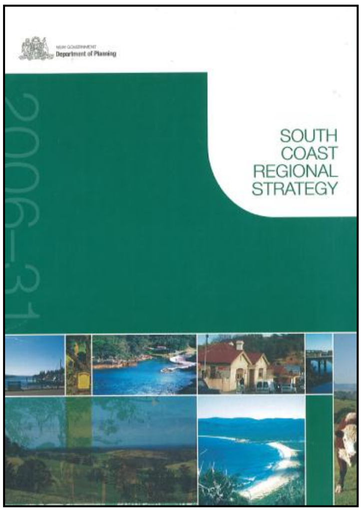
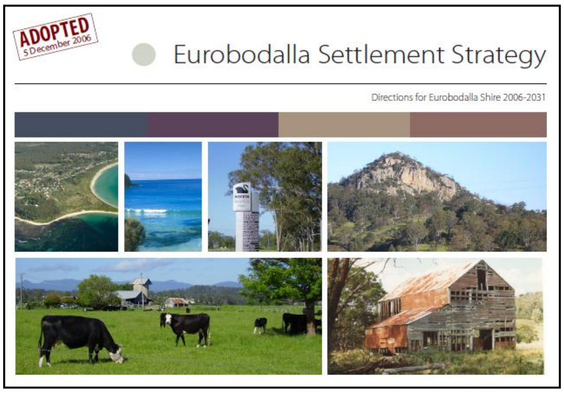
eurobodalla shire council

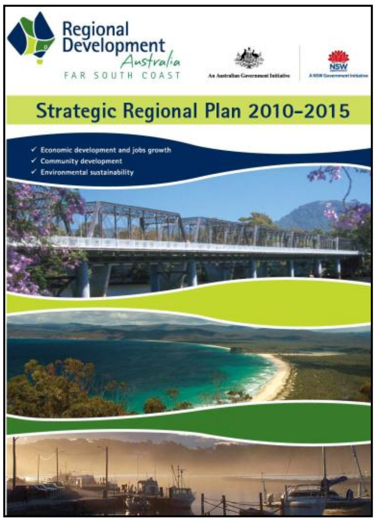
Economic Development and Employment Lands Strategy

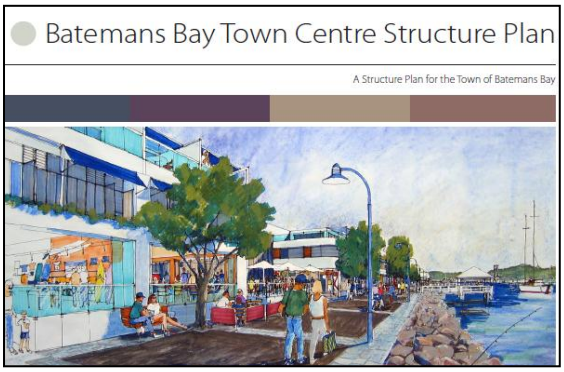
Appendix A

The Planning and Policy Framework









THE PLANNING AND POLICY FRAMEWORK

Chapter 1.1 of the Strategy provides a list of the key planning and policy documents that inform the development of the Strategy. Some discussion on each of the planning and policy documents is provided in this Appendix along with relevant details contained in those documents that underpin the findings of this Strategy.

State and Regional Planning

NSW State Plan, 2010 and State Infrastructure Strategy, 2008

First released in 2006 and most recently updated in March 2010, the NSW State Plan is the overarching policy direction document for the NSW State Government. All strategies and actions of Government Agencies should align with the State Plan and local Council planning strategies and instruments should also support the directions in the State Plan.

Chapter 2 of the State Plan *Supporting Business and Jobs* identifies the strategies to be implemented by Government to drive economic growth in the State. For regional NSW, the State Plan indicates that Regional Business Growth Plans are currently being developed. The Growth Plans will identify "specific local actions to drive investment and create jobs in rural and regional NSW". 12 Regional Business Growth Plans were developed by the Department of Industry and Innovation in 2008 and recently updated in August 2010. A new Regional Business Growth Plan for the Illawarra/South Coast Region identifies continued development of the Moruya airport and associated tourism development as an opportunity for the Eurobodalla Shire. In addition, there are a range of general matters about business attraction, marketing and support.

Other elements of the State Plan are also relevant to economic development, in particular the chapters on *Better Transport and Liveable Cities* and *Clever State*. With regards to transport, the State Plan indicates that Transport Strategies for the regions, including one for the South Coast Region will be developed. It is now understood that the transport Strategies will be developed as part of the next review of the Regional Strategies. Reference is also made to upgrades to the major highways across NSW, including the Princes Highway. The Clever State chapter relates to improving education and skills training across NSW. The State Infrastructure Strategy identifies the following infrastructure investments in the Eurobodalla Shire over the next 10 years:

- Batemans Bay Ambulance Station;
- Batemans Bay Sewerage Upgrade: Stage 2;
- Rosedale/Guerilla Bay Sewerage Upgrade;
- Eurobodalla Water Supply: Stage 4a Trunk Main;
- Princes Highway: Dignams Creek Realignment; and
- Princes Highway: Victoria Creek realignment.

South Coast Regional Strategy, 2007 and Settlement Guidelines, 2007

The South Coast Regional Strategy is a 25 year land-use blueprint covering the Shoalhaven, Eurobodalla and Bega Valley local government areas. The Strategy targets 6,200 new jobs in Eurobodalla Shire by 2031, with a focus on the finance, administration, business services, health and aged care and tourism industries. Job growth will be supported by the identification of sufficient employment generating lands close to the major towns. In particular, the Batemans Bay Marina and the Moruya airport are to be protected as significant potential employment generating lands. Batemans Bay is identified in the Strategy as a Major Regional Centre for the South Coast.

The Strategy is based on population projections that suggest an additional 15,500 people will live in the Eurobodalla Shire by 2031, the majority of which will be concentrated in and around Batemans Bay, Moruya and Narooma. Growth in Batemans Bay is identified as being primarily of town centre type development, with mixed use and higher density living to strengthen its role as the major residential, commercial and tourism centre for the middle part of the region.

The Settlement Planning Guidelines for the South Coast Regional Strategy provide a set of settlement planning principles to guide decisions on the location and nature of new urban development, to protect the existing character of places and promote sustainability. A set of employment lands principles were developed as a part of the South Coast Regional Strategy process. A total of 59 principles are contained in the guidelines, covering the following areas:

- General Principles
- Heavy Industrial
- Light Industrial
- Business or Technology Park
- Commercial and Retail
- Tourism, Entertainment and Hospitality
- Bulky Goods Retailing
- Home-based Business
- Agriculture/Rural Lands
- Transport and Logistics
- Education/Health and Government
- Spot Rezonings

Regional Development Australia Far South Coast Strategic Regional Plan 2010-2015

The Strategic Regional Plan for the Far South Coast Region of New South Wales, comprising the Shoalhaven, Eurobodalla and Bega Valley Council areas, provides a vision for the economic future of the region, with a range of actions covering five key priority areas. Actions of each of the key priority areas include the following:

Broaden our economic base

- Encourage local government to maintain the current net supply of zoned employment lands;
- Consideration may be given to support for zoning changes that address concerns regarding tenure, location, constraints and specific opportunities;
- Liaise with local government with regard to the monitoring of employment lands, including their appropriate location and zoning; and
- Investigate the identification of appropriate sites for major tourism developments, and specific 'tourism precincts'. These sites may focus on nature tourism, art, food and wine production, cultural and heritage tourism, visiting friends and relatives market, touring market and short breaks market.

Build infrastructure capacity

- Make representation to government authorities wherever possible to ensure the regions infrastructure needs are recognised and given priority;
- Liaise with the community to identify transport priorities;
- Support the expansion of the Moruya Airport; and
- Investigate clean energy options and, where possible, renewable energy alternatives.

Preserve and nurture our natural environment

- Balance ongoing environmental safeguards against the need for recreational, urban and employment development;
- Investigate measurable outcomes for environmental safeguards; and

- Encourage use of conservation measures such as solar hot water, rainwater tanks, grey water re-usage.

Improve our quality of life
- Sustainability and safety principles, e.g. walkable neighbourhoods, compact centres, water and energy efficiency and transit-oriented development will be encouraged; and
- Support and encourage a balanced planning process that considers a healthy, holistic approach to the life cycle.

Engage our community
- Pursue priority inclusion in the National Broadband Network rollout as a matter of urgency; and
- Work with government and community groups to foster social inclusion and promote a sustainable economy.

The Plan states that the major focus for the region will be "*infrastructure led economic development and job creation, the integration of high speed broadband into the area, improved transport and sustainable and affordable clean energy all the while increasing regional competitiveness through innovation; education and training; attractive and affordable lifestyle, including access to first class health and aged care facilities; and retaining and caring for our unique natural environment*".

Local Planning

Eurobodalla Retail Policy and Guidelines, 2006

In 2006, Council commissioned the Eurobodalla Retail Policy and Guidelines document (Wakefield, 2006) to establish the centres hierarchy that was subsequently adopted in the Eurobodalla Settlement Strategy. The Wakefield report also developed a number of planning principles for centre development and identified those centres that will have a demand for additional floorspace by 2026. The key planning principles from the Wakefield Report are:

- Town centres should have priority for any new large quantum floorspace;
- Within neighbourhood centres, supermarket floorspace should generally not exceed 30-50% of the total retail floorspace;
- New supermarket floorspace should complement, rather than replace, existing specialty shops;
- Bulky goods retail with high turnover per unit area, should ideally locate within or adjacent to town centres. Where a bulky goods centre is proposed (i.e. a "homemaker centre") other retail businesses should not be permitted to co-locate, to ensure town centre viability is not threatened;
- Integrated housing into centres can assist with their viability across a wider range of hours, as well as ensuring better surveillance of public space;
- Commercial centres should remain compact in form;
- New commercially zoned land should be contiguous with existing neighbourhood centres, rather than establish new stand alone centres;
- The floorspace of neighbourhood centres should generally not exceed the floorspace of the largest supermarket operator in the main town centre; and
- Neighbourhood centres need good urban design and a good mix of uses. Active frontages are important, rather than big boxes and blank walls.

Specifically, the report identified that development of vacant sites at Sunshine Bay and Broulee is at odds with these key planning principles and should not proceed without adequate impact assessment of the implications on the existing retail hierarchy.

Table 1 demonstrates that most of the smaller neighbourhood centres have sufficient zoned land to cater for retail and commercial demand up to 2026. Where the estimated future demand is shown in the negative, full development of the available commercially zoned land would result in excessive floorspace to meet the local demand.

While Batemans Bay was not the focus of the subject study, it clearly is the highest order retail and commercial centre in the Shire and will continue to grow to satisfy growing demand.

Table 1: Commercial Centre Vacancies and Floorspace Demand

Centre	Vacant Shops (2006)	Vacant Land (2006)	Estimated Floorspace Demand (2026)
Batehaven	3	Nil	+2534m²
Batemans Bay	Not stated	Not stated	+18,261m²
Bodalla	3	4 lots	+24m²
Broulee	Nil	4ha	-1,059m²
Dalmeny	Nil	8125m²	-1459m²
Durras	Nil	Nil	-189m²
Kianga	1	2250m²	-653m²
Lilli Pilli	Nil	Nil	N/A
Long Beach	Nil	Nil	-1915m²
Maloney's Beach	Nil	Nil	-74m²
Malua Bay	1	Not stated	-1373m²
Moruya	Not stated	Not stated	+1532m²
Moruya Heads	Nil	Nil	-906m²
Mogo	Nil	Nil	+1729m²
Mossy Point	Nil	2 lots	-252m²
Narooma	13	Minimal	-10,087m²
Rosedale	Nil	Nil	-1909m²
Sunshine Bay	Nil	8680m²	-2,309m²
Surf Beach	Nil	Nil	-221m²
Surfside	1	5 lots	-75m²
Tomakin	Nil	Nil	-843m²
Tuross Head	1	10.14ha	+74m²

Eurobodalla Settlement Strategy, 2006

The Eurobodalla Settlement Strategy, adopted by Council in 2006, provides directions for the development of the Shire to the year 2031. The Settlement Strategy is influenced by the following factors:

- High population growth;
- Need for housing choice;
- Need to protect coastal ecosystems and scenic values;
- Need for employment opportunities;
- Lack of alternative transport modes; and
- Infrastructure provision to service growth.

The core of the Settlement Strategy is to contain new development and accommodate population growth within compact well-planned settlements. A number of the objectives of the Strategy relate specifically to employment land, as follows:

- Strengthen the role of the major centres of Batemans Bay, Moruya and Narooma and reinforce the existing commercial hierarchy to ensure that neighbourhoods are centred around services and civic facilities;
- Restrict commercial development outside of settlement centres, except where land has been identified for such uses and servicing plans are in place;
- Provide opportunities for greater diversity in retail and commercial business by supporting active and vibrant town and village centres protecting the viability and safety of main streets; and
- Facilitate community economic development and protect existing commerce and industry.

The Settlement Strategy adopts a centres hierarchy for the Eurobodalla Shire and identifies the preferred future level in the hierarchy for each centre, as shown in Table 2. As highlighted in the table, a number of centres are planned to step up the hierarchy at some stage in the future. This will correspond with increases in local population catchments around those centres and an increase in retail floorspace to satisfy the additional demand generated. Other centres in the hierarchy will also grow in size in the future, however such growth is unlikely to result in a change to their classification in the centres hierarchy.

Specifically, expansion of the business zoning of the Batehaven, Dalmeny, Malua Bay and Narooma centres was identified along with the zoning of new centres at Long Beach and Tomakin. Some of the new commercial zones will cover land already developed for commercial purposes, however approximately 7,500m² of new commercially zoned land that is currently undeveloped was identified. A reduction of the commercial zoning at Broulee and Tuross Head was also identified.

The ESS also identifies some potential new employment lands for further investigation, as identified below:

- Expansion of North Moruya Industrial Estate
- Expansion of Dalmeny Industrial Estate

Both areas contain some environmental constraints and will need new infrastructure for development, reducing the potential yield for industrial development. The Settlement Strategy defines a set of criteria to assist in determining the growth and location of future industry, being:

- Encouragement of local economic and value added industry;
- Greater emphasis on ‘green’ industry;
- Encourage industry sympathetic to the ‘nature coast’ resource base;
- Focus on attracting new technology businesses;
- Identify expansion areas that minimise environmental impact and utilise existing infrastructure capacities;
- The land is located to best serve existing and future whole of Shire demographics; and
- The land displays existing topographical and landscape qualities that require minimal structural disturbance to accommodate development.

In addition, the Settlement Strategy identifies the potential for mixed use activities, comprising light industry, bulky goods warehousing, retail and other uses on the Surf Beach industrial land that currently contains Council’s sewerage and waste treatment facilities.

Tourism was also addressed in the Settlement Strategy as an important economic development industry. The Strategy noted the rise in rural tourism and the pressure to convert tourism establishments near the coast to permanent residential accommodation as issues to address. The directions in the Strategy therefore promote appropriate rural tourism opportunities and support the retention of existing tourist accommodation.

