: one to be located at the Seagulls site and the other to be located on a yet to be identified site central to the future Bilambil Heights urban expansion area.

7.0 Social and Economic Impact Assessment

7.1 Introduction

This section provides an overview of the existing and planned social and economic environments for the proposed Supermarket. This complies with points 3 and 4 of the Terms of Reference. This assessment is detailed in the following tables.

7.2 Summary

The establishment of a small format full line supermarket at the Seagulls Club is considered to be a good fit with the needs of the community. The proposed supermarket will fulfil an established need of the local community. Local residents are currently required to travel four or five km to the larger centres at Tweed Heads and South Tweed Heads in order to undertake what is a regular shopping activity.

The redevelopment of the club will also provide 20 equivalent full-time (EFT) construction jobs with the ongoing workforce being approximately 80 EFTs. The operational workforce will consist of a large number of part-time and casual staff which will provide employment opportunities for people entering or re-entering the workforce.

The redevelopment of the Seagulls Club will also allow this facility to remain viable and continue to service the community and entertainment needs of local and regional residents. No specific mitigation measures are required with respect to this application.

Table 2 Economic Impacts

Criteria			Effect				Comment
			Positive	Neutral or Uncertain	Negative	Net Total	
1	Economic Impacts	Increases or decreases retail and other services within the local area	+			+	Establishment of a 2000 Sq M small format full line supermarket that will be complementary to the existing local and convenience centres in the area.
		Increases or decreases facilities within the local area		0		0	No change to current situation.
		Better uses or makes redundant existing infrastructure	+			+	Development of the subject site will provide a more efficient use of the existing Seagulls Club that provides an important community and social function.
		Impact on existing economic land uses (commercial, tourism, etc)	+			+	The Seagulls Club provides a local and regional community and entertainment function. This will be supported by the redevelopment of the site to include a small format full line supermarket.
2	Employment	Improves or reduces access to employment	+			+	The supermarket will employ a large number of part-time and casual employees which is beneficial for first-time workers and people re-entering the workforce.
		Increases or decreases long term jobs (temporary or permanent)	+			+	Provision of additional employment in the construction of the supermarket.
		Impact on skills / education		0		0	No change to current situation
		Safeguards or threatens existing jobs		0		0	No change to current situation
3	Investment	Jobs created directly from the development					
		- construction phase	+			+	The construction workforce is estimated to be the equivalent of 20 EFT jobs.
		- ongoing operation	+			+	A Supa IGA will have a workforce of about 70 to 80 equivalent full-time (EFT) employees
		Investment in the development	+			+	The inclusion of the supermarket is part of the reinvigoration of the Seagulls Club and this will involve further investment in this privately held community facility.

Table 3 Social Impacts

Criteria			Effect				Comment
			Positive	Neutral or Uncertain	Negative	Net Total	
4	Community Networks	Provides or reduces facilities or opportunities for social interaction	+			+	Reinforces Seagulls as a community destination.
		Improves or reduces community identity and cohesion	+			+	Provides a local small format full line supermarket as part of a revitalised Seagulls centre that will increase the community identity in the local areas.
		Improves or reduces existing residential amenity	+			+	Will enhance local residents amenity with a provision of necessary local retail and will be an adaptive reuse of a large (privately owned) community facility.
		Creates or removes physical barriers between homes and community facilities	+			+	Improved road access will enhance access for local residents.
		Impacts on disadvantaged social groups	+			+	The provision of a local proximate small format full line supermarket will benefit restricted income and other disadvantaged groups.
		Consolidates or dislocates existing social or cultural networks		0		0	No change to current situation as the entertainment function of the club will remain intact.
5	Public Realm	Promotes anti-social behaviour		0		0	No change to current situation
		Safeguards or threatens heritage sites or buildings, or archaeological sites		0		0	No archaeological sites found
		Makes available / enhances or detrimental to public places / open space		0		0	No change to current situation
		Provides or displaces public facilities	+			+	Helps ensure that the club function can be retained in order to service the local and regional community.
		Avoids or exhibits overdevelopment / large scale buildings	+			+	Will be established as an adaptive reuse of the current building and will not be an overdevelopment of the site.

