



Lower Clarence Retail Strategy

Final Report

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Clarence Valley Council



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Executive Summary

Purpose of the Study

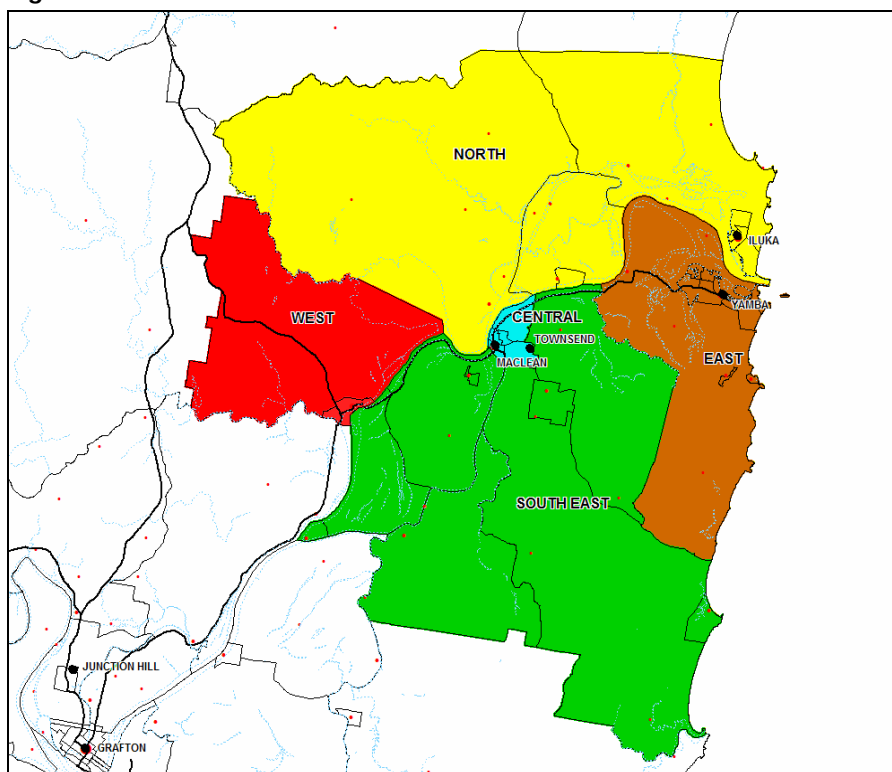
This study represents a Retail Strategy for the Lower Clarence region, with specific emphasis on the township of Maclean. The project has been undertaken on behalf of Clarence Valley Council. The study's aim is to present a sustainable framework for the future direction of retail development in the Lower Clarence over the next 10 years. The study analyses existing and future floorspace requirements, assesses the relative merits of potential locations for retail expansion, and recommends a preferred location and scale for future retail expansion that will not adversely impact the existing retail sector.

Retail Trade Area

Trade areas are of vital importance to the analysis of a retail centre and determining the viability of new development. The Main Trade Area (MTA) is generally defined as the geographical area accounting for 70%-80% of a centre's retail sales. The MTA for the Maclean retail sector is defined as the entire Lower Clarence region, or former Maclean Shire. This definition considers a range of factors, including Maclean's District Centre role in the region. Five catchment areas are defined reflecting the diverse settlement pattern, growth imbalances, different socio-economics, roads and access and different shopping patterns, and to provide the opportunity for microanalysis of the region's retail market.

The MTA is a relatively low socio-economic area; recording an older population, lower workforce participation, higher unemployment and lower household income. The MTA's population is projected to increase from an estimated 18,980 persons in 2006 to 21,000 in 2011 and 23,020 in 2016, which is based on the average of Council's Settlement Strategy population targets and historical growth rates between 2001 and 2004. The main future growth areas are expected to be Gulmarrad, Maclean, Townsend, Yamba, Iluka, Ashby, Wombah, Illarwill and Lawrence.

Figure E.1: Maclean Main Trade Area and Sub-Areas



Source: AECgroup

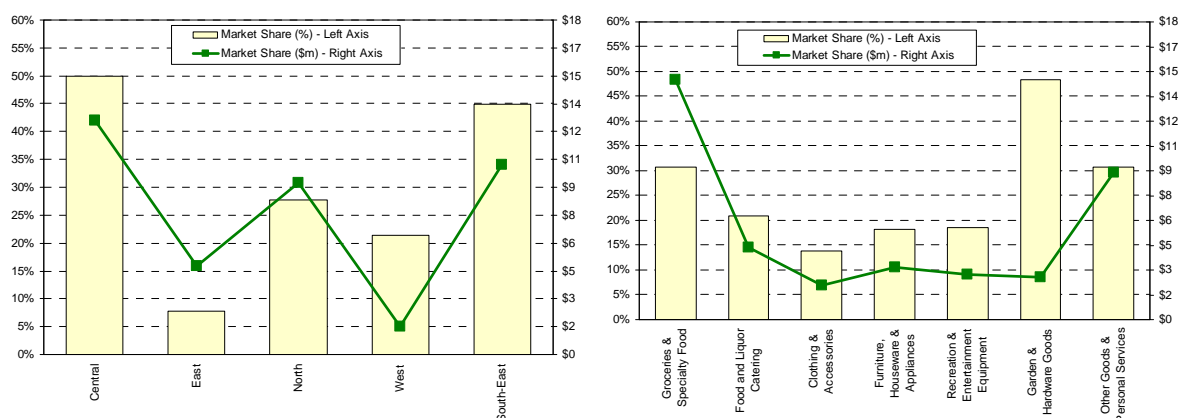
Retail Expenditure and Turnover

Average weekly household retail expenditure in the MTA was estimated at \$352 in 2006, approximately 9% below the non-metropolitan New South Wales average of \$380, reflecting the lower socio-economic status of the region. Based on average household expenditure and the estimated number of households, the total household retail expenditure in the MTA is estimated at \$149.2 million in 2006.

Based on the Household Shopper Survey, Maclean is estimated to record a 26% market share of total household retail expenditure in the MTA in 2006. Yamba is estimated to record the highest market share of 34%, while Grafton is estimated to record 24% of retail spending generated from the MTA. Other retail locations both within and outside the MTA are estimated to account for the remaining 17% of the total.

Maclean's market share is estimated to be highest in the Garden & hardware goods category at 48%, with Groceries & specialty food and Other goods & personal services recording shares of 31% (see **Figure E.2**). The lowest market share is recorded in the Clothing & accessories category at 14%. In terms of the catchments, Maclean's market share is predictably highest in the Central catchment at 50%, followed by the South-East catchment (45%). Market share is lowest in the East catchment (8%).

Figure E.2: Estimated Maclean Market Share of MTA Household Retail Expenditure, 2006



Source: AECgroup Household Shopper Survey, AECgroup Retail Model

Total visitor (or rogue) retail expenditure in Maclean is estimated at \$8.94 million, or 19% of total retail sales. Coupled with household spending, total retail turnover in Maclean was estimated at \$47.27 million in 2006, of which households from the MTA contributed 81% (or \$38.33 million) (see **Table E.1**). The largest retail turnover was recorded by the Groceries & specialty food sector (\$17.09 million), followed by Other goods & personal services (\$10.49 million) and Food & Liquor catering (\$7.30 million).

Table E.1: Total Retail Turnover, Maclean, 2006 (\$m)

Retail Type	Households in the MTA	Rogue (Visitors)	Total
Groceries & Specialty Food	\$14.52	\$2.56	\$17.09
Food & Liquor Catering	\$4.38	\$2.92	\$7.30
Clothing & Accessories	\$2.08	\$0.37	\$2.45
Furniture, Houseware & Appliances	\$3.14	\$0.55	\$3.69
Recreation & Entertainment Equipment	\$2.72	\$0.68	\$3.39
Garden & Hardware Goods	\$2.58	\$0.29	\$2.86
Other Goods & Personal Services	\$8.91	\$1.57	\$10.49
Total	\$38.33	\$8.94	\$47.27

Source: ABS 2003-04 Household Expenditure Survey, AECgroup Retail Model

Retail Sector Trends and Characteristics

The Maclean Town Centre is a retail strip concentrated along River Street between Union Street and Wharf Street. The major retailers in Maclean are the SPAR Supermarket, Home Hardware, Harvey Norman, Carpet Court, Toy Kingdom along with specialty convenience tenants such as a newsagency and pharmacy. There are a number of cafes, restaurants and take-away food outlets serving the local catchment, employees and visitors to the region. There is a small range of clothing stores, personal services businesses and recreational retailers.

The Maclean Town Centre is unique in that it is one of the few small regional towns that have managed to retain a vibrant Town Centre with an historic village atmosphere in the face of large-scale modern development in nearby towns. The Town Centre has remained relatively compact and a measure of its vibrancy is its zero retail vacancy rate. The centre has maintained a healthy mix of small independent retail tenants focused on customer service as a point of difference. Interestingly the centre has developed over time along River Street without directly integrating with the adjacent Clarence River. The appeal of the Town Centre is reflected by the significance of tourism to retail sales.

The Maclean Town Centre, in retail and commercial terms, is described as a District Centre in the Clarence Valley Settlement Strategy (1999). This role is defined as helping serve the Lower Clarence community with secondary levels of sub-regional services, commercial and industrial development. The Strategy defines the role of Grafton as the regional centre and the role of Yamba as a town. In the more recent *Draft Mid North Coast Regional Strategy*, Maclean is described as a Major Town. Major Towns are defined as having a functional role in serving their subregions with outreaches of regional services. They are to be self-contained with shopping and business services and may have bulky goods, warehousing, transport logistics, farm support services, health and professional services mixed with some medium density residential. Yamba is defined as a Town and Grafton as a major regional centre.

There is an estimated 11,840sqm of occupied retail floorspace in Maclean (see **Table E.2**). There is approximately 13,000-14,000sqm of other non-retail uses, including commercial offices, professional services, entertainment and leisure venues, car sales yards and auto repairs. There are no ground floor retail vacancies in the Maclean Town Centre and it is reported vacancy rates have traditionally been low. There are an estimated 64 retail businesses in Maclean. The retail tenancy mix largely reflects the convenience retailing function of the centre. Maclean's retail sector is characterised by a relatively high share of local independent retailers at around 90%.

The average trading level (gross turnover per sqm of net lettable space per annum) of retailers in Maclean in 2006 was estimated at \$4,000/sqm, which lies at the low end of national benchmarks of \$4,000-\$5,100/sqm. While trading levels are, on the whole, below national averages, business operating costs are estimated to be 10-15% lower based on comparisons between rents, wages, transport costs, wholesale prices and rates.

Table E.2: Occupied Retail Floorspace, Maclean (2006)

Retail Type	Floorspace		Tenants		Trading Levels	
	sqm	%	No.	%	Maclean (\$/sqm)	National (\$/sqm)
Groceries & Specialty Food	2,160	18.2%	11	17%	\$7,900	\$6,000-\$8,700
Food & Liquor Catering	1,720	14.5%	13	20%	\$4,200	\$5,300-\$7,000
Clothing & Accessories	1,260	10.6%	8	13%	\$1,900	\$2,700-\$3,800
Furniture, Houseware & Appliances	1,120	9.5%	6	9%	\$3,300	\$2,000-\$3,800
Recreation & Entertainment Equipment	2,180	18.4%	14	22%	\$1,600	\$3,800-\$4,900
Garden & Hardware Goods	1,860	15.7%	2	3%	\$1,500	\$2,000-\$3,800
Other Goods & Personal Services	1,540	13.0%	10	16%	\$6,800	\$6,000-\$8,000
Total	11,840	100.0%	64	100%	\$4,000	\$4,000-\$5,100

Source: Clarence Valley Council, Land Partners, AECgroup

Retail Development Potential and Needs

Based on projected population, spending and market share, the sustainable retail development benchmarks for Maclean are outlined in **Table E.3** and suggest the development of an additional 1,590-3,440sqm of retail floorspace assuming unchanged retail market shares and 5,770-8,470sqm assuming increased market shares over 10 years. An increase in market shares could be expected through the development of appropriate shopping facilities that address service gaps and meet consumer needs. There is an opportunity for the development of a new supermarket in Maclean of 1,500-2,000sqm in size. There is also the potential for small-scale bulky goods development, and consideration for small local centres at Townsend and Gulmarrad over time.

Table E.3: Projected Future Demand for Additional Retail Floorspace in Maclean

Retail Type	Existing (sqm)	Status Quo (sqm)		Upper Threshold (sqm)	
		2011	2016	2011	2016
Groceries & Specialty Food	2,160	+310	+760	+1,420	+2,260
Food & Liquor Catering	1,720	+230	+490	+960	+1,320
Clothing & Accessories	1,260	+160	+330	+520	+750
Furniture, Houseware & Appliances	1,120	+190	+390	+550	+810
Recreation & Entertainment Equipment	2,180	+170	+360	+690	+960
Garden & Hardware Goods	2,800	+270	+560	+430	+750
Other Goods & Personal Services	1,540	+260	+550	+1,200	+1,620
Total	12,780	+1,590	+3,440	+5,770	+8,470

Source: AECgroup

Strategic Planning Context and Framework

The Maclean Town Centre is unique in that it is one of the few small regional towns that have managed to retain a vibrant Town Centre, with an historic village atmosphere, in the face of large-scale modern development in nearby towns. The Town Centre has remained relatively compact and a measure of the vibrancy of the centre is its zero retail vacancy rate. The centre has maintained a healthy mix of small independent retail tenants focused on customer service as a point of difference. The appeal of the Town Centre is reflected by the significance of tourism markets as a generator of retail sales.

The competitive advantages of the Maclean centre are, in summary, identified as its customer service, convenience, range of services and lively atmosphere. Maclean's administrative role is also an activity inspirer, as is a range of community facilities and professional services. In terms of trading disadvantages, there is some evidence of overcrowding in areas of River Street and for particular retailers, perhaps indicating overshopping of these facilities and the need for retail expansion. Consumers indicate some dislike of the small range of stores, prices and parking and access issues. In general, parking represents one of the key issues for the centre, while price and range is identified as a reason for the shopping leakage to places like Grafton, Yamba and Ballina.

Population growth, consumer needs, market forces and regional planning direction now necessitates the expansion of retail facilities in the Maclean area. Population, expenditure and market share analysis projects demand for an additional 1,620-5,770sqm in the next 5 years and 3,510-8,470 sqm over the next 10 years. Of this total, there is estimated demand for a 1,500-2,000sqm supermarket and 500-1,000sqm of specialty tenants. A larger full line 3,000sqm supermarket could be sustained depending on certain conditions outlined in the study. Development to these scales requires the capture of market share from, and the reduction of leakage to, other competing locations. Any short-term development beyond these parameters threatens the viability of existing retailers given the size of the market and expansion capacity set out in this study. The recommended development approach is considered appropriate and in line with the precautionary principle established in the *Clarence Valley Sustainability Initiative*.

From a regional planning perspective, Maclean is defined as a District Centre and Major Town in the regional hierarchy. The role of such a centre is to serve the Lower Clarence community with secondary levels of sub-regional services, commercial and industrial development. District Centres are described as having a functional role in serving their sub-regions with outreaches of regional services and are self-contained with shopping and business services and may have bulky goods, warehousing, transport logistics, farm support services, health and professional services mixed with some medium density residential. To fulfill this role, Maclean will require additional retail development. The *Draft Mid North Coast Regional Strategy* confirms the expectation that Maclean will be expected to undergo some growth and redevelopment of its commercial centre.

The strategic planning context in the Maclean retail catchment is best described by the SWOT analysis in **Table E.4**. The future opportunities relate mainly to addressing key weaknesses and service gaps, increasing trade and reducing spending leakage, promoting retail expansion in an orderly and appropriate fashion to enhance Maclean's District Centre role, improve retailing performance and operations, and improve the layout and structure of the Town Centre including integration with the Clarence River. The threats revolve around unsustainable planning decisions and developments, competing retail centres, increasing escape expenditure, reduced amenity and convenience and the economic health of the region.

To guide future retail development in Maclean and surrounds, a strategic planning framework has been developed. The strategic planning framework determines:

- The appropriate **planning horizon** is 10 years on the basis of uncertainties regarding population growth beyond 10 years, the retail development projections and benchmarks are already for 10 year's of growth, the retail market is dynamic and new retail styles may emerge, it provides the ability to review the strategy in 3 year's time, and it provides a flexible and performance-based approach to planning;
- Population, expenditure and market share analysis projects **demand** for an additional 1,590-5,770sqm in the next 5 years and 3,440-8,470 sqm over the next 10 years. All projections below are "net" additions. Therefore, the relocation and expansion of an existing operator could be considered for a larger floorspace, depending on the use of the previous premises. Development to the upper limits requires the capture of market share from, and the reduction of leakage to, other competing locations. Any short-term development beyond these parameters threatens the viability of existing retailers given the size of the market and expansion capacity set out in this study. Within the retail categories, one of the key development pressures in Maclean is for a full-line supermarket. The demand analysis suggests the development of a 2,000sqm supermarket. Demand for convenience retail within a shopping centre development is projected at 500-1,000sqm. There could be other retail located within a new shopping centre, such as a small discount department store, clothing chains and recreational and entertainment retailers. There is demand projected for bulky goods retail development to further strengthen the role of Maclean as the District Centre. Demand is also projected in the service gap areas of clothing and department store merchandise. There is limited convenience retail demand projected for Gulmarrad and Townsend in the next 10 years; and
- **Spatial distribution criteria** suggests additional large-scale development should be focussed in the Maclean Town Centre, with small-scale development providing for the everyday shopping needs of the growing Townsend and Gulmarrad populations. In-centre development is favoured based on many case studies and examples of situations where out-of-centre development has negatively impacted existing centres by forcing consumers to make a distinct choice between two different retailing destinations. Unnecessary out-of-centre development has generally resulted in increases to vacancies in existing and traditional centres, a large reduction in trade, reduced land values, a loss of vibrancy and a negative impact on community sentiment. Out-of-centre development also threatens the social and community values of a local area, including the unique nature of town centres and their points of difference such as atmosphere and ambience. Out-of-centre development is considered a risk to the vibrancy and unique nature of the Maclean Town Centre. Maclean has the unique opportunity to learn from the negative experiences elsewhere

and action some of the strategic aims and objectives of this Retail Strategy, the *Maclean LEP* and *Draft Mid North Coast Regional Strategy* for in-centre development. Therefore, a key direction of this retail strategy is the reinforcement of the District Centre role and strengthening of Maclean's retail position, preference for retail development within existing centres as opposed to out-of-centre development so as to manage impacts on existing retailers and commercial investment, and better utilise existing commercial areas where development potential exists.

Table E.4: SWOT Analysis of Maclean Retail Sector

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> • Main administrative centre in the Lower Clarence • District Centre/Major Town status • Customer service standards • Vibrancy • Low floorspace vacancy rate • Village atmosphere • Historic streetscape and facades • Adjacent river and boulevard • Compactness • Location close to Highway • Local road systems and access • Catchment size and growth • Tourist appeal and visitor expenditure • Supporting activity inspirers • Lower business operating costs 	<ul style="list-style-type: none"> • Significant shopping leakage to other locations • Lack of variety of stores and limited range • Relatively low average trading levels • Ongoing issues with parking and access • Higher prices and lack of competitiveness • Identified service gaps resulting in leakage • Non-existence of a major supermarket • Overcrowding of some retail stores • Low socio-economic catchment • Retail supply not aligned with District Centre role • High transport costs for retailers • Uncoordinated opening and closing hours • Freight and service vehicle access/delivery • Lack of landlord reinvestment in some premises • Disparity of rental rates across the Town Centre
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Reinforce District centre role • Future population and spending growth • Development and expansion potential • Provide improved retail services and floorspace • Respond to changing retail trends and needs • Reducing leakage/increasing market share • Consolidation of existing commercial areas • Strengthen land owner and retailer viability • Increase supply in bulky goods categories • Improve retail supply and range • Orientating toward the river • Revival of heritage theme • Conversion of buildings through redevelopment • More efficient utilisation of commercial areas • Preservation of village feel and character • Increase tourism market and stopovers • Introduction of major national retailers/franchises 	<ul style="list-style-type: none"> • Approval of out of centre development • Approval of unsustainable development proposals • Unsustainable retail development in Yamba • Unsustainable retail development in Iluka • Deterioration of average trading levels • Expansion of Grafton Shoppingworld • Realignment of the Highway and interchanges • Population growth trends and land take-up • Sustained economic growth and industry base • Forecast population ageing and reduced spending • Macro economic impacts such as interest rates • Introduction of major national retailers/franchises • Collapse of development proposals/options

Source: AECgroup

Retail Development Strategy

The retail development strategy outlines sustainable development benchmarks for future retail development and the optimal locations and guiding principles for new development. The aims and objectives of this Strategy are outlined earlier in this Chapter. The sustainable retail development benchmarks for Maclean suggest the development of an additional 1,620-3,510sqm of retail floorspace assuming unchanged retail market shares and 5,380-8,570sqm assuming increased market shares. An increase in market shares could be expected through the development of appropriate shopping facilities that address service gaps and meet consumer needs. There is an opportunity for the development of a major supermarket in Maclean.

The Lower Clarence's retail development in the next 10 years should be carried out within the following regional retail centres hierarchy, with the retail development strategy consolidating the role of the Maclean Town Centre in the short-term:

- Maclean – District Centre;
- Yamba – Town;
- Townsend – Village;
- Gulmarrad – Village; and
- Iluka – Village.

The recommended retail development strategy is as follows:

- Develop a new supermarket of a maximum of 2,000sqm in the Maclean Town Centre, unless the proposal represented an expanded/relocated supermarket or other pre-conditions are determined as outlined earlier in this study. The possible locations for the development are the Northern end of the Town Centre and Council car park. Council would not need to rezone the Northern end of the Town Centre, but may need to sell public land if a development proposal involved the purchase of Clyde Street. Preference for the Council car park would require Council to allow the ownership/lease of airspace and subterranean space and the rezoning to business. Council would also need to be satisfied parking requirements were met. Both sites represent the potential to activate the waterfront. The key issue with regards to the Council car park site is whether its merits (such as potential linkages to River Street and any future waterfront development) are strong enough to warrant its rezoning despite development potential existing within the existing business zone at the Northern end of the Town Centre at the boulevard;
- Consider the development of the new supermarket as part of a shopping centre and ensure specialty convenience retailers comprise no more than 1,000sqm to manage potential impacts. In addition to a supermarket and convenience retail, the shopping centre could contain other retail such as clothing, department store merchandise and recreational equipment to sustainable development levels;
- Consider the potential for retail as part of any redevelopment of the waterfront, including tourist focussed uses such as cafes, restaurants and take-aways. Such development should occur within a master planning and urban design framework for the waterfront that activates linkages to the Town Centre;
- Undertake a Structure Planning exercise to identify additional redevelopment opportunities, such as the refurbishment of the Palace Arcade which is already identified, to provide expansion potential for other retailing categories such as clothing, department store merchandise and recreational retailing;
- Consider the development of a small bulky goods cluster to accommodate future growth in the Furniture, houseware & appliances and Garden & hardware goods retail categories, possibly involving the relocation of the Home Hardware commercial business outside of the Maclean Town Centre. Potential sites could include the Townsend commercial site or the Taloumbi Street site, along with consideration for redevelopment of other Business zone parcels south and north of the Town Centre. Bulky goods uses should be restructured in industrial zones;
- Encourage the expansion of the Townsend Centre by 300sqm. Such development would represent a sustainable and orderly development within the planned retail hierarchy. The tenancy mix for the development should be convenience based i.e. convenience store, newsagent, liquor store, bakery, butcher, take-away food etc;
- Allow for the development of a small convenience centre in Gulmarrad in the next 10 years time comprising a maximum of up to 500sqm of convenience retail floorspace. The rezoning could be undertaken immediately. This provides the opportunity for some flexibility to meet the every day shopping needs of this growing area commensurate with population growth. The tenancy mix for development should be convenience based i.e. convenience store, newsagent, liquor store, bakery, butcher, take-away food etc. The long-term requirements of this area would be reviewed in 3 year's time when development and growth trends become clearer;

- Consider the expansion of the Yamba shopping precincts in the medium and long-terms only following the consolidation of the Maclean Town Centre as the District Centre and as per the findings of the Yamba Retail/Commercial Study; and
- Allow for minor expansion of the Iluka retail sector through improved concentration of retail services and provision of convenience-based retailing.