Table 2: Eurobodalla Centre Hierarchy, Current and Future

Centre	Estimated floorspace (2006)	Current Level in hierarchy	Preferred level in hierarchy	Preferred future level in hierarchy
Batehaven	4,315m²	Large Urban Neighbourhood	Large Urban Neighbourhood	Large Urban Neighbourhood
Batemans Bay	65,308m²	Regional	Regional	Regional
Bodalla	400m²	Tourist Neighbourhood	Tourist Neighbourhood / Convenience	Tourist Neighbourhood / Convenience
Broulee	1,090m²	Hamlet Neighbourhood	Hamlet Neighbourhood	Medium Village Neighbourhood
Central Tilba	2,600m²	Tourist Neighbourhood	Tourist Neighbourhood	Tourist Neighbourhood
Dalmeny	1,405m²	Hamlet Neighbourhood	Hamlet Neighbourhood	Medium Village Neighbourhood
Durras	150m²	General Store	General Store	Convenience Shops
Kianga	200m²	n/a cafes only	General Store	Convenience Shops
Lilli Pilli	350m²	n/a cafes only	General Store	General Store
Long Beach	Nil	n/a	Convenience	Small Urban Neighbourhood
Maloney’s Beach	250m²	General Store	General Store	General Store
Malua Bay	1,500m²	Medium Village Neighbourhood	Medium Village Neighbourhood	Medium Village Neighbourhood
Mogo	4,200m²	Tourist Neighbourhood	Tourist Neighbourhood / Medium Village Neighbourhood	Tourist Neighbourhood / Medium Village Neighbourhood
Moruya	27,000m²	District	District	District
Moruya Heads	30m²	General Store	General Store	Convenience Shops
Mossy Point	200m²	General Store	General Store	General Store
Narooma	15,400m²	District	District	District
Nelligen	150m²	General Store	General Store	General Store
Rosedale	Nil	Nil	General Store	Medium Urban Neighbourhood
Sunshine Bay	Nil	Nil	Small Urban Neighbourhood	Small Urban Neighbourhood
Surf Beach	1,080m²	Small Urban Neighbourhood	Small Urban Neighbourhood	Small Urban Neighbourhood
Surf Beach industrial zone	Nil	Bulky Goods Retail	Bulky Goods Retail	Bulky Goods Retail
Surfside	755m²	Convenience Shops	Convenience Shops	Convenience Shops
Tomakin	100m²	General Store	General Store	Convenience Shops
Tuross Head	2,620m²	Large Village Neighbourhood	Large Village Neighbourhood	Large Village Neighbourhood

Draft Eurobodalla Local Environmental Plan

In 2011, Council prepared and placed on public exhibition an amended Draft Eurobodalla Local Environmental Plan (ELEP) in the form of the Standard Instrument for LEPs. The Draft ELEP delivers upon many of the directions and actions outlined in the Eurobodalla Settlement Strategy in relation to employment development.

Batemans Bay Town Centre Structure Plan, 2008

Batemans Bay is the main business centre for the Eurobodalla Shire and will continue to be the focus for increased commercial, tourism and retail development over the next 25 years. The Town Centre Structure Plan will direct and manage this increased growth and activity and ensure that it occurs in such a way that reflects the aspirations of the people who live, work and visit the town centre. In order to manage this growth and change, the Plan sets out objectives, strategies and actions to be achieved in future development and improvements within the town centre. The town centre is defined in the Structure Plan as all land zoned commercial and industrial and residential (tourism) close to the commercial centre of the town.

With regard to economic and employment growth, the Structure Plan makes the following points:

- The Town Centre currently supports in excess of 65 000m2 of active retail/ commercial floor space. However this generous floorspace offer does struggle to accommodate the seasonal influx of tourists and visitors during peak holiday demand periods;
- While busy during business hours, the Town Centre can be very quiet and somewhat deserted in the evenings and non-traditional trading hours. There are opportunities to introduce more varied and longer operational activities such as restaurants, bars and cultural spaces, which would increase activity levels and a sense of vibrancy and safety within the centre;
- The town centre has not accommodated the usual level of in-town residential population that traditionally provide heightened levels of passive security. This may also explain, to some extent, the lack of out-of-hours entertainment options and mainly mono-retail purpose. Economic assessment of future development within the centre, would suggest a greater capacity for mixed-use – including higher densities of residential accommodation - directly benefiting diversity and imbue heightened levels of activity;
- The strong presence of community, civic and educational facilities in and around the Town Centre makes a significant contribution to ensuring Batemans Bay functions as a well-rounded activity centre, building on the strong retail offer. Further opportunities to strengthen the social and community role of the town should be explored and promoted;
- There is sufficient development land and floor space available to adequately absorb future growth within the existing urban footprint;
- Opportunities exist, both within existing redevelopment and new development to absorb a diverse mix of uses, which will activate a more intense centre;
- The growing demographics will create opportunities for a more diverse consumer/provider mix and the consequent demand for retail space;
- A growing town centre economy with greater numbers of participating businesses will activate a demand for service and support businesses within the region;
- The distance to adjoining regional centres is relatively close to still permit daily access for higher-order consumer products. Therefore, marketing of businesses and products availability within the Batemans Bay centre need to counter the attraction of other centres;
- The current land market is not yet robust enough to support a higher level of development and redevelopment. This activity may come at a much more measured pace thus resulting in some outcomes taking longer timeframes to achieve;

- The town centre is not well serviced by public transport, the population is very car dependent, which in turn infers mobility and access barriers to higher order goods for those without individual vehicle choice; and
- Many allotments within the town centre are held as individual owner titling or strata titling. Until the development market is stronger, this will tend to inhibit redevelopment of existing under-developed sites.

In 2006, an audit of floorspace in the Batemans Bay Town Centre was undertaken, with the results shown in Table 3.

Table 3: Batemans Bay Floorspace Breakdown

Floor space use	Current status (m2)	% of Total
Retail	65308	67.43
Commercial (office space)	15515	16.02
Institutional	2115	2.18
Residential	11371	11.74
Vacant	2548	2.63
Total	96857	100.0

With regard to industrial land in the Batemans Bay Town Centre, the Structure Plan identifies the Hughes, Russell and Gregory Street area as the “Centre Support Precinct”, and the Cranbrook Road, Sharon Road and Kylie Crescent area as the “Industrial Enterprise Precinct”.

The Centre Support Precinct is identified as a historic light industrial area that is undergoing some conversion to retail uses, particularly uses that require a large floor plate and highway exposure. The Structure Plan supports the continued conversion of this land to large floor plate retail uses that support and compliment the main commercial centre of the town. However, light and service industries, particularly high-tech, value adding industries, are also supported in this precinct.

The Industrial Enterprise Precinct is also identified as being under some conversion to large floor plate retail uses. However, this area remains the most significant location for manufacturing and warehousing in Batemans Bay. This area is now land-locked for future ‘greenfield’ expansion, with both environmental and infrastructure barriers that will contain the industrial area to its present footprint. Growth can still be accommodated through natural attrition of existing uses and intensification and better management of existing sites. There are a number of sites that are under-utilised and it is possible that some existing developments could be re-structured to yield higher floor areas, additional units for new businesses and a greater number of jobs.

Greater Batemans Bay Structure Plan, 2007

The Greater Batemans Bay area stretches along the northern coast of Eurobodalla from Maloney’s Beach in the north to Malua Bay in the south. This area is predominantly residential with a number of small neighbourhood centres providing local convenience needs. In the hierarchy of centres referred to above, Batehaven and Malua Bay are the most important neighbourhood centres in the Greater Batemans Bay area. However, it is important to note that employment opportunities are scattered throughout the area, corresponding to the scattering of tourism developments along the coastline and education and community facilities within residential communities. Future major employment lands are planned at Surf Beach on land currently containing Council’s sewerage treatment and waste facilities.

In relation to the growth and support of neighbourhood centres in the Greater Batemans Bay area, the Structure Plan states the following:

- Within a 400m radius around the core of neighbourhood centres, there are sites suitable for aged care and affordable housing developments. However, sites with a high level of amenity, such as those with prime views are unlikely to be developed for this purpose;
- Improved attention to the public realm of the neighbourhood centres would assist the growth of the centres;
- Land to the north of Edward Street in the Batehaven centre should be rezoned for business purposes;
- Some additional supermarket and specialty shop floor space at the Malua Bay centre would be of advantage to the centre. Rezoning of land in Kuppa Avenue for business purposes may be appropriate;
- Development of vacant land at Sunshine Bay for significant retail floorspace may have a detrimental impact on the Batehaven centre;
- Minor expansion within the existing Surf Beach neighbourhood centre would be appropriate; and
- Vacant lots exist in the Surfside neighbourhood centre, however there is limited development potential within the immediate catchment that would make additional retail development feasible in this area. Increased densities near The Vista may generate additional demand for retail facilities.

In relation to the Surf Beach industrial land, the Structure Plan supports the Eurobodalla Settlement Strategy by identifying parts of the site for a future bulky goods retailing centre and other uses.

Moruya Structure Plan, 2007

The Moruya Structure Plan applies to the Moruya township, the North Moruya Industrial Estate and Moruya Heads. The Moruya township is the historic and administrative centre of Eurobodalla, a traditional inland coastal town with a wide mix of land uses. The North Moruya Industrial Estate is the principal location for larger industrial developments in the Shire. Moruya Heads is a stretch of residential development along the mouth of the Moruya River, with a small neighbourhood centre. In addition to the above, close to Moruya township is the Moruya Airport which has some potential for additional airport related development as an additional economic development and job growth opportunity. Further discussion on the Moruya Airport is provided below.

In relation to economic development and employment lands in and around Moruya, the Structure Plan identifies the following issues:

- Expansion of the North Moruya Industrial Estate to the west;
- There is an adequate supply of commercial zoned land in the Moruya township;
- New commercial development in Moruya will need to give consideration to the heritage and scenic values of the town, the traditional town centre function and amenity (in particular of the main street), and flooding impacts;
- Encourage mixed use developments in the town centre, in particular shop-top housing, residential flats and tourist accommodation;
- Land along Shore Street (east) should be nominated as a tourist precinct; and
- Topographical constraints and proximity to rural residential land prevent any expansion of the Yarragee Industrial Estate, located on the south western edge of town.

Narooma Plan, 2005

While not a Structure Plan in the same sense as the Batemans Bay and Moruya Structure Plans, the Narooma Plan provides a blending of issues, directions and development controls for Narooma. The Narooma Plan has now been repealed by the Narooma Township DCP, however the non development control elements of the Plan remain of interest in the development of this Strategy. Some of the principle elements of the Narooma Plan relating to economic development and employment lands are:

- Reinforce the importance of the main street as a primary characteristic of South Coast Coastal Towns;
- Recognise the importance of the Main Street as a primary tourist attraction;
- Encourage the expansion of marine related uses; commercial and recreational;
- Rationalise car parking;
- Encourage redevelopment of lots fronting the Princes Highway along The Flat;
- The three industrial compartments making up the southern district account for a total area of 30.94ha and have expansion capacity (land already zoned industrial) of Bodalla (0.82ha), Dalmeny (3.77ha) and Narooma (4.2ha), which more than satisfies the 20 year projected demand of 6.8ha;
- Existing industrial land is limited and environmentally constrained. The Glasshouse Rocks Road estate will not be extended due to environmental constraints and edge of settlement principles;
- Opportunity to expand the Industrial precinct at Dalmeny (approximately 2ha) to accommodate growth in this sector and encourage new business;
- Encourage existing industrial/bulky goods outlets within the town centre to relocate to new industrial land in Dalmeny and free up prime commercial land within the town centre.

Moruya Airport Concept Plan, 2006

In 2006, Eurobodalla Shire Council adopted a concept plan for redevelopment of the Moruya Airport. The Concept Plan contains several distinct components, as follows:

- Terminal Building Reserve, including administration offices, car rental desk, coffee shop etc;
- Fuel Storage Reserve, including administrative office space;
- Residential Airpark Reserve, consisting of residential accommodation associated with airport hangars;
- Aviation Business Reserve, for specific purpose aviation related businesses;
- Airport Related Commercial, for airport related commercial developments that may provide a complementary service to the airport operations;
- Aviation Tourism, for various aviation related tourism opportunities; and
- General Aviation Hangar Reserve.

Commencement of the airport redevelopment is (in part) pending the finalisation of the Draft Eurobodalla Local Environmental Plan which will allow delivery of the concept plan through appropriate zoning of the land. However, as the concept plan is now five years old, a review will be required in order to ensure the components of the concept plan remain relevant having regard to current aviation industry issues and trends and to seek further feedback from the community on the future of the Moruya Airport.

Eurobodalla Economic Development Strategy, 2009

Eurobodalla Shire Council adopted an Economic Development Strategy in 2009. The objectives and actions of the Economic Development Strategy are shown in Table 4. The Strategy identified the following issues for the future:

- Ensuring that job and business growth at least keeps pace with population growth (and preferably continues to exceed population growth);
- Employment lands modelling suggests a need for 3,714 new jobs to 2026 (plus a likely 1,000 more through to 2031);
- Facilitating this level of employment growth through expansion of existing businesses and emergence of new businesses;
- Ensuring sufficient land is available to accommodate business expansion and new employment; and
- Fostering growth in 'export' industries, such as high value health services, IT knowledge, niche manufacturing and renewable energy.

Table 4: Economic Development Strategy, 2009 Objectives and Actions

Objectives/Goals	Actions
1. Present Eurobodalla as an attractive place to invest and do business	• Re-launch vibrant branding for ESC ED function, adopting the new ESC branding • Produce information / promotional pack for potential investors, business people • Revamp ED component of Website with new look and information – emphasising 'business relevant' information. Promote ED website internally and externally • Update and revamp the Eurobodalla Investment Profile • Leverage our tourism promotion activities to present Eurobodalla as a desirable place to live, work and set-up business • Facilitate the commercial re-development of Moruya Airport
2. Strengthen partnerships between council and the business community	• Play an active role in supporting the Chambers of Commerce. • Establish an appropriate forum to discuss and explore economic development matters. • Continue to foster close relationship with other govt bodies and organisations involved in Regional Development. (ie. AusIndustry, RDA, Austrade, DSRD State Govt., other Councils, etc) • Ensure information contained in ESC business database is current • Continue to network regionally within the South East region and the Southern Council Group • Develop a commercial awareness of staff to create a culture reflecting Council's business directive.
3. Increase employment opportunities in the Shire	• Focus on building employment opportunities in addition to those seasonally generated • Support employment generating development applications • Continue to offer traineeships, cadetships and apprenticeships to promote youth employment • Actively guide and support the education sector in addressing current and future demands for skills. • Look for new industry opportunities creating 'new' jobs, especially in businesses selling to customers outside the Shire
4. Help grow our local businesses	• Investigate Economic Gardening Project • Continue the flow of relevant business information • Provision of business information, predominantly through ED website, regular e-news, media • Skills and labour market planning, particularly for youth and mature workers • Industrial/commercial land provision. Assist with DAs, liaise between business and council

Draft Community Strategic Plan, 2011

During 2010 and 2011, Council undertook extensive community consultations in the development of a Draft Community Strategic Plan for the Eurobodalla. The Draft Plan identifies the key messages to emerge from the community engagement process, which included "*employment and a broad based economy is essential*".

The Draft Plan, which was placed on public exhibition during July and August 2011, included "*productive communities*" as one of four focus areas for the Strategy, with the following objective: "*the economy is competitive and our people skilled*".

The three strategies in the Draft Plan to achieve this objective are:

- Help our local economy grow;
- Develop new industries and market places; and
- Improve access to education and training.

eurobodalla shire council

Economic Development and Employment Lands Strategy

Appendix B

Economic Trends and Drivers

New Technology

The Ageing Population

Business Clusters

Growth in New Industries

Tourism Trends

ECONOMIC TRENDS AND DRIVERS

Chapter 1.4 of the Strategy provides a description of the key drivers of economic development and employment growth in the Eurobodalla. This Appendix explores in more detail the strategic influences on the Eurobodalla economy. The discussion in this Appendix is based on the Strategic Influences Report undertaken by consulting firm Strategic Economic Solution as a part of the package of investigations that inform this Strategy. The key drivers are:

National and State Drivers

- Energy and carbon price movements and policies
- Demand and competition from emerging Asian economies
- Proliferation of new communication technologies
- Demographic changes – particularly growth and ageing

Local Drivers

- Retail trends
- Domestic tourism trends
- Construction industry trends
- Agricultural industry trends
- Professional services and Information, Media and Telecommunications industry trends
- Environmental values and carrying capacity
- Business locational trends

National and State Drivers

Energy and carbon price movements and policies

The Commonwealth Government is currently planning for significant economic reform to reduce the reliance of the nation's economy on carbon. The introduction of a price on carbon (a carbon tax) will increase business costs, however the exact nature of the financial impact on businesses will be dependent upon the size of the tax, the extent to which businesses are exempt from the tax or the level of compensation that will be provided to offset the tax.