Table 4 Social Impacts (continued)

Criteria			Effect				Comment
			Positive	Neutral or Uncertain	Negative	Net Total	
6	Housing	Increases or decreases housing stock		0		0	No change to current situation
		Increases or decreases stock of low income, or its affordability		0		0	No change to current situation
		Increases or decreases housing rental averages		0		0	No change to current situation
		Increases or decreases choice in housing		0		0	No change to current situation
		Increases or decreases provision of special needs housing		0		0	No change to current situation
		Increases or decreases the social mix of residents in the area		0		0	No change to current situation

Table 5 Community Infrastructure

Criteria			Effect				Comment
			Positive	Neutral or Uncertain	Negative	Net Total	
7	Human Services Facilities	Increases or decreases supply of:					
		- community support / welfare services		0		0	No change to current situation
		- child care, health or educational services		0		0	No change to current situation
		- special services for high need / disadvantaged groups		0		0	No change to current situation
		Decreases or increases demand for					
		- community support / welfare services		0		0	No change to current situation
		- child care, health or educational services		0		0	No change to current situation
		- special services for high need / disadvantaged groups		0		0	No change to current situation
		Increases or decreases in the choice of local shopping facilities	+			+	Provides a local small format full line supermarket that will complement existing local centres and provide residents the opportunity to conduct bulk weekly shopping in a nearby venue.
		Increases or decreases local recreation or leisure facilities		0		0	No change to current situation

Table 6 Community Infrastructure (continued)

Criteria			Effect				Comment
			Positive	Neutral or Uncertain	Negative	Net Total	
8	Access	Decreases or increases distance from homes to local community facilities and services		0		0	No change to current situation
		Improves or reduces public transport services or access to such services		0		0	No change to current situation
		Improves or reduces disabled access to local facilities		0		0	No change to current situation
		Improves or reduces access by cycle to local facilities		0		0	No change to current situation
		Improves or reduces pedestrian access to local facilities		0		0	No change to current situation
		Improves or reduces flood access.		0		0	No change to current situation
		Improves or reduces acoustic amenity.		0		0	No change to current situation

8.0 Tweed Retail Strategy

In September 2005 RPS (formerly Core Economics) produced the Retail Strategy for Tweed Shire. This concluded 2 years of work that focused on the key questions of the scale of new centres and how to integrate new development into existing communities in a manner that was socially and economically sustainable.

In consideration of the Tweed Retail Strategy in November 2005 [at Council meeting 16 November 2005], the Tweed Shire Council had a number of resolutions. These are:

1. “The character of existing towns and villages and the retail facilities they already have to be protected.
2. 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.
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.
4. Maintain and wherever possible enhance the special appeal of the retail centre of Murwillumbah and those village centres of similar style.
5. 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.
6. Council does not support the establishment of another district retail shopping centre.
7. The retail concepts in these recommendations form the basis of locality plans in the Shire and any retail development applications which are submitted in the interim of these locality plans being prepared and approved by Council be assessed so that the above retail strategies are supported and not compromised.”

8.1 Assessment of the proposal

How the proposed uses ‘fit’ the adopted strategies resolutions is described as follows in the table below:

Table 7 - Retail Strategy Principles

Item	Recommended Uses
The character of existing towns and villages and also retail facilities have to be protected;	The inclusion of a small format full line supermarket on the subject site will not affect the character of existing towns and villages. The trade area is presently not serviced by a full line supermarket and such use will complement the existing small retail nodes located in Tweed Heads West and Bilambil Heights.
Where appropriate, TSC will support the incremental expansion of existing retail centres in such a way as not to threaten or fracture those centres, rather than building new ones;	None of the existing small retail nodes in the local area have the capacity to expand to include a full line supermarket. While it is preferable to expand an existing centre where possible, this must be balanced against the broader needs of the community particularly with the introduction of a supermarket which is an everyday requirement for local residents.