Retail Performance Strategy

The main driver of improved retail performance in Maclean is increasing retail business and trade through increases to patronage and spending. This means the development strategy outlined above is an integral component of achieving improved performance by ensuring Maclean provides improved retail facilities for its customer markets.

In addition to the development strategy, there is also the need for other strategic actions to improve the performance of the Maclean retail market. This relates to operating more efficiently, providing a more pleasant shopping experience, and ultimately doing better with the facilities and opportunities the Town Centre offers in an operational context.

Some of the key questions relating to the concept of operational performance include:

- Working in partnership and improving communication channels;
- Encourage landlord reinvestment;
- Coordinated trading hours and Sunday trading;
- Attract and retain quality staff and improve customer service standards;
- Review signage policy and negotiate with RTA on the Highway;
- Undertake appropriate marketing of the local retail sector;
- Build on the historic streetscape and theming of Maclean;
- Address parking and access issues in the Maclean Town Centre;
- Consider techniques to connect the Town Centre with the River; and
- Consider amount of open space and public amenity for visitors.

Conclusions

A key feature of the recommended retail development strategy is to ensure any new retail development in Maclean and surrounds is sustainable and is based on a strategic planning framework that carefully considers demand, need, location and capacity. The thrust of the strategy is for retail development in the next 10 years to be consolidated in the Maclean Town Centre to fulfil its District Centre role as defined in the *Draft Mid North Coast Regional Strategy*. Small-scale retail development is supported in the growing areas of Townsend and Gulmarrad. The strategy's review in 3 year's time will allow for longer-term planning in these growth areas. Bulky goods development is encouraged for the business zones south and north of the Town Centre proper. Activating the waterfront through retail and urban design represents a key opportunity for tourist services.

The retail development benchmarks over the next 10 years have been formulated on detailed retail market analysis of population growth, shopping patterns and the respective roles of retail centres, balanced against the precautionary principle's conservative approach to planning. The recommendation is for a 2,000sqm supermarket unless occupied by a relocated/expanded tenant. Other conditions under which a larger supermarket could be considered are detailed in the strategy. The development of a smaller sized supermarket is considered sustainable, is common in other regional locations and would still represent an anchor tenant for the Maclean Town Centre. There is also demand and need projected across the entire retail spectrum, including clothing, department store merchandise, recreation & entertainment equipment and bulky goods. There would be potential for further retail expansion beyond 10 years.

The strategic planning framework clearly identifies the Maclean Town Centre as the preferred location for the development of any shopping centre proposal. Out-of-centre development is not supported unless development within the Town Centre is not possible for any reason. Two possible locations are identified within the Maclean Town Centre to accommodate such development: Northern end of the Town Centre at the Boulevard; and

the Council car park. A Structure Plan is recommended to address transport and access, parking, infrastructure, engineering and construction issues that would result from development in either location. A Structure Plan would also identify other redevelopment options within the Town Centre.

The Northern end of the Town Centre is zoned for business use but may require the sale of Clyde Street depending on design. Development at the Council car park site would require ownership/leasing of airspace and/or subterranean space and subsequent rezoning. This rezoning needs to demonstrate that expansion within existing zoned areas cannot be undertaken for identified reasons (such as site amalgamation, tenure, traffic, cost, feasibility etc) or that the merits of the Council car park site are so strong that they warrant rezoning (such as potential linkages to River Street and any future waterfront development), or a combination of both.

The Strategy clearly demonstrates overriding demand and need for additional retail development in Maclean from the general public and business community. There are active proposals in the market from the private sector for retail development in Maclean, predominantly for a supermarket-anchored shopping centre. It is important the implementation of the Strategy by Council works in partnership with the private sector to deliver real and much needed development on the ground.

Ultimately, Council can only assess development applications if, and when, received. This means that despite the Strategy existing, there is still a market situation to be played out between competing developers. Council's adoption of the Strategy signals its endorsement of the strategic planning approach and framework as a tool to assess retail expansion proposals. The development application that first successfully addresses the strategic planning framework and site selection criteria is likely to have first mover advantage.

Council could include various clauses as part of any development consent to ensure that development would ultimately occur/be delivered, which would provide added security to Council and the community. If the market does not deliver the recommended development within the Town Centre for any reason within the next 3 years, then consideration for out-of-centre developments may be required in any review of the strategy at that time.

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1. Introduction

1.1 Purpose of the Study

This study represents a Retail Strategy for the Lower Clarence region, with specific emphasis on the township of Maclean. The project has been undertaken on behalf of Clarence Valley Council. The study's aim is to present a sustainable framework for the future direction of retail development in the Lower Clarence over the next 10 years. The study analyses existing and future floorspace requirements, assesses the relative merits of potential locations for retail expansion, and recommends a preferred location and scale for future retail expansion that will not adversely impact the existing retail sector.

1.2 Project Methodology



1.3 Report Structure

Chapter 1: Introduction – Overview of the purpose of the study, project methodology, report format and retail definitions.

Chapter 2: Background and Planning Context – Overview of the relevant strategic and statutory planning documents and their implications for the study.

Chapter 3: Retail Trade Area Analysis – Analysis of population, demographic and economic trends, including future population and settlement patterns.

Chapter 4: Retail Expenditure and Turnover – Analysis of retail expenditure, market shares and leakage, and retail turnover.

Chapter 5: Retail Sector Trends and Characteristics – Overview of the structure and characteristics of the existing retail sector and key issues and challenges.

Chapter 6: Retail Development Potential and Needs – Assessment of future retail development potential and need, service gaps and specific development case studies.

Chapter 7: Retail Development Options – Identification and evaluation of the key retail development options and proposals.

Chapter 8: Retail Strategy – Outline of future retail development and performance strategies, associated planning policy and performance measurement approaches.

1.4 Retail Definitions

The **retail trade** sector is defined as businesses mainly engaged in the resale of new or used goods to final consumers for personal or household consumption. The definition applied in this study closely aligns with the Australian and New Zealand Standard Industrial Classification (ANZSIC) definition which was adopted by the ABS for its *1991-92 Retail and Services Census* and *1998-99 Retail Industry Report*, and has been adopted for the purposes of detailing the retail market using the ABS' *2003-04 Household Expenditure Survey*, as well as categorising retail centres' turnover and tenancy details. The retail types defined in this study are outlined in **Table 1.1**.

The **non-retail** sector refers to the following store types, services and expenditure categories:

- Amusements;
- Appliance rental;
- Auto accessories and parts;
- Banks, building societies and credit unions;
- Cinemas;
- Equipment hire;
- Financial and property services;
- Fuel retailing;
- Lottery and gaming;
- Marine equipment;
- Medical and dental services;
- New and used motor vehicles;
- Offices;
- Post offices;
- Repair and maintenance of household durables;
- Travel agency;
- Vehicle charges; and
- Video hire.

Table 1.1: Retail Type Definitions

Broad Retail Types	Goods and Services (Merchandise)	Store Types (Retailers)
Groceries & Specialty Food	<ul style="list-style-type: none"> Bakery products, meat, fish and seafood, eggs, dairy products, edible oils and fats, fruit and nuts, vegetables, condiments, confectionary, food additives and prepared meals, non-alcoholic beverages 	<ul style="list-style-type: none"> Supermarkets, local stores, service stations, bakeries, pastry shops, butchers, ice cream shops, fruit stores, vegetable stores, candy shops, drink stores, discount department stores, department stores
Food & Liquor Catering	<ul style="list-style-type: none"> Meals out and fast foods, alcoholic beverages for consumption off licensed premises 	<ul style="list-style-type: none"> Cafes, restaurants, take-aways and fast food stores, liquor stores and bottle shops
Clothing & Accessories	<ul style="list-style-type: none"> Men's, women's, children's clothing and footwear, watches, clocks, jewellery and other accessories, travel goods 	<ul style="list-style-type: none"> Specialty clothing and footwear stores, discount department stores and department stores, jewellers, travel goods stores and other accessory stores
Furniture, Houseware & Appliances	<ul style="list-style-type: none"> Kitchen, bedroom, lounge/dining room, outdoor/garden furniture, carpets, floor rugs, mats, matting, vinyl and other sheet floor coverings and floor tiles, blankets, household linen, household furnishings, glassware, tableware, cutlery, household utensils, cooking stoves, ovens, microwaves, hot plates, rangehoods, refrigerators, freezers, washing machines, air-conditioners, dishwashers, clothes dryers, other electrical appliances, non-electrical appliances 	<ul style="list-style-type: none"> Bulky goods stores, furniture stores, carpet stores, discount department stores and department stores, antique stores, manchester stores, curtains and blinds stores, electrical / appliance stores, other homewares stores
Recreation & Entertainment Equipment	<ul style="list-style-type: none"> Audiovisual equipment and parts, home computer equipment, blank and pre-recorded media, books, newspapers, magazines and other printed material, other recreational and educational equipment and hire 	<ul style="list-style-type: none"> Bulky goods stores, electrical and audiovisual stores, computer stores, discount department stores and department stores, sporting, camping and outdoor goods stores, music shops, newsagencies, book shops
Hardware & Garden Goods	<ul style="list-style-type: none"> Gardening tools and equipment, other hand and power tools, household non-durables including gardening products 	<ul style="list-style-type: none"> Bulky goods stores, garden centres and hardware stores, discount department and department stores
Other Goods & Personal Services	<ul style="list-style-type: none"> Stationery, pharmaceuticals and personal care products and services, animal purchases and food, tobacco, other miscellaneous goods 	<ul style="list-style-type: none"> Supermarkets, local stores and service stations, newsagents and stationery stores, chemists, pharmacies, cosmetic stores, discount department stores and department stores, hair salons, beauty salons, laundromats, tobacconists

Source: AECgroup, ABS 2003-04 Household Expenditure Survey, ABS Retail & Services Census

1.5 Disclaimer

Whilst all care and diligence have been exercised in the preparation of this report, the AEC Group Limited does not warrant the accuracy of the information contained within and accepts no liability for any loss or damage that may be suffered as a result of reliance on this information, whether or not there has been any error, omission or negligence on the part of the AEC Group Limited or its employees. Any forecasts or projections used in the analysis can be affected by a number of unforeseen variables, and as such no warranty is given that a particular set of results will in fact be achieved.

2. Background and Planning Context

2.1 Project Background

Clarence Valley Council has received a number of enquiries for new retail development within the Maclean township and its surrounds, including specific development and rezoning applications. Some of these have been proposed within the heart of the Maclean CBD, others on the periphery, and others on Greenfield sites in proximity to growing dormitory satellite suburbs. The former Grafton and Maclean Councils had prepared retail and commercial strategies for Grafton and Yamba, however there is no such strategy for the Maclean area. Council has recognised the need for such a strategy to guide its decision-making in regard to the current proposals before it and any future proposals.

2.2 Planning Context

The Lower Clarence Retail Strategy is being prepared within the context of a number of local and regional planning instruments. Relevant considerations are outlined below.

2.2.1 Maclean Local Environmental Plan

The Clarence Valley Council was formed in February 2004 through the amalgamation of the former Councils of Copmanhurst, Grafton, Maclean and Pristine Waters¹, and activities of North Coast Water and Clarence River County Council. There has been no new consolidated LEP for the total Clarence Valley Council. The Maclean Local Environmental Plan (LEP) 2001 remains the relevant planning instrument for the former Maclean Local Government Area (LGA) and outlines the preferred arrangement for the future use, development and management of land in the area.

The Maclean LEP defines a Business Zone, which aims to enable the provision of a range of retail and commercial activities and employment opportunities to meet the needs of the Maclean LGA's population and visitors. The particular objectives of the zone are:

- (a) well designed commercial and retail development which will enhance the appearance, function and viability of commercial and retail areas, and
- (b) to provide development which is associated with, ancillary to, or supportive of, commercial or retail development, and
- (c) adequate provision for water and effluent disposal.

Business zoned land is mostly contained in the Maclean Town Centre with a non-connected portion of land situated south of the Civic and administration precinct. There is a total of 7.5 hectares of Business zoned land in Maclean.

Clauses 49 and 50 of the LEP are also relevant to this study and relate to development of land in the 3(a) Business zone in the Main Town Precinct and Southern Town approach to ensure redevelopment and refurbishment produces attractive facades and streetscape.

The implications of the Maclean LEP for this study include the capacity of existing Business zoned land to accommodate future development requirements and any need for additional rezoning to cater for future development.

2.2.2 North Coast Regional Environmental Plan

The North Coast Regional Environmental Plan (REP) 1988 establishes a regional planning framework for the North Coast region of New South Wales. In regard to retail, commercial or business activities, the REP outlines the following clauses for the preparation of LEPs:

¹ Pristine Waters Shire Council was formed in July 2000 with the amalgamation of Nymboida Shire Council and Ulmarra Shire Council.

“A draft local environmental plan should not provide for the establishment of significant retail, commercial or business development unless:

- (a) the expansion is adjacent to or adjoins the existing commercial centre, or*
- (b) if the expansion is not adjacent to or adjoining the existing centre, that development is in accordance with a commercial/retail expansion strategy prepared by the Council, published for public discussion and:*
 - (i) be available, without change, for public inspection and comment at the office of the Council during normal office hours, and*
 - (ii) be forwarded by the Council for their information to such public authorities as, in the opinion of the Council, have responsibilities reasonably requiring them to be aware of the strategy.*

The implication of the REP for this study is that the Lower Clarence Retail Strategy represents a responsible and supported approach to planning for future retail and commercial expansion in Maclean and that any additional development should preferably be located adjacent or adjoining the Maclean Town Centre. The definition of what constitutes the Town Centre is important to implementing these objectives.

2.2.3 Clarence Valley Development Control Plan in Business Zones

The Clarence Valley Development Control Plan (DCP) in Business Zones outlines controls for the Maclean Town Centre and its business zones. The DCP divides the Town Centre into seven separate precincts with individual policies for each.

The DCP notes the heritage character of Maclean is an important asset of the town and that the overall aim of the DCP is to provide policies and guidance to enable development to take place whilst maintaining this unique character.

Some of the individual objectives of the DCP relevant to this study include the:

- (a) to conserve and enhance the character of Maclean's town centre;
- (b) to encourage the conservation and reconstruction of historical buildings to their original forms;
- (c) to encourage a high standard of contemporary design for new developments that relates well to the historic context of the streetscape;
- (d) to reunite the town centre with the river; and
- (e) to encourage the vitality of the town.

The DCP defines the Main Shopping Area of Maclean as that area bounded by Argyle and Stanley Streets and Centenary Drive.

2.2.4 Clarence Valley Settlement Strategy

The Clarence Valley Settlement Strategy 1999 represented a valley-wide strategic approach to future planning by the Councils of Copmanhurst, Grafton, Maclean, Nymbodia and Ulmarra in conjunction with the Department of Urban Affairs and Planning. The Strategy outlines a vision of how the Clarence Valley can grow sustainably over the next 20 years and seeks to locate population growth areas which will have the least costs in economic, social and environmental terms. The strategy represents an urban and rural land release strategy in terms of the North Coast REP and includes a basic hierarchical pattern of city, towns, villages and rural areas.

The strategy defines Maclean's role as a District centre. This role is defined as helping serve the Lower Clarence community with secondary levels of sub-regional services, commercial and industrial development. Maclean will also continue as the central town of the former Maclean Shire and maintain its strong physical and cultural identity. The strategy indicates future rural residential growth in Gulmarrad will build on, and enhance, the major facilities provided by Maclean as the district centre of the Shire. Further, the

strategy indicates development in Maclean should be designed to complement the heritage character and physical attributes of the town and that Council should encourage district level community facilities to be located in Maclean to serve the Shire.

The implication of the strategy for this study is that future residential growth in Gulmarrad will support the development of retail in Maclean, but that retail development should be complementary to the district centre role played by Maclean.

2.2.5 Clarence Valley Sustainability Framework

The *Clarence Valley Sustainability Framework* highlights a number of principles and aspects that should be considered to ensure sustainable and appropriate development within the Clarence Valley. The documents defines sustainability in the following way:

“Sustainability involves identifying what we really care for as a community on a long term basis – ecological, economic, social and cultural values – and engaging in behaviour that ensures these values are maintained for present and future generations”

With regard to planning for future development, one of the guiding principles of the initiative is “taking a precautionary and anticipatory approach” which requires that decisions regarding future proposed development need to be based on a careful assessment of the potential risks, including reference to examples from other locations.

The implications of the initiative for this project are that any future retail development in the Maclean retail catchment needs to be sustainable and enhance its retail and economic role. Development that jeopardises existing investment or the current trading strengths and advantages of the retail market would be considered unsustainable. The precautionary principle also suggests a more conservative approach versus an aggressive approach to assessing future floorspace requirements.

2.2.6 Draft Mid North Coast Regional Strategy

The *Draft Mid North Coast Regional Strategy* aims to ensure that adequate land is available and appropriately located to accommodate to the projected housing and employment needs of the region’s population over the next 25 years.

Maclean is identified as a Major Town which are defined to have a functional role in serving their subregions with outreaches of regional services. They are self-contained with shopping and business services and may have bulky goods, warehousing, transport logistics, farm support services, health and professional services mixed with some medium density residential. Yamba is defined as a Town.

The Draft Strategy indicates Maclean will be expected to undergo some growth and redevelopment of its commercial centre reflecting its role as a major town. The strategy indicates fragmentation and out-of-centre retailing will need to be resisted in order to maintain the healthy retail and service functioning of all centres in the region.

Therefore, the key implication of the Draft Strategy for this study is that Maclean is to fulfil a Town Centre role, including being self-contained in shopping, and resist out-of-centre development that may fragment the market and damage existing precincts.

2.2.7 Yamba Retail/Commercial Strategy

The Yamba Retail/Commercial Strategy was prepared in 2002 to provide a direction for future retail and commercial growth in Yamba. The study projected the demand for an additional 1,578-3,128sqm in Yamba between 2001 and 2011 across the food and non-food retail sectors depending on the extent of escape expenditure retained in Yamba.

However, basing any new retail development wholly on the capture of all available escape expenditure would be unsustainable in Yamba’s case given the reasons for the shopping leakage and the roles of other centres in the retail hierarchy. The Strategy noted some remaining development potential in the Yamba Town Centre and West Yamba to

accommodate new retail developments. The study indicates that future population levels in Yamba are likely to be too small to sustain additional floorspace of any significance.

The implications for this study are that there is demand and need for additional retail development in the Lower Clarence and Yamba is positioned as the main growth centre with future retail development potential. Therefore, Maclean is increasingly under pressure to confirm its status as the district centre in the short term prior to any new development occurring in Yamba which may undermine its district role.

2.2.8 Review of Grafton Business Centres

A Review of Grafton Business Centres was carried out in November 2003 focussing on the Grafton CBD and South Grafton in particular. The study clearly identifies the Grafton CBD as the regional retailing and administrative centre for the Clarence Valley, including the former Maclean Shire.

The key implication for this study is that the review clearly indicates it is appropriate that Grafton's role as principal regional retail centre for the Clarence be acknowledged and inappropriate development elsewhere should be avoided. This means the scale and mix of future retail development in Maclean should not undermine Grafton's regional role.

3. Retail Trade Area Analysis

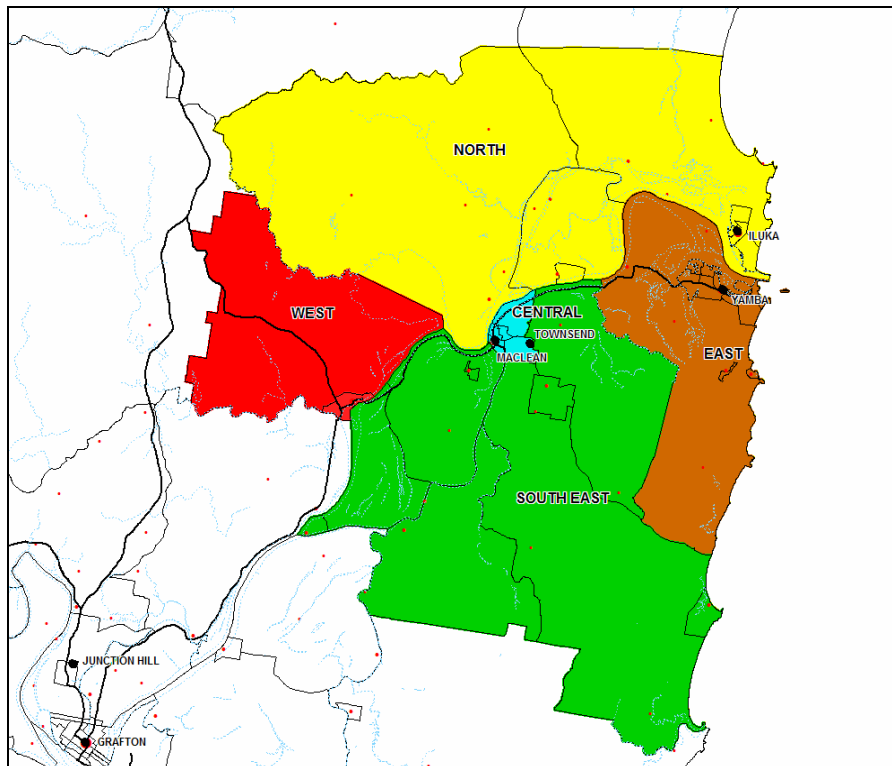
3.1 Trade Area Definition

Trade areas are of vital importance to the analysis of a retail centre and determining the viability of new retail development. The Main Trade Area (MTA) is generally defined as the geographical area accounting for 70%-80% of the centre's retail sales. The definition of the MTA for Maclean has been based on a number of important factors, including:

- Role of the Maclean district centre and its retail structure, tenancy mix, characteristics, performance and trading position within the broader region.
- Results of the Household Shopper Survey in terms of patronage of the Maclean district centre expressed as a percentage of the centre's retail sales.
- The location, composition, quality and scale of competitive retail centres, which include Grafton to the south, Yamba to the east and Lismore/Ballina to the north.
- The availability of major roads providing access from the region. These roads include the Pacific Highway, the Maclean-Yamba Road and Woodford/Lawrence Roads.
- Significant physical or geographical barriers, such as the Clarence River, which adjoins Maclean and separates it from areas immediately to the west.
- Provision of community infrastructure that acts as activity-inspirer for retail, including facilities like schools, hospitals, professional services and government.

Based on these factors, the MTA is defined as the former Maclean Shire Council boundary (also referred to as the Lower Clarence) (see **Figure 3.1**). Five catchment areas are defined reflecting the diverse settlement pattern, growth imbalances, different socio-economics, roads and access, different shopping patterns. The catchments provide the opportunity for microanalysis of the region's retail market.

Figure 3.1: Maclean Main Trade Area and Sub-Areas

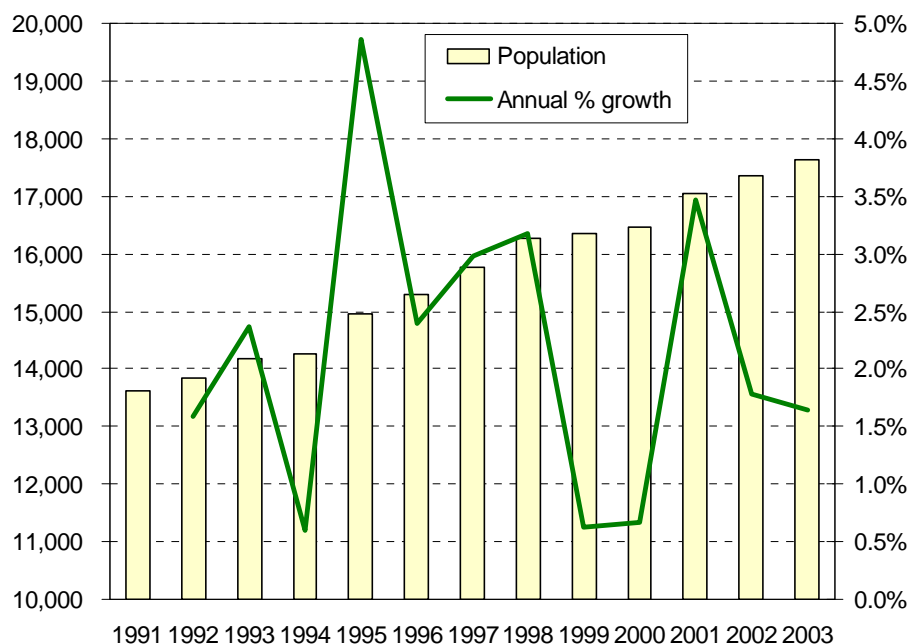


Source: AECgroup

3.2 Population Trends

The last official estimate of the resident population of Maclean Shire, which corresponds to the MTA, was 17,633 persons in 2003 (see **Figure 3.2**). Since 2003 population estimates have only been released for the amalgamated Clarence Valley Council. The data available indicates the estimated resident population of Maclean Shire had increased by just over 4,000 persons from 1991, equating to an average growth rate of 2.2%. Population growth has fluctuated in Maclean Shire over this period with annual growth varying between 0.6% and 4.9% over the period. Growth in the two most recent years on record averaged 1.6%-1.8%. Maclean Shire was by far the fastest growing area of the Clarence Valley between 1991 and 2003 with the Clarence Valley as a whole recording average growth of 1.0%. Population growth in the entire Clarence Valley was reported as 0.2% and 0.6%, respectively, in the past two years (2004 and 2005).