Energy costs are also rising due to other factors, such as the upgrading of electricity infrastructure, fuel supply and price movements and the flow on impacts of changes to renewable energy policies.

Eurobodalla businesses will need to predict and plan for any business cost changes that may result from the introduction of a carbon price or from other changes to energy policy and continued infrastructure upgrades. Governments at all levels and business organisations can assist by disseminating information and providing tools to assist businesses in the transition towards a clean energy economy.

Demand and competition from emerging Asian economies

The most populous and fastest growing economies in the world are in Asia, most notably India and China. The rapid industrialisation of these two countries alone is driving significant growth in export industries in Australia, particularly in raw materials such as minerals and iron ore. However, due to cheaper labour costs in Asian countries, manufacturing and other labour intensive industries prefer to locate in those countries rather than in Australia where the costs of production are significantly higher.

Businesses in Eurobodalla that can develop products or services that capitalise on the unique qualities of the local region in order to generate an export market and/or compete with businesses in the emerging economies will likely prosper in the increasingly global market.

Proliferation of new communications technologies

The roll out of the National Broadband Network (NBN) will be a significant driver of advances in communications and other technology industries and will be a catalyst for greater levels of innovation across all industries. The use of social media is another example of how new communications technologies can assist businesses to market themselves and increase their customer base.

Businesses in Eurobodalla need to identify and take advantage of the opportunities that new technologies can offer, particularly with regard to business marketing. The opportunities for technological advances in existing businesses and new business opportunities resulting from the National Broadband Network should also be being explored in advance of its introduction to this region.

Demographic changes – particularly growth and ageing

Demographic changes can have significant consequences on the prosperity of a place. Rapid growth can increase opportunities but if infrastructure is not in place to support the growth there can be detrimental consequences. Alternatively slow or negative growth can reduce economic opportunities but also can protect the natural and visual qualities of the place. Ageing of the population can lead to a highly dependent community where there are insufficient people of working age to support existing and future business opportunities. A vibrant and sustainable community needs a diverse population in terms of age and other characteristics (eg. gender, cultural background, income, etc).

Eurobodalla's population is already significantly older than the national and state averages and the ageing phenomenon is forecast to continue. The Strategic Influences report states that "*it is clear that the trend of ageing is firmly embedded in the Shire's demographics, and the extent to which ageing is a problem or a benefit will depend very much on how businesses and communities react*".

The older population must be seen as an asset in terms of their economic contribution as employees and customers. If the trend of younger persons leaving the Shire for education and employment opportunities continues or increases, older workers will become even more important to Eurobodalla businesses as potential staff. Flexibility in business operations to take advantage of older workers who wish to work part-time or job-share will need to be considered. Additional training of older persons to update their skills may also be required. In terms of older people as customers and consumers, it will be essential for all local businesses to better understand, work with and service the ageing population, to ensure sales are not lost as a result of any actual or perceived neglect of older persons as customers.

Medium and higher density housing in and adjacent to town centres will be critical to accommodating an ageing population. As people grow older and household sizes reduce, many will choose to 'downsize' from their current homes into independent unit-style accommodation or seniors housing. New housing developments of this kind must be accessible for older persons and people with a disability. This form of development in and adjacent to town centres will be competing with pressures for growth in commercial development. Mixed-use development solutions may be able to meet both demands.

Local Drivers

Retail trends

Retail trends have changed over time, from outdoor markets to main streets to shopping arcades to shopping centres and most recently in some places to 'super-centres'. In recent years there has been a move towards greater competition in the retail market, particularly in relation to supermarkets, with large retail players in the United States and other countries looking at major expansion plans in Australia. Other recent trends in the retail sector include the increasing diversity of products offered within or in conjunction with supermarkets (such as liquor, hardware, fuel, etc) and the growth of large warehouse stores for the Do-It-Yourself (DIY) market.

The Strategic Influences Report states that the State Government is expecting the pattern of consumer demand to change over the next decade "*reflecting new consumer preferences and an extended range of products, such as a greater focus on environmentally friendly products, DIY and a preference for local suppliers*".

The retail industry will continue to grow in the Eurobodalla in response to population growth. Further, changes in the retail industry are likely to reflect national retailing trends. The Strategic Influences Report states that "*the challenge for the Shire is to ensure that the retail offer keeps pace with a volatile consumer market*". This suggests there is a potential gap between industry led growth and the expectations and demands of the local community.

At a national level, retailing growth will be driven by the major domestic players, Woolworths and Wesfarmers (Coles), and other 'big box' retail players. At a local level, demands for retail services will be driven to some degree by a desire for independent retail alternatives, to maintain a local identity and image, in part to support and strengthen tourism.

In order to meet the challenge of ensuring the retail offer meets the demands of both industry and the community, the planning system will need to facilitate a range of retail developments in the right locations. This can be achieved through the reinforcement of a strong centres hierarchy, the facilitation of retail clusters and the use of local character statements. The land use planning system must accommodate both growth and change in the supermarket sector as well as protection of and growth in the traditional main-street retail offer. There must be a balance between reinforcing the retail hierarchy, through the facilitation of redevelopment opportunities within existing centres, while providing additional land for new retail developments in appropriate locations.

Growth in the bulky goods retail sector also requires a balance of town centre and new centre approaches. However, any new 'bulky goods centre' should not accommodate other smaller retail businesses in order to protect the viability of existing retail centres.

Domestic tourism trends

Domestic tourism refers to Australians travelling and holidaying in Australia. The domestic tourism market has fallen across Australia over the last decade, with reduced overnight stays and reduced expenditure. One growing segment of the market is the 'grey nomads' (holidaying older persons, usually by long road trips in caravans or campervans). A growing trend in domestic tourism has been in the cultural and heritage market, where holiday-makers are seeking out cultural events, festivals, and choosing specifically to visit places of heritage significance.

The tourism industry is a mainstay of the Eurobodalla economy, and like the retail sector, is volatile and changing. The Strategic Influences Report states that "*the Shire is in the midst of a transition from its foundation as a low-cost family holiday destination to a more diverse and mature tourism offer*". It will be important for tourism related functions and services to undergo continuous improvement in order to keep their appeal fresh, relevant, competitive, aspiring and inspirational for visitors. Of particular importance will be the development of events and activities that provide tourists with an 'experience'.

Eurobodalla already enjoys many of the attributes that both overseas and domestic tourists enjoy, such as nature, beach experiences, seafood, culture and heritage. Throughout the year, a myriad of events and festivals are held to celebrate these assets, provide tourists with an 'experience' and contribute to marketing the region as a destination.

Opportunities for Eurobodalla to expand upon its existing assets will include:

- Development of tourist operations and accommodation in rural areas (eg. farm stay experiences);
- Development of more tourist experiences based on the Shire's natural assets;
- Development of adventure sport events and infrastructure;
- Expanding the food and wine industries; and
- Increasing activities and experiences for the 'grey nomads'.

When tourist developments, particularly tourist accommodation developments, reach the end of their financial life, there is often pressure for redevelopment and/or conversion of the development for permanent residential purposes. This potential loss of tourism accommodation needs to be countered by opportunities for growth in new tourism accommodation developments. Alternatively, incentives for maintaining tourist accommodation can be considered, such as assistance to tourist operators to upgrade existing premises to extend their financial viability.

Tourism operations are developed in the location that best suits the type of tourism experience being offered. It is therefore not a simple matter of designating certain lands for tourism activities, but maintaining flexibility in the planning system for tourism operations to locate in the right place. This can be achieved through making appropriate tourism operations and accommodations permissible across a wide range of land use zones.

Construction industry trends

The construction industry is important to the Eurobodalla Shire in terms of supporting population growth and responding to changing demographic trends. The Eurobodalla construction industry is now well established after a decade or so of growth, but will depend on a sustainable level of continued population growth in order to remain strong. A boom in construction was experienced at the height of the 'sea-change' phenomenon in 2002-04. Given approximately one-quarter of all businesses in Eurobodalla were in the construction industry in 2010, the importance of this industry to the Eurobodalla economy remains strong.

However, the 2006 census identified the main industry exporting workers from Eurobodalla was the construction industry. This does not necessarily suggest a declining trend in construction activity in Eurobodalla, but rather acknowledges that there will be peaks and troughs in demand for work in Eurobodalla and that construction workers are highly mobile. It also demonstrates the underlying strength of the construction industry that can withstand peaks and troughs in local activity. The Strategic Influences Report states that "*analysis suggests that as construction comes off the sea-change boom it will have a continuing underlying strength estimated at around $215M per year*".

The industrial lands in Eurobodalla are dominated by construction-related industries, and those retail and wholesale businesses that support the construction industry. Greater diversity of land use in the industrial areas will support greater resilience in industrial employment opportunities, particularly for workers in the construction industry in periods of low growth. Non-construction industries however are experiencing either slow growth or decline in Eurobodalla and more broadly across Australia. One means of actively encouraging industrial enterprise is for Council to undertake any necessary site works or infrastructure improvements to make land suitable for development or redevelopment. A further way to encourage industrial enterprise is to facilitate the growth of industrial clusters, based on Eurobodalla's strategic advantages, and attract new businesses that support such clusters.

Agricultural industry trends

The number of agriculture, forestry and fishing businesses in Eurobodalla decreased slightly over the last decade, yet the industry remains an important component of the local economy. The amount of land under agricultural production remained stable between 1997 and 2004, with some fluctuations in cropping and grazing, which have been significantly impacted by recent drought conditions. The 2009 State of the Environment Report identified that there had been no change to land use patterns between 2004 and 2008.

The Strategic Influences Report states that "*the Shire's stable production mix and environmental assets mean that it is in a good position to value-add to its existing agricultural industries and take advantage of growing export demand for organic food and 'non-traditional' processed agricultural products*". The combination of agricultural enterprise within a natural setting also provides opportunities for agricultural-based tourism developments to support the economic growth of the industry, such as through the expansion of food and wine tasting and farm-stay accommodation experiences.

The growing trend towards agricultural self-containment as food security issues become more critical will drive the expansion and diversification of agricultural industry and the growth of community gardening. As with other industries, innovation and adaption will be crucial requirements for growth in the agricultural sector in the coming decades.

Professional Services and Information, Media and Telecommunications Industry Trends

The Australian and NSW Governments have both forecast the strongest growth in employment over the next five to ten years will be in the higher income generating jobs, particularly in the professional services category. Eurobodalla has already experienced some growth in professional services over the last decade, with 7.7% of all businesses in 2010 in this category. Strong growth in the information, media and telecommunications sector is also forecast over the next decade, driven by advances in technology and capacity. Eurobodalla has experienced modest growth in this sector, but the proportion of businesses in this category remains low at 1.5%.

Increasing the skill levels of the workforce will facilitate both growth in professional services industries and increasing the average income level in Eurobodalla, as it is projected by the Department of Education, Employment and Workforce Relations that 45.8% of all new jobs in Australia will be based on higher education qualifications. This compares to a 17.8% share of new jobs in low skilled employment. A targeted and coordinated approach to growth in this sector, linked to growth in local higher education institutions, will be required to ensure Eurobodalla captures its share of growth in higher skilled and paid jobs.

Professional services are more flexible in their locational needs compared to retail businesses. For those services that need good accessibility, a town centre location will be critical. However, many professional service businesses, particularly in their establishment phase, will prefer an edge-of-centre location and may convert existing dwellings to business premises. Many others will be more decentralised and will establish as home businesses throughout the Shire. It will be important to ensure that edge of centre 'start-up' business locations are not lost as a result of significant commercial redevelopment.

Business locational trends

With advances in telecommunications and changes in personal values, business owners now have a greater choice in making their decisions about where to locate their business. Operating a wide variety of businesses from home and over the internet is now much easier and many businesses are choosing this path to avoid the costs of operating a business from a commercial premises. However there are some limits within the planning system to the operation of certain businesses from home. Greater flexibility in the planning system to facilitate the expansion of home business opportunities should be considered, having regard to the need to protect the amenity of residential areas.

The clustering of related businesses or industries is a useful strategy that can result in benefits to individual businesses simply from their co-location with other businesses. Co-location provides for ease of access for customers through shared parking or access arrangements, it provides a one-stop-shop convenience for customers and it provides opportunities for business operators to collectively market themselves and share resources. Shopping centres are an obvious example of a retail cluster. The location of private medical facilities, chemists and other related businesses near hospitals is known as a health cluster. Home-maker centres are a relatively new form of a retail cluster, focused on a range of goods for furnishing houses.

However, the concept of clustering is not limited to co-location, and indeed co-location is not necessarily a pre-requisite for certain related businesses to achieve the benefits of clustering. In addition to co-location, businesses that work together for common goals can achieve greater outcomes. Similarly, businesses that need not be located together can still work together, such as through mutual referral agreements or by the development of complimentary services. Tourist businesses spread across an area commonly use this clustering approach.

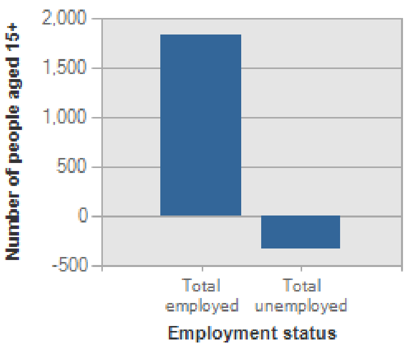
Potential employment lands should be located where business and industry can take advantage of the opportunity to form economic clusters. New businesses will seek to locate in close proximity to related businesses, particularly those that provide services to or will use the products of the new business. Such symbiotic business relationships can reduce costs associated with the transport of people and goods between businesses and can assist in productive industry collaboration.

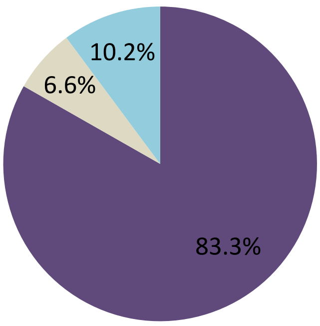
Where new employment lands are not located in close proximity to existing employment lands, it will be necessary to identify, through land use zoning, lot size controls and other planning measures, the intended land use mix for the land. For example, a new industrial employment area may be zoned and characterised as a heavy industrial area, a light or service industrial area or a rural industrial area. Similarly, a new commercial employment area may be characterised as a major town centre, a neighbourhood centre or a mixed use area. All of these classifications of employment lands can direct prospective business owners to the right site for their business.

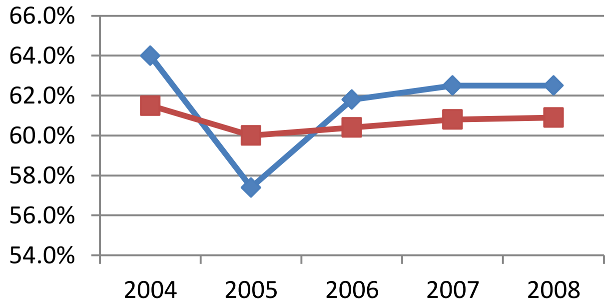
Economic Development and Employment Lands Strategy

Appendix C

Eurobodalla's Economic Profile







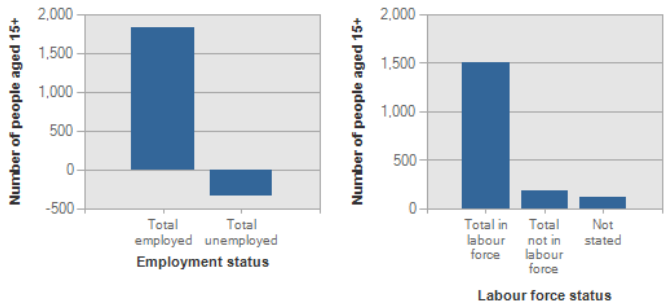
EUROBODALLA'S ECONOMIC PROFILE

Chapter 2.1 of the Strategy provides a summary of the key statistics that define Eurobodalla's economy, particularly the workforce and businesses. This Appendix provides a full economic profile of Eurobodalla, addressing a wide range of statistics and issues that have informed the development of this Strategy.