Item	Recommended Uses
<p>Reinforce Tweed Heads South as the major district retail centre by encouraging its expansion when the Tweed's population demands an increased range and level of shopping;</p>	<p>The inclusion of a supermarket at Tweed Heads West will not erode the role of Tweed Heads South as a major district retail centre as a supermarket is a ubiquitous piece of retail infrastructure, a number of which are distributed throughout the Shire to service the needs of local residents.</p>
<p>Maintain, and where possible, enhance the special appeal of the retail centre of Murwillumbah and those village centres of similar style;</p>	<p>The inclusion of a supermarket on the subject site will not affect the appeal or character of Murwillumbah and other village centres.</p>
<p>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 is to reflect the need to reduce fuel consumption and to support sustainability within each centre through discouraging vehicle use and encouraging walking;</p>	<p>A supermarket shopping trip is a chore type trip. The intent of this principle is to ensure that residents of the Tweed Shire have access to local supermarket anchored shopping centres. The subject proposal fulfils this need as it will substantially reduce the distance local residents will be required to travel to undertake a supermarket trip.</p>
<p>Council does not support the establishment of another district retail shopping centre.</p>	<p>A single supermarket is well below the scale of a district retail shopping centre and as such this principle does not apply the proposal.</p>

The intent of the principles is to develop supermarket anchored shopping centres throughout the Shire to service the needs of the population while directing development of higher order and specialised retail to the district centres of Tweed Heads and Tweed Heads South. Where possible, these supermarkets should be integrated with existing centres and towns. The development of a Supa IGA at the Seagulls Club fulfils these requirements and provides for the needs of the local community.

9.0 Needs Assessment

9.1 Introduction

This section assesses the economic need and impact for the proposed supermarket anchored shopping centre development on the subject site. The growing population and household expenditure levels in the total catchment area will see demand for a supermarket in the area with 2011 as the first year of operation.

9.2 Need and Impact Assessment

The following questions and answers address these issues as well as the need and impact of the proposed supermarket development on the subject site.

9.2.1 Is there economic need for the proposed development on the subject site?

Yes.

The population of the total catchment is currently approximately 10,000 people. Through the continued development of residential land in the total catchment this will see the population increase to approximately 17,400 at capacity. Household supermarket expenditure in the total catchment is projected to increase from approximately \$43.4 million in 2012 to approximately \$77.9 million at capacity. The general rates of provision for a full line supermarket (such as Coles, Supa IGA and Woolworths) are one supermarket for every 8,000 to 10,000 people. This, one supermarket is justified now with a second required in the future.

9.2.2 Is there planning need for the proposed development on the subject site?

Yes.

Council has recognised the need for a series of supermarket anchored shopping centres to service local residents throughout Tweed Shire. The trade areas are presently unserved by a full line supermarket and this requires local residents to undertake unnecessary travel in order to service their everyday retail needs. A supermarket anchored retail centre is planned for the Bilambil Heights urban expansion area, such a development is likely to be decades away given current rate of growth and economic circumstances. The Seagulls Club site offers an ideal opportunity to enhance the current community focus with a small format full line supermarket and provide everyday retail services to local residents. Such a development will not preclude the establishment of a supermarket anchored shopping centre within the Bilambil Heights urban expansion area.

9.2.3 Is the subject site suitable for the proposed supermarket?

Yes.

The subject site has exposure to the Kennedy Drive, Gollan Drive and Scenic Drive corridor that services the trade area. This will result in the site being well exposed and easily accessible which is suitable for a full line supermarket. Supa IGA has also made a pre-commitment to occupy the subject site which further indicates the suitability of the site for the proposed development.

9.2.4 Will the proposed development on the subject site benefit the community?

Yes.

The proposed location of the Supa IGA will benefit residents of the defined catchment in terms of convenience and accessibility, with no supermarkets currently in the local area. It will provide residents with the choice of a local retail option in addition to those located at Tweed Heads and Tweed Heads South promoting competition and leading to lower prices.