Figure 3.2: Estimated Resident Population Trends, Maclean Shire



Source: ABS 3218 *Regional Population Growth*

On the night of the 2001 ABS Census, there were 16,928 persons in the MTA (see **Table 3.1**). The largest sub-region in terms of population was the East catchment (6,767 persons, or 40.0% of the total), followed by the North catchment (3,657 persons, or 21.6%). Maclean's catchment (Central catchment) recorded 3,043 persons, or 18.0% of the total. The analysis clearly shows Maclean itself is relatively small but its central location and history as the administrative centre of the former Maclean Shire has defined it as the district centre.

Table 3.1: 2001 Census Population by Sub-Region

Sub-Region	No.	%
Central	3,043	18.0%
East	6,767	40.0%
North	3,657	21.6%
West	923	5.5%
South-East	2,538	15.0%
Total	16,928	100.0%

Source: CDATE 2001, AECgroup

3.3 Socio-Economic Trends

3.3.1 SEIFA

As a measure of the socio-economic status of regional populations like the MTA, the ABS produced Socio-Economic Index for Area's (SEIFA) from the 2001 Census. Four different measures are provided:

- *Index of Disadvantage* – Derived from attributes such as income, educational attainment, unemployment, and dwellings without motor vehicles. It focuses on low-income earners, relatively lower educational attainment and high unemployment.
- *Index of Advantage/Disadvantage* – Low values indicate areas of disadvantage, and high values indicate areas of advantage. It takes into account variables relating to income, education, occupation, wealth and living conditions.
- *Index of Economic Resources* – Variables for this index include those relating to the income, expenditure and assets of families, such as family income, rent paid, mortgage repayments, and dwelling size.
- *Index of Education and Occupation* – This index includes variables relating to the educational and occupational characteristics of communities, such as the proportion of people with a higher qualification or those employed in a skilled occupation.

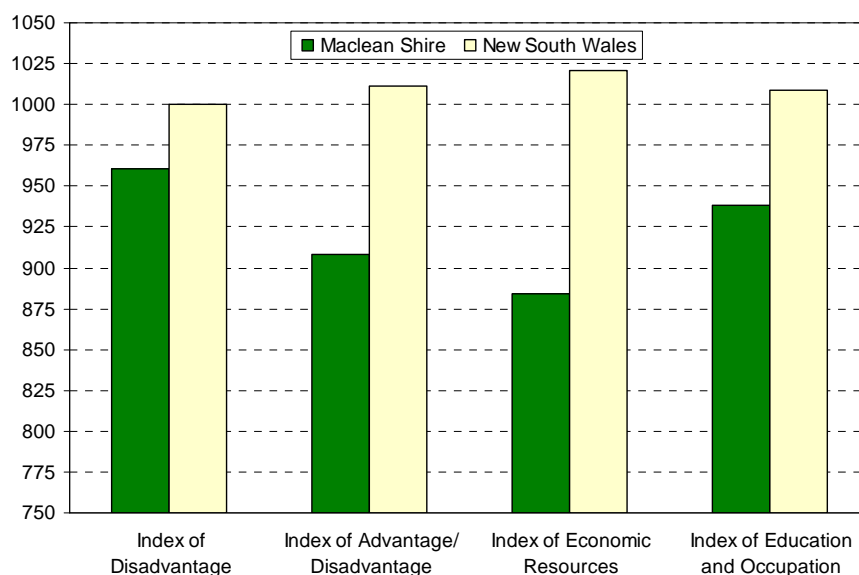
The SEIFAs for Maclean Shire are decidedly below State averages across each of the indexes (see **Table 3.2**). In terms of the index of disadvantage, Maclean Shire's rating was low at 961, the index of advantage/ disadvantage was lower still at 908, while the index of economic resources (more financial-based) was lower again at 884.

Table 3.2: Comparison of SEIFAs, 2001 Census

Region	Disadvantage	Advantage/ Disadvantage	Economic Resources	Education and Occupation
Maclean Shire	961	908	884	938
Clarence Valley	947	907	892	932
New South Wales	1,000	1,011	1,021	1,009

Source: ABS 2001 Census, AECgroup

Figure 2.1: Comparison of SEIFAs, 2001 Census



Source: ABS 2001 Census, AECgroup

3.3.2 Demographic Profile of MTA in 2001

There are a number of socio-economic characteristics that influence retail spending patterns in the MTA (see **Table A.1**).

- The population of the MTA as a whole is relatively old when compared to New South Wales averages with a significantly higher proportion of persons aged over 65 years and a significantly lower proportion aged under 25 years. The average age of Maclean residents was 43.4 years in 2001, significantly lower than the New South Wales average of 36.0 years.
- The average household size in the MTA (2.4) was lower than the State average of 2.7. The proportion of couple families with children (41.9%) in the MTA was significantly lower than the State average (52.9%). On the other hand, couples without children (31.5%) were much more prominent.
- Average weekly household income was significantly lower in the MTA (\$630) when compared with New South Wales (\$987) in 2001.
- The average monthly housing loan repayment in the MTA was \$770 in 2001, well below the New South Wales average (\$1,151). The average weekly rent payment in the MTA was also lower than the State average. The MTA recorded a higher proportion of house owners (54.2%) compared with the State average (41.1%), with a lower proportion of renters (22.7%).
- The unemployment rate in the MTA was recorded at 13.6% in 2001, much higher than the New South Wales average of 7.2%. At the same time, the MTA's labour force participation rate (41.8%) was lower than the State average of 62.2%, and there were a lower proportion of persons aged over 15 years working full-time (47.0%) in the MTA.

3.3.3 Demographic Trends in MTA Between 1991 and 2001

A summary of the demographic characteristics of the MTA, New South Wales and Australia for the 1991, 1996 and 2001 Censuses is outlined in **Table A.2**. Based on the data, the key demographic trends in the MTA include:

- The MTA population is ageing with the average age increasing by 2.8 years between 1991 and 2001 to 43.4 years in 2001, exceeding the rate of ageing in the State and country as a whole;
- The ageing population structure in the region reflects a number of emerging social trends that have occurred throughout the country, including less children per woman (i.e. lower fertility rates), lower marriage rates, people marrying later in life, higher divorce rates, persons staying in education longer, increasing life expectancy and lower mortality rates;
- There has been a shift out of full-time employment into part-time employment, with the unemployment rate falling from 19.9% in 1991 to 13.6% in 2001. However, the unemployment rate still remains significantly higher in the MTA compared with State and National averages, despite a lower overall participation rate;
- There has been an increase in the proportion of persons living in couple families without children, one-parent families and lone persons households in the MTA, again reflecting the broader social trends outlined above. As a consequence, the average household size is declining in the MTA;
- The percentage of the population with post-school qualifications has increased, indicating a more skilled workforce. Almost 30% of people over the age of 15 had post-school qualifications in 2001;

- Home ownership within the MTA is high compared with the State average. In 2001 54.2% of households owned their own home significantly higher than the State average of 41.1%;
- The proportion of employment in the Agriculture, Forestry and Fishing sector has declined significantly between 1991 and 2001 from 17.4% to 11.5%, though is still well above the State average. This has been offset by increases in the Property and Business Services, Retail Trade, and Health and Community Service sectors; and
- In a related area the proportion of people employed as labourers and related workers have fallen while professionals and associate professionals have increased. These changes are similar to those experienced by the State as a whole.

3.3.4 Demographic Profile of the Sub-Regions in 2001

A detailed analysis of the key demographic characteristics of each catchment area is provided in **Table A.3**. A summary of each catchment's key trends is outlined below.

Central Catchment

- The average age in the catchment is relatively high at 45.6 years;
- Part time workers are prominent accounting for 37.6% of the workforce;
- The percentage of lone parent families is the highest of any catchment at 13.3%;
- Average weekly income for households in the catchment is \$633; and
- Housing prices are low with average monthly house repayments of \$707 and average weekly rents of \$122 in 2001.

East Catchment

- Records an old population with an average age of 49.4 years with only 20.2% of residents aged between 25-45 years;
- An unemployment rate of 12.7% is the lowest of all catchments though this is combined with a low participation rate of only 42.3%;
- Along with the North Catchment, the catchment has the lowest average household size at 2.3 persons. This is reflected by the fact that it has the lowest proportion of couple families with children at 30.7%;
- Housing payments are the highest of all catchments at \$912 with weekly rents average \$170 in 2001; and
- Persons with non-school qualifications are the highest at 32.2%.

North Catchment

- With an average age of 51.3 years, the North Catchment is the oldest in the MTA. This is matched by 44.1% of residents aged over 55;
- The labour force in the catchment is not as strong as the others. The participation rate is the lowest at 38.4% while the unemployment rate is high at 15.9%. Full time employment is the lowest of all catchments with only 44.5% of the labour force;
- In line with the older population the catchment has the lowest average household size of 2.3. This is reflected by the proportions of couple families without children (32.3%) and lone person households (10.6%) being the highest in the MTA; and

- The North Catchment has by far the lowest average weekly household income of \$561.6 though also has the highest proportion of people owning their own home at 63.4%. This reflects the older population and the low labour force participation.

West Catchment

- The West Catchment has the youngest population with an average age of 39.8 years with a high proportion (27.2%) of people under the age of 15 years;
- The unemployment rate in the catchment is the highest in the MTA at 16.7%;
- Predictably the average household size in the catchment is the highest at 2.7. Families with children make up 60.8% of households;
- The catchment has the largest proportion of households buying their home at 27.4%; and
- Housing prices appear to be lower in the catchment with average monthly repayments (\$711) and weekly rents (\$131) in 2001.

South-East Catchment

- Has a slightly young population with an average age of 41.3 years.
- The labour market in the South East Catchment is the strongest in the MTA. The participation rate is the highest at 52.0% as well as the proportion of full time workers in the labour force at 50.9%. The unemployment rate is lowest at 12.7%;
- The proportion of couple families with children is the highest at 50.7% in line with the young population;
- The average household income in the catchment is the highest at \$714 reflecting the strong labour market; and
- White collar workers make up a large proportion of workers with over 40% of workers in professional occupations.

3.4 Economic Trends

3.4.1 Unemployment Rate

There were an estimated 584 unemployed persons in the MTA in the September Quarter 2006, equating to an unemployment rate of 8.7%, well above the New South Wales average of 5.4% (see **Table 3.3**). While the unemployment rate is higher in the MTA, it has demonstrated a downward trend over the past year in the MTA, which went against the upward trend recorded by New South Wales as a whole.

Table 3.3: Small Area Labour Market Analysis

Region	Sep 05	Dec 05	Mar 06	Jun 06	Sep 06
MTA					
Unemployed Persons	656	638	617	605	584
Unemployment Rate	10.1%	9.6%	9.3%	9.1%	8.7%
NSW					
Unemployment Rate	5.2%	5.2%	5.2%	5.3%	5.4%

Source: DEWR Small Area Labour Market Analysis, AECgroup

3.4.2 Journey to Work

In terms of journey to work trends, of the total employed persons living in the MTA, 77.2% work in the MTA, with 7.6% working in Grafton (see **Table 3.4**). A further 13.0% work outside the Clarence Valley Council area. Overall, the MTA was estimated to account for a total of 25.0% of the Clarence Valley's total jobs in 2001. This journey to work data can be used as a reference point for retail shopping trends.

Table 3.4: Where People Who Live in Clarence Valley Work (READ FROM TOP TO BOTTOM)

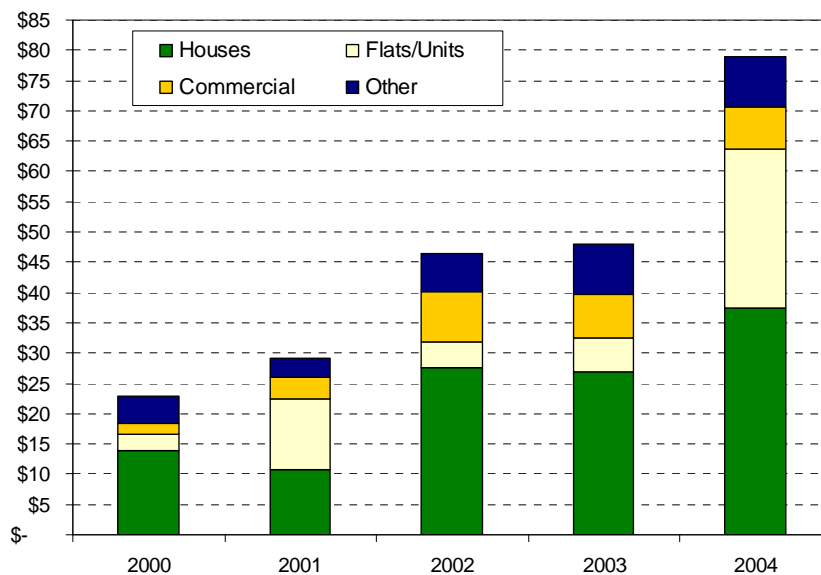
Live in this Region	Copmanhurst	Grafton	MTA (Maclean Shire)	Pristine Waters	Clarence Valley
Work in this Region					
Inside Clarence Valley					
Copmanhurst	20.9%	3.2%	0.4%	2.0%	3.8%
Grafton	57.2%	83.3%	7.6%	47.5%	49.3%
Maclean	1.3%	1.1%	77.2%	1.7%	25.0%
Pristine Waters	0.7%	1.2%	0.4%	25.2%	6.2%
Clarence Valley	80.2%	88.8%	85.6%	76.4%	84.3%
Outside Clarence Valley in Region					
Coffs Harbour	0.5%	0.9%	0.2%	8.9%	2.4%
Richmond Valley	1.2%	0.2%	0.3%	0.2%	0.3%
Ballina	0.2%	0.1%	0.4%	0.1%	0.2%
Other LGAs within 150 km south of Grafton ^(a)	0.0%	0.2%	0.1%	1.5%	0.4%
Other LGAs within 150 km north of Grafton ^(b)	0.9%	0.3%	0.7%	0.2%	0.5%
LGAs within 150 km west of Grafton ^(c)	1.6%	0.2%	0.1%	0.8%	0.4%
Other NSW	10.5%	5.7%	8.3%	7.0%	7.2%
Outside Clarence Valley Intrastate and Other					
Queensland	0.5%	0.4%	0.7%	0.5%	0.5%
Elsewhere	4.5%	3.2%	3.7%	4.4%	3.7%
Total	100.0%	100.0%	100.0%	100.0%	100.0%

Note: (a) Includes the LGAs of Armidale-Dumaresq, Nambucca, Bellingen and Kempsey. (b) Includes the LGAs of Kyogle, Lismore, Byron and Tweed. (c) Includes the LGAs of Tenterfield, Severn, Glen Innes and Guyra.

Source: ABS 2001 Census, AECgroup

3.4.3 Building Approvals

The most recent available data for building investment in the MTA indicates positive economic conditions and future growth outlook, evidenced by significant increases in investment between 2003 and 2004 to a total of almost \$80 million (see **Figure 3.2**). The major components of the growth have been houses and flats/units, while investment in commercial and other non-residential property sectors remained steady at around \$15-\$20 million between 2002 and 2004.

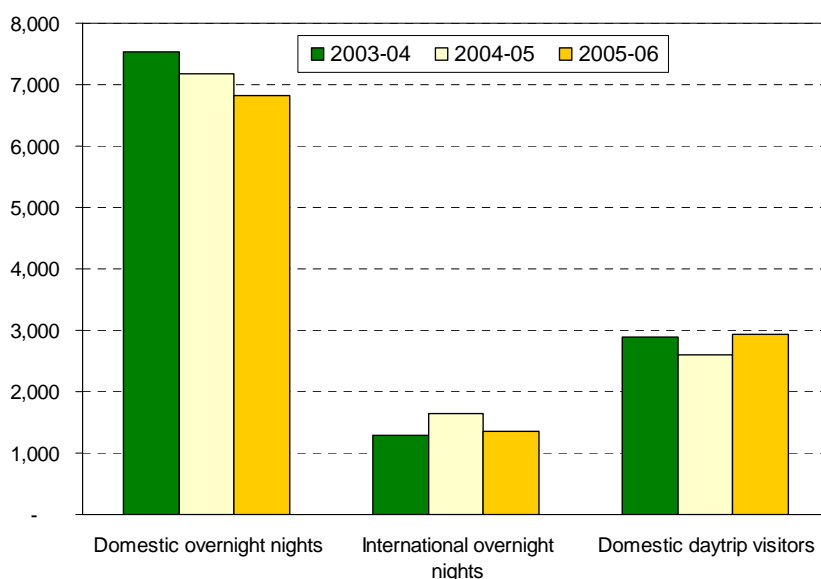
Figure 3.2: Value of Building Approvals, Maclean Shire

Source: Clarence Valley Council, AECgroup

3.4.4 Visitor Trends

The Clarence Valley, and the MTA, form part of the Northern Rivers Tourism Region. According to the National and International Visitor Surveys for the year to June 2006, there were an estimated 1.74 million domestic overnight visitors, 0.20 million international overnight visitors and 2.92 million domestic day trip visitors recorded in the Northern Rivers Tourism Region, spending a total of 11.09 million days/nights in the region. Overnight travel has declined in the past three years, although domestic day trip visitation increased between 2004-05 and 2005-06 (see **Figure 3.3**).

The average expenditure of domestic overnight visitors was estimated at \$119 per night, the average for international overnight visitors was estimated at \$70 per night and the average for domestic daytrip visitors was estimated at \$89 per trip. Based on analysis of the ABS Tourism Satellite Account, it is estimated 42.9% of domestic overnight visitor expenditure represents retail expenditure, with this ratio estimated at 30.4% for international overnight visitors and 63.7% for domestic day trip visitors.

Figure 3.3: Tourist Numbers to the Northern Rivers Tourism Region

Source: Tourism NSW, National and International Visitor Survey

3.5 Population Growth and Future Settlement

Recent population growth and residential development in the Lower Clarence has been largely recorded in the coastal areas, particularly in the East, North and South-East Catchments (see **Table 3.5**). Based on the residential dwelling approval rates, the population of the MTA is estimated at 18,980 persons in 2006, equating to average growth of around 380 persons from 160 dwellings per annum between 2001 and 2004.

Table 3.5: Residential Building Approvals in Maclean Shire, 2001-2004

Catchment	2001	2002	2003	2004	Total
Central	10	29	23	14	17
East	44	50	44	43	54
North	25	28	41	37	30
West	5	7	8	6	6
South-East	6	41	37	40	27
Other	14	42	24	26	25
Total	104	197	177	166	160

Source: Clarence Valley Council, AECgroup

There is a range of sources/techniques for future population growth in the MTA, the results of which are outlined in **Table 3.6** and **Figure 3.4**:

- Future population growth targets were established in the Clarence Valley Settlement Strategy (1999). The 2016 target for the MTA is estimated at between 23,000-23,500 persons. Council is presently reviewing the Settlement Strategy.
- There has been an average of 180 dwelling approvals in the MTA between 2001 and 2004, equating to average growth of around 380 persons per annum. Assuming natural population increases are marginal, then based on this historical growth rate, population is projected at 20,900 persons in 2011 and 22,820 in 2016.
- Future population projections have been published by the NSW Department of Planning. The projection for 2011 is 21,100 persons and for 2016 is 20,740 persons. This projection is well below that projected in the Clarence Valley Settlement Strategy and based on historical growth rates. In fact, up to 2006, it is estimated the Department's projections have understated population by 610 persons, or 4-5%.

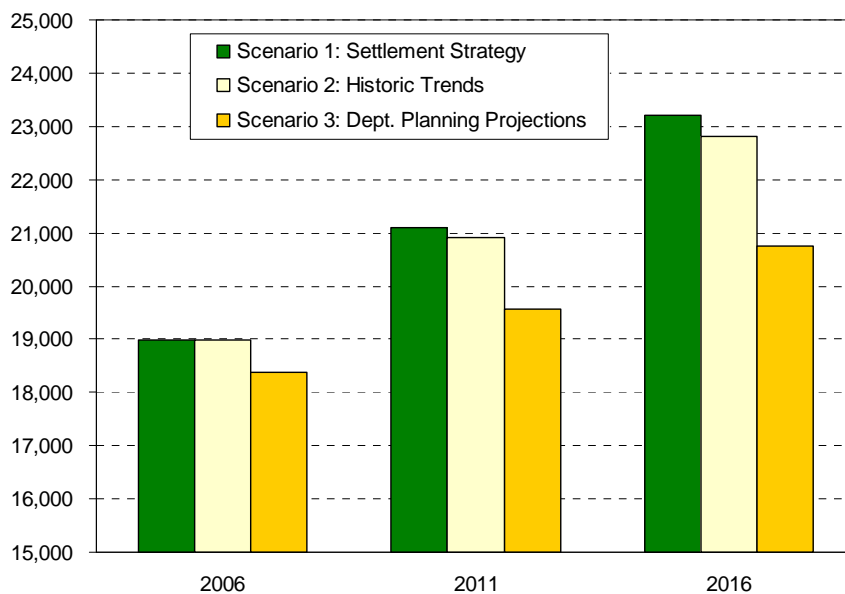
A further projection can be derived from the recently released *Draft Mid North Coast Regional Strategy* which outlines demand for an additional 7,000 dwellings throughout the Clarence Valley over the next 20 years, which equates to around 17,500 additional persons. The future growth areas are identified as Clarenza, Junction Hill and Gulmarrad. The MTA has historically accounted for 65%-70% of the Valley's population growth, although this ratio is not expected to continue based on competing residential areas and constraints in Yamba and coastal areas. Therefore, the MTA could account for around 3,000 dwellings, possibly equating to around 7,500 persons over 20 years, which could mean 3,750 persons over the next 10 years (or close to 23,000 in 2016).

In terms of adopting a projection scenario to assist with the retail market analysis, it is considered the average of the Settlement Strategy and the historical growth trends techniques presents an appropriate projection given a difference of +/-2% in these projections. The main future growth area for the MTA is Gulmarrad, which is presently zoned rural-residential. Positive growth is projected for each catchment over the next 10 years, particularly the townships of Maclean, Townsend, Yamba, Iluka, Ashby, Wombah, Illarwill and Lawrence.

Table 3.6: Projected Population for MTA

Catchment	2006	2011	2016
Scenario 1: Based on Clarence Valley Settlement Strategy (1999)			
Central	3,360	3,900	4,440
East	7,420	8,800	10,180
North	4,120	4,190	4,260
West	1,030	1,100	1,160
South-East	3,060	3,120	3,180
Total	18,980	21,100	23,220
Scenario 2: Based on 2001-2004 Historical Trends			
Central	3,360	3,650	3,930
East	7,420	8,060	8,700
North	4,120	4,550	4,990
West	1,030	1,140	1,240
South-East	3,060	3,500	3,950
Total	18,980	20,900	22,820
Scenario 3: Based on Dept Planning Projections (2004)			
Total	18,370	19,560	20,740
Adopted Population Projections (Average of Scenarios 1 and 2)			
Central	3,360	3,770	4,190
East	7,420	8,430	9,440
North	4,120	4,370	4,620
West	1,030	1,120	1,200
South-East	3,060	3,310	3,560
Total	18,980	21,000	23,020

Source: Clarence Valley Settlement Strategy, Department of Planning Population Projections (2004), AECgroup

Figure 3.4: Projected Population for MTA

Source: Clarence Valley Settlement Strategy, Department of Planning Population Projections (2004), AECgroup

Looking ahead, the age profile of the MTA and the rest of the country is projected to become even more heavily distributed toward the older age groups. This situation is referred to as the "ageing phenomenon" and reflects a number of broader social trends noted in the demographic analysis. The changing age distribution of the region's population will mean increases to the number of people aged 65 years. The changing

needs of older people and the changing locations of ageing will have a major effect, not only on investment but also on local economies and the consumer demand for services.