Eurobodalla Workforce

In 2010, there were 16,397 people in the labour force in Eurobodalla, representing 43.4% of the total population. This is quite low compared to the NSW average of 51.3%. The labour force consists of the total number of people either in work or looking for work. Of those in the labour force, 91.7% were employed in some form. Since 2006, the labour force has decreased from 47.1% of the total population, an indication of the ageing of the population. The changes in unemployment and labour force between 2001 and 2006, as shown in Figure 1, demonstrates that over 1800 more people were employed during that period and there were almost 350 fewer unemployed people. Between 2006 and 2010, it is estimated that a further 2845 people were employed in Eurobodalla.

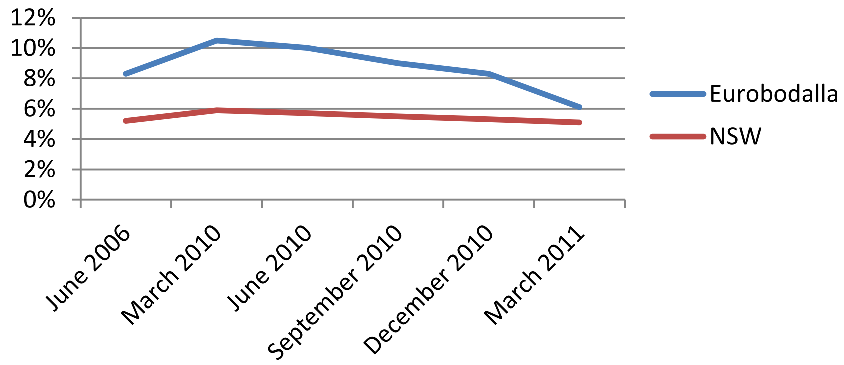
Figure 1: Change in Unemployment and Labour Force, Eurobodalla, 2001 to 2006



Source: Australian Bureau of Statistics, 2006 and 2001 Census of Population and Housing (Enumerated)

The proportion of unemployed persons in the Eurobodalla has fluctuated over the last five years from 8.3% in June 2006 to a high of 10.4% in March 2010, falling again to 8.3% by December 2010. The unemployment rate is continuing to fall, reaching 6.1% in March 2011. The unemployment rate from June 2006 to March 2011, compared to the NSW average is shown in Figure 2. Eurobodalla's unemployment rate has consistently been higher than the NSW average, but in recent times has been reducing at a faster rate than the NSW trend.

Figure 2: Change in Unemployment Rate, Eurobodalla and NSW, 2006 to 2011



Compared to the whole of NSW, there is a smaller proportion of the population in the labour force and a higher unemployment rate in the Eurobodalla Shire. According to the 2005 Economic and Employment Opportunities Study by Diana Gibbs and Partners, in 2005 in Eurobodalla there were 707 people outside of the labour force for every 1000 persons of working age. Data from the 2006 census shows that the dependency rate had decreased to 678 and Council's population forecasts for 2010 estimated the dependency rate in 2010 had further decreased to 669. Notwithstanding a decreasing trend, Eurobodalla's dependency rate remains significantly larger than the regional average of 590.

There are currently approximately 2.53 persons of working age to support each person aged over 65. The Intergenerational Report released by the Federal Government in January 2010 states that across Australia there are currently 5 persons of working age to support each person aged over 65.

Council's Population Forecast website provides estimates of population characteristics to 2031, showing that in Eurobodalla the number of persons of working age to support those aged over 65 will decrease to 2 by 2031. Across Australia, this is not predicted to be reached until well after 2050, with the Intergenerational Report predicting it will be 2.7 by 2050. The dependency rate is projected to change from a declining trend to an increasing trend, to 777 persons outside of the labour force for every 1000 persons of working age by 2031.

Eurobodalla Workforce – Working Hours

Analysis of the 2006 Census data on the working hours of the Eurobodalla workforce undertaken by Campbell Page in their State of our Community Report (2011) shows that working hours vary across occupation groups, as shown in Figure 3. Managers work on average 42.7 hours per week while sales workers and labourers work on average just over 26 hours per week.

Part-time work is a significant component of employment in Eurobodalla. In 2006, 16% of all workers work less than 16 hours per week, compared to 30% of all workers who work between 35 and 40 hours per week. In total, 40% of Eurobodalla workers were employed on a part time basis, compared to 29% across NSW, while 52% were employed on a full time basis, compared to 65% across NSW.

Figure 3: Average Working Hours by Occupation Group, Eurobodalla, 2006

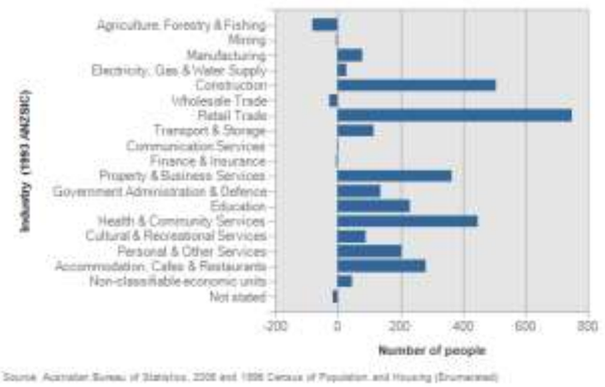
Eurobodalla Jobs

Employment by Industry

The main industries in which the Eurobodalla workforce were employed in 2006 were retail, health and community services, construction and accommodation and food services, as shown in Figure 4. The majority of these main industries are related to the tourism industry and services to the existing population. An analysis of the jobs in the Shire in 2006 shows the industries listed below employed over 6,400 people or almost 53% of the resident workforce. These industries also experienced the highest employment growth between 1996 and 2006:

- Retail Trade(2466 persons or 20.2%);
- Health and Community Services (1458 persons or 12%);
- Construction (1261 persons or 10.3%); and
- Accommodation, Cafes and Restaurants (1219 persons or 10%).

Figure 4: Change in Employment by Industry, Eurobodalla, 1996 to 2006

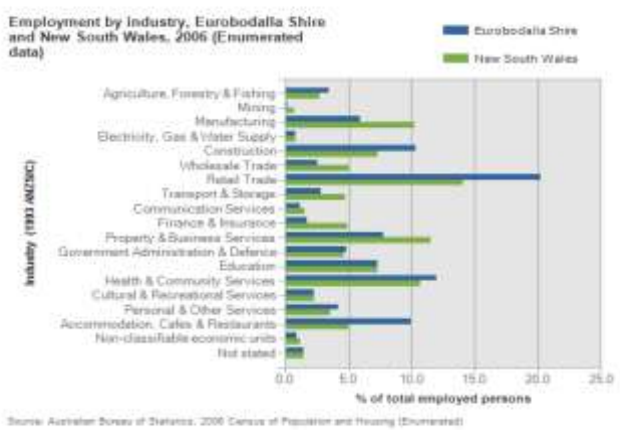


As shown in Figure 5, the largest changes in the jobs held by the resident population in Eurobodalla Shire between 1996 and 2006 were for those employed in:

- Retail Trade (+747 persons);
- Construction (+504 persons);
- Health and Community services (+448 persons);and
- Property and Business Services (+366 persons).

In the same period, primary industries (agriculture, forestry, and fishing) experienced a minor decline in job numbers.

Figure 5: Employment by Industry, Eurobodalla and NSW, 2006



Employment by Occupation

The main occupations of Eurobodalla workers in 2006 were clerical, sales and service workers, professionals and associate professionals, with a high number of tradespersons as well, as shown in Figure 6. An analysis of the jobs in the Shire in 2006 shows the occupations listed below employed over 7,200 people or almost 60% of the resident workforce:

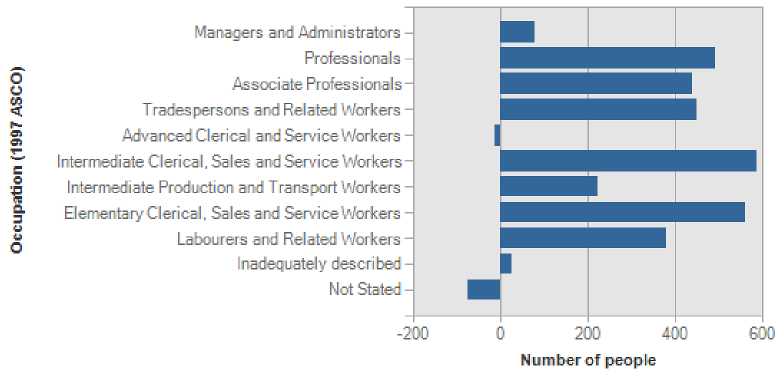
- Intermediate Clerical, Sales and Service Workers (1,986 persons or 16.3%);
- Professionals (1,783 persons or 14.6%);
- Associate Professionals (1,763 persons or 14.5%); and
- Tradespersons and related workers (1,719 persons or 14.1%).

Figure 6: Employment by Occupation, Eurobodalla and NSW, 2006

As shown in Figure 7, the largest changes in the jobs held by the resident population in Eurobodalla Shire between 1996 and 2006 were for those in the following occupations:

- Intermediate Clerical, Sales and Service Workers (+586 persons);
- Elementary Clerical, Sales and Service Workers (+561 persons);
- Professionals (+492 persons);and
- Tradespersons and Related Workers (+450 persons).

Figure 7: Change in Employment by Occupation, Eurobodalla, 1996 to 2006

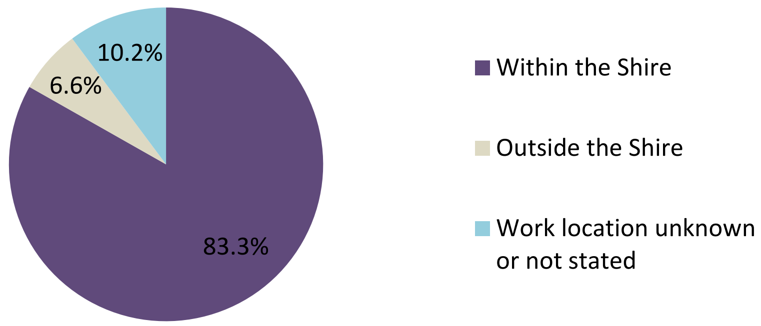


Source: Australian Bureau of Statistics, 2006 and 1996 Census of Population and Housing (Enumerated)

A key factor in understanding the availability of employment in a local area is the level at which local residents work in their local area. As shown in Figure 8, 83.3% of the Eurobodalla resident workforce worked in Eurobodalla in 2006. This is a relatively high level of employment self-containment.

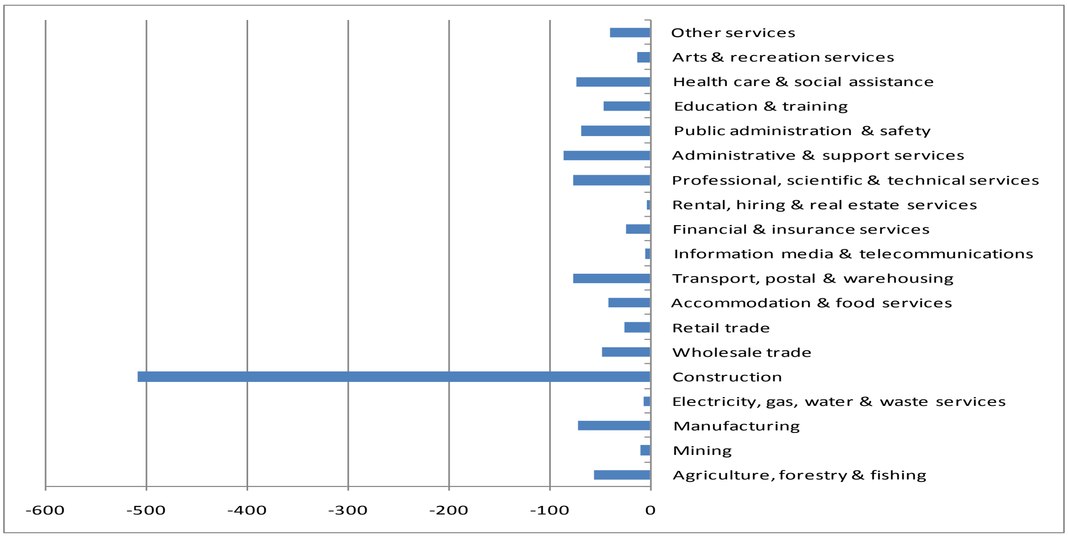
However, 6.6% of the resident workforce leave Eurobodalla for work, either because suitable jobs are not available within Eurobodalla or through demand for employment elsewhere.

Figure 8: Employment Location of Residents of Eurobodalla, 2006



It is also important to understand whether Eurobodalla imports people from outside the Shire to work. Figures from the 2006 census show that 95.2% of workers in Eurobodalla are residents of Eurobodalla while only 4.2% of workers in Eurobodalla live outside of the Shire. Having regard to the relatively high unemployment rate, it is possible that the skills required for those jobs taken by non-residents were not available in Eurobodalla at the time. However, given two of Eurobodalla's main centres are close to the northern and southern boundaries of the Shire, the employment catchments for these centres extend to the adjoining local government areas. Figure 9 identifies that the main industry in which residents leave the Shire for work is construction, however across all industries, more people travel outside of the Shire to work than into the Shire.

Figure 9: Net Import(+)/Export(-) of Jobs by Industry, Eurobodalla, 2006



Source: ABS Census, 2006

According to the 2006 Census, the three highest local government areas outside of Eurobodalla where residents work are as follows:

- Unincorporated ACT (1.4%)
- Bega Valley (0.8%)
- Shoalhaven (0.5%)

The main local government areas where non-resident workers come from in 2006 are:

- Shoalhaven (1.9%)
- Bega Valley (1.4%)

Eurobodalla Businesses

In terms of the number of businesses, a count of all registered businesses in Eurobodalla was undertaken in late 2010 using Australian Business Registry (ABR) data. The ABR data defines the nature of all existing businesses in Eurobodalla, including business type and location. The ABR identified a total of 3237 businesses operating in Eurobodalla in 2010, an increase of 315 businesses since 2001. This represents an average increase of 32 businesses per year. However, the ABR data for business entries and exits shows that an average of 336 new businesses start every year, while an average of 304 businesses close every year. This rate of business start-up and closure is consistent with the national average of approximately 15% annually. Table 1 shows the change in number of registered businesses in Eurobodalla over the last decade.

Table 1: Change in number of registered businesses, 2001-2010

Industry Division	Gain, 2001-2010	Loss, 2001-2010	Net Change, 2001-2010	No. businesses in 2010
Accommodation and Food Services	291	218	73	232
Administrative and Support Services	168	142	26	114
Agriculture, Forestry and Fishing	186	203	-17	242
Arts and Recreation Services	34	35	-1	27
Construction	861	813	48	811
Education and Training	33	37	-4	42
Electricity, Gas, Water and Waste Services	7	5	2	11
Financial and Insurance Services	60	58	2	63
Health Care and Social Assistance	94	75	19	118
Information Media and Telecommunications	43	34	9	47
Manufacturing	226	242	-16	271
Mining	9	7	2	9
Other Services	166	170	-4	147
Professional, Scientific and Technical Services	241	210	31	249
Public Administration and Safety	22	19	3	12
Rental, Hiring and Real Estate Services	225	185	40	249
Retail Trade	316	270	46	286
Transport, Postal and Warehousing	213	194	19	184
Wholesale Trade	74	62	12	66
Unable to obtain industry details	87	62	25	57
Grand Total	**3,356**	**3,041**	**315**	**3237**

Source: Australian Business Registry, 2011

The key businesses that increased or decreased in number between 2001 and 2010 are identified below:

Business categories that increased in number (2001-2010)

- Accommodation and Food Services (+73)
- Construction (+48)
- Retail Trade (+46)
- Rental, Hiring and Real Estate Services (+40),

Business categories that decreased in number (2001-2010)

- Agriculture, Forestry and Fishing (-17)
- Manufacturing (-16)
- Education and Training (-4)

From the ABR data, the industry classification of every business in Eurobodalla can be identified. In 2010, 25% of all Eurobodalla businesses were classified in the construction industry. The next most common industries were:

- Retail (8.8%)
- Manufacturing (8.4%)
- Professional, Scientific and Technical Services (7.7%)
- Rental, Hiring and Real Estate (7.7%)
- Agriculture, Forestry and Fishing (7.5%)
- Accommodation and Food Services (7.2%)

The industry breakdown of all businesses in Eurobodalla is shown in Figure 10.