The demographic profile of the catchment is of households with modest incomes. People with lower disposable incomes will benefit from proximate facilities and increased competition.

Community benefit also arises from employment during construction and the employment required for the centre's operation. Estimated employment will provide for an approximate total of 80 EFT positions consisting of full-time, part-time and casual positions and approximately 20 EFT construction jobs. These jobs will predominately be in the retail industry which provides employment opportunities for 'employment poor' groups including women and young adults. With an expanding population in the local area local employment (such as that provided by the subject site) will help to create a liveable and sustainable community.

9.2.5 Will the proposed development on the subject site affect the intended retail hierarchy in the area?

No.

The proposed development will not affect the intended retail hierarchy of the Tweed Shire. The trade area is of sufficient population to support a supermarket as proposed with future development in the Bilambil Heights urban expansion area capable of supporting a supermarket anchored retail centre.

9.2.6 Will the proposed development have any unsustainable impacts on existing centres?

No.

The introduction of a new small format full line supermarket will see a transference effect take place whereby residents who previously shopped at other supermarkets now patronise the local facility. This effect is expected to be distributed amongst most of the existing full line supermarkets serving the northern urban area of Tweed Shire. Consequently, no one supermarket will experience a significant decline in turnover. The level of impact on existing full on supermarkets is estimated to be in the order of 1.5% to 2%. The trading performance of other retailers located in Tweed Heads and Tweed Heads South will not be materially affected.

The proposed supermarket also has the potential to impact on the trading performance of local retail centres. While most local retail centres currently serving the trade area will likely see a reduction in trade in the vicinity of 4% to 7%, the impact on the nearby Panorama Plaza could potentially be greater. A number of tenants (butcher, baker, bottle shop, convenience store) offer a product range that will also be offered by the Supa IGA. The actual impact on each of these retailers will be dependent upon how they respond to the new level of competition. Numerous examples exist whereby specialist retailers (either in the same centre or nearby localities) offer attractive alternatives to that provided by a full line supermarket, under these circumstances, speciality retailers have the capacity to expand their overall turnover as the new supermarket provides them with a higher degree of exposure to potential customers.

The store at Panorama Plaza that is most directly comparable/competitive with the proposed supermarket is the existing convenience store. The store will need to rely on convenience (exposure, parking and

accessibility) and marketable points of difference (as a Lotto agent) in order to avoid a significant impact on turnover.

Any impacts on existing centres are expected to be alleviated over time as the population of the total catchment (Bilambil Heights urban expansion area) continues to grow. As such, the proposed supermarket development on the subject site is not expected to affect the viability of any current centres with all centres maintaining the opportunity to operate at viable levels.

9.3 Statement of Justification

The establishment of a Supa IGA at the Seagulls Club is considered to be a good fit with the needs of the community. The development (the supermarket in conjunction with the revitalised club) will offer a range of economic and social benefits to the community.

The site will provide retail services that are an everyday requirement for local residents, the proximate provision of which will benefit the community both socially and financially. Additionally, the retention of the club function and the substantial provision of employment will further benefit local residents. A supermarket anchored on the subject site will also benefit the community through a greater level of convenience and an increase in choice, local jobs, competition (resulting in lower prices) and product offer.

In conclusion, the total catchment will be able to support the proposed Supa IGA supermarket by 2012. In the longer term a new supermarket anchored shopping centre will be required to cater to the future residents of the Bilambil Heights expansion area.