4. Retail Expenditure and Turnover

4.1 Household Expenditure

Average weekly household retail expenditure in the MTA was estimated at \$352 in 2006, approximately 9% below the non-metropolitan New South Wales average of \$380 (see **Table 4.1**). This is due to the lower socio-economic status of the Lower Clarence, reflected by characteristics such as a lower average disposable income, higher unemployment, lower workforce participation and an older population, which in turn means a reduced propensity to expend on retail goods and services. Average weekly household expenditure varies between \$370 in the South-East Catchment and \$343 in the North Catchment. The Central Catchment records an average of \$352 per week.

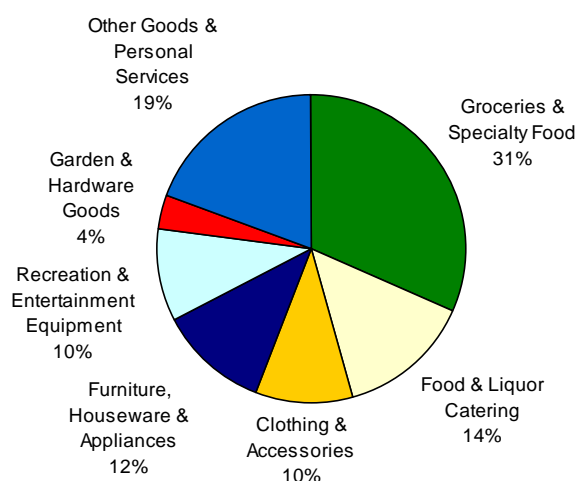
Table 4.1: Average Weekly and Annual Household Retail Expenditure, 2006

Trade Area	Avg. \$ per week	Avg. \$ per annum
Central	\$352	\$18,352
East	\$351	\$18,308
North	\$343	\$17,860
West	\$356	\$18,566
South-East	\$370	\$19,301
Total Main Trade Area	\$352	\$18,366
Clarence Valley	\$357	\$18,352
Non-Metro NSW	\$380	\$19,795
NSW	\$417	\$21,744

Source: ABS 2003-04 Household Expenditure Survey, AECgroup Retail Model

Groceries & specialty food is the largest retail expenditure group in the MTA accounting for 31% of the total (see **Figure 4.1**). The next largest expenditure groups are Other goods & personal services (19%), Food & liquor catering (14%) and Furniture, houseware & appliances (12%). Relative to non-metropolitan New South Wales averages, the MTA's households expend a slightly greater proportion of their retail expenditure on convenience retail items like Groceries & specialty food, but a lower ratio on more discretionary items like Clothing and Recreation & entertainment equipment.

Figure 4.1: Breakdown of Household Retail Expenditure, Main Trade Area



Source: ABS 2003-04 Household Expenditure Survey, AECgroup Retail Model

Overall, based on average household expenditure and the estimated number of households, the total household retail expenditure in the MTA is estimated at \$149.2 million in 2006 (see **Table 4.2**). The East Catchment records the largest household retail expenditure of \$60.92 million given its larger population. The Groceries & specialty food retail category records the largest amount of household expenditure at \$47.13 million.

Table 4.2: Total Household Retail Expenditure, 2006 (\$m)

Retail Type	Central	East	North	West	South-East	Total
Groceries & Specialty Food	\$7.97	\$19.26	\$10.63	\$2.21	\$7.06	\$47.13
Food & Liquor Catering	\$3.54	\$8.56	\$4.69	\$0.99	\$3.19	\$20.97
Clothing & Accessories	\$2.54	\$6.10	\$3.21	\$0.72	\$2.45	\$15.02
Furniture, Houseware & Appliances	\$2.91	\$7.03	\$3.87	\$0.81	\$2.58	\$17.20
Recreation & Entertainment Equipment	\$2.46	\$5.94	\$3.17	\$0.69	\$2.32	\$14.59
Garden & Hardware Goods	\$0.90	\$2.18	\$1.20	\$0.25	\$0.80	\$5.33
Other Goods & Personal Services	\$4.90	\$11.84	\$6.56	\$1.36	\$4.30	\$28.95
Total	\$25.22	\$60.92	\$33.32	\$7.03	\$22.71	\$149.2

Source: ABS 2003-04 Household Expenditure Survey, AECgroup Retail Model

4.2 Market Share Analysis

To accurately determine household shopping patterns and consumer views regarding shopping in Maclean and the Lower Clarence, AECmarket research undertook a 400 household shopper survey of the region in November and December 2006. In-home consumer surveys such as this are often used to determine trade areas and market shares for existing retail centres, and to better understand attitudinal and behavioural shopping trends and motivating factors for shopping at existing retail areas. The survey covered the entire Lower Clarence (MTA) and was stratified by population numbers.

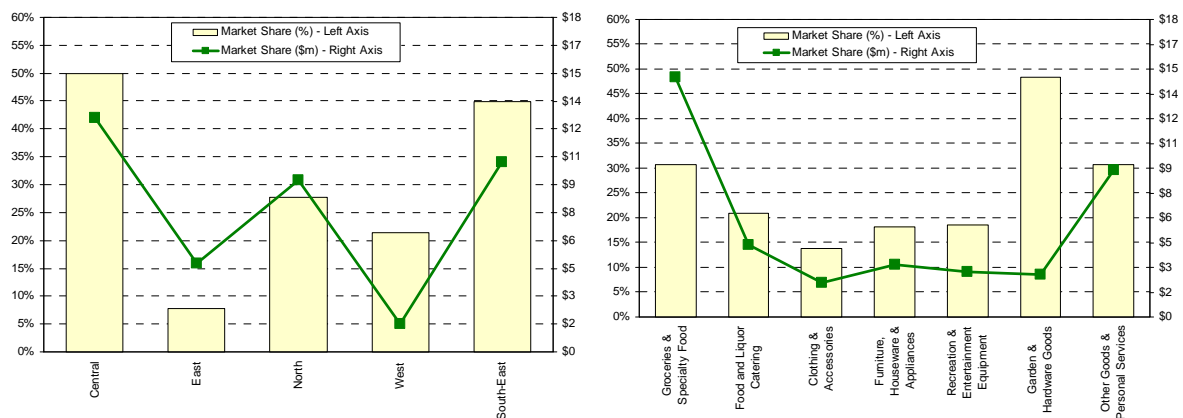
Based on the Household Shopper Survey, Maclean is estimated to record a 26% market share of total household retail expenditure in the MTA in 2006 (see **Table 4.3**). Yamba is estimated to record the highest market share of 34%, while Grafton is estimated to record 24% of retail spending generated from the MTA, with its market share highest in the discretionary spending categories of Clothing & accessories (41%) and Furniture, houseware & appliances (25%). Other retail locations both within and outside the MTA are estimated to account for 17% of the total, with market share highest in the discretionary spending categories.

Table 4.3: Market Share of Total MTA Household Retail Expenditure, 2006

Retail Type	Maclean	Yamba	Grafton	Other
Groceries & Specialty Food	31%	43%	21%	5%
Food & Liquor Catering	21%	27%	22%	30%
Clothing & Accessories	14%	22%	41%	23%
Furniture, Houseware & Appliances	18%	24%	25%	32%
Recreation & Entertainment Equipment	19%	24%	22%	35%
Garden & Hardware Goods	48%	14%	22%	16%
Other Goods & Personal Services	31%	43%	21%	5%
Total	26%	34%	24%	17%

Source: AECgroup Household Shopper Survey, AECgroup Retail Model

Maclean's market share is estimated to be highest in the Garden & hardware goods category at 48%, with Groceries & specialty food and Other goods & personal services recording shares of 31% (see **Figure 4.2** and **Table 4.5**). The lowest market share is recorded in the Clothing & accessories category at 14%. In terms of the catchments, Maclean's market share is predictably highest in the Central catchment at 50%, followed by the South-East catchment (45%). Market share is lowest in the East catchment (8%).

Figure 4.2: Estimated Maclean Market Share of MTA Household Retail Expenditure, 2006

Source: AECgroup Household Shopper Survey, AECgroup Retail Model

The household shopper survey also involved questions regarding whether households shopped more or less in Maclean than they did 5 years ago. The figures in the table below represent the "net balance" of the responses i.e. % more subtract % less.

The analysis in **Table 4.4** indicates the following:

- Central Catchment households report increased shopping in Maclean compared with five years ago. This essentially means a greater retention of household retail expenditure. The increase has been most pronounced in the Groceries & specialty food and the Garden & hardware goods retail categories.
- There has generally been a decline in the amount of shopping undertaken in Maclean by East Catchment households over the past five years.
- There have been moderate increases reported for the amount of shopping undertaken by North Catchment households in Maclean over the past five years.
- There has been a moderate increase in the amount of Grocery & specialty food and Garden & hardware goods shopping undertaken in Maclean by West Catchment households compared with five years ago, although the amount of shopping in Maclean has declined across most other retail categories by 15%-20%.
- There have been positive increases in the amount of shopping undertaken in Maclean by South-East Catchment households over the past five years, with the increases most pronounced in the Grocery & specialty food and garden & hardware goods categories of almost 20%.

In summary, there have been some positive changes to the frequency of shopping in Maclean over the past five years for households in the Lower Clarence, particularly for households in the Central, North and South-East Catchments. This indicates Maclean's market share of household retail expenditure has increased in these areas.

Table 4.4: Net % of Households That Shop More in Maclean than 5 Years Ago

Retail Type	Groceries & specialty food	Clothing & accessories	Furniture, houseware & appliances	Recreation & entertainment equipment	Garden & hardware goods
Catchment					
Central Catchment	15%	0%	2%	5%	12%
East Catchment	-12%	-19%	-19%	-18%	-4%
North Catchment	6%	8%	6%	4%	15%
West Catchment	5%	-17%	-15%	-15%	7%
South-East Catchment	19%	5%	5%	3%	17%

Source: AECgroup Household Shopper Survey

Table 4.5: Estimated Maclean Market Share of MTA Household Retail Expenditure by Retail Type by Sub-Region, 2006

Retail Type	Central	East	North	South-East	West	Total
Groceries & Specialty Food	63%	7%	32%	28%	57%	31%
Food & Liquor Catering	31%	10%	28%	19%	30%	21%
Clothing & Accessories	24%	4%	13%	10%	31%	14%
Furniture, Houseware & Appliances	39%	5%	22%	9%	28%	18%
Recreation & Entertainment Equipment	39%	5%	20%	14%	33%	19%
Garden & Hardware Goods	74%	35%	43%	34%	67%	48%
Other Goods & Personal Services	63%	7%	32%	28%	57%	31%
Total	50%	8%	28%	21%	45%	26%

Source: AECgroup Household Shopper Survey 2006

4.3 Rogue (Visitor) Expenditure

Rogue expenditure is that proportion of expenditure which comes from outside of the geographic boundary of the MTA, and therefore can be considered equivalent to visitor expenditure. Rogue expenditure can result for a number of reasons. First, workers living outside the MTA may have their place of employment in Maclean and frequent the Maclean Town Centre while in the area. Other people will visit Maclean as visitors to the region, possibly staying elsewhere but travelling into Maclean for a day trip. Additionally, there may be other consumers that visit Maclean because of a particular retailer or service which is not found elsewhere. Various estimates are made of the level of rogue expenditure within shopping centres. In general, rogue expenditure is estimated at between 10% and 20% of retail sales at retail centres. For retail centres such as Maclean with a more prominent day tripper and tourist market, the percentage is generally estimated at the upper end of this scale.

From a local perspective, Tourism NSW formulated the last official estimates for visitation to the MTA in the mid 1990s with a clear trend of around 240,000 visitors per annum spending a total of 920,000 nights in the region. The average expenditure of these visitors equates to around \$75 in today's dollars, with between 40% and 60% of this retail expenditure. Assuming Maclean records a reasonable 35% of all visitors to the MTA and 15% of visitor nights, total visitor retail expenditure is estimated at around \$8.94 million, or 19% of total retail sales (see **Table 4.6**). A breakdown of this expenditure indicates rogue expenditure is most significant in the Food & liquor catering sector at 40% (or \$2.92 million), followed by Groceries & specialty food at 15% (or \$2.56 million).

Table 4.6: Estimated Rogue Expenditure, Maclean (2006)

Retail Type	% of Sales	\$m Sales
Groceries & Specialty Food	15%	\$2.56
Food & Liquor Catering	40%	\$2.92
Clothing & Accessories	15%	\$0.37
Furniture, Houseware & Appliances	15%	\$0.55
Recreation & Entertainment Equipment	20%	\$0.68
Garden & Hardware Goods	10%	\$0.29
Other Goods & Personal Services	15%	\$1.57
Total	19%	\$8.94

Source: Tourism NSW, Clarence Valley Council, AECgroup

4.4 Turnover

Total retail turnover in Maclean is estimated at \$47.27 million in 2006, of which households from the MTA contribute 81% (or \$38.33 million) and visitors from outside the MTA contribute 19% (or \$8.94 million) (see **Table 4.7**). The largest retail turnover is recorded by the Groceries & specialty food sector (\$17.09 million), followed by Other goods & personal services (\$10.49 million) and Food & Liquor catering (\$7.30 million).

Table 4.7: Total Retail Turnover, Maclean, 2006 (\$m)

Retail Type	Households in the MTA						Rogue (Visitors)	Total
	Central	East	North	South-East	West	Total		
Groceries & Specialty Food	\$5.02	\$1.40	\$3.45	\$0.61	\$4.03	\$14.52	\$2.56	\$17.09
Food & Liquor Catering	\$1.10	\$0.85	\$1.30	\$0.19	\$0.95	\$4.38	\$2.92	\$7.30
Clothing & Accessories	\$0.60	\$0.25	\$0.41	\$0.07	\$0.75	\$2.08	\$0.37	\$2.45
Furniture, Houseware & Appliances	\$1.14	\$0.37	\$0.83	\$0.08	\$0.72	\$3.14	\$0.55	\$3.69
Recreation & Entertainment Equipment	\$0.96	\$0.27	\$0.63	\$0.09	\$0.76	\$2.72	\$0.68	\$3.39
Garden & Hardware Goods	\$0.67	\$0.77	\$0.51	\$0.08	\$0.54	\$2.58	\$0.29	\$2.86
Other Goods & Personal Services	\$3.09	\$0.86	\$2.13	\$0.38	\$2.46	\$8.91	\$1.57	\$10.49
Total	\$12.58	\$4.78	\$9.27	\$1.51	\$10.20	\$38.33	\$8.94	\$47.27
% of total	26.6%	10.1%	19.6%	3.2%	21.6%	81.1%	18.9%	100.0%

Source: ABS 2003-04 Household Expenditure Survey, AECgroup Retail Model

5. Retail Sector Trends and Characteristics

5.1 Role of the Town Centre

The Maclean Town Centre is a strip retailing environment concentrated along River Street between Union Street and Wharf Street. In total there are an estimated 64 retail stores occupying around 11,840sqm of retail floorspace. The major retailers in Maclean are the SPAR Supermarket, Home Hardware, Harvey Norman, Carpet Court, Mackellys and Toy Kingdom along with specialty convenience tenants such as a newsagency and pharmacy. There are a number of cafes, restaurants and take-away food outlets serving the local catchment, employees and visitors to the region. There is a small range of clothing stores, personal services businesses and recreational retailers.

The Maclean Town Centre, in retail and commercial terms, is described as a District Centre in the Clarence Valley Settlement Strategy (1999). This role is defined as helping serve the Lower Clarence community with secondary levels of sub-regional services, commercial and industrial development. The Strategy defines the role of Grafton as the regional centre and the role of Yamba as a town. In the more recent *Draft Mid North Coast Regional Strategy*, Maclean is described as a Major Town. Major Towns are defined as having a functional role in serving their subregions with outreaches of regional services. They are to be self-contained with shopping and business services and may have bulky goods, warehousing, transport logistics, farm support services, health and professional services mixed with some medium density residential. Yamba is defined as a Town and Grafton as a major regional centre.

A summary of the regional retail hierarchy is outlined in **Table 5.1**. Coffs Harbour is identified as the regional centre with more than 200,000sqm of retail floorspace. Sub-regional centres are located north and south of Maclean at Lismore and Grafton. It is noted a common feature of District Centres is a major supermarket anchor.

Table 5.1: Summary of Regional Retail Hierarchy

Retail Centre	Floorspace (sqm)	Key Precincts and Major Retailers	Distance from Maclean (km)
Regional Centre			
Coffs Harbour	201,000	<ul style="list-style-type: none"> • Park Beach Plaza (Target, Big W, Woolworths, Action, Best & Less) • Coffs Harbour CBD (Big W, Coles) • Home Base (Freedom, Harvey Norman) • Coffs South (Bunnings) 	125
Sub-Regional Centres			
Grafton	51,400	<ul style="list-style-type: none"> • Grafton Shoppingworld (Big W, Target, Woolworths, supermarket) • Grafton Mall (Coles) • Prince St Strip (Aldi) • Bunnings 	47
Lismore	64,300	<ul style="list-style-type: none"> • Lismore Central (Woolworths) • Lismore Square (Kmart, Big W, Coles, Woolworths) 	90
Ballina	58,500	<ul style="list-style-type: none"> • Ballina Fair (Woolworths, Action) • Kmart Centre (Kmart, Coles) • Tinkerbelle Site (Big W, Aldi) • Other (Woolworths) 	85
District Centres			
Maclean	11,840	<ul style="list-style-type: none"> • SPAR, Home Hardware 	-
Kyogle	5,000	<ul style="list-style-type: none"> • IGA 	125
Murwillimbah	10,000	<ul style="list-style-type: none"> • Coles 	185
Town Centres			
Yamba	11,000	<ul style="list-style-type: none"> • Target Country, Bi-Lo 	15

Retail Centre	Floorspace (sqm)	Key Precincts and Major Retailers	Distance from Maclean (km)
South Grafton	8,000	• Bi-Lo	48
Casino	20,000	• Casino Plaza (Woolworths) • Casino Village (Bi-Lo)	95
Goonellabah	4,000	• Coles	95
Byron Bay	15,000	• Woolworths	120

Source: Property Council of Australia, AECgroup

5.1.1 Regional Centre

Coffs Harbour is the regional centre of the retail market in the Mid North Coast region of New South Wales. Coffs Harbour's Regional Catchment extends south to the Kempsey LGA, west to the Armidale-Dumaresq LGA, and north to the Clarence Valley LGA. Coffs Harbour's role as a major tourist destination also means it records significant levels of visitor expenditure over and above that from its Regional Catchment. Coffs Harbour records by far the largest concentration of retail floorspace and businesses in the region, and boasts the leading provision of comparative shopping and higher order retail facilities. In most cases it provides for the greatest range of retailers and the largest representation from national retailers. The Coffs Harbour regional centre comprises the Coffs Harbour CBD, Park Beach Plaza, a network of district centres (Woolgoolga and Moonee to the north and Toormina to the south), and a number of neighbourhood centres and local centres. Bulky goods (or homemaker centres) are located mainly at Homebase, fronting the highway in strip development, and at Isles Drive in Coffs South.

5.1.2 Sub-Regional Centres

The major sub-regional centres in the region are Grafton to the south and Ballina and Lismore to the north. The centres are described as follows:

- Grafton is the primary sub-regional centre in the Clarence Valley and is the location of the majority of higher order, comparison and discretionary shopping supply. Its significance to the region is reflected by its pull of household retail expenditure from the Maclean MTA. The Grafton Town Centre incorporates in excess of 50,000sqm of retail space including a main retail strip along Prince Street, Grafton Shoppingworld anchored by a Big W and Woolworths, the Grafton Mall anchored by Coles, and the South Grafton retail area containing a Bi-Lo supermarket.
- Ballina is the closest sub-regional centre to the north of Maclean (85km). The centre incorporates almost 60,000sqm of retail floorspace including Ballina Fair anchored by Woolworths and Action, a Kmart Centre anchored by Kmart and Coles, the Tinkerbell Site anchored by Big W and Aldi and a free standing Woolworths supermarket. The centre records some expenditure from the Maclean MTA, particularly in the closer North Catchment.
- The Lismore sub-regional centre is located 90km north of Maclean and incorporates around 65,000sqm of retail floorspace including Lismore Central anchored by Woolworths and Lismore Square anchored by Kmart, Coles, Big W and Woolworths. Lismore also records some expenditure from the northern parts of the Maclean MTA.

5.1.3 Town Centres

Within the Maclean MTA, the major retail facilities are located at Maclean and Yamba, with a limited local provision of stores at Iluka. Yamba's retail market is divided into two centres: the Yamba CBD and West Yamba. The Bi-Lo supermarket and Yamba Fair (which also has a Target Country) is the major anchor for the Yamba retail market and is the primary reason for the attraction of spending from other areas of the Maclean MTA. There is an estimated 11,000sqm of retail floorspace in Yamba, almost comparable to Maclean's estimated 11,840sqm. While Maclean is defined as the District Centre, its lack of a major supermarket or shopping centre currently threatens this role relative to Yamba.

5.2 Floorspace

There is an estimated 11,840sqm of occupied retail floorspace in Maclean (see **Table 5.2**). There is approximately 13,000-14,000sqm of other non-retail uses, including commercial offices, professional services, entertainment and leisure venues, car sales yards and auto repairs. In terms of the distribution of retail floorspace, Maclean records a relatively strong share of floorspace in the Recreation & entertainment equipment retail category (18.4%), Groceries & specialty food (18.2%), Garden & hardware goods (15.7%) and Food & liquor catering (14.5%).

Table 5.2: Occupied Retail Floorspace, Maclean (2006)

Retail Type	sqm	% of total
Groceries & Specialty Food	2,160	18.2%
Food & Liquor Catering	1,720	14.5%
Clothing & Accessories	1,260	10.6%
Furniture, Houseware & Appliances	1,120	9.5%
Recreation & Entertainment Equipment	2,180	18.4%
Garden & Hardware Goods	1,860	15.7%
Other Goods & Personal Services	1,540	13.0%
Total	11,840	100.0%

Source: Clarence Valley Council, Land Partners, AECgroup

5.3 Vacancy Rate

There were no ground floor retail vacancies in the Maclean Town Centre at the time of assessment and it is reported vacancy rates have traditionally been low. Since the time of assessment there has been the closure of a small independent supermarket, one of two operating in Maclean. The low vacancy rate in Maclean is a sign of strong tenant demand, capacity pressure and the need for additional retail supply. There are also examples of overcrowding in existing retail tenancies.

5.4 Retail and Commercial Tenancy Mix

There are an estimated 64 retail businesses in Maclean (see **Table 5.3**). The largest retail categories in terms of business numbers are Recreation & entertainment equipment (22%), Food & liquor catering (20%) and Groceries & specialty food (17%). The retail tenancy mix largely reflects the convenience retailing function of the centre. Maclean's retail sector is characterised by a relatively high share of local independent retailers at around 90%. The average occupied floorspace size of retail stores of 200sqm is below the national average of 267sqm, consistent with the many small businesses.

Table 5.3: Estimated Number of Retail Businesses, Maclean (2006)

Retail Type	No.	% of total
Groceries & Specialty Food	11	17%
Food & Liquor Catering	13	20%
Clothing & Accessories	8	13%
Furniture, Houseware & Appliances	6	9%
Recreation & Entertainment Equipment	14	22%
Garden & Hardware Goods	2	3%
Other Goods & Personal Services	10	16%
Total	64	100%

Source: AECgroup

5.5 Trading Levels

The average trading level (gross turnover per sqm of net lettable space per annum) of retailers in Maclean in 2006 was estimated at \$4,000/sqm, which lies at the low end of national benchmarks of \$4,000-\$5,100/sqm (see **Table 5.4**). The trading levels in Maclean are estimated to be mid range for Groceries & specialty food, Furniture, houseware & appliances and Other goods & personal services. However, trading levels are low for Food & liquor catering, Clothing & accessories, Recreation & entertainment equipment and Garden & hardware goods. While trading levels are, on the whole, below national averages, business operating costs are estimated to be 10-15% lower than benchmarks based on comparisons between rents, wages, transport costs, wholesale prices and rates. As an historic benchmark, the 1991-92 Retail Census reported Maclean Shire trading levels as 40% below national averages.