Figure 10: All business by Industry, Eurobodalla Shire, 2010

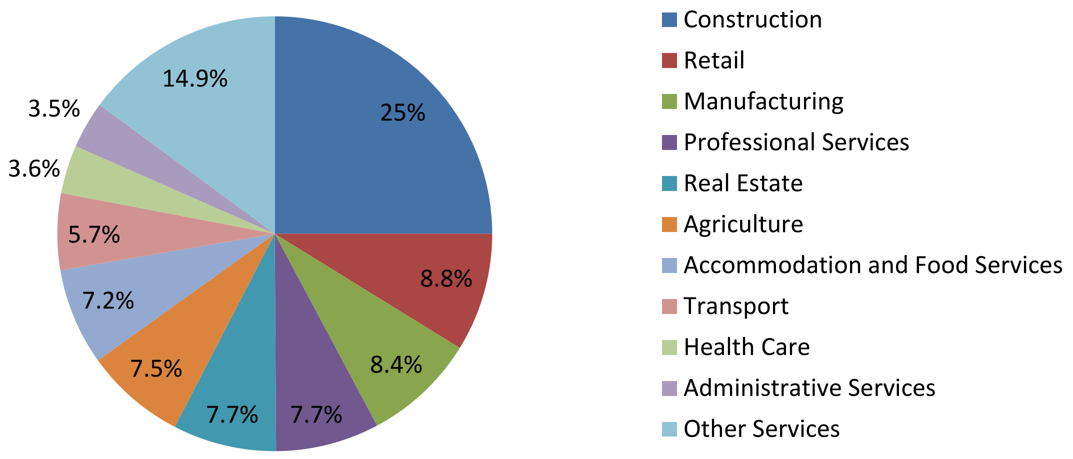


Table 2 is from the Australian Bureau of Statistics counts of Australian businesses and breaks down the number of businesses in the Eurobodalla Shire by their number of employees.

Table 2: Counts of Businesses in Eurobodalla Shire, 2004 to 2007

Business size	**2004**	**2005**	**2006**	**2007**	**2009**	**Change 2004 to 2009**
Non-employing businesses	1917	1812	1764	1698	1699	**-218**
Employing businesses: 1 to 4 employees	690	777	822	813	760	**+70**
Employing businesses: 5 or more employees	417	462	462	453	488	**+71**
Total businesses	**3024**	**3051**	**3048**	**2 964**	**2947**	**-77**

Source: ABS, Counts of Australian Businesses, 2004-2009

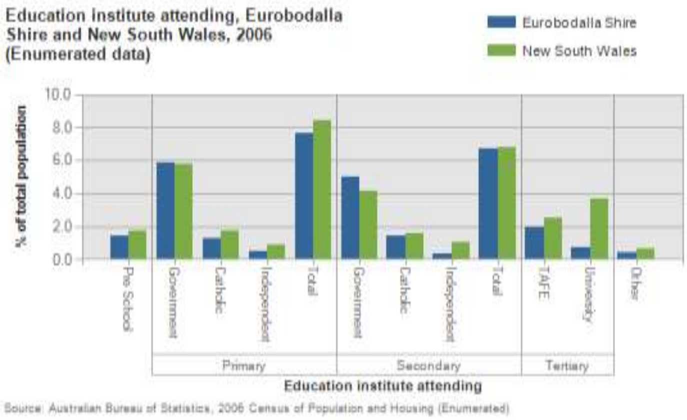
Non-employing businesses saw a marked decline over the period, with the loss of over 200 businesses. This loss was partly countered by an additional 70 businesses employing 1 to 4 people and an additional 71 businesses employing more than 5 people. It is possible that this change indicates the growth of some businesses from non-employing to employing.

Eurobodalla Education

Attendance at Education

In 2006, 18.5% of the Eurobodalla population indicated on their Census form that they were attending some form of education institution. The types of education institutions being attended are shown in Figure 11. Compared to New South Wales, Eurobodalla Shire has a similar proportion of persons attending primary school, a similar proportion attending secondary school, and a smaller proportion engaged in tertiary level education.

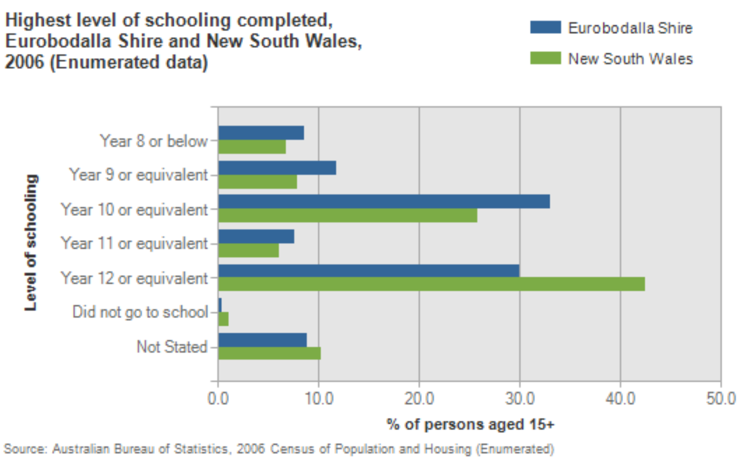
Figure 11: Education institute attending, Eurobodalla and NSW, 2006



Level of Schooling Completed

In 2006, 29.9% of Eurobodalla residents indicated that they had completed high school to Year 12, and 33% had completed to Year 10. Compared to New South Wales, a smaller proportion of Eurobodalla residents had completed high school to Year 12, with a correspondingly higher proportion of school completion at earlier grades, as shown in Figure 12.

Figure 12: Highest level of schooling completed, Eurobodalla and NSW, 2006



Highest Education Qualifications Achieved

In 2006, 51% of the Eurobodalla adult population held educational qualifications, and 49% had no qualifications. Compared to the NSW average, Eurobodalla had a smaller proportion of people holding formal qualifications (Bachelor or higher degree; Advanced Diploma or Diploma; or Vocational qualifications) and a larger proportion of people with no formal qualifications, as shown in Figure 13. However, since the establishment of a University of Wollongong Campus at Batemans Bay and growth in the courses offered at local TAFE centres, there has recently been a marked increase in both tertiary qualification achieved and enrolments.

From 1996 to 2006, more than 2,100 additional persons held a vocational qualification and almost 1,300 additional persons held a Bachelor or higher degree, as shown in Figure 14. Considering the total population growth over this time was approximately 4,200 persons, the growth in educational qualifications is encouraging.

Figure 13: Highest qualification achieved, Eurobodalla and NSW, 2006

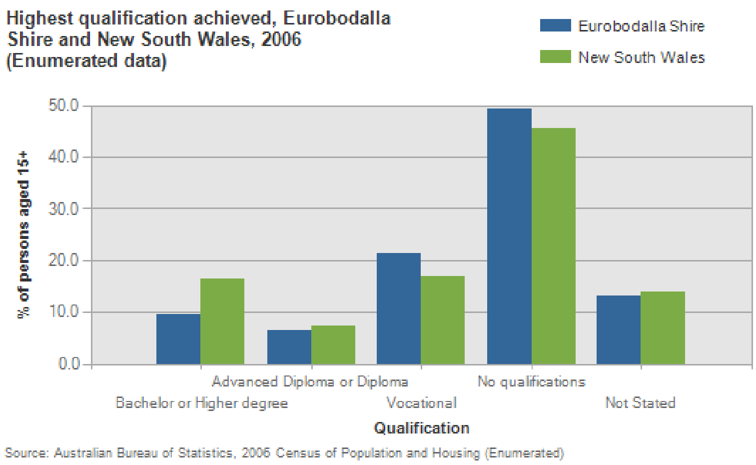
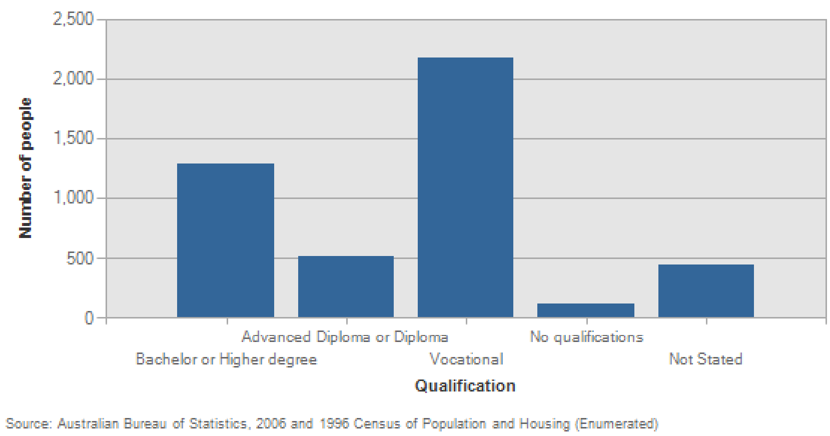


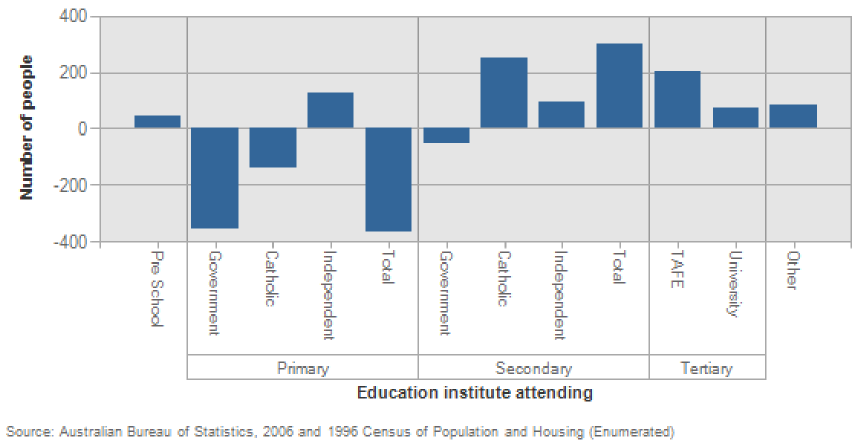
Figure 14: Change in highest qualification achieved, Eurobodalla, 1996-2006



Current School Enrolments

In 2010 there were 4221 students enrolled in public primary and high schools in Eurobodalla, compared to 4697 in 2006. A review of the My School website in 2010 indicated that there were also currently 1373 students enrolled at non-government schools in Eurobodalla. According to the 2006 census, there were 1202 students enrolled at non-government schools in 2006. So, while government school enrolments have declined, non-government school enrolments have increased. There is currently a high level of attendance at adult education courses in Eurobodalla. In 2009, Eurobodalla Adult Education offered 450 courses, attended by approximately 5000 people in total. The changes in education attendance between 1996 and 2006 are shown in Figure 15.

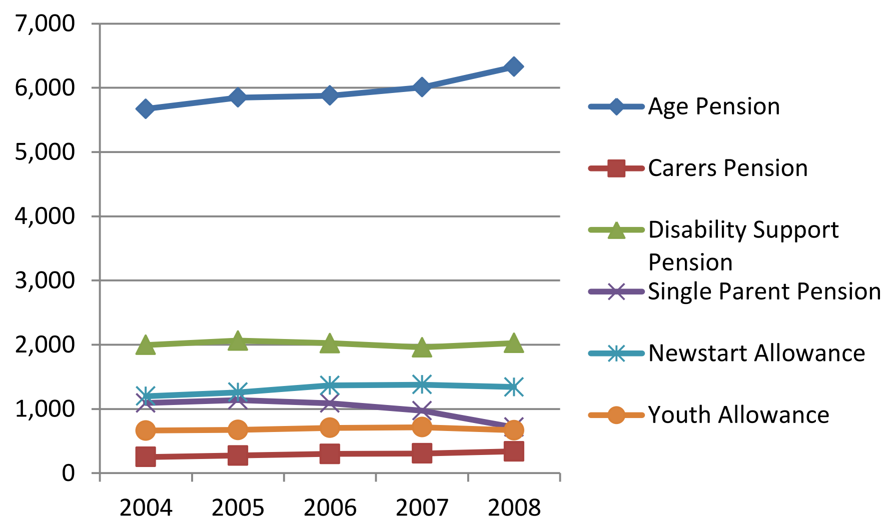
Figure 15: Change in Education Institute Attending, Eurobodalla Shire, 1996-2006



Eurobodalla Pensioners

From 2004 to 2008, the number of Eurobodalla residents on a Government Pension or Allowance has not changed dramatically. There has been a slight increase in the number of aged pensioners and a slight decline in the number of persons on the single parent pension. Otherwise, the level of dependence on a government pension or allowance has remained relatively stable. The number of persons on a government pension or allowance between 2004 and 2008 is shown in Figure 16.

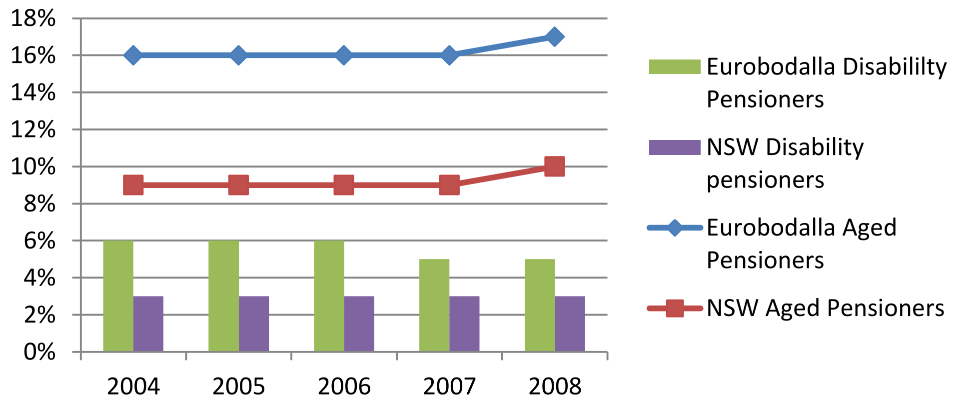
Figure 16: Persons on a Government Allowance, Eurobodalla, 2004-2008



In order to compare Eurobodalla with other places, the proportion of the population on a government pension or allowance is important.

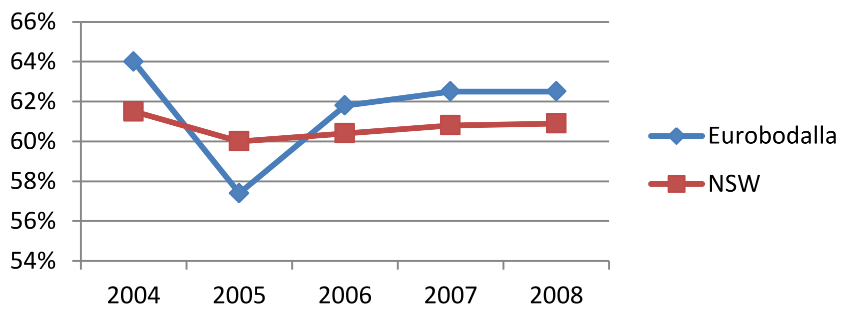
Figure 17 compares Eurobodalla and NSW with regard to the Aged Pension and the Disability Support Pension identifying that Eurobodalla has a significantly higher proportions of its population aged over 65 and with a disability. For all of the other forms of pensions and allowances, Eurobodalla Shire has similar proportions to NSW as a whole, however the total percentage of Eurobodalla residents on some form of pension or allowance in 2008 was 31%, compared to a total of 20% for NSW.