Appendix – Demographic Profile

Demographic Profile	PTA		STA		Tweed		NSW	
Total Persons	7,346		2,238		85,105		6,917,658	
Age								
0 to 4	461	6.3%	134	6.0%	4,868	5.7%	458,735	6.6%
5 to 14	821	11.2%	207	9.2%	10,289	12.1%	873,776	12.6%
15 to 19	446	6.1%	137	6.1%	5,211	6.1%	443,416	6.4%
20 to 24	347	4.7%	148	6.6%	3,667	4.3%	449,687	6.5%
25 to 34	692	9.4%	255	11.4%	7,564	8.9%	941,496	13.6%
35 to 44	919	12.5%	255	11.4%	10,295	12.1%	971,629	14.0%
45 to 54	1,001	13.6%	273	12.2%	12,166	14.3%	950,451	13.7%
55 to 64	993	13.5%	325	14.5%	11,578	13.6%	810,290	11.7%
65 to 74	811	11.0%	252	11.3%	9,401	11.0%	541,687	7.8%
75 to 84	652	8.9%	190	8.5%	7,163	8.4%	336,756	4.9%
85 years and over	203	2.8%	62	2.8%	2,903	3.4%	139,735	2.0%
Marital Status - Persons								
Married	2,932	48.5%	587	30.7%	33,236	47.5%	2,758,853	49.4%
Separated	186	3.1%	96	5.0%	2,551	3.6%	170,429	3.1%
Divorced	638	10.6%	353	18.5%	8,136	11.6%	461,146	8.3%
Widowed	490	8.1%	141	7.4%	5,783	8.3%	324,517	5.8%
Never Married	1,800	29.8%	733	38.4%	20,240	28.9%	1,870,202	33.5%
Total	6,046		1,910		69,946		5,585,147	
Language Spoken at Home								
English Only	6,853	96.7%	1,994	94.9%	77,992	96.1%	5,013,344	76.3%
Other	235	3.3%	108	5.1%	3,124	3.9%	1,554,333	23.7%
Total	7,088		2,102		81,116		6,567,677	
Relationship in Household								
Husband or wife in registered marriage	2,687	39.1%	522	24.6%	30,191	38.2%	2,514,378	39.2%
Partner in de facto marriage	585	8.5%	175	8.2%	6,153	7.8%	418,722	6.5%
Lone parent	370	5.4%	186	8.8%	4,321	5.5%	297,904	4.6%
Child under 15	1,216	17.7%	313	14.8%	14,313	18.1%	1,256,031	19.6%
Dependent student (15-24)	309	4.5%	62	2.9%	3,415	4.3%	339,163	5.3%
Non-dependent child	404	5.9%	98	4.6%	4,214	5.3%	429,512	6.7%
Other related individual	129	1.9%	55	2.6%	1,484	1.9%	152,902	2.4%
Unrelated individual living in family h/hold	91	1.3%	31	1.5%	756	1.0%	66,691	1.0%
Group household member	233	3.4%	147	6.9%	2,594	3.3%	210,927	3.3%
Lone person	723	10.5%	489	23.0%	9,568	12.1%	599,150	9.3%
Visitor (from within Australia)	128	1.9%	44	2.1%	2,006	2.5%	129,681	2.0%
Total	6,875		2,122		79,015		6,415,061	
Household Structure								
Couple with no children	937	45.5%	233	41.6%	10,444	44.8%	669,019	36.6%
Couple family with children	740	36.0%	134	23.9%	8,238	35.4%	831,850	45.5%
with children under 15	517	25.1%	90	16.1%	5,713	24.5%	560,605	30.6%
no children under 15	223	10.8%	44	7.9%	2,525	10.8%	271,245	14.8%
One parent family	350	17.0%	177	31.6%	4,322	18.6%	297,904	16.3%
Other family	31	1.5%	16	2.9%	293	1.3%	30,780	1.7%
Total	2,058		560		23,297		1,829,553	
Internet Connection								
None	628	21.9%	410	37.3%	8,398	25.0%	495,949	20.1%
Broadband	1,930	67.3%	505	46.0%	21,403	63.6%	1,726,472	69.9%
Dial up or Other	224	7.8%	115	10.5%	2,502	7.4%	158,936	6.4%
Total with connection	2,154	75.1%	620	56.5%	23,905	71.0%	1,885,408	76.3%
Not Stated	85	3.0%	68	6.2%	1,355	4.0%	89,940	3.6%
Total	2,867		1,098		33,658		2,471,297	
Average Number of Cars	1.67		1.20		1.57		1.59	