Table 5.4: Average Retail Trading Levels, Maclean (2006)

Retail Type	Avg. Trading Level (\$/sqm)	National Benchmark Averages (\$/sqm)	Maclean vs Benchmark
Groceries & Specialty Food	\$7,900	\$6,000-\$8,700	Average
Food & Liquor Catering	\$4,200	\$5,300-\$7,000	Low
Clothing & Accessories	\$1,900	\$2,700-\$3,800	Low
Furniture, Houseware & Appliances	\$3,300	\$2,000-\$3,800	Average
Recreation & Entertainment Equipment	\$1,600	\$3,800-\$4,900	Low
Garden & Hardware Goods	\$1,500	\$2,000-\$3,800	Low
Other Goods & Personal Services	\$6,800	\$6,000-\$8,000	Average
Total	\$4,000	\$4,000-\$5,100	Low

Source: AECgroup

5.6 Trading Characteristics and Trends

The Maclean Town Centre is unique in that it is one of the few small regional towns that have managed to retain a vibrant Town Centre with an historic village atmosphere in the face of large-scale modern development in nearby towns. The Town Centre has remained relatively compact and a measure of its vibrancy is its zero retail vacancy rate. The centre has maintained a healthy mix of small independent retail tenants focused on customer service as a point of difference. Interestingly the centre has developed over time along River Street without directly integrating with the adjacent Clarence River. The appeal of the Town Centre is reflected by the significance of tourism to retail sales.

The competitive advantages and points of difference of the Maclean Town Centre are its customer service, convenience, historic facades, ambience and lively atmosphere. Maclean's administrative role is also an activity inspirer, including nearby community facilities and professional services. In terms of trading disadvantages, there is some evidence of overcrowding for particular retailers, perhaps indicating overshopping of these facilities and the need for retail expansion. Consumers indicate some dislike of the small range of stores, prices, and parking and access. In general, parking represents one of the key issues for the centre, while price and range is identified as a reason for the shopping leakage to places like Grafton, Yamba and Ballina.

Maclean's retail business mix is generally divided into the following key markets:

- Households in Maclean and Townsend (Central Catchment);
- Households in the broader MTA;
- Employees from the MTA and other regions;
- Passing by trade from the Pacific Highway;
- Day trip visitors from Grafton, Yamba and Ballina; and
- Overnight visitors staying in Maclean.

The household market in the Central Catchment, which comprises Maclean and Townsend, accounts for around 26% of total retail sales. The household market in the outlying areas of the MTA account for around 55% of total retail sales. The tourist segment accounts for the remaining 19%, with its share largest in the Food & liquor catering retail category comprising cafes, restaurants and take-aways.

5.7 Competing Locations and Developments

Maclean's main retail competitor is the sub-regional centre of Grafton which records around 24% of the total MTA household retail expenditure budget. Grafton's competitive pressure is strongest in the higher order discretionary retail categories, although it still records a 25% share of some of the convenience retailing categories, reflecting its shopping centres, national retailers, retail range and multi-purpose shopping appeal.

The main drawcard of the Grafton retail market is Grafton Shoppingworld with 20,000sqm of retail floorspace, anchored by Big W and Woolworths. Council recently approved a \$50 million extension to the centre, increasing the net lettable floor area to 30,000sqm. The features of the new centre will be a second discount department store, a second supermarket, an extensive range of fashion and food outlets, as well as associated increases to parking and general amenity. The development proposal largely reflects an attempt to decrease Clarence Valley spending leakage to areas such as Coffs Harbour. The expansion of the Grafton Shoppingworld is expected to impact the Grafton CBD and other retail locations in the Clarence Valley, including Maclean and Yamba, and place pressure on these centres to reduce spending leakage to more sustainable levels.

Other recent and proposed development in the Grafton retail market includes an Aldi supermarket, Bunnings Superstore and a small local centre next to Bunnings in South Grafton. There is presently a proposed Homebase development in South Grafton, along with another Homemaker Centre style development proposal at an unidentified location.

Yamba is the main local competitor to the Maclean Town Centre and records an estimated 34% market share, which indicates that Yamba retailers record a more competitive average trading level based on a slightly smaller retail floorspace of around 11,000sqm. However, this floorspace is also in higher trading retail categories versus the prominence of Garden & hardware goods in the Maclean Town Centre. Yamba is also a recognised tourist destination and records significant spending from tourists. The Yamba Fair Shopping Centre has undergone a recent expansion. There is remaining development potential in the Yamba CBD and West Yamba according to the Yamba Retail/Commercial Strategy that could accommodate additional retail development.

5.8 History of the Local Retail Sector

The last official analysis of the retail markets of Australia's regions was the ABS 1991-92 Retail Census. The Census reported the following characteristics for Maclean Shire:

- 173 locations;
- 631 persons employed;
- \$49.9 million in turnover;
- 27,000sqm in floorspace; and
- Average trading levels of \$1,850/sqm.

Comparison with current retail market estimates demonstrates the change that has occurred in the MTA's retail market over the past 10-15 years. While the number of retail businesses and employment has increased only moderately, it is estimated the construction and expansion of Yamba Fair and the population growth in the Lower Clarence have pushed retail turnover to more than \$100 million, floorspace beyond 33,000sqm and average trading levels toward \$4,000/sqm.

Maclean's retail facilities have traditionally been concentrated along River Street. This remains the case and the centre continues to experience parking and access issues. The centre has not been integrated in recent times with the adjacent Clarence River and this represents a long-term development opportunity. There has been little expansion of the

Town Centre over time, but rather an improvement in productivity. There remain a number of historically important buildings with heritage style facades.

The key anchors of the town continue to be the small supermarket, hardware retailer and small convenience based retailers. The ongoing administrative functions of Maclean provide further activity inspirers for the retail market.

5.9 Household Shopping Trends

A 400 household shopper telephone survey of the Lower Clarence was completed in December 2006 to research issues such as shopping frequency, shopping locations, motivations for choosing certain locations, market share of specific retail locations, satisfaction with existing retail facilities and suggestions for improvements. Detailed analysis of the survey findings is contained in the **Lower Clarence Retail Strategy – Household Shopper Survey Report**.

The key findings of the household shopper survey can be summarised as:

- In most cases, Maclean recorded the highest percentage in terms of its own catchment's general shopping locations (i.e. Central catchment). The ratio was highest for groceries & specialty food (60%) and garden & hardware goods (84%), reflecting the convenience aspect of shopping for groceries and the influence of Home Hardware. Grafton recorded a higher percentage than Maclean for clothing & accessories (60%), reflecting its greater range and variety of stores. Yamba recorded a moderate 14% for groceries & specialty food.
- Yamba recorded the highest percentages in terms of the East catchment's general shopping locations. The ratio was significantly high for groceries & specialty food (89%) and above 50% for all other retail categories. Grafton recorded a 35% result for clothing & accessories while garden & hardware goods represented the highest ratio for Maclean at 18%. The 1-3% result for the other retail types in Maclean is considered lower than the on-the-ground indications from local retailers.
- North Catchment households undertake a roughly even amount of their groceries & specialty food shopping between Iluka (26%), Grafton (24%), Yamba (22%) and Maclean (19%). Grafton is the main location for higher order comparison shopping, followed equally by Maclean and Lismore (contained in other). Maclean records its highest percentage in the garden & hardware goods category at 30%.
- Grafton records the majority of spending (around 80% across each retail type) for West Catchment households. Only a small proportion (generally less than 20%) travel across the Clarence River to Maclean to shop for retail goods and services.
- Maclean is a leading shopping location for households in the South and East Catchment whom have direct access to Maclean. The ratio is highest for garden & hardware goods (67%), followed by groceries & specialty food (48%). The lowest ratio for Maclean is 24% for clothing & accessories. Grafton records a much higher percentage for clothing & accessories (51%).
- In general, convenience is the key reason for choosing where to shop, particularly for common shopping needs such as groceries & specialty food. Variety of stores is a relatively important factor for higher order comparison shopping categories such as clothing & accessories and furniture, houseware & appliances. Additionally, price and competition's importance is generally accepted across each of the retail categories.
- The main reasons for shopping in Grafton ahead of Maclean generally revolve around price and competition (particularly for groceries & specialty food) and variety of stores (across all retail categories). On the other hand, Maclean generally records strong emphasis from its patrons on convenience, close location of home relative to the shops and customer service. Yamba also generally records trade for reasons of convenience.

- There have been some positive changes to the frequency of shopping in Maclean over the past five years for households in the Lower Clarence Valley, particularly for households in the Central, North and South and East Catchments. This indicates Maclean's market share of household retail expenditure has improved in these areas.
- Compared with five years ago, convenience, price and competition, parking and access, closeness to home and variety of stores have each become significantly more important as considerations when choosing where to shop. On the other hand, advertising, entertainment and the location of work have recorded the lowest increases to importance.
- The most positive thing about shopping in Maclean as identified by consumers is customer service standards, followed by the convenience of shopping in the Town Centre, the range of services and atmosphere.
- By far the leading dislike of shopping in Maclean is the lack of range and variety of stores, followed by prices and parking.
- The leading retail development need (and service gap) in Maclean is identified as a larger supermarket, followed by clothing stores, a discount department store, a second chemist and dining options.

5.10 Retail Issues and Challenges

Retail issues can generally be categorised into those relevant to the consumer, those relevant to the retailer/investor, and those relevant to the planning authority/Council.

Consumer issues were gauged from the Household Shopper Survey. The results of the survey clearly point to consumer dissatisfaction with the variety and range of retail stores in Maclean, which, along with comments regarding higher prices, explains the major extent of the shopping leakage from Maclean. However, this feedback needs to be balanced against the role of Maclean as a District Centre and the size and ability of the MTA to sustain increased variety and shops. Parking and access are clearly identified as the main areas of dissatisfaction with the Maclean Town Centre and any additional retail development and planning will require this issue to be addressed. Improved parking was actually raised as an area for improvement by 30% of survey respondents. The ageing population and changing demographics of the region will continue to require integrated centres, improved convenience and access, and reduced travel times.

Retailer and investment issues are more related to the functioning of the Town Centre and the profitability of individual retail businesses. The key issues raised in the consultation process related to parking access including freight and delivery vehicle access, inconsistent and uncoordinated opening and closing hours, the need for sensible planning by Council, awareness and cross selling tactics, the need to preserve the village atmosphere, the sustainability of any retail expansion, disparity of rental rates, confidence and attitude toward competition, availability of ground floor retail space, shopfront displays, signage, theming of the town and landlord reinvestment. From a land owner perspective, tenant demand and land value impacts are key considerations for any future retail development strategy.

Planning issues are numerous for the Maclean Town Centre and are the reason of this study. Council is presently faced with a number of enquiries and specific applications for new retail development and rezoning within Maclean and its catchment. Some of these have been proposed within the heart of the Maclean CBD, others on the periphery, and others on Greenfield sites in proximity to growing dormitory satellite suburbs. Council requires a clear direction as to what represents the most suitable development strategy moving forward that strengthen the Maclean District Centre.

6. Retail Development Potential and Needs

6.1 Projected Household Expenditure

Projected available household retail expenditure is based on the combination of projected household numbers and average household retail expenditure levels. All analysis is undertaken in constant 2006 dollars i.e. CPI increases have been removed from the analysis. Average household retail expenditure is increased at a rate of 0.6% per annum to account for 'real' increases in expenditure based on the experience in non-metropolitan New South Wales between 1998-99 and 2003-04. The total retail expenditure by MTA households is projected to increase from \$149.20 million in 2006 to \$173.23 million in 2011, representing an increase of \$24.04 million, or 16.1% (see **Table 6.1**). Over 10 years, MTA household expenditure is projected to increase to almost \$200 million, representing an increase of \$50.15 million, or 33.6%.

Table 6.1: Projected Household Retail Expenditure, MTA

Retail Type	Projected Expenditure (\$m)			Projected Increase (\$m)	
	2006	2011	2016	2006-2011	2006-2016
Groceries & Specialty Food	\$47.13	\$54.72	\$62.97	\$7.59	\$15.84
Food & Liquor Catering	\$20.97	\$24.34	\$28.01	\$3.38	\$7.05
Clothing & Accessories	\$15.02	\$17.44	\$20.07	\$2.42	\$5.05
Furniture, Houseware & Appliances	\$17.20	\$19.98	\$22.99	\$2.77	\$5.78
Recreation & Entertainment Equipment	\$14.59	\$16.94	\$19.50	\$2.35	\$4.91
Garden & Hardware Goods	\$5.33	\$6.19	\$7.13	\$0.86	\$1.79
Other Goods & Personal Services	\$28.95	\$33.62	\$38.68	\$4.66	\$9.73
Total	\$149.20	\$173.23	\$199.35	\$24.04	\$50.15

Note: All projections are in constant 2006 dollars

Source: AECgroup

6.2 Assessment of Sustainability of Trading Levels

Assumptions regarding average trading levels are needed to project the future demand for retail floorspace in Maclean based on projected turnover. Average retail trading levels in Maclean are generally at the lower end of national benchmarks. However, the centre's small regional nature, historic trading levels relativities (40% lower in 1991-92) and lower business operating costs of around 10-15% all contribute to slightly lower trading levels. The comparison of average trading levels is again presented in **Table 6.2**. Assumptions have been developed regarding sustainable trading levels for the projection of future floorspace in Maclean based on the trends above but also considering increases to building and investment costs for new floorspace in real terms, recent rent movements and firmer yields for new retail and shopping centre developments. The assumptions allow for some future consolidation before additional stock is required where trading levels are lowest in relative terms.

Table 6.2: Average Retail Trading Levels, Maclean (2006)

Retail Type	Avg. Trading Level (\$/sqm)	National Benchmark Averages (\$/sqm)	Floorspace Projection Assumption (\$/sqm)
Groceries & Specialty Food	\$7,900	\$6,000-\$8,700	\$7,000
Food & Liquor Catering	\$4,200	\$5,300-\$7,000	\$4,700
Clothing & Accessories	\$1,900	\$2,700-\$3,800	\$2,300
Furniture, Houseware & Appliances	\$3,300	\$2,000-\$3,800	\$3,000
Recreation & Entertainment Equipment	\$1,600	\$3,800-\$4,900	\$3,000
Garden & Hardware Goods	\$1,500	\$2,000-\$3,800	\$1,700
Other Goods & Personal Services	\$6,800	\$6,000-\$8,000	\$6,000
Total	\$4,000	\$4,000-\$5,100	

Source: AECgroup

6.3 Projected Future Retail Demand

6.3.1 Status Quo

The future demand for additional retail floorspace development in Maclean will be driven primarily by projected household expenditure growth and changes to market share, including reductions in leakage. These factors in turn are driven by a large number of variables, including the provision of appropriate floorspace and tenancy mixes.

Assuming the status quo regarding Maclean's retail market share in the MTA and unchanged rogue expenditure, the retail turnover in Maclean is projected to increase from \$47.27 million in 2006 to \$54.02 million in 2011, an increase of \$6.75 million, or 14.3% (see **Table 6.3**). Over 10 years, Maclean's retail turnover is projected to increase to \$62.15 million, representing an increase of \$14.88 million, or 31.5%.

Table 6.3: Projected Retail Turnover in Maclean, Status Quo

Retail Type	Projected Turnover (\$m)			Projected Increase (\$m)	
	2006	2011	2016	2006-2011	2006-2016
Groceries & Specialty Food	\$17.09	\$19.27	\$22.44	\$2.18	\$5.35
Food & Liquor Catering	\$7.30	\$8.40	\$9.59	\$1.10	\$2.29
Clothing & Accessories	\$2.45	\$2.82	\$3.22	\$0.37	\$0.77
Furniture, Houseware & Appliances	\$3.69	\$4.25	\$4.86	\$0.56	\$1.17
Recreation & Entertainment Equipment	\$3.39	\$3.91	\$4.46	\$0.51	\$1.07
Garden & Hardware Goods	\$2.86	\$3.32	\$3.81	\$0.46	\$0.95
Other Goods & Personal Services	\$10.49	\$12.06	\$13.77	\$1.58	\$3.28
Total	\$47.27	\$54.02	\$62.15	\$6.75	\$14.88

Note: All projections are in constant 2006 dollars

Source: AECgroup

Based on the projected retail turnover under the status quo market share scenario and the assumed average trading levels, the future demand for retail floorspace is projected at 1,590 additional sqm in the next 5 years and 3,440 additional sqm over the next 10 years (see **Table 6.4**). The breakdown by retail type is outlined in the table below.

Table 6.4: Projected Future Demand for Additional Retail Floorspace in Maclean, Status Quo

Retail Type	Projected Floorspace (sqm)			Projected Increase (sqm)	
	2006	2011	2016	2006-2011	2006-2016
Groceries & Specialty Food	2,160	2,470	2,920	+310	+760
Food & Liquor Catering	1,720	1,950	2,210	+230	+490
Clothing & Accessories	1,260	1,420	1,590	+160	+330
Furniture, Houseware & Appliances	1,120	1,310	1,510	+190	+390
Recreation & Entertainment Equipment	2,180	2,350	2,540	+170	+360
Garden & Hardware Goods	1,860	2,130	2,420	+270	+560
Other Goods & Personal Services	1,540	1,800	2,090	+260	+550
Total	11,840	13,430	15,280	+1,590	+3,440

Source: AECgroup

6.3.2 Reduced Leakage Scenario

There is presently a significant amount of retail expenditure generated from MTA households that is spent outside of the MTA in regional and sub-regional centres such as Grafton, Coffs Harbour, Ballina and Lismore. The majority of this spending "leakage" occurs in the discretionary retail categories such as Clothing & accessories, Furniture, homeware & appliances and Recreation & entertainment equipment. However, the MTA actually records sizeable leakage in the convenience-based retail categories of Groceries & specialty food, Food & liquor catering and Other goods & personal services. There is the potential, and need, to reduce the leakage in these categories to enhance convenience.

For example, in most of the catchments of the MTA there is leakage of more than 20% to Grafton alone in the Groceries & specialty food category. The exception is Yamba which has a 2,800sqm Bi-Lo supermarket recording only 11% leakage to Grafton from the East catchment and 7% to Maclean, adding to 18% in total to other proximate locations. By comparison, Maclean's Central catchment records 22% leakage to Grafton and 13% to Yamba, adding to 35% in total. Therefore, it could be considered Maclean has the potential to reduce the Central Catchment's leakage through improved retail development such as a major supermarket to around 15% in total. At the same time, there is the potential to increase market share from the other catchments in the MTA by reducing their leakage to Grafton and reinforcing Maclean's role as the District Centre. There is also potential to reduce spending leakage to Coffs Harbour, Ballina and Lismore.

An alternative retail market share scenario has been prepared for Maclean based on the following considerations:

- Potential to reduce spending leakage to Grafton to a reasonable level;
- Potential to reduce spending leakage to other locations to a reasonable level;
- Potential to capture a manageable proportion of Yamba's market share;
- Reasonable market share level relative to the District Centre role and retail mix;
- Ability to develop retail supply commensurate with District Centre role; and
- Expansion of Grafton Shoppingworld and other competing developments.

It is estimated there is potential for Maclean to increase its overall retail market share of household spending in the MTA from the present level of 26% to 36% based on the above-mentioned factors (see **Table 6.5**). The leakage to Grafton and other locations has been reduced to the greatest extent in the local Central Catchment, the well-connected South-east Catchment and the North Catchment.

Table 6.5: Projected Retail Market Share in Maclean, Upper Threshold from Reduced Leakage

Retail Type	Central	East	North	West	South-East	Total
Status Quo						
Groceries & Specialty Food	63%	7%	32%	28%	57%	31%
Food & Liquor Catering	31%	10%	28%	19%	30%	21%
Clothing & Accessories	24%	4%	13%	10%	31%	14%
Furniture, Houseware & Appliances	39%	5%	22%	9%	28%	18%
Recreation & Entertainment Equipment	39%	5%	20%	14%	33%	19%
Garden & Hardware Goods	74%	35%	43%	34%	67%	48%
Other Goods & Personal Services	63%	7%	32%	28%	57%	31%
Total	50%	8%	28%	21%	45%	26%
Leakage Capture Scenario						
Groceries & Specialty Food	85%	18%	49%	31%	73%	45%
Food & Liquor Catering	48%	16%	34%	21%	40%	29%
Clothing & Accessories	32%	7%	16%	11%	35%	18%
Furniture, Houseware & Appliances	47%	9%	25%	11%	34%	23%
Recreation & Entertainment Equipment	52%	10%	26%	15%	41%	26%
Garden & Hardware Goods	80%	39%	47%	35%	71%	52%
Other Goods & Personal Services	85%	18%	49%	31%	73%	45%
Total	67%	15%	39%	24%	56%	36%

Source: AECgroup Household Shopper Survey, AECgroup Retail Model

Assuming the reduced leakage scenario and unchanged rogue expenditure, the projected retail turnover in Maclean is estimated to increase from \$47.27 million in 2006 to \$80.59 million in 2011, an increase of \$27.28 million, or 57.7% (see **Table 6.6**). Over 10 years, Maclean's retail turnover is projected to increase to \$87.32 million, representing an increase of \$40.05 million, or 84.7%.

Table 6.6: Projected Retail Turnover in Maclean, Upper Threshold from Reduced Leakage

Retail Type	Projected Turnover (\$m)			Projected Increase (\$m)	
	2006	2011	2016	2006-2011	2006-2016
Groceries & Specialty Food	\$17.09	\$27.03	\$32.92	\$9.94	\$15.83
Food & Liquor Catering	\$7.30	\$11.80	\$13.50	\$4.50	\$6.21
Clothing & Accessories	\$2.45	\$3.65	\$4.17	\$1.19	\$1.72
Furniture, Houseware & Appliances	\$3.69	\$5.34	\$6.12	\$1.65	\$2.42
Recreation & Entertainment Equipment	\$3.39	\$5.48	\$6.27	\$2.08	\$2.87
Garden & Hardware Goods	\$2.86	\$3.60	\$4.13	\$0.74	\$1.27
Other Goods & Personal Services	\$10.49	\$17.67	\$20.21	\$7.18	\$9.72
Total	\$47.27	\$74.55	\$87.32	\$27.28	\$40.05

Note: All projections are in constant 2006 dollars

Source: AECgroup

Based on the projected retail turnover under the status quo market share scenario, and the assumed average trading levels moving forward, the future demand for retail floorspace is projected at an additional 5,770sqm in the next 5 years and 8,470sqm over the next 10 years (see **Table 6.4**).

Table 6.7: Projected Future Demand for Additional Retail Floorspace in Maclean, Upper Threshold from Reduced Leakage

Retail Type	Projected Floorspace (sqm)			Projected Increase (sqm)	
	2006	2011	2016	2006-2011	2006-2016
Groceries & Specialty Food	2,160	3,580	4,420	+1,420	+2,260
Food & Liquor Catering	1,720	2,680	3,040	+960	+1,320
Clothing & Accessories	1,260	1,780	2,010	+520	+750
Furniture, Houseware & Appliances	1,120	1,670	1,930	+550	+810
Recreation & Entertainment Equipment	2,180	2,870	3,140	+690	+960
Garden & Hardware Goods	1,860	2,290	2,610	+430	+750
Other Goods & Personal Services	1,540	2,740	3,160	+1,200	+1,620
Total	11,840	17,610	20,310	+5,770	+8,470

Source: AECgroup

6.4 Need for Additional Development

An assessment of the demand for additional retail floorspace in a region must also give due consideration to the net public benefits likely to be derived from floorspace additions. The following needs arguments support additional retail development in Maclean:

- **Maintenance and reinforcement of district centre role**

Maclean is defined as a District Centre and Major Town in the regional hierarchy. The role of such a centre is defined as helping serve the Lower Clarence community with secondary levels of sub-regional services, commercial and industrial development. District Centres are also described as having a functional role in serving their sub-regions with outreaches of regional services and are self-contained with shopping and business services and may have bulky goods, warehousing, transport logistics, farm support services, health and professional services mixed with some medium density residential. To fulfill this role, Maclean will require additional retail development. The *Draft Mid North Coast Regional Strategy* confirms the expectation that Maclean will be expected to undergo some growth and redevelopment of its commercial centre. A strategy to fulfill this role is the establishment of an anchor retail tenant such as a larger supermarket.