Figure 17: Aged and Disability Pensions, Eurobodalla and NSW, 2004-2008



An important statistic regarding the Newstart Allowance, which is for job seekers, is the proportion of persons on Newstart who have been on the allowance for more than 365 days. As shown in Figure 18, with the exception of 2005, Eurobodalla consistently has a higher proportion of the long-term unemployed compared to the NSW average. The reason for the significant difference in the 2005 result will need further investigation to understand whether specific policies or programs produced this result and can be repeated.

Figure 18: Proportion of long-term unemployed, Eurobodalla and NSW, 2004-2008

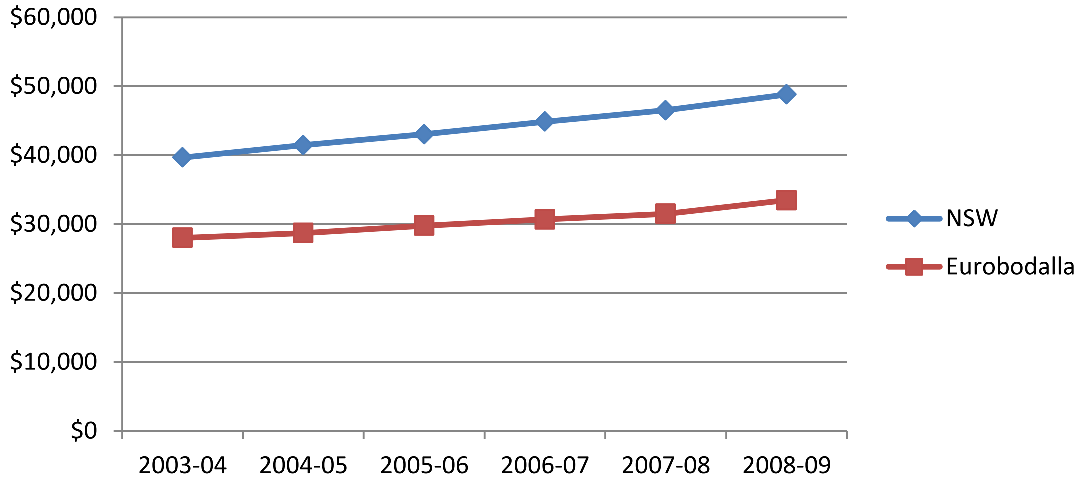


Eurobodalla Income

In 2009, there were 12,002 wage and salary earners in the Eurobodalla Shire. The total earnings of these employed persons in the 2008-09 financial year was $401.5M, at an average of $33,452 per wage and salary earner, compared to $48,793 across NSW. In the same year, the total income of Eurobodalla residents from all sources, excluding government pensions and allowances, was $608.7M, at an average of $32,562 per person, compared to $48,755 across NSW.

The average wage of Eurobodalla's workforce has been consistently lower than the NSW average, and the wage difference has been increasing in recent years, as shown in Figure 19.

Figure 19: Change in average annual wage levels, Eurobodalla and NSW, 2003-04 to 2008-09



In 2006, a higher proportion of Eurobodalla residents and households were in the lower income categories and a lower proportion in the higher income categories than for NSW, as shown in Figures 20 and 21. This statistic correlates with the smaller labour market, higher proportion of aged persons and higher unemployment rate in Eurobodalla, compared to NSW.

Figure 20: Weekly individual income, Eurobodalla and NSW, 2006

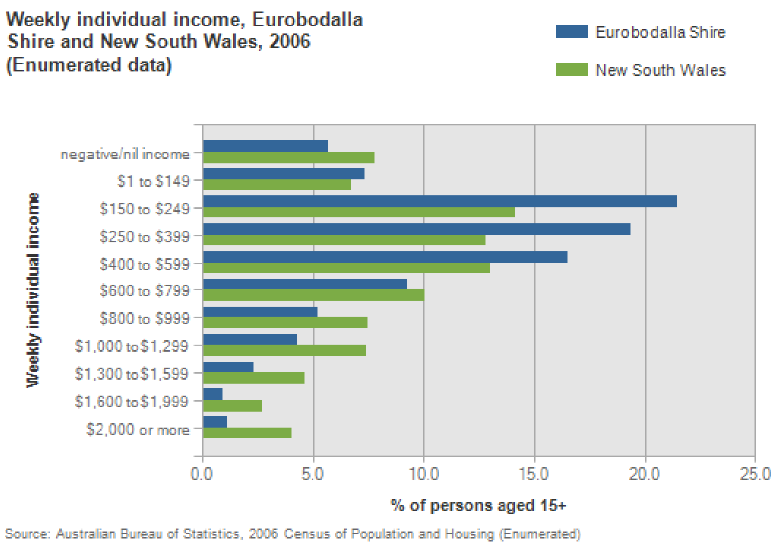
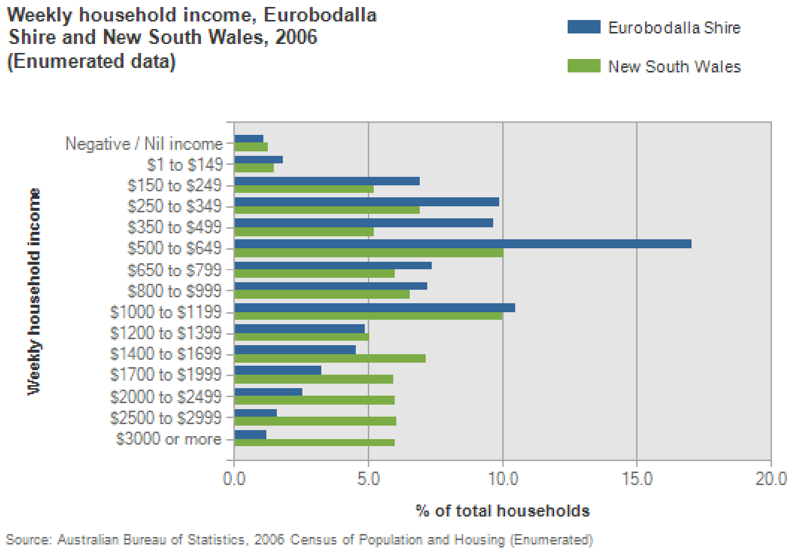


Figure 21: Weekly household income, Eurobodalla and NSW, 2006



Eurobodalla Wealth

Business Turnover ($)

Data on the annual turnover of businesses is also collected by the Australian Bureau of Statistics. The majority of businesses in the Shire have an annual turnover of less than $500k. Those businesses that exceed this annual turnover are mostly in the retail and accommodation and food services industries. There are no high-turnover businesses in the Information, Media and Telecommunications sector and very few in the Financial and Insurance Services sector. Table 3 shows the number of businesses by industry by turnover for the Eurobodalla in 2009.

Table 3: Counts of Businesses by Industry by Turnover, Eurobodalla Shire, 2009

INDUSTRY	Zero to $50k	$50k - $100k	$100k - $200k	$200k - $500k	$500k - $1m	$1m - $5m	> $5m
Agriculture, Forestry and Fishing	136	34	36	42	9	9	0
Mining	6	0	0	6	0	0	0
Manufacturing	48	15	30	33	12	18	9
Electricity, Gas, Water and Waste Services	0	0	0	3	6	0	0
Construction	139	195	152	131	38	30	0
Wholesale Trade	12	12	12	12	12	9	3
Retail Trade	36	33	39	66	36	60	6
Accommodation and Food Services	24	27	33	66	28	33	7
Transport, Postal and Warehousing	55	21	23	37	6	27	0
Information Media and Telecommunications	6	3	3	0	0	0	0
Financial and Insurance Services	43	25	18	15	3	0	0
Rental, Hiring and Real Estate Services	76	81	33	52	20	9	0
Professional, Scientific and Technical Services	47	57	15	41	21	3	0
Administrative and Support Services	24	18	24	9	12	6	0
Public Administration and Safety	0	0	0	12	0	0	0

Education and Training	15	9	3	9	0	0	3
Health Care and Social Assistance	15	9	21	40	12	24	0
Arts and Recreation Services	22	0	9	12	0	3	0
Other Services	33	31	37	39	15	6	0
Not Classified	14	9	6	3	0	0	0
TOTAL	422	579	494	628	230	237	28

Source: ABS, Counts of Australian Businesses, 2009

In the two years between 2007 and 2009, there was a reduction in the number of businesses with a turnover less than $200k and an increase in the number of businesses with a higher turnover. Importantly, there was a significant increase in the number of businesses with a turnover greater than $1m. The majority of these businesses were in manufacturing, transport and health industries. The change in business turnover between 2007 and 2009 is shown in Table 4.

Table 4: Change in Business Turnover, Eurobodalla Shire, 2007 to 2009

Annual Turnover	2007	2009	Change 2007 to 2009
Zero to less than $50k	738	731	+13
$50k to less than $100K	645	579	-66
$100k to less than $200k	543	494	-49
$200k to less than $500k	579	628	+49
$500k to less than $1m	252	230	-22
$1m to less than $5m	186	237	+51
$5m or more	21	28	+7

Source: ABS, Counts of Australian Businesses, 2009

Housing Stress

A measure of the capacity of a community to generate wealth is the level of housing stress in the community. Housing stress is an indication that a high proportion of income (more than 30%) is being spent on housing costs (rents or mortgage repayments) leaving very little disposable income, after other essential costs, for savings or investments.

In the housing market analysis recently released by Housing NSW, it is stated that 58% of all low and moderate income households renting in the private rental market in Eurobodalla are in housing stress. The level of rental housing stress in Eurobodalla is higher than the average of 50% across non-metropolitan areas of NSW. The level of housing stress has increased by 8.1% since 2001.

The housing market analysis also identifies a high level of housing stress for households in the private purchase market at 49%, compared to the non-metropolitan NSW average of 43%. The level of housing stress has increased by 10.8% since 2001.

The affordability of housing in Eurobodalla was estimated by Judith Stubbs and Associates in the preparation of the Draft Housing Strategy for Eurobodalla, 2008. With a median house price of around $320,000, it can be seen from Table 5 that home purchase would be unaffordable for more than 90% of typical first home buyers in the area. In addition, approximately 50% of households in 2006 found it difficult to afford the average rental cost of housing of approximately $200 per week.

Table 5: Housing affordability, Eurobodalla, 2006

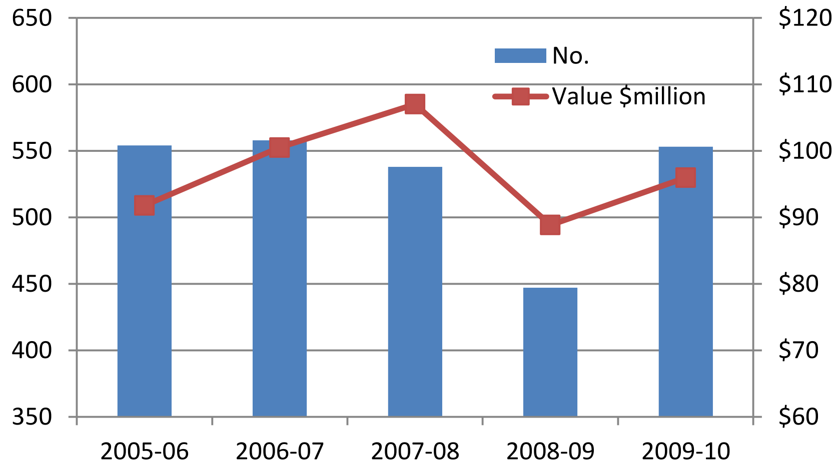
Decile	Household number	median household income 2006	maximum rental assistance pw (3)	net median household income + CRA	affordable rent pw (2)	Affordable purchase (1)
1	1236	$ 237	$ 50	$ 287	$ 121	$ 42,960
2	2472	$ 330	$ 50	$ 380	$ 149	$ 59,866
3	3709	$ 458		$ 458	$ 137	$ 83,062
4	4945	$ 554		$ 554	$ 166	$ 100,631
5	6181	$ 633		$ 633	$ 190	$ 114,838
6	7417	$ 788		$ 788	$ 236	$ 143,021
7	8653	$ 1,025		$ 1,025	$ 308	$ 186,041
8	9890	$ 1,193		$ 1,193	$ 358	$ 216,446
9	11126	$ 1,642		$ 1,642	$ 493	$ 298,026
10	12362	$ 3,000		$ 3,000	$ 900	$ 544,500

Source: Judith Stubbs and Associates, 2008

Eurobodalla Building Activity

In the 2009-10 financial year, there was 553 development approvals in the Eurobodalla Shire, with a total construction value of almost $96M. This represents a similar number of development approvals to previous years, with the exception of 2008-09, which saw a significant decline in approvals. The value of development approvals over the last five years has generally been increasing, again with the exception of 2008-09 which saw a significant decline in value. The change in development approvals over the last five years is shown in Figure 22.

Figure 22: Change in number and value of development approvals, 2005-2010



The types of development approvals issued over the last five years have been predominantly residential. As shown in Figures 23 and 24, the two years between 2006 and 2008 saw some large commercial developments of significant value approved, while the value of residential development in those same years was in decline.

Figure 23: Number and Value of Commercial Building Approvals, 2005-2010

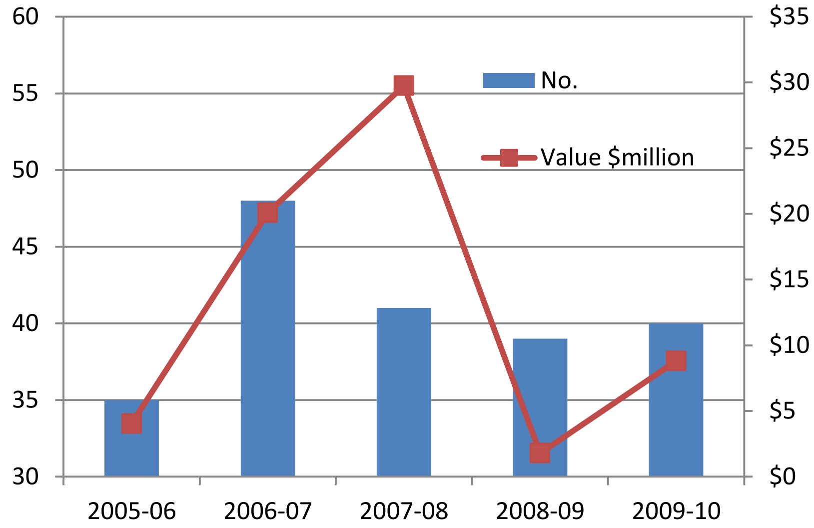
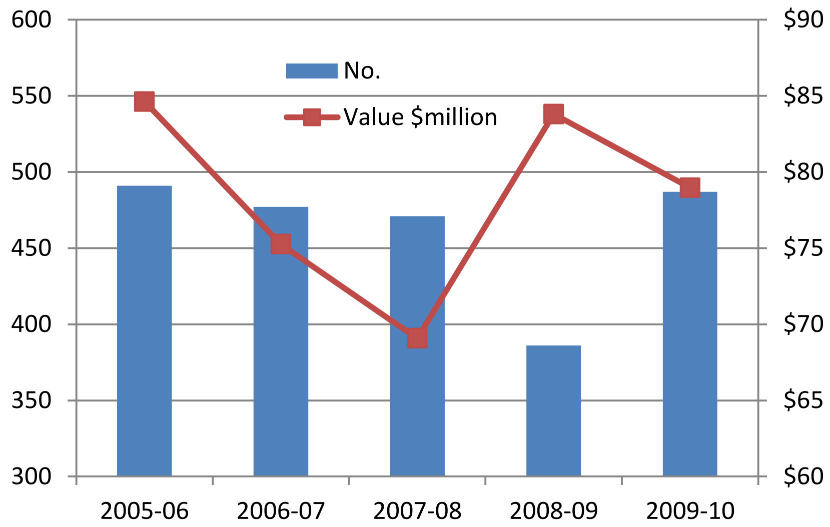


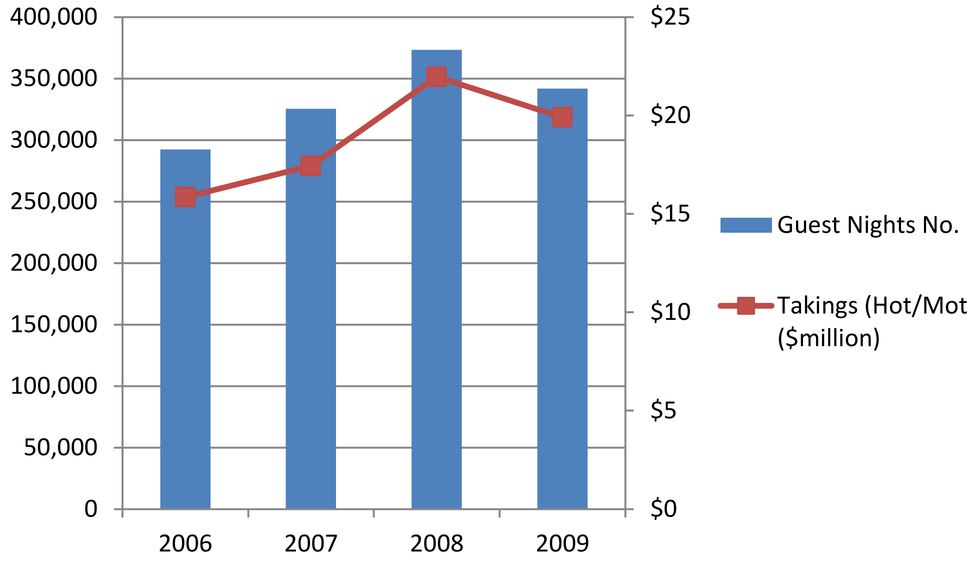
Figure 24: Number and Value of Residential Building Approvals, 2005-2010



Eurobodalla Tourism

Tourism is the largest industry within Eurobodalla and is therefore the key economic driver for the Shire. The value of tourism's visitor expenditure in Eurobodalla increased by 18% in the 12 months to December 2008 and is now valued at $426 million annually. 20% of the region's workforce is employed in tourism, accounting for 2900 jobs. Through a robust and successful tourism industry jobs will continue to grow in the region. The number of tourists spending nights in Eurobodalla is an important indication of the strength of the local economy. In 2009, there were 194,038 guest arrivals occupying 341,767 guest nights. The total takings for accommodation in hotels and motels in 2009 was approximately $20M. This represents a reduction in guest nights and takings from 2008, but continues a general trend of increased tourism activity in the Shire, as shown in Figure 25.