Source: ABS 2011 Census, RPS (Current Dollars - September 2012)

Demographic Profile	PTA		STA		Tweed		NSW	
Dwelling Type (Occupied -private)								
Separate house	2,323	81.2%	253	23.1%	21,893	65.0%	1,717,701	69.5%
Semi-detached and townhouse	478	16.7%	404	36.9%	6,418	19.1%	263,926	10.7%
Flat, unit, apartment	41	1.4%	334	30.5%	4,144	12.3%	465,188	18.8%
Other dwelling	18	0.6%	105	9.6%	1,157	3.4%	21,141	0.9%
Not stated	0	0.0%	0	0.0%	46	0.1%	3,343	0.1%
Total Occupied	2,860	100.0%	1,096	100.0%	33,658	100.0%	2,471,299	100.0%
Total Occupied Private Dwellings	2,860	93.3%	1,096	89.0%	33,658	88.9%	2,471,299	90.3%
Unoccupied Private Dwellings	205	6.7%	136	11.0%	4,205	11.1%	265,338	9.7%
Total Private Dwellings	3,065		1,232		37,863		2,736,637	
Persons per Household								
Separate house	2.56		2.61		2.62		2.83	
Semi-detached and townhouse	1.88		1.85		1.96		2.31	
Flat, unit, apartment	2.05		1.73		1.78		1.95	
Other dwelling: Total	1.22		1.49		1.55		1.78	
Not stated	NA		NA		1.96		2.10	
Total	2.43		1.96		2.35		2.59	
Dwelling Ownership								
Fully owned	1,193	41.5%	306	27.8%	13,401	39.8%	820,006	33.2%
Being purchased directly	1,017	35.4%	205	18.7%	9,407	27.9%	824,293	33.4%
Rented	587	20.4%	524	47.7%	9,517	28.3%	743,050	30.1%
Other Tenure	20	0.7%	9	0.8%	331	1.0%	20,418	0.8%
Not Stated	56	1.9%	55	5.0%	1,003	3.0%	63,529	2.6%
Total	2,873		1,099		33,659		2,471,296	
Monthly Housing Loan Repayments								
Average Repayment - Sept 2011 \$	\$1,882		\$1,757		\$1,885		\$2,132	
Average Repayment - Current \$	\$1,914		\$1,787		\$1,917		\$2,168	
Weekly Rent								
Average Rent - Sept 2011 \$	\$312		\$264		\$292		\$320	
Average Rent - Current \$	\$317		\$269		\$297		\$326	
Employment								
Employed - Full-time	N/A		N/A		N/A		N/A	
Employed - Part-time	N/A		N/A		N/A		N/A	
Employed - Away From Work	N/A		N/A		N/A		N/A	
Employed - Total	N/A		N/A		N/A		N/A	
Unemployed	N/A		N/A		N/A		N/A	
Total labour force	N/A		N/A		N/A		N/A	
Not in the labour force	N/A		N/A		N/A		N/A	
Occupation								
Upper White	N/A		N/A		N/A		N/A	
Lower White	N/A		N/A		N/A		N/A	
Upper Blue	N/A		N/A		N/A		N/A	
Lower Blue	N/A		N/A		N/A		N/A	
Other	N/A		N/A		N/A		N/A	
Total	N/A		N/A		N/A		N/A	
Household Income								
Average Weekly - Sept 2011 \$	\$1,165		\$831		\$1,110		\$1,537	
Average Weekly - Current \$	\$1,184		\$845		\$1,129		\$1,563	
Average Annual - Sep 2011 \$	\$60,718		\$43,346		\$57,865		\$80,120	
Household Income - Current \$	\$61,751		\$44,084		\$58,850		\$81,483	

Source: ABS 2011 Census, RPS (Current Dollars - September 2012)