- **Catering for the spending growth from households and visitors**

Projected growth in household and visitor retail expenditure will drive the demand and need for expanded retail facilities and constant improvement to services in Maclean. The Maclean Town Centre runs the risk of losing competitiveness, viability and market share if it doesn't develop to the critical benchmarks outlined in this study which are based on the upper thresholds of sustainable development.

- **Improving the quality of retail facilities and services**

It is important the quality of Maclean's retail sector continues to improve, respond and adapt to changing industry trends, and positions itself as a leading node within the broader region it serves i.e. the Lower Clarence. It is acknowledged new development provides the impetus for existing retail facilities to upgrade and remain competitive. New development, particularly anchor tenants, can also act as activity inspirers for the retail market. Unless new development occurs in line with projected growth, there is the risk consumer and tenant demand could be lost to other areas in the region. Any additional pressure on average trading levels would threaten the viability of the retail stock and the ability for landlords to provide appropriate levels of reinvestment.

- **Increasing product choice**

The development of additional retail floorspace would provide a greater product choice to households in the MTA and would potentially reduce the need for visits to other shopping locations for certain items at competitive prices. The variety of stores and prices has been identified as two of the key consumer issues presently facing the market. A greater range of products would be available in a central district location and would therefore enhance consumer choice. Additional retail floorspace provision is likely to see household retail expenditure spent in Maclean increase over time.

- **Greater convenience and comfort**

By satisfying extra retail demand through the provision of new retail floorspace rather than relying upon existing facilities, Maclean would be increasing convenience for its consumers. Limiting floorspace provision and development may result in continued:

- Overcrowding in retail facilities;
- Above average prices;
- Product shortages;
- Lack of adequate parking facilities; and
- Lack of public amenity and space at retail facilities.

- **Market entry and competitive pricing**

Maclean will, at some stage, need additional floorspace to cater for projected growth in retail spending so that new businesses are not prohibited from entering the market and existing businesses do not experience abnormal profits. If supply is restricted, increasing demand may allow businesses to take advantage of the strong customer base by raising prices and profits. Such a move from existing businesses will result in either higher prices paid or a greater proportion of expenditure spent outside Maclean in competing shopping locations. Therefore, market demand and supply forces, as measured through spending and turnover, should be used to designate when additional businesses can enter the market to maintain the demand/supply balance. This process should be carefully managed within the framework outlined in this study, including reference to the sustainable development benchmarks and economic impact assessment criteria. Council would be impeding the growth of the local and regional retail markets if it did not allow development to the levels suggested in the preceding analysis. On the other hand, Council risks unsustainable economic impacts by approving development beyond these levels unless certain a valid case is made by the proponent which includes detailed economic impact assessment.

6.5 Service Gaps

Identifying service gaps can be completed on a number of levels and further explain specific areas of retail service and facilities needs:

- **Consumer attitudes**

The Household Shopper Survey identified a number of consumer attitudes with regards to what additional retail types were needed in Maclean. Around 46% of households identified the need for additional retailing, with the most common being:

- Supermarket;
- Clothing;
- Discount department store;
- Chemist; and
- Dining.

The survey responses regarding supermarkets were mixed, with responses received for a “second or additional” supermarket, “expanded or larger” supermarket and for specific operators such as “Woolworths or Coles”. There was an expressed need for specialty clothing stores, along with a discount department store (DDS) such as Big W or Target. However, any provision of a DDS in Maclean would need to be treated carefully in terms of market size, sustainability and the role of other retail centres. The need for increased provision in the pharmacy area was also noted, with responses again mixed between a “second” pharmacy and “chemist” in general. Improved dining options were also noted as a service gap area. A small proportion of respondents indicated “shopping complex” suggesting the need for a purpose-built centre in addition to the River Street strip.

- **Shopping market share and leakage**

The retail analysis suggests shopping leakage to locations such as Grafton is most significant in the Clothing & accessories category, reflecting Grafton’s specialty clothing and discount department stores. However, most retail categories record shopping leakage of at least 20%, which is a high ratio for convenience retail categories such as Groceries & specialty food, particularly in a retail network situation where Maclean is located 40 kilometres from Grafton. Therefore, this would point toward a lack of appropriate supply in this retail category requiring improved supermarket provision.

- **Average trading levels**

Average retail trading levels in Maclean are generally at the lower end of national benchmarks, although this can be explained by lower business operating costs and a history of trading below national levels due to the small nature of the Town Centre. Therefore, trading levels within the national benchmark bounds may indicate a situation of “overtrading”. Such areas include Groceries & specialty food, Furniture, housewares & appliances and Other goods & personal services. It is presently estimated the independent supermarket in Maclean alone is recording significantly high trading levels.

- **Retail tenancy mix**

The retail tenancy mix analysis suggests there is a relatively low supply of Groceries & specialty food and Other goods & personal services tenants, particularly for a District Centre focused on meeting the local convenience needs of the region. However, there is considered to be fairly strong supply of Food & liquor catering tenants and Recreation & entertainment equipment tenants, reflecting the significance of tourism to the local market. There is relatively limited supply of retail in the higher order retail categories such as Clothing & accessories, reflecting the regional role of Grafton. Most bulky goods retailers are located in Grafton and both Yamba and Maclean record a relatively limited representation from these retailers. There may be demand for the small-scale expansion of bulky goods retail in Maclean respective of its district role and market size.

- **Stakeholder consultation and independent review**

There are considered to be service gaps based on independent reviews and stakeholder consultation, including the community workshop. A major supermarket is considered a service gap given the overcrowding and overtrading of the present operators. There is considered to be room for improvement to the supply of cafes & restaurants to serve the local and tourist markets. As the District Centre there is also considered to be service gaps and further potential in the bulky goods market.

6.6 Demand and Need for Specific Retail Developments

6.6.1 Supermarket

A feature of the retail development pressure in Maclean and surrounds is the establishment of a new supermarket-anchored centre. The common development model for such a centre is generally a full-line supermarket as the anchor (of at least 3,000sqm) and then supporting specialty stores of around 1,000-2,000sqm. To justify this scale of development in Maclean would require significant capture of spending leakage and/or considerable market growth.

The reduced leakage scenario demonstrates what is considered to be the upper threshold of potential demand for any such development and indicates a supermarket beyond 2,000sqm in the next 10 years would not be economically sustainable in terms of impacts on existing retailers and investors. The formulation of this upper limit firstly considers the projected demand for the Groceries & specialty food category. This demand comprises supermarkets along with specialty food retailers like butchers, bakeries and pastry stores, local stores, fruit stores and any others retailing food or non-alcoholic drinks. Therefore, a supermarket would not entirely provide the projected additional 2,260sqm of the Groceries & specialty food category. There is also a small positive allowance, normally 5%-10% of turnover based on benchmarks, made for supermarket turnover from the Other goods & personal services category for the sale of personal care products.

Population methodologies suggest there is generally one full-line supermarket for every 9,000-10,000 persons in Australia, and therefore the Lower Clarence should theoretically have two full-line supermarkets exceeding 3,000sqm in size. On face value, this suggests there is adequate demand and need for a full-line supermarket in Maclean. Additionally, there is the argument the future viability of the Maclean Town Centre is actually dependent on the development of an anchor retailer, such as a full-line supermarket, and that escape expenditure will only be arrested when Maclean provides an alternative to the facilities available in Grafton. However, future allowable development must still be sustainable and based on a detailed assessment of shopping patterns and regional dynamics, competing centres, existing local supply, the settlement pattern, socio-economic status and retail expenditure, as has been the case with the assessment presented in this study. It should be noted that major supermarket retailers like Coles and Woolworths operate on smaller floorplates than 3,000sqm in many regional markets where the market is not at a size to support such development.

There are conditions, though, that could see the sustainable development of a full-line supermarket exceeding 3,000sqm in size in Maclean inside 10 years, including:

- Assumption of overtrading presently and shortage of floorspace;
- Closure of one of the two existing supermarkets and adding the vacant space;
- Relocation and expansion of an existing tenant;
- Inclusion of a liquor store component in the supermarket;
- Household spending on groceries increased at a "real" rate above 0.6% per annum;
- Tourist and visitor spending on groceries accounted for more than 15% of turnover;
- Assumption of a lower average trading level of \$6,000/sqm;
- Increases to the assumed market shares in Table 6.5; and
- Preparation of an economic impact report demonstrating sustainable development.

6.6.2 Other Convenience Retail

Specialty convenience retailers are contained in the Groceries & specialty food (e.g. supermarkets, butchers, bakeries and pastry stores, local stores, fruit stores and any others retailing food or non-alcoholic drinks), Food & liquor catering (cafes, restaurants, take-aways, fast food stores, liquor shops) and Other goods & personal services (pharmacies, stationery stores, cosmetic stores, hair and beauty salons, jewellers). These retailers aim to meet everyday shopping needs. Added to this, there are newsagents in the Recreation & entertainment equipment category.

The development pressure in Maclean presently is for a shopping centre development of up to 5,200sqm including a 3,200sqm supermarket and 2,000sqm of specialty retailers. As a reference point, there is presently 5,420sqm of convenience retail in Maclean. Therefore, the development of a 5,200sqm shopping centre providing convenience retailers would essentially double this retail supply. Therefore, caution needs to be employed in terms of sustainable development.

Overall, there is projected demand for an additional 5,200sqm of convenience retail over the next 10 years, comprising the range of tenancies described above. Allowance needs to be made for increased and improved café & restaurants in Maclean to service the local and tourist markets. When accounting for this demand, there would potentially be demand for around 3,500-4,000sqm of convenience retail, including a supermarket. However, not all of this would conceivably be located within a shopping centre.

The approval of specialty convenience retailers beyond this level could result in major economic impacts to the independent and small business traders in Maclean, particularly those adding most to the uniqueness of the Maclean Town Centre and providing its tourism appeal. The fear is largely the duplication of many of these small retailers, particularly from franchises. The impacts of any new development of this nature could also be heightened by an out-of-centre location not integrated with existing businesses.

6.6.3 Clothing and Department Stores

Department store merchandise comprises expenditure on department store and discount department store type merchandise such as fabric and other soft good retailing, clothing, china, glassware and houseware, perfumes, cosmetics and toiletries, furniture, household appliances and other department. Clothing stores and discount department stores have been identified as service gaps within the Maclean retail catchment.

The analysis above projected demand for up to an additional 750sqm of Clothing floorspace and 810sqm of Furniture, houseware & appliances. When accounting for the other locations of spending in these categories, this demand would only justify a small discount department store in Maclean. Such a store would be consistent with the District Centre role of Maclean in the Lower Clarence catchment.

Development of a larger discount department store would threaten the viability of existing independent retailers. There is demand and need for specialist clothing chains which could also be accommodated within any new shopping centre development.

6.6.4 Recreation and Entertainment Equipment

Maclean records a relatively high share of its retail market in the Recreation & entertainment equipment category. The reason for this is largely due to one of the region's largest toy stores, tourist shops, bookshop and fishing equipment store. The toy store in particular is an anchor tenant for Maclean. Projected demand analysis suggests there will be expansion within the recreational & entertainment sector of up to 960sqm over the next 10 years. This additional development could be supported as part of any bulky goods development (see section below).

6.6.5 Bulky Goods

The bulky goods market refers to the market relevant to homemaker centres and bulky Goods Centres, and generally comprises the following:

- Furniture and floor coverings;
- Large appliances and household goods, including whitegoods;
- Small appliances and household goods;
- Home entertainment equipment;
- Glassware and tableware;
- Manchester, curtains and blinds;
- Camping and outdoor recreation equipment; and
- Garden and hardware goods.

The projections for the bulky goods retail categories have been adjusted for differences in market share and the role of Grafton in this market, particularly considering proposed developments and drawcard tenants such as Bunnings. However, there is still local demand for increased bulky goods demand in Maclean, consistent with the Major Town status role outlined in the *Draft Mid North Coast Regional Strategy*. There is projected demand for an additional 1,670-2,520sqm of bulky goods floorspace under the reduced leakage scenario, which could be accommodated a single dedicated site away from the Maclean Town Centre, possibly at the southern Business zone parcels or in Townsend. There is also the potential for the relocation of parts of the Home Hardware business in the Maclean Town Centre to another site outside the Town Centre.

6.6.6 Townsend and Gulmarrad

This case study considers the development potential within the Townsend and Gulmarrad area. Two of the future development options for Maclean involve the establishment of a supermarket-anchored centre at Townsend or Gulmarrad to the east of Maclean. A submission received by Dougherty Bros Pty Ltd indicates the following residential development occurring within 1km of its Townsend commercial site:

- 162 existing residential lots within 1km;
- Further 25 residential lots on the 1km fringe;
- 221 approved, undeveloped residential lots within 1km;
- Potential for a further 115 lots; and
- 2.5 hectares of additional available land.

The proposed Gulmarrad commercial development site on the corner of Sheehan Lane and Brooms Head Road is located no more than 2km from the Townsend commercial area. Council's Settlement Strategy indicated a potential settlement of 1,224 persons in Gulmarrad by 2016. The majority of the South-East Catchment could also be considered as the catchment area for any retail development at Townsend or Gulmarrad. The retail expenditure from households in the Townsend and South-East Catchment areas is projected to increase from \$25.79 million in 2006 to \$37.21 million over the next 10 years, equating to an increase of \$11.43 million.

The South-East Catchment has been identified as a major contributor to the Maclean Town Centre accounting for an estimated 22% of sales in 2006, making it the second largest source of retail sales for the Maclean Town Centre. Therefore, any future retail development in the Townsend or Gulmarrad area would need to be carefully considered within the regional retail hierarchy along with potential economic impacts.

The estimated and projected household expenditure from the area is estimated to sustain around 6,400sqm of retail floorspace presently, increasing to 9,250sqm by 2016. This floorspace is located inside and outside the MTA. Based on market share, 2,680sqm of this floorspace is located in Maclean and, based on current market share, 3,860sqm will be sustained in Maclean in 2016. Therefore, any additional retail development in Townsend or Gulmarrad will significantly impact the viability of existing floorspace provision and planned floorspace development in Maclean.

The only suitable type of development considered for Townsend and Gulmarrad is convenience-based retailing. As the analysis has demonstrated, there is only a maximum 1,650sqm sustained by the catchment's Grocery & specialty food by 2016, well below the requirement for a supermarket centre. Additionally, it is likely even if such a centre existed there would still be 20-30% leakage, meaning only 1,200sqm of floorspace would be sustainable long-term, excluding the retail hierarchy and impacts on Maclean.

7. Strategic Planning Framework

7.1 Appropriate Planning Horizon

A 10-year planning timeframe has been adopted for the Lower Clarence Retail Strategy and the projection of future retail expansion needs. The adoption of this timeframe is considered appropriate for the following reasons:

- Uncertainties regarding population growth beyond 10 years, particularly for areas such as Gulmarrad and Yamba. Council is yet to revise its Settlement Strategy beyond 2016, incorporate planning from the *Draft Mid North Coast Regional Strategy* or make a decision regarding the West Yamba LEP;
- The development parameters outlined in this Retail Strategy are based on projected demand over the next 10 years i.e. any development to the projected scale in the next 10 years could be considered 10 years ahead of its time. This essentially means the Strategy could already be considered somewhat aggressive in terms of the scale of development, despite the adoption of the precautionary principle for the study that suggests the need for a more conservative approach. Extending the planning timeline beyond 10 years to justify larger development would be irresponsible;
- The recommended development in the next 10 years, including a new shopping centre in Maclean, will result in a structural change to the regional retail market and will alter shopping patterns and regional dynamics. It will not be entirely clear what the impact of these structural market changes has had on shopping patterns and retail performance until 2-3 years after establishment. These trends will need to be understood, along with additional population analysis beyond 2016, to assess the need for further retail development. Adopting a 10-year timeframe does not restrict further retail expansion beyond 10 years, whether that be expansion of the new development in the next 10 years or the entrance of other developments;
- The dynamic nature of the retail market and changing development and retail trends. Different and relevant retailing concepts are likely to emerge in the next 5-10 years which would need to be considered in the longer-term development strategies;
- The ability to review the Strategy at timely intervals such as in 3 year's time. A 3 year review is appropriate to allow review of the implementation of the Strategy, measure changes in shopping patterns following structural market changes and provide necessary lead-time for longer-term planning beyond the 10 year period; and
- The need for flexibility and a performance driven approach to future development. This aligns with the review of the Retail Strategy in 3 year's time. The first stage of development in the next 3 years is necessary before performance can be measured. Taking a performance-based approach more closely aligns future investment with market demand conditions and trends.

7.2 Demand and Need

Population, expenditure and market share analysis (status quo versus capture of escape expenditure) projects demand for an additional 1,590-5,770sqm in the next 5 years and 3,440-8,470sqm over the next 10 years (see **Table 7.1**). This retail demand extends across the entire retail spectrum and includes supermarket, cafes, restaurants, take-aways, clothing, furniture, homewares, appliances, recreation and entertainment, garden and hardware retailing space. All projections below are "net" additions. Therefore, the relocation and expansion of an existing operator could be considered for a larger floorspace, depending on the use of the previous premises.

Development to the upper limits requires the capture of market share from, and the reduction of leakage to, other competing locations. Any short-term development beyond these parameters threatens the viability of existing retailers given the size of the market and expansion capacity set out in this study. The recommended development approach is

considered appropriate and in line with the precautionary principle established in the *Clarence Valley Sustainability Initiative*.

Within the retail categories, one of the key development pressures in Maclean is for a full-line supermarket. The demand analysis suggests the development of a 2,000sqm supermarket unless meeting certain conditions described earlier. Demand for convenience retail within a shopping centre development is projected at 500-1,000sqm. There could be other retail located within a new shopping centre, such as a small discount department store, clothing chains and recreational and entertainment retailers. There is demand projected for bulky goods retail development to further strengthen the role of Maclean as the District Centre. Demand is also projected in the service gap areas of clothing and department store merchandise. There is limited convenience retail demand projected for Gulmarrad and Townsend in the next 10 years.

Table 7.1: Projected Future Demand for Additional Retail Floorspace in Maclean

Retail Type	Existing (sqm)	Status Quo (sqm)		Upper Threshold (sqm)	
		2011	2016	2011	2016
Groceries & Specialty Food	2,160	+310	+760	+1,420	+2,260
Food & Liquor Catering	1,720	+230	+490	+960	+1,320
Clothing & Accessories	1,260	+160	+330	+520	+750
Furniture, Houseware & Appliances	1,120	+190	+390	+550	+810
Recreation & Entertainment Equipment	2,180	+170	+360	+690	+960
Garden & Hardware Goods	2,800	+270	+560	+430	+750
Other Goods & Personal Services	1,540	+260	+550	+1,200	+1,620
Total	12,780	+1,590	+3,440	+5,770	+8,470

Source: AECgroup

7.3 Spatial Distribution

Determining the most appropriate spatial distribution for new retail development in the Lower Clarence is a key element of the strategic planning framework. A key reference point is the regional centres hierarchy and consolidating retail development within or adjacent to existing centres. This is the planning approach supported and adopted by many local governments to ensure an orderly approach to retail development, maintain the ongoing vibrancy and amenity of retail centres, protect the viability of existing investment and enhance convenience and access for local consumers and ratepayers. The Maclean LEP has as its objective reinforcing and strengthening the Maclean Town Centre and preserving and enhancing its unique character and points of difference. The *Draft Mid North Coast Strategy* is one such planning document that does not support market fragmentation and out-of-centre retailing and advises it should be resisted in order to maintain the healthy retail and service functioning of all centres in the region.

The *Clarence Valley Sustainability Initiative* identifies a key guiding principle for future planning is "taking a precautionary and anticipatory approach" which requires that decisions regarding future proposed development need to be based on a careful assessment of the potential risks, including reference to examples from other locations. There are many case studies and examples of situations where out-of-centre development has negatively impacted existing centres by forcing consumers to make a distinct choice between two different retailing destinations. Unnecessary out-of-centre development has generally resulted in increases to vacancies in existing and traditional centres, a large reduction in trade, reduced land values, a loss of vibrancy and a negative impact on community sentiment. Out-of-centre development also threatens the social and community values of a local area, including the unique nature of town centres and their points of difference such as atmosphere and ambience.

Out-of-centre development is a risk to the vibrancy and unique nature of the Maclean Town Centre. Maclean has the unique opportunity to learn from the negative experiences elsewhere and action some of the strategic aims and objectives of this Retail Strategy, the *Maclean LEP* and *Draft Mid North Coast Regional Strategy* for in-centre development. Therefore, a key direction of this retail strategy is the reinforcement of the District Centre

role and strengthening of Maclean's retail position, preference for retail development within existing centres as opposed to out-of-centre development so as to manage impacts on existing retailers and commercial investment, and better utilise existing commercial areas where development potential exists.

Any form of out-of-centre development in the local Maclean catchment would create a competing retail destination and force consumers to choose between the two centres for the same services, effectively splitting the retail market. The business community and general public based on detailed consultations do not support out-of-centre development. It is recommended that unless necessary retail development cannot be located within the Town Centre due to capacity and planning issues, any development proposal undermining this objective should not be considered favourably by Council and would operate to the detriment of existing retailers, commercial areas and local investment.

In terms of what constitutes in-centre and out-of-centre development, a definition is required of the Maclean Town Centre. There is general agreement on this position amongst business owners, developers and the community that the Maclean Town Centre is defined as the Maclean Central Business District, bounded by Union, MacLachlan and Stanley Streets. This definition has been based on the existing retail concentrations, pedestrian activity and parking, topography, site lines and general land use patterns. The Clarence Valley Development Control Plan – Development in Business Zones – Maclean Town Centre defines Precinct 1 as the Main Shopping Area bounded by Argyle and Stanley Streets and Centenary Drive.

While the strategic intent is for future retail development to occur in the Maclean Town Centre, a key issue is whether such development is possible relative to capacity within the existing business zone, or whether additional land needs to be zoned to accommodate the additional development. Local planning firm Land Partners completed an indicative analysis of the utilisation of Business zoned land in Maclean. It was estimated there was around 75,500sqm of Business zoned land within Maclean, of which occupied floor area amounted to 41,200sqm, or 55%. Therefore, the land take-up in the commercial zone and the land use pattern indicates there could be remaining development potential in the Town Centre, including the development of a new shopping centre, although such development would need to be carefully managed in terms of access, parking and integration.

Accommodating additional retail development within the Maclean Town Centre, or an expansion of the Maclean Town Centre through rezoning, is a complex planning, design and business process, particularly for a major development such as a shopping centre. To plan for additional retail development in the Maclean Town Centre, including identifying redevelopment opportunities, it is recommended a Structure Plan be produced. Such a Plan would provide a framework for increasing land use efficiency within the existing zone, accommodating expanded retail development and responding to emerging retail trends and needs. More detail is provided in the implementation plan.

There is also projected growth in the suburban areas of Townsend and Gulmarrad that need to be considered in terms of their development potential and objective of providing everyday shopping needs in a convenient fashion to this catchment. It would be reasonable to expect some small-scale retail development in these areas. Larger scale development would be postponed until more clearer growth trends emerge and after the Maclean Town Centre has consolidated as the District Centre.

7.4 Locations and Development Options

On the basis of the spatial distribution criteria, there are a number of locations that could accommodate the types of new retail development demanded and needed in Maclean and surrounds. The market situation and development pressure in the Maclean area has meant that a number of these locations already have active development proposals pertaining to them. The locations are mixed between the Maclean Town Centre, its periphery and the fast growing suburbs of Townsend and Gulmarrad.

In terms of accommodating a new supermarket-anchored shopping centre, the following locations are identified as sufficient in size for at least a 3,000sqm development:

- Northern end of Town Centre at the Boulevard;
- Council car park in Town Centre;
- South of the Town Centre at Taloumbi Street;
- Townsend commercial centre; and
- Gulmarrad at corner of Sheehan Lane and Brooms Head Road.