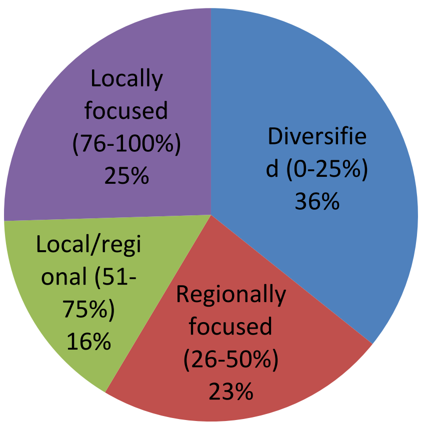
Figure 25: Tourist Accommodation nights and takings, 2006-2009

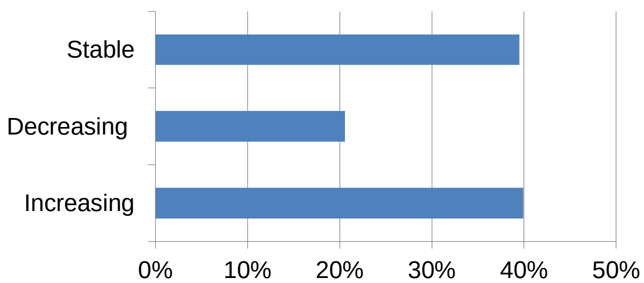


Economic Development and Employment Lands Strategy

Appendix D

Business Survey





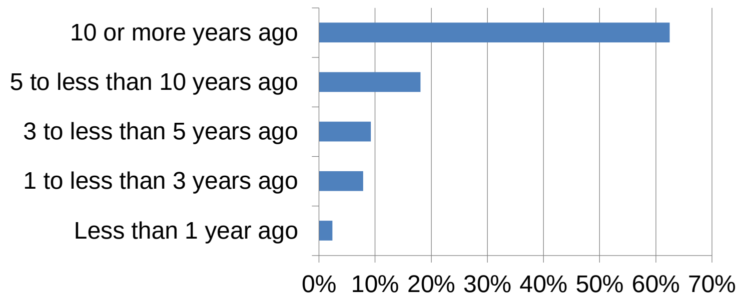
BUSINESS SURVEY

A survey of existing businesses was undertaken as part of the Strategic Influences Report. The survey explored the views of existing business owners on current business conditions, future influences and future prospects. Chapter 2.3 of the Strategy summarises the results of the survey. The full detail and analysis is provided in this Appendix.

When did you start your business?

Most businesses in Eurobodalla are long-term and established enterprises, with over 60% of respondents having started their business 10 or more years ago. This demonstrates that when businesses become established in the local area, they can expect to become long-term businesses. However, becoming established may be difficult in Eurobodalla, as it appears from Figure 1 below that many businesses do not survive past 3 years.

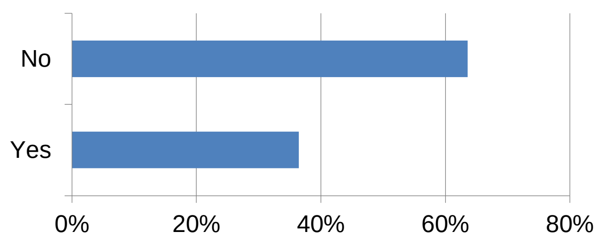
Figure 1: Start time of businesses



Is your business based at home?

Just over one-third of all businesses surveyed are home-based businesses, as shown in Figure 2. This is significantly low compared to the national average of approximately two-thirds of businesses being home-based. In the analysis of employment land demand, it has been assumed that 80% of non-employing businesses and 20% of small businesses in Eurobodalla are home-based. This equates to approximately 50% of all businesses in Eurobodalla, which remains low compared to the national average, but is considered a reasonable proportion for employment land planning purposes.

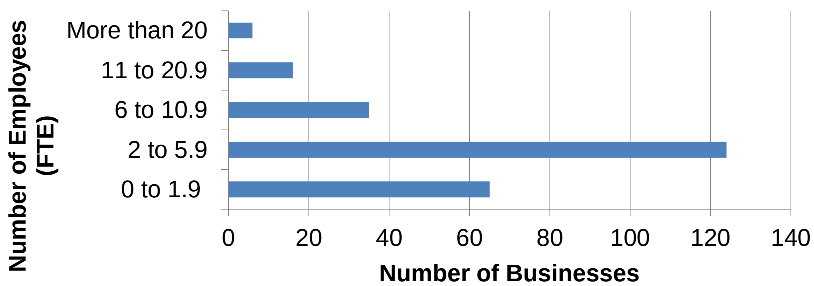
Figure 2: Number of businesses based at home



How many people, including yourself, other owners, family members, other operators, etc, currently work in your business?

Only 6 businesses surveyed employed more than 20 people. This represents 2.4% of businesses surveyed and translates to approximately 78 businesses in total across the Shire. A total of 24 (9.8%) of businesses surveyed employed more than 11 people. In 2005, a business survey of the three major centres in Eurobodalla identified 15.6% of businesses employing more than 10 people. Given the current survey covers the entire Shire, and therefore includes more smaller and home-based businesses, the number of large businesses in the Shire has most likely remained steady, though at a relatively low level. Figure 3 shows that the majority of businesses surveyed were 'small to medium enterprise' i.e. less than 20 employees, and of these most contained 5 employees or less.

Figure 3: Employee numbers for businesses surveyed



Over the last two years has your business's turnover been generally increasing, decreasing or stable?

Over the last two years, turnover had increased or been stable for almost 80% of businesses surveyed, as shown in Figure 4. An almost 80% reporting of stable or increasing business turnover is a positive indication of a resilient economy. Over the last five years, the global economy has been in turmoil and the influences of this have been felt in Australia. In particular, the impact of the global downturn on tourism has been felt in local communities across Australia. The Australian economy generally has recovered well in recent years and local evidence of this recovery can be found in this indication of stable or increasing business turnover in Eurobodalla. This demonstrates that many local businesses are well established and sufficiently resilient to weather the impacts of global economic changes.

Figure 4: Stability of business in the last two years

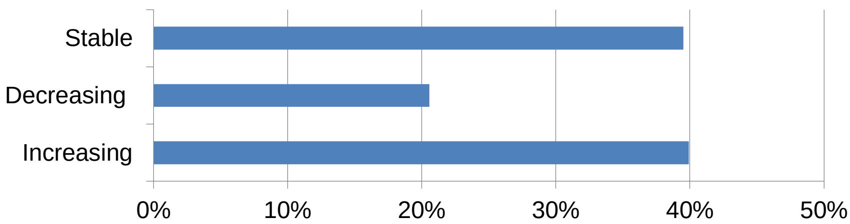
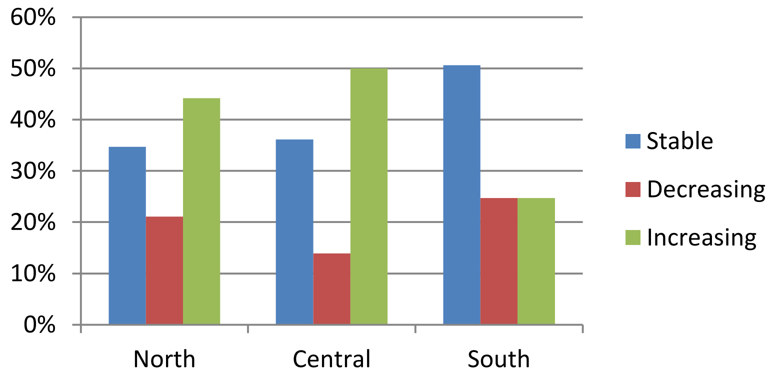


Figure 5 compares the business turnover results for each of the three settlement areas in the Eurobodalla. It can be seen that there was more growth in businesses over the last two years in the north and central areas of Eurobodalla, while the southern area remained more stable.

Figure 5: Business turnover in the last two years, North, Central and South Eurobodalla



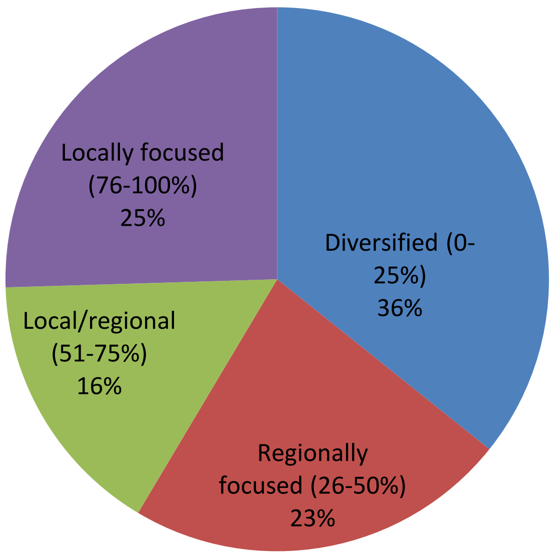
Roughly what proportion of your sales are to...?

Eurobodalla Shire businesses are a mix of the following:

1. Diversified (mix of local, regional and international customers)
2. Regionally focused
3. Local/regional mix
4. Locally focused.

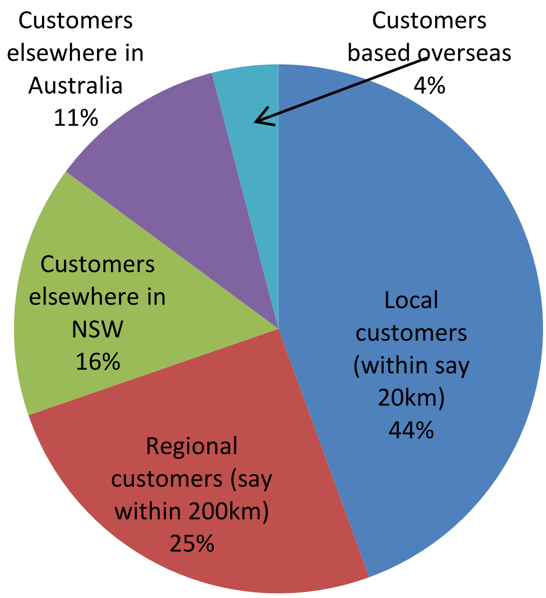
The mix of these is shown in Figure 6.

Figure 6: Business sales mix



A high proportion of diversified businesses is another positive indication of the resilience of many businesses. Diversified businesses have a relatively even spread of their sales locally, regionally and internationally. For these businesses, if one market segment declines, the business can rely on the other sectors for a period of time. One quarter of Eurobodalla businesses are locally focused, and therefore are more susceptible to shifts in the local market. Overall, the average pattern of trade across the Shire emphasises the importance of local and regional markets, as illustrated in Figure 7.

Figure 7: Business customer mix



More than two-thirds of customers are local or from the surrounding region, while only 4% are based overseas. This result, when compared to the sales result previously discussed, suggests that non-local customers have a sales value disproportionate to their numbers and are likely to consist mainly of tourists.

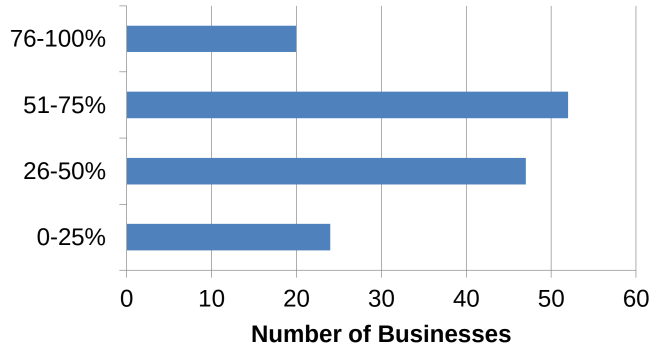
Is your business affected by annual seasons?

The vast majority of businesses indicated that their peak period was between December and April, with emphasis on the Christmas period. Most businesses make 26-75% of their turnover in the peak period. 20 businesses (14%) said that 76-100% of their turnover was made in the peak period, as shown in Figure 8.

These results demonstrate the strong impact of seasonality on the local economy. Supporting this result is the view of business owners that seasonality is a disadvantage to operating a business in Eurobodalla. Other disadvantages raised by business owners were:

- Isolation (and the resultant impact on business costs, eg. transportation);
- Regulations; and
- Small population.

Figure 8: Proportion of turnover in the peak period



What is your plan for your business over the next two years?

As shown in Figure 9, 133 businesses (54%) said that they planned to increase in some way in the next two years. 21 businesses (9%) said they would be closing or selling. For those 133 businesses that said they plan to increase, over 100 said they would be increasing their turnover by up to 50%, and 35 said they would be increasing their staff by up to 5 people.

These results show a generally positive view of economic growth over the next two years amongst business owners, with more than half of businesses planning to increase turnover and/or staff levels. This positive attitude is also based on the advantages of operating a business in Eurobodalla cited by business owners, including the following:

- Lifestyle and Environment;
- Proximity to Capital Cities; and
- Community.