A larger shopping centre development comprising clothing retailers, a small discount department store and retailers in other categories could be accommodated on each of these sites depending on design, layout and parking solutions.

Based on the strategic planning framework, it is preferable that new retail development occurs in the Maclean Town Centre where possible, unless such development is proven to be not possible. From this perspective, the locations of the northern end of the Town Centre and the Council car park are considered preferable. On the basis of consultation and independent assessment, it is considered the site south of the Town Centre at Taloumbi Street represents out-of-centre development. The locations at Townsend and Gulmarrad are considered to have only minor development potential in the next 10 years when considered within a strategic planning framework that sees the consolidation of the Maclean Town Centre as a District Centre as the short-term priority. This recommendation will be reviewed in 3 year's time when growth trends become clearer.

Each of the shopping centre locations has differing tenure status and requirements to enable retail development. These issues relate mainly to site amalgamation and landowner cooperation and/or the ownership/lease of Council-owned land, airspace and subterranean space. The following details are provided for each location:

- Northern end of Town Centre at the Boulevard: The development of this area requires the amalgamation of sites and consent from a number of landowners. Depending on design, the development may possibly require the purchase of parts of Clyde Street from Clarence Valley Council and subsequent rezoning. The land is all business-zoned and requires no extension of zoning;
- Council car park in Town Centre: The development of the car park would require the ownership/lease of subterranean space from Council if providing underground car parking to meet the additional parking requirements of any development above. The development would also require the ownership/lease of airspace from Council if developing aboveground. The car park would need to be rezoned for business use;
- South of the Town Centre at Taloumbi Street: The development site is zoned for business uses. Development requires the cooperation of multiple landowners. The development of a larger retail facility requires rezoning, as per the current development proposal on the site;
- Townsend commercial centre: The development would be located on business-zoned land. The recommended scale of development could be accommodated within the business-zoned land. Any development beyond the recommended scale would require rezoning of adjacent properties from open space zones. The site is currently held in single private ownership; and
- Gulmarrad at corner of Sheehan Lane and Brooms Head Road: The development site is zoned for rural residential uses. Development of the site requires rezoning to business uses. Rezoning of this site is recommended for the immediate short-term to prepare for development. The application for rezoning may be part of a broader master plan/structure plan for the Gulmarrad growth area. The site is currently held in single private ownership.

There are development proposals on each of the sites at different stages of study. A summary of the development proposals is described below:

- Northern end of Town Centre at the Boulevard: There is a development proposal for a shopping centre on the site, anchored by a supermarket, with undercover parking;
- Council car park in Town Centre: There is a development proposal for a shopping centre on the site, anchored by a supermarket, with underground and ground level parking. The development proposal forms part of a broader project involving the refurbishment of the Palace Arcade to link the shopping centre with River Street and the redevelopment of the waterfront as a mixed-use development containing retail and commercial space, residential units and a marina. It is proposed that car parking for the waterfront would be provided underneath the shopping centre;
- South of the Town Centre at Taloumbi Street: There is a development proposal for a shopping centre containing a 3,200sqm supermarket and 1,840sqm of specialty stores with undercover parking;
- Townsend commercial centre: There is a development proposal for a shopping centre on this site to service the growing Townsend population; and
- Gulmarrad at corner of Sheehan Lane and Brooms Head Road: There is a rezoning proposal for business use on this site to facilitate retail development at some time into the future commensurate with population growth and need.

There are sites to the north and south of the Town Centre, still on business land, that are considered suitable for bulky goods and larger format retailing, including the Taloumbi Street and the Townsend commercial centre sites. The waterfront represents a development opportunity, particularly for tourist retail development such as cafes, restaurants and take-aways. This development would require master planning, urban design and possible rezoning. A Structure Plan is recommended to identify further redevelopment opportunities within the Town Centre to accommodate other expansion over time such as clothing specialty stores, a small department store and recreation retail. However, these uses could also be considered in any new shopping centre.

7.5 Site Assessment

In addition to tenure and whether additional land should be zoned for business, there are other factors to consider when identifying and assessing potential sites for new retail development (see **Table 7.2**). This site assessment framework should be utilised when undertaking detailed assessment of the appropriateness of various sites and extended to development applications when submitted.

The assessment framework references the strategic planning framework and spatial distribution criteria, particularly in regards to the retail hierarchy. The development scale and economic impacts are considered in economic sustainability, while impacts on the unique values and points of difference of the region's retail sector are considered in social sustainability. Community need and service gaps are considered in consumer services. Following this, there are development issues such as transport and access, town planning, design, parking, rents and values, infrastructure and construction which all need to be considered in the assessment process by Council.

Table 7.2: Development Option Assessment Framework

Variable/Factor/Impact	Measures
Retail hierarchy	<ul style="list-style-type: none"> Strategic location relative to other centres Proposed role within the regional retail hierarchy Ability to conserve, enhance and reinforce existing retail centres
Economic sustainability	<ul style="list-style-type: none"> Development scale within sustainable development parameters Impact on the operating and investment viability of existing retail areas Proposed tenancy mix relative to service gaps and consumer need Ability for the centre to capture leakage and grow the local market
Social sustainability	<ul style="list-style-type: none"> Preservation of social and cultural values of retail and community Enhancement of unique points of difference of retail centre
Consumer services	<ul style="list-style-type: none"> Improvement to retail service provision and quality of supply Expanded retail range versus duplication of existing retail supply Ability to enhance convenience, access and competitive pricing
Transport and access	<ul style="list-style-type: none"> Impact on traffic and potential management solutions Appropriate access provided for service vehicles and loading Consideration for pedestrian access, precincts and corridors
Town planning	<ul style="list-style-type: none"> Current zoning of the land and requirements for rezoning/amendments Adjacent land uses, conflict issues and associated impacts Current planning status and timing of development Standard and comprehensiveness of supporting documentation
Design	<ul style="list-style-type: none"> Contemporary design, aesthetics and overall appearance of centre Ability to enhance and complement the historic streetscape Well laid out centre with suitable floor plan and tenancy schedule
Parking	<ul style="list-style-type: none"> Appropriate supply of parking relative to additional floorspace Role played in addressing current parking and access issues
Rents and values	<ul style="list-style-type: none"> Likely impact on rents and commercial attractiveness for tenants Likely impact on land values and investment return
Infrastructure	<ul style="list-style-type: none"> Investment requirements for transport infrastructure Infrastructure financing and developer contributions Flooding, stormwater and engineering considerations
Construction	<ul style="list-style-type: none"> Length and complexity of construction Disruptions to retail trade during construction period

Source: AECgroup

The various location options can be considered relative to the site assessment criteria. The following merits and demerits are identified for each of the five locations identified for a possible shopping centre. There are common demerits for the two locations in the Town Centre such as transport and access, parking, infrastructure, engineering and construction that would need to be addressed by each development and would be included in any Structure Plan for the Town Centre.

• **Northern end of Town Centre at the Boulevard:**

The merits of the site include:

- Reinforces the District Centre role of the Maclean Town Centre;
- Conserves and enhances the character of the Maclean Town Centre;
- Revitalises the northern end of the Town Centre;
- Possibilities for integration with the waterfront and promenade;
- Zoned commercial and could yield the required floorspace; and
- Represents a more efficient use of existing commercial areas.

The demerits of the site include:

- Parking on site is likely to require multi-storey development;
- Transport and access issues that will still occur in the CBD;
- Flooding and engineering issues;
- Site amalgamation across a number of titles; and
- Impacts on trade during construction.

In summary, the site presents possibly the only development opportunity in the business zone in the Town Centre. The site's ability to revitalise the northern end of the Town Centre and activate with the waterfront promenade are its key advantages.

- **Council car park in Town Centre:**

The merits of the site include:

- Reinforces the District Centre role of the Maclean Town Centre;
- Conserves and enhances the character of the Maclean Town Centre;
- Possibilities for integration with the waterfront; and
- Places modern shopping facility without impact heritage theme of River Street.

The demerits of the site include:

- Parking on site is likely to require multi-storey development;
- Transport and access issues that will still occur in the CBD;
- Flooding and engineering issues;
- Purchase/sale of airspace and subterranean space from Council; and
- Impacts on trade during construction.

One of the key advantages of this development site is the future possibility of linking it to River Street via a refurbishment of Palace Arcade (or other redevelopment) and then to any redevelopment at the waterfront. The site provides the ability to place a modern shopping facility in the Town Centre without impacting the uniqueness of River Street, including the historic architecture and buildings.

Developing the site would require the ownership/sale of subterranean and/or airspace by Council. This could yield financial revenue for Council but would need to be balanced against community and Council values. Development would also require the retention of the existing car parking quota, plus meet the parking requirement for the shopping centre. The current proposal on the site is attempting to meet these obligations.

The site would require rezoning. The key issue with regards to this location is whether its merits (such as potential linkages to River Street and any future waterfront development) are strong enough to warrant its rezoning despite development potential existing within the existing business zone at the Northern end of the Town Centre at the boulevard.

- **South of the Town Centre at Taloumbi Street:**

The merits of the site include:

- The site would reduce pressure on traffic in the Town Centre;
- The site would reduce pressure on Town Centre parking;
- The site is zoned commercial and could yield the required floorspace;
- The site is above the 100-year flood level; and
- The site would not have major construction impacts.

The demerits of the site include:

- Inconsistency with the retail hierarchy (out-of-centre development);
- Likely negative impact on land values in the Town Centre;
- Lack of integration with the existing Town Centre;
- Difficult access for different demographic groups to/from Town Centre; and
- The current proposal requires rezoning of part of the site.

The site is located south of the Town Centre at Taloumbi Street. On the basis of consultation and independent assessment, the location is considered to represent out-of-centre development and likely to result in the negative impacts noted earlier in the spatial distribution criteria. However, the site is partially zoned for business uses and represents a feasible alternative if development is not possible in the Town Centre for any reason.

- **Townsend commercial centre:**

The merits of the site include:

- The site would reduce pressure on traffic in the Town Centre;
- The site would reduce pressure on the Town Centre parking;
- The site is zoned commercial and could yield the required floorspace; and
- The site would not have major construction impacts.

The demerits of the site include:

- Inconsistency with the retail hierarchy (out-of-centre development); and
- Inadequate transport and access from the main customer markets.

It is considered that small-scale retail development in the Townsend area occurs in respect the District Centre status of the Maclean Town Centre. Development of a new supermarket-anchored shopping centre in Townsend would not be consistent with the strategic planning framework.

- **Gulmarrad at corner of Sheehan Lane and Brooms Head Road:**

The merits of the site include:

- The site would reduce pressure on traffic in the Town Centre;
- The site would reduce pressure on the Town Centre parking;
- The site is zoned commercial and could yield the required floorspace; and
- The site would not have major construction impacts.

The demerits of the site include:

- Inconsistency with the retail hierarchy (out-of-centre development); and
- Inadequate transport and access from the main customer markets.

The assessment of the Gulmarrad development proposal is similar to the Townsend review, given they are both located close to each other. The residential development in Gulmarrad will not be of a significant size to warrant development beyond a small local centre for at least the next 10 years. This position can then be reviewed in 3 year's time when the Retail Strategy is reviewed.

8. Retail Strategy

8.1 Strategic Planning Context

The Maclean Town Centre is unique in that it is one of the few small regional towns that have managed to retain a vibrant Town Centre, with an historic village atmosphere, in the face of large-scale modern development in nearby towns. The Town Centre has remained relatively compact and a measure of the vibrancy of the centre is its zero retail vacancy rate. The centre has maintained a healthy mix of small independent retail tenants focused on customer service as a point of difference. The appeal of the Town Centre is reflected by the significance of tourism markets as a generator of retail sales.

The competitive advantages of the Maclean centre are, in summary, identified as its customer service, convenience, range of services and lively atmosphere. Maclean's administrative role is also an activity inspirer, as is a range of community facilities and professional services. In terms of trading disadvantages, there is some evidence of overcrowding in areas of River Street and for particular retailers, perhaps indicating overshopping of these facilities and the need for retail expansion. Consumers indicate some dislike of the small range of stores, prices and parking and access issues. In general, parking represents one of the key issues for the centre, while price and range is identified as a reason for the shopping leakage to places like Grafton, Yamba and Ballina.

Population growth, consumer needs, market forces and regional planning direction now necessitates the expansion of retail facilities in the Maclean area. Population, expenditure and market share analysis projects demand for an additional 1,590-5,770sqm in the next 5 years and 3,440-8,470 sqm over the next 10 years. Of this total, there is estimated demand for a 1,500-2,000sqm supermarket and 500-1,000sqm of specialty tenants. A larger full line 3,000sqm supermarket could be sustained depending on certain conditions outlined in the study. Development to these scales requires the capture of market share from, and the reduction of leakage to, other competing locations. Any short-term development beyond these parameters threatens the viability of existing retailers given the size of the market and expansion capacity set out in this study. The recommended development approach is considered appropriate and in line with the precautionary principle established in the *Clarence Valley Sustainability Initiative*.

From a regional planning perspective, Maclean is defined as a District Centre and Major Town in the regional hierarchy. The role of such a centre is to serve the Lower Clarence community with secondary levels of sub-regional services, commercial and industrial development. District Centres are described as having a functional role in serving their sub-regions with outreaches of regional services and are self-contained with shopping and business services and may have bulky goods, warehousing, transport logistics, farm support services, health and professional services mixed with some medium density residential. To fulfill this role, Maclean will require additional retail development. The *Draft Mid North Coast Regional Strategy* confirms the expectation that Maclean will be expected to undergo some growth and redevelopment of its commercial centre.

The strategic planning context in the Maclean retail catchment is best described by the SWOT analysis in **Table 8.1**. The future opportunities relate mainly to addressing key weaknesses and service gaps, increasing trade and reducing spending leakage, promoting retail expansion in an orderly and appropriate fashion to enhance Maclean's District Centre role, improve retailing performance and operations, and improve the layout and structure of the Town Centre including integration with the Clarence River. The threats revolve around unsustainable planning decisions and developments, competing retail centres, increasing escape expenditure, reduced amenity and convenience and the economic health of the region.

Table 8.1: SWOT Analysis of Maclean Retail Sector

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> • Main administrative centre in the Lower Clarence • District Centre/Major Town status • Customer service standards • Vibrancy • Low floorspace vacancy rate • Village atmosphere • Historic streetscape and facades • Adjacent river and boulevard • Compactness • Location close to Highway • Local road systems and access • Catchment size and growth • Tourist appeal and visitor expenditure • Supporting activity inspirers • Lower business operating costs 	<ul style="list-style-type: none"> • Significant shopping leakage to other locations • Lack of variety of stores and limited range • Relatively low average trading levels • Ongoing issues with parking and access • Higher prices and lack of competitiveness • Identified service gaps resulting in leakage • Non-existence of a major supermarket • Overcrowding of some retail stores • Low socio-economic catchment • Retail supply not aligned with District Centre role • High transport costs for retailers • Uncoordinated opening and closing hours • Freight and service vehicle access/delivery • Lack of landlord reinvestment in some premises • Disparity of rental rates across the Town Centre
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Reinforce District centre role • Future population and spending growth • Development and expansion potential • Provide improved retail services and floorspace • Respond to changing retail trends and needs • Reducing leakage/increasing market share • Consolidation of existing commercial areas • Strengthen land owner and retailer viability • Increase supply in bulky goods categories • Improve retail supply and range • Orientating toward the river • Revival of heritage theme • Conversion of buildings through redevelopment • More efficient utilisation of commercial areas • Preservation of village feel and character • Increase tourism market and stopovers • Introduction of major national retailers/franchises 	<ul style="list-style-type: none"> • Approval of out of centre development • Approval of unsustainable development proposals • Unsustainable retail development in Yamba • Unsustainable retail development in Iluka • Deterioration of average trading levels • Expansion of Grafton Shoppingworld • Realignment of the Highway and interchanges • Population growth trends and land take-up • Sustained economic growth and industry base • Forecast population ageing and reduced spending • Macro economic impacts such as interest rates • Introduction of major national retailers/franchises • Collapse of development proposals/options

Source: AECgroup

8.2 Aims and Objectives

The aims and objectives of the Lower Clarence Retail Strategy are:

- Reinforce Maclean as the Lower Clarence's District Centre with the leading supply of retail facilities and services in the region;
- Encourage the orderly development of retail floorspace with a preference toward existing centres, but also in new retail areas where locational needs require it;
- Ensure any new retail development is based on need and represents sustainable development that does not adversely impact existing retail areas and trading levels;
- Encourage retail development that addresses service gaps and meets the additional needs of the consumer market;
- Strengthen the vitality and viability of the Maclean Town Centre, with consideration for the needs of tenants, landlords and consumers;
- Encourage efficient utilisation of existing retail and commercial areas and promote more intensive redevelopment of existing zoned areas where suitable;
- New retail development should enhance access to, and between, retail facilities, improving the potential for multi-purpose shopping trips to grow market share;

- Traditional retailing categories such as supermarkets, convenience retail, clothing and department store merchandise should be primarily permitted and encouraged to locate within existing centres such as the Maclean Town Centre;
- Developments such as bulky goods stores, homemaker centres, retail warehouses, car sales yards and other large equipment retailers are to be encouraged to locate outside the Town Centre but within commercial zones and clustered where possible;
- Conserve and enhance the character of Maclean's Town Centre, including its unique nature with a vibrant village atmosphere and historic facades and streetscape;
- Encourage the conservation and reconstruction of historical buildings to their original forms within the Maclean Town Centre;
- Well designed commercial and retail development which will enhance the appearance, function and viability of commercial and retail areas;
- Promote development concepts that respond to changing retail industry trends;
- Reunite the Maclean Town Centre with the Clarence River and identify opportunities for the role the waterfront could play in accommodating future retail development;
- Encourage the replacement of low quality retail with higher quality retail by encouraging landlord reinvestment and retail tenants to remain in Maclean;
- Maintain strict design guidelines to improve the appearance and operation of future development, including relation to the historic context of the streetscape;
- Improve transport, parking and access in Maclean in line with consumer convenience requirements, including changing demographics; and
- Provide development which is associated with, ancillary to, or supportive of, commercial or retail development such as other activity inspirers.

8.3 Development Strategy

The retail development strategy outlines sustainable development benchmarks for future retail development and the optimal locations and guiding principles for new development. The aims and objectives of this Strategy are outlined earlier in this Chapter. The sustainable retail development benchmarks for Maclean suggest the development of an additional 1,620-3,510sqm of retail floorspace assuming unchanged retail market shares and 5,380-8,570sqm assuming increased market shares. An increase in market shares could be expected through the development of appropriate shopping facilities that address service gaps and meet consumer needs. There is an opportunity for the development of a major supermarket in Maclean.

The Lower Clarence's retail development in the next 10 years should be carried out within the following regional retail centres hierarchy, with the retail development strategy consolidating the role of the Maclean Town Centre in the short-term:

- Maclean – District Centre;
- Yamba – Town;
- Townsend – Village;
- Gulmarrad – Village; and
- Iluka – Village.

The recommended retail development strategy is as follows:

- Develop a new supermarket of a maximum of 2,000sqm in the Maclean Town Centre, unless the proposal represented an expanded/relocated supermarket or other pre-conditions are determined as outlined earlier in this study. The possible locations for the development are the Northern end of the Town Centre and Council car park. Council would not need to rezone the Northern end of the Town Centre, but may

need to sell public land if a development proposal involved the purchase of Clyde Street. Preference for the Council car park would require Council to allow the ownership/lease of airspace and subterranean space and the rezoning to business. Council would also need to be satisfied parking requirements were met. Both sites represent the potential to activate the waterfront. The key issue with regards to the Council car park site is whether its merits (such as potential linkages to River Street and any future waterfront development) are strong enough to warrant its rezoning despite development potential existing within the existing business zone at the Northern end of the Town Centre at the boulevard;

- Consider the development of the new supermarket as part of a shopping centre and ensure specialty convenience retailers comprise no more than 1,000sqm to manage potential impacts. In addition to a supermarket and convenience retail, the shopping centre could contain other retail such as clothing, department store merchandise and recreational equipment to sustainable development levels;
- Consider the potential for retail as part of any redevelopment of the waterfront, including tourist focussed uses such as cafes, restaurants and take-aways. Such development should occur within a master planning and urban design framework for the waterfront that activates linkages to the Town Centre;
- Undertake a Structure Planning exercise to identify additional redevelopment opportunities, such as the refurbishment of the Palace Arcade which is already identified, to provide expansion potential for other retailing categories such as clothing, department store merchandise and recreational retailing;
- Consider the development of a small bulky goods cluster to accommodate future growth in the Furniture, houseware & appliances and Garden & hardware goods retail categories, possibly involving the relocation of the Home Hardware commercial business outside of the Maclean Town Centre. Potential sites could include the Townsend commercial site or the Taloumbi Street site, along with consideration for redevelopment of other Business zone parcels south and north of the Town Centre. Bulky goods uses should be restructured in industrial zones;
- Encourage the expansion of the Townsend Centre by 300sqm. Such development would represent a sustainable and orderly development within the planned retail hierarchy. The tenancy mix for the development should be convenience based i.e. convenience store, newsagent, liquor store, bakery, butcher, take-away food etc;
- Allow for the development of a small convenience centre in Gulmarrad in the next 10 years time comprising a maximum of up to 500sqm of convenience retail floorspace. The rezoning could be undertaken immediately. This provides the opportunity for some flexibility to meet the every day shopping needs of this growing area commensurate with population growth. The tenancy mix for development should be convenience based i.e. convenience store, newsagent, liquor store, bakery, butcher, take-away food etc. The long-term requirements of this area would be reviewed in 3 year's time when development and growth trends become clearer;
- Consider the expansion of the Yamba shopping precincts in the medium and long-terms only following the consolidation of the Maclean Town Centre as the District Centre and as per the findings of the Yamba Retail/Commercial Study; and
- Allow for minor expansion of the Iluka retail sector through improved concentration of retail services and provision of convenience-based retailing.

8.4 Performance Strategy

The main driver of improved retail performance in Maclean is increasing retail business and trade through increases to patronage and spending. This means the development strategy outlined above is an integral component of achieving improved performance by ensuring Maclean provides improved retail facilities for its customer markets.

In addition to the development strategy, there is also the need for other strategic actions to improve the performance of the Maclean retail market. This relates to operating more efficiently, providing a more pleasant shopping experience, and ultimately doing better with the facilities and opportunities the Town Centre offers in an operational context.

Some of the key questions relating to the concept of operational performance include:

- How can we do better with what we already have?
- What factors impact retail performance?
- How could we improve retail performance?
- What issues do we need to address?

Discussions and consultation with Council, businesses and local market commentators identified the following performance strategy approaches:

1. Working in Partnership and Improving Communication Channels

To develop an improved working relationship between Clarence Valley Council and the Maclean retailing community, including improvements to communication channels, consultation processes and strategic planning. This would enable a more informed and coordinated planning and policy environment for both Council and key retailing stakeholders. This process should involve public consultation and communication regarding retail strategy planning. Other options involve undertaking 6-Monthly workshops between Council and private sector to discuss retail issues and Council's retail policy, undertaking regular retailer survey to gauge success of Council policy and assess market conditions from the retailer perspective and benchmark over time, and establishing a quarterly retail and economic brief for the Lower Clarence to ensure all stakeholders have access to the latest economic statistics for the region.

2. Encourage Landlord Reinvestment

To increase the levels of landlord reinvestment in the Maclean Town Centre to improve trading positions, shop fronts, fit outs and general amenity of retail premises. This would provide a superior retail shopping experience, enhanced character, improved competitiveness of retailers, improving the viability of tenants and landlords. This process could involve an education program for retailers to provide information and strategies on how to improve trading positions and performance, and the quality of retail floorspace. The process could also involve introducing retailer awards competition and combine with existing business awards to provide an incentive for retailers and landlords to improve the quality of retail floorspace.

3. Coordinated Trading Hours and Sunday Trading

To implement a coordinated policy for trading hours in the Maclean Town Centre which would provide far more consistency to the sector's operations and improve service provision and viability. The process could involve leadership by the Chamber of Commerce in the implementation of new local guidelines. Additionally, it is considered there should be coordinated trading hours on Sundays to increase retail trade from visitors and increase multi-shopping trips and family attraction.

4. Attract and Retain Quality Staff and Improve Customer Service Standards

To attract and retain quality retail staff to enhance the service provision in Maclean's retail sector. This process could involve the establishment of customer service awards to attract quality retail staff and ensuring retail and hospitality courses provided at local TAFE address training needs and encourage graduates to look locally for employment. This process could be implemented by the Chamber.

5. Review Signage Policy and Negotiate with RTA on the Highway

To introduce uniform and consistent signage to the Maclean Town Centre and strategic transport routes, including the realigned Pacific Highway. This would improve precinct definition for retailing areas and nodes, and increase potential trade from passing

highway trade and visitors to the region. The process could involve establishing coordinated retail precinct signage to ensure all consumers are provided with good signage and linkages are enhanced between retail precincts. Additionally, the process could involve negotiations with the Roads & Traffic Authority regarding signage on the realigned highway and interchange locations.

6. Undertake Appropriate Marketing of the Local Retail Sector

To develop a coordinated marketing program directed at consumers in the retail catchment, which positions Maclean as the leading retail shopping destination in the region relative to its District Centre role. This strategy would have positive benefits for market share within the MTA (reduction of leakage) and increased visitor attraction. The process could involve the establishment of a coordinated consumer marketing strategy and program for all Maclean retailers and establish Town Centre promotional activities. This process could be implemented by the Chamber, possibly in conjunction with Council. There could be consideration for a small business levy to fund the activities.

7. Build on the Historic Streetscape and Theming of Maclean

To encourage the conservation and reconstruction of historical buildings to their original forms. This process required maintaining strict design guidelines to improve the appearance and operation of future development, including relation to the historic context of the streetscape. The process could also include incentives to refurbish historic buildings and facades. This could be undertaken in conjunction with the landlord reinvestment strategy outlined above.

8. Address Parking and Access Issues in the Maclean Town Centre

To successfully address parking concerns expressed by consumers and staff in the Maclean Town Centre and to improve car parking signage and availability for both customers and staff on both a short-term and long-term basis, thereby easing parking and access concerns of these groups. This process involves Council undertaking parking audits to gauge utilization levels during peak and non-peak periods, establishing coordinated car parking signage, undertaking a parking strategy (particularly in consideration of new retail development), ensuring appropriate supply of onsite car parking spaces at new developments, monitoring/enforcement of the parking policy and developing a coordinated transport plan for Maclean.

9. Consider Techniques to Connect the Town Centre with the River

To integrate the Maclean Town Centre with the Clarence River to provide increased amenity for locals and visitors, and further increase the appeal of the Town Centre. This strategy would benefit market share and trading levels, including encouraging visitors and patrons to stay in the Town Centre for longer periods. The process could involve a master planning exercise along the waterfront both behind the existing strip and along the Boulevard and consideration for pedestrian links to hospitality in this area. The master plan could be part of a broader Structure Plan for the Maclean Town Centre. There is already a development proposal to revitalise the waterfront area linking/integrating to River Street and the main shopping area. There are further activity opportunities north along River Street and the promenade.

10. Consider Amount of Open Space and Public Amenity for Visitors

To increase the amount of open space and public amenity in the Town Centre which would improve the attractiveness of the Town Centre as a place to visit. The process requires consideration for an appropriate allocation of open space, either along the riverfront or in some other areas adjacent to the Town Centre.

11. Small Business Management and Education

To improve the business management skills of local small retailers to ensure more competitive performance and improved viability. This process could involve local training courses and education programs with the Chamber of Commerce.

8.5 Implementation Plan

8.5.1 Tenure and Zoning

Each of the shopping centre locations has differing tenure status and requirements to enable retail development. These issues relate mainly to site amalgamation and landowner cooperation and/or the ownership/lease of Council-owned land, airspace and subterranean space. The following details are provided for each location:

- Northern end of Town Centre: The development of this area requires the amalgamation of sites and consent from a number of landowners. Depending on design, the development may possibly require the purchase of parts of Clyde Street from Clarence Valley Council and subsequent rezoning. Apart from Clyde Street, the land is all business-zoned and requires no extension of zoning;
- Council car park in Town Centre: The development of the car park would require the ownership/lease of subterranean space from Council if providing underground car parking to meet the additional parking requirements of any development above. The development would also require the ownership/lease of airspace from Council if developing aboveground. The car park would need to be rezoned for business use;
- South of the Town Centre at Taloumbi Street: The development site is zoned for business uses. Development requires the cooperation of multiple landowners. The development of a larger retail facility requires rezoning, as per the current development proposal on the site;
- Townsend commercial centre: The development would be located on business-zoned land. The recommended scale of development could be accommodated within the business-zoned land. Any development beyond the recommended scale would require rezoning of adjacent properties from open space zones. The site is currently held in single private ownership; and
- Gulmarrad at corner of Sheehan Lane and Brooms Head Road: The development site is zoned for rural residential uses. Development of the site requires rezoning to business uses. Rezoning of this site is recommended for the immediate short-term to prepare for development. The application for rezoning may be part of a broader master plan/structure plan for the Gulmarrad growth area. The site is currently held in single private ownership.

There are sites to the north and south of the Town Centre, still within business zonings, that are considered suitable for bulky goods and larger format retailing, including the Taloumbi Street and the Townsend commercial centre sites. The waterfront represents a development opportunity, particularly for tourist retail development such as cafes, restaurants and take-aways. This development would require master planning, urban design and possible rezoning.

8.5.2 Development Assessment

The Lower Clarence Retail Strategy has been prepared to present Council with a sustainable framework for the future direction of retail development in the Lower Clarence over the next 10 years, with specific emphasis on the township of Maclean.

A key component of the study is the preparation of a strategic planning framework that can be used by Council to assess development applications. The strategic framework presents a systematic decision-making process through the issues of demand, need, location, centres and capacity.

Ultimately, Council can only assess development applications if, and when, received. This means that despite the Strategy existing, there is still a market situation to be played out between competing developers. Council's adoption of the Strategy signals their

endorsement of the strategic planning approach and framework as a tool to assess retail expansion proposals.

Given the need for additional development, if there was no private sector driven expansion of the market, then Council could consider using the endorsed framework to identify and promote development opportunities in partnership with the private sector.

It is recommended that proposals outside of the parameters of this strategy be accompanied by an economic impact assessment report prepared by an independent third party and reviewed by an independent third party.

8.5.3 Statutory Planning Provisions

As outlined above, Council can only ultimately assess development applications if, and when, received. This means that despite the existence of an adopted Strategy, there is still a market situation to be played out between competing developers. Council's adoption of the Strategy signals its endorsement of the strategic planning approach and framework as a tool to assess retail expansion proposals.

The Lower Clarence Retail Strategy demonstrates overriding demand and need for additional retail development in Maclean from the general public and business community. There are active proposals in the market from the private sector for retail development in Maclean, predominantly for a supermarket-anchored shopping centre. It is important the implementation of the Strategy by Council works in partnership with the private sector to deliver real and much needed development on-the-ground. The development application that first successfully addresses the strategic planning framework and site selection criteria is likely to have first mover advantage.

This introduces the issue of statutory planning provisions by Council on any development approval or consent. The inclusion of clauses with development consent would provide added security to Council and the community that development would ultimately occur/be delivered. These provisions could include sunrise or sunset clauses. For example, a sunrise clause could be that the rezoning of a particular site is only effective if something (such as development) doesn't occur elsewhere. The implementation of a sunrise clause would be complex in a statutory planning context. The implementation of a sunset clause could be more achievable and effective. An example could be that a development approval is ineffective if construction or operations do not occur within a specified time period. The NSW planning system provisions presently legislates that a development approval lapses after 5 years.

This strategy recommends the development of a new shopping centre within the Maclean Town Centre. However, if the market does not deliver this outcome for any reason, including any development constraints, within the next 3 years, then consideration for out-of-centre developments may be required in any review of the strategy at that time.

8.5.4 Structure Plan

Recent assessments by Land Partners indicated there was around 75,500sqm of Business zoned land within Maclean, of which occupied floor area amounted to 41,200sqm, or 55%, which suggests there remains further development potential within the Maclean business zone to accommodate future retail development needs.

Accommodating additional retail development within the Maclean Town Centre, or an expansion of the Maclean Town Centre through rezoning, is a complex planning, design and business process, particularly for a major development such as a shopping centre.

To plan for additional retail development in the Maclean Town Centre, including identifying redevelopment opportunities, it is recommended a Structure Plan be produced. Such a Plan would provide a framework for increasing land use efficiency within the existing zone, accommodating expanded retail development and responding to emerging retail trends and needs.

A Structure Plan would address the following issues for the long-term development of the Maclean Town Centre:

- Opportunities for redevelopment;
- Opportunities for development;
- Constraints to development;
- Hydraulics, engineering and flooding issues;
- Site amalgamation possibilities;
- Land use pattern and zoning;
- Urban design principles and concepts;
- Landscape design and architecture;
- Transport, access and parking strategies;
- Community and open space provisions; and
- Funding mechanisms.

8.6 Performance Measurement

A 10-year planning horizon has been adopted for the Lower Clarence Retail Strategy. The rationale for this planning timeframe has been outlined. It is recommended a review of the Lower Clarence Retail Strategy be undertaken in 3 years for the following reasons:

- Allow for the implementation of the Strategy;
- Measure changes in shopping patterns following structural market changes; and
- Provide necessary lead-time for longer-term planning.

As mentioned above, this strategy recommends the development of a new shopping centre within the Maclean Town Centre. However, if the market does not deliver this outcome for any reason, including any development constraints, within the next 3 years, then consideration for out-of-centre developments may be required in any review of the strategy at that time (i.e. 3 years).

Regular monitoring of the performance of the Lower Clarence Retail Strategy should include measurement of the following indicators:

- Retail development and investment;
- Consumer shopping trends and satisfaction levels;
- Retailer attitudes and identified issues;
- Retail market share and demand analysis;
- Stock of retail floorspace by segment and locations;
- Stock of zoned land for retail activity;
- Retail vacancy rates; and
- Rentals and trading performance figures.

In addition, other areas for monitoring should include:

- Consistency between town planning schemes and retail strategy;
- Progress in improving the operational function of strip development;
- Examination of industry trends and adaptation of the retail strategy; and
- Examination of the retail market's structure in relation to new growth areas.

Appendix A: Socio-Economic Tables

Table A.1: Demographic Analysis, 2001 Census

Demographic Indicator	MTA (Maclean Shire)	Non-Metro NSW	NSW
Age Distribution			
0-14 years	19.0%	21.8%	20.8%
15-24 years	7.9%	12.4%	13.4%
25-34 years	8.4%	12.0%	14.5%
35-44 years	12.8%	14.6%	15.3%
45-54 years	13.4%	13.6%	13.5%
55-64 years	14.7%	10.4%	9.4%
65+ years	23.9%	15.2%	13.1%
Average age (years)	43.4	38.4	36.0
Labour Market			
Full-time employment (% labour force)	47.0%	56.2%	61.0%
Part-time employment (% labour force)	36.8%	31.7%	29.0%
Total employment (% labour force)	86.4%	90.7%	92.8%
Unemployment rate (% labour force)	13.6%	9.3%	7.2%
Participation rate (% of population > 15 years)	41.8%	57.9%	62.2%
Household Type			
Couple family with children (% of household)	24.9%	34.8%	36.4%
Couple family without children (% of household)	37.3%	31.1%	26.5%
One parent family (% of household)	9.7%	12.9%	1.4%
Lone person household (% of household)	25.2%	38.8%	24.0%
Group household (% of household)	2.2%	7.5%	3.9%
Average household size (persons)	2.4	N/a	2.7
Household Finances			
% of households fully owning home	54.2%	44.4%	41.1%
% of households purchasing home	16.1%	22.7%	23.3%
% of households renting	22.7%	25.3%	27.5%
Average weekly household income	\$630	N/a	\$987
Average monthly housing loan repayment	\$770	\$854	\$1,151
Average weekly rent repayment	\$146	\$135	\$201
Qualifications			
% of persons with non-school qualification	29.9%	32.0%	36.2%
% of persons with Bachelor or higher	5.1%	7.5%	13.6%
% of persons with Certificate	19.3%	18.2%	16.4%
Occupation			
Managers & Administrators	10.1%	10.3%	9.4%
Professionals	13.8%	15.2%	19.1%
Associate Professionals	12.8%	11.2%	11.6%
Tradespersons & Related Workers	12.4%	13.6%	11.9%
Advanced Clerical & Service Wkrs	3.9%	3.4%	4.2%
Int Clerical, Sales, Service Wkrs	14.4%	15.1%	16.5%
Int Production & Transport Wkrs	10.5%	8.8%	7.9%
Elem Clerical, Sales, Service Wkrs	9.2%	9.9%	9.3%
Labourers & Related Workers	11.0%	10.5%	8.0%

Source: ABS 2001 Census, AECgroup

Table A.2: Changing Demographic Trends, 2001 Census

Demographic Indicator	MTA (Maclean Shire)			Non-Metropolitan NSW			New South Wales		
	1991	1996	2001	1991	1996	2001	1991	1996	2001
Age Distribution									
0-14 years	20.5%	19.8%	19.0%	23.6%	22.8%	21.8%	22.1%	21.4%	20.8%
15-24 years	9.5%	8.3%	7.9%	14.1%	13.1%	12.4%	15.3%	14.2%	13.4%
25-34 years	11.6%	9.6%	8.4%	14.9%	13.4%	12.0%	16.1%	15.3%	14.5%
35-44 years	12.5%	13.6%	12.8%	14.5%	15.0%	14.6%	15.0%	15.3%	15.3%
45-54 years	11.0%	11.8%	13.4%	10.7%	12.3%	13.6%	10.9%	12.5%	13.5%
55-64 years	14.3%	14.1%	14.7%	9.5%	9.3%	10.4%	8.7%	8.5%	9.4%
65+ years	20.7%	22.8%	23.9%	12.8%	14.2%	15.2%	11.9%	12.7%	13.1%
Average age (years)	40.6	40.6	43.4	35.3	36.8	38.4	34.3	35.2	36.0
Labour Market									
Full-time employment (% labour force)	60.7%	51.1%	47.0%	59.5%	58.4%	56.2%	62.2%	62.7%	61.0%
Part-time employment (% labour force)	14.6%	29.0%	36.8%	23.1%	28.1%	31.7%	22.1%	26.4%	29.0%
Total employment (% labour force)	80.1%	82.5%	86.4%	87.2%	88.7%	90.7%	88.8%	91.2%	92.8%
Unemployment rate (% labour force)	19.9%	17.5%	13.6%	12.8%	11.3%	9.3%	11.2%	8.8%	7.2%
Participation rate (% of population > 15 years)	44.2%	42.8%	41.8%	59.1%	57.6%	57.9%	62.4%	61.1%	62.2%
Household Type									
Couple family with children (% of persons)	52.5%	45.6%	41.9%	58.6%	53.2%	49.8%	58.8%	54.6%	52.9%
Couple family without children (% of persons)	27.6%	30.3%	31.5%	18.9%	20.7%	22.2%	17.0%	18.2%	19.1%
One parent family (% of persons)	7.2%	8.7%	10.5%	9.6%	10.7%	12.1%	9.5%	10.3%	11.2%
Lone person household (% of persons)	9.2%	10.8%	11.6%	8.0%	9.7%	10.7%	7.8%	9.1%	9.6%
Group household (% of persons)	1.6%	2.2%	2.2%	2.8%	3.0%	2.8%	3.9%	3.7%	3.5%
Average household size (persons)	N/a	N/a	2.4	58.6%	53.2%	49.8%	2.87	2.76	2.69
Household Finances									
% of households fully owning home	57.3%	55.8%	54.2%	46.0%	45.4%	44.4%	41.6%	42.5%	41.1%
% of households purchasing home	13.8%	14.8%	16.1%	21.8%	21.5%	22.7%	24.6%	22.5%	23.3%
% of households renting	21.7%	23.0%	22.7%	25.4%	26.6%	25.3%	27.1%	28.6%	27.5%
Average weekly household income	N/a	N/a	N/a	N/a	N/a	N/a	N/a	N/a	\$987
Average monthly housing loan repayment	\$538	\$676	\$770	\$574.2	\$768.6	\$854.8	N/a	N/a	\$1,151
Average weekly rent repayment	\$101	\$125	\$146	\$99.7	\$116.3	\$135.5	N/a	N/a	\$201

Demographic Indicator	MTA (Maclean Shire)			Non-Metropolitan NSW			New South Wales		
	1991	1996	2001	1991	1996	2001	1991	1996	2001
Qualifications									
% of persons with non-school qualification	23.4%	25.4%	29.9%	25.3%	27.9%	32.0%	27.6%	31.5%	36.2%
% of persons with Bachelor or higher	2.7%	3.7%	5.1%	4.2%	5.7%	7.5%	7.8%	10.9%	13.6%
% of persons with Certificate	15.4%	16.2%	19.3%	15.2%	15.2%	18.2%	14.6%	14.1%	16.4%
Occupation									
Managers & Administrators	12.6%	19.1%	10.1%	11.7%	10.7%	10.3%	9.7%	9.2%	9.4%
Professionals	11.3%	21.4%	13.8%	12.3%	14.5%	15.2%	15.1%	17.9%	19.1%
Associate Professionals	8.4%	20.2%	12.8%	7.4%	11.0%	11.2%	7.4%	11.1%	11.6%
Tradespersons & Related Workers	14.4%	23.1%	12.4%	15.0%	14.1%	13.6%	13.8%	12.7%	11.9%
Advanced Clerical & Service Wkrs	4.9%	7.2%	3.9%	5.3%	3.7%	3.4%	7.1%	4.8%	4.2%
Int Clerical, Sales, Service Wkrs	10.1%	21.4%	14.4%	10.3%	14.5%	15.1%	12.0%	16.2%	16.5%
Int Production & Transport Wkrs	12.4%	19.7%	10.5%	9.7%	9.6%	8.8%	8.5%	8.5%	7.9%
Elem Clerical, Sales, Service Wkrs	8.9%	14.3%	9.2%	10.9%	8.9%	9.9%	11.0%	8.8%	9.3%
Labourers & Related Workers	10.5%	17.0%	11.0%	11.1%	10.4%	10.5%	9.0%	8.2%	8.0%
Industry									
Agriculture, Forestry & Fishing	17.4%	13.3%	11.5%	10.1%	9.3%	8.8%	3.9%	3.6%	3.4%
Mining	0.2%	0.2%	0.1%	2.3%	2.1%	1.4%	1.0%	0.8%	0.5%
Manufacturing	7.7%	10.7%	8.9%	11.0%	11.1%	10.3%	12.8%	12.2%	11.5%
Electricity, Gas & Water Supply	1.2%	0.9%	0.5%	1.8%	1.3%	1.0%	1.4%	0.9%	0.7%
Construction	9.4%	7.9%	8.2%	6.4%	6.5%	6.9%	6.2%	6.4%	6.9%
Wholesale Trade	5.1%	4.7%	3.4%	4.7%	4.8%	4.6%	6.4%	6.3%	5.6%
Retail Trade	15.2%	15.6%	17.1%	13.8%	14.7%	16.0%	12.8%	13.3%	14.2%
Accom, Cafes & Restaurants	8.0%	8.2%	9.2%	5.3%	6.0%	6.0%	4.3%	5.0%	5.2%
Transport and Storage	4.2%	3.7%	3.8%	4.0%	3.9%	3.8%	4.9%	4.7%	4.6%
Communication Services	1.5%	1.5%	1.2%	1.4%	1.5%	1.3%	1.7%	2.1%	2.0%
Finance and Insurance	2.6%	2.1%	1.8%	2.9%	2.5%	2.2%	5.2%	4.8%	4.8%
Property and Business Services	5.2%	7.0%	7.1%	5.4%	6.9%	7.8%	8.2%	10.6%	12.2%
Government Admin & Defence	3.7%	4.1%	4.3%	5.1%	4.9%	4.6%	5.0%	4.3%	3.8%
Education	6.7%	7.5%	7.3%	6.9%	7.6%	7.7%	6.3%	6.8%	6.8%
Health and Community Services	8.1%	8.2%	10.2%	8.2%	9.9%	10.4%	8.1%	9.3%	9.4%
Cultural & Recreational Services	1.3%	1.0%	1.7%	1.3%	1.7%	1.8%	1.7%	2.3%	2.5%
Personal and Other Services	2.5%	3.3%	3.7%	3.0%	3.5%	3.6%	3.2%	3.6%	3.6%

Source: ABS 2001 Census, AECgroup

Table A.3: Demographic Trends for Catchment Areas, ABS Census of Population and Housing

Demographic Indicator	Central	East	North	West	South East	Total MTA
Age Distribution						
0-14 years	20.7%	17.2%	17.1%	27.2%	21.0%	19.0%
15-24 years	9.0%	7.8%	6.6%	6.3%	9.2%	7.9%
25-34 years	9.3%	8.2%	7.3%	10.3%	9.7%	8.4%
35-44 years	12.8%	12.0%	11.7%	14.0%	15.4%	12.8%
45-54 years	12.1%	12.9%	13.2%	14.4%	16.3%	13.4%
55-64 years	12.7%	15.3%	16.2%	12.9%	12.8%	14.7%
65+ years	23.4%	26.5%	27.9%	14.9%	15.5%	23.9%
Average age (years)	45.6	49.4	51.3	39.8	41.3	43.4
Labour Market						
Full-time employment (% labour force)	46.7%	46.6%	44.5%	48.7%	50.9%	47.0%
Part-time employment (% labour force)	37.6%	38.2%	36.8%	32.7%	34.1%	36.8%
Total employment (% labour force)	86.3%	87.6%	84.1%	83.3%	87.3%	86.4%
Unemployment rate (% labour force)	13.7%	12.4%	15.9%	16.7%	12.7%	13.6%
Participation rate (% of population > 15 years)	46.6%	42.3%	38.4%	45.8%	52.0%	41.8%
Household Type						
Couple family with children (% of household)	25.3%	21.2%	21.9%	34.0%	35.3%	24.9%
Couple family without children (% of household)	32.2%	38.4%	41.4%	37.3%	34.2%	37.3%
One parent family (% of household)	13.4%	9.9%	7.2%	9.8%	9.0%	9.7%
Lone person household (% of household)	25.9%	26.6%	27.0%	17.2%	19.9%	25.2%
Group household (% of household)	2.0%	3.0%	1.2%	1.8%	1.6%	2.2%
Average household size (persons)	2.4	2.3	2.3	2.7	2.6	2.4
Household Finances						
% of households fully owning home	49.2%	54.0%	63.4%	56.2%	58.8%	54.2%
% of households purchasing home	15.6%	15.1%	14.0%	27.4%	21.3%	16.1%
% of households renting	2.4%	3.6%	4.8%	2.7%	5.3%	22.7%
Average weekly household income	\$633.0	\$644.4	\$561.6	\$647.8	\$713.6	\$630.1
Average monthly housing loan repayment	\$707.7	\$912.4	\$820.6	\$711.3	\$796.1	\$770.0
Average weekly rent repayment	\$121.6	\$170.4	\$141.0	\$131.3	\$116.2	\$146.0
Qualifications						
% of persons with non-school qualification	26.5%	32.2%	28.1%	29.4%	30.7%	29.9%
% of persons with Bachelor or higher	3.7%	5.6%	4.2%	6.5%	5.6%	5.1%
% of persons with Certificate	18.2%	20.0%	19.2%	18.2%	19.0%	19.3%
Occupation						
Managers & Administrators	4.2%	8.4%	12.2%	15.1%	17.5%	10.1%
Professionals	13.2%	14.8%	12.4%	16.6%	14.1%	13.8%
Associate Professionals	11.1%	16.5%	12.5%	6.6%	8.5%	12.8%
Tradespersons & Related Workers	10.0%	14.1%	12.4%	10.7%	11.3%	12.4%
Advanced Clerical & Service Wkrs	4.4%	3.8%	4.2%	2.2%	2.8%	3.9%
Int Clerical, Sales, Service Wkrs	17.7%	14.6%	13.8%	11.4%	13.3%	14.4%
Int Production & Transport Wkrs	10.7%	7.7%	12.8%	14.8%	10.6%	10.5%
Elem Clerical, Sales, Service Wkrs	11.1%	9.0%	6.6%	10.3%	8.8%	9.2%
Labourers & Related Workers	15.3%	9.1%	11.7%	10.0%	11.4%	11.0%

Source: ABS 2001 Census, AECgroup



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