Figure 9: Plans for business in the next two years

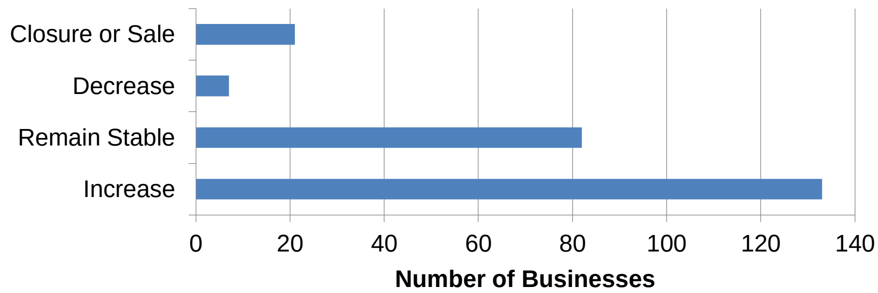
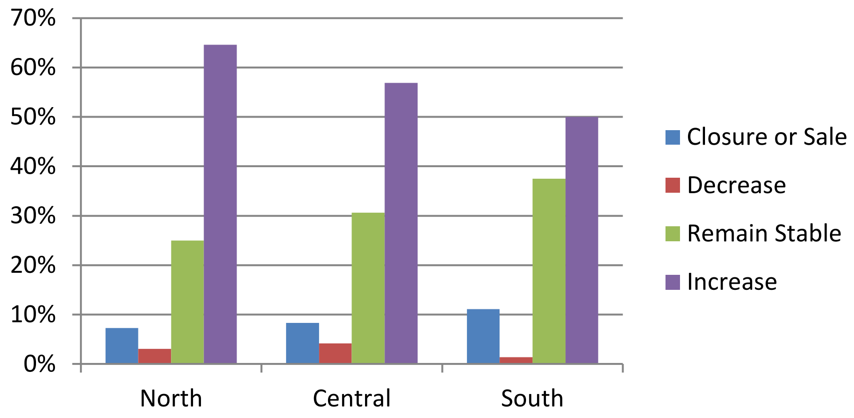


Figure 10 compares the business intentions for each of the three settlement areas in the Eurobodalla It can be seen that business confidence for growth over the next two years is stronger in the northern and central areas of the Shire, while again more businesses in the southern area expect continued stability.

Figure 10: Business intentions over the next two years, North, Central and South Eurobodalla



What are the greatest barriers to growth for your business?

'Government regulations' were the most important perceived barrier, picked by almost 60 respondents. 'Lack of finance' and 'lack of demand' also important growth barriers, each being picked by over 40 respondents. 'Lack of skilled staff', and 'poor local infrastructure' were the next most important barriers.

Other barriers raised by respondents included:

- Lack of marketing
- Inadequate Facilities
- Rising Costs or Competition

All of these barriers need to be addressed in order to ensure the continued economic prosperity of Eurobodalla.

What would help your business to overcome these barriers?

This was an open-ended question and attracted a range of answers. Generally they fell into one of the following categories:

- Improved Tourism and Marketing
- More Land
- Better Facilities
- Better Council Process/Less Regulation
- Training/Skilled Staff
- Access to Finance

Some external factors may have an impact on your business profits over the next 2 years. Which of these are important?

The 'economic climate' was by far the most mentioned external factor impacting on profits, with 169 'yes' responses. 'Government policies' and 'local competition' attracted over 120 responses. 'Interest rates', 'taxes', 'transportation costs', 'energy costs', 'population changes' and 'changing consumer tastes' were also all relatively highly rated .

The economic climate, transportation and energy costs, changing consumer tastes and government regulations were most frequently cited as most significant.

Economic Development and Employment Lands Strategy

Appendix E

Employment Land Audit

EMPLOYMENT LAND AUDIT

Chapter 2.4 of the Strategy summarises the results of an Employment Land Audit undertaken in October 2010. This Appendix provides the full results of the audit, which covers all land zoned commercial or industrial in the Shire. All sites were categorised in terms of land use and all vacant sites or premises were recorded. In some areas, such as Nelligen and Tilba Tilba, the area of audit included land not currently zoned commercial, but form part of an identifiable centre or village, and land adjacent to existing commercially zoned land that has already undergone or is undergoing some transition to commercial development, such as along the Old Princes Highway, Batemans Bay. The key findings of the audit were:

- 10% of all existing commercial land was vacant;
- 10% of all existing commercial premises were vacant;
- 20% of all existing industrial land was vacant;
- 15% of all existing industrial premises were vacant;
- 40% of businesses in commercial areas were retail or wholesale businesses;
- 26% of businesses in commercial areas were included in the professional, technical, business and personal services category;
- 30% of businesses in industrial areas were retail or wholesale businesses; and
- 21% of businesses in industrial areas were mechanical repair service businesses.

Commercial Land

A total of 795 businesses were counted in the land use audit in Eurobodalla's commercial areas. Almost 40% of these businesses were defined in the retail and wholesale category. A further 26% were included in the professional, technical, business and personal services category and nearly 20% in the hospitality and tourism category. The proportion of businesses by industry category across all commercial land is shown in Figure 1, while the number of businesses by industry category across all commercial zones is shown in Figure 2.

Figure 1: Business types on commercial land, Eurobodalla Shire, 2010

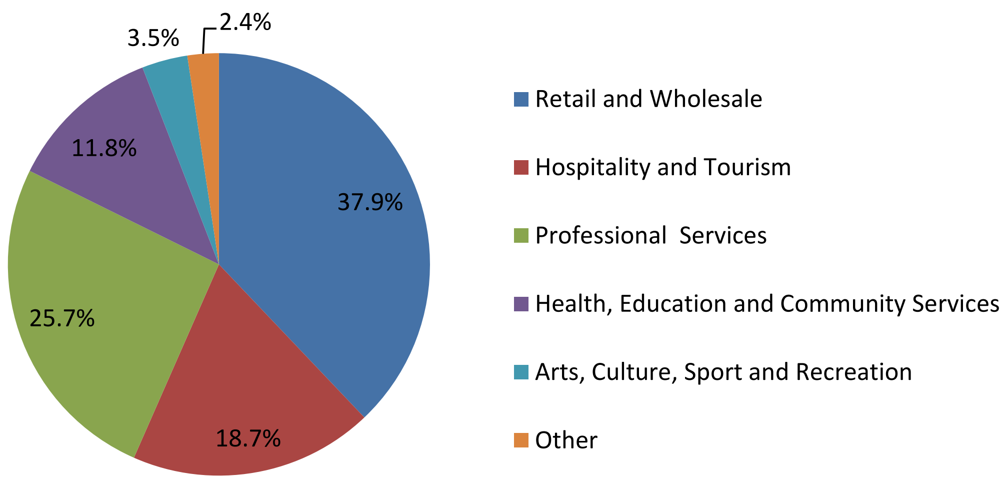
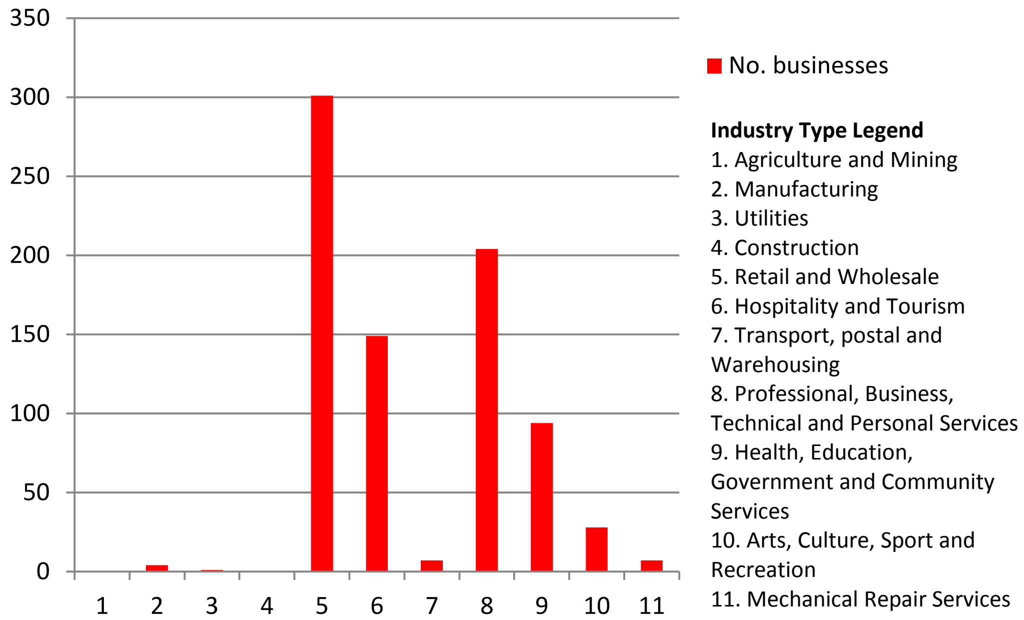


Figure 2: No. businesses per category across all commercial zoned land



When compared to the ABR data, it can be seen that nearly all registered retail businesses in the Shire are located in a centre and approximately 64% of registered accommodation and food service businesses are located in a centre. However, nearly 66% of registered professional service businesses are not located in a centre, but are distributed across the Shire, many in residential areas as home businesses.

As would be expected, the major centres in Eurobodalla are the more diverse and provide more of the professional business services. Batemans Bay contained 33% retail, 32% professional business, 16% hospitality and tourism and 14% health, education, government and community services. Narooma has very similar proportions to Batemans Bay. Moruya however, was more consistent with the proportions for the Shire as a whole. The distribution of businesses by industry category in the three major centres is shown in Figure 3.

The smaller centres differed in land use to the larger centres in that the proportion of hospitality and tourism businesses was similar or greater than the proportion of retail or professional businesses. The tourism neighbourhoods by contrast, with the exception of Bodalla, had lower proportions of hospitality and tourism businesses compared to retail. For example, Central Tilba contained 58% retail, with 32% hospitality and tourism.

Figure 3: Industry Distribution by Major Commercial Centre

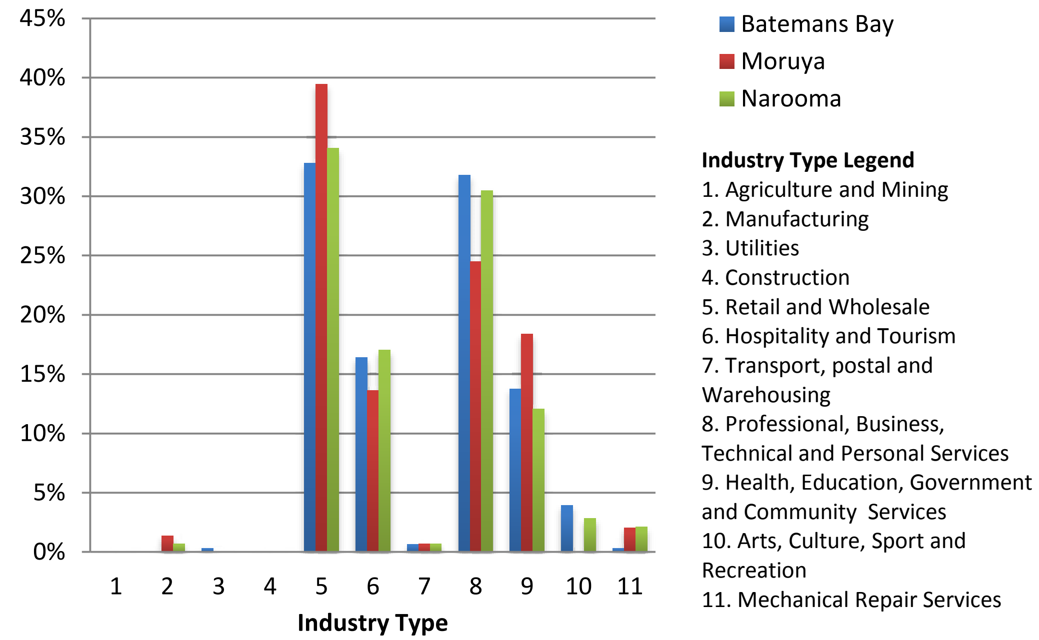
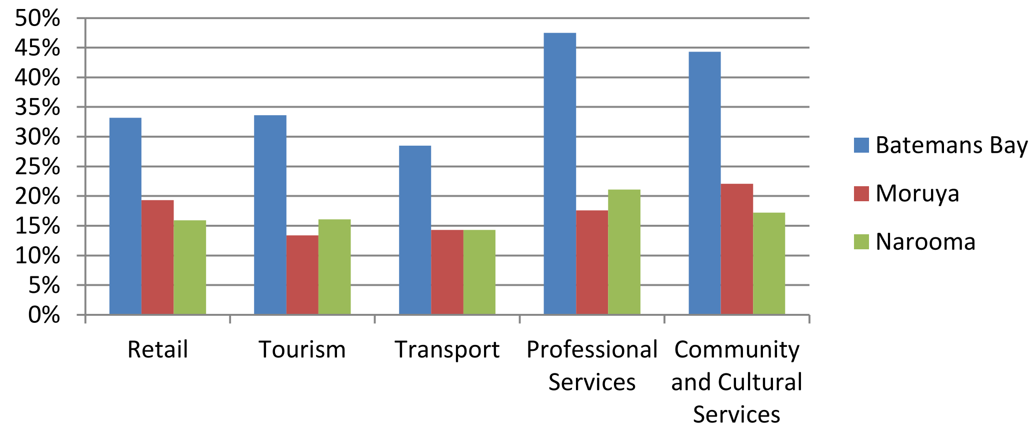


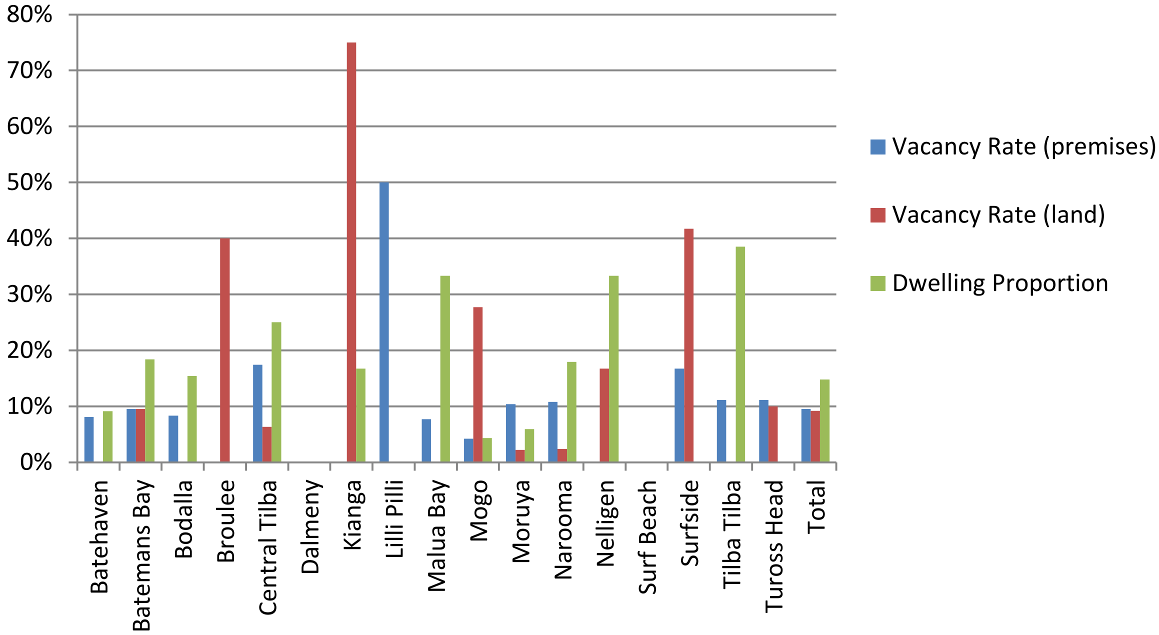
Figure 4 demonstrates the distribution of key commercial business types across the Shire, with a focus on the three major centres. It can be seen that Batemans Bay contains the largest share of all of the key business types, while Moruya and Narooma are generally consistent in their share of commercial businesses.

Figure 4: Proportion of commercial business types in the three major centres, 2010



Across all commercial land in Eurobodalla, there is an approximately 10% vacancy rate in terms of land available for development and premises available for rent. All of the three major centres in Eurobodalla are consistent with around a 10% vacancy rate for premises, however Batemans Bay also has a high vacancy rate for land, while Moruya and Narooma have less than 3% of land vacant. Both Narooma and Batemans Bay also have a high proportion of land within the centres currently occupied by dwellings. Some of this is in areas already undergoing transition from residential to commercial, such as along the Old Princes Highway in Batemans Bay. The vacancy rates for commercial land are shown in Figure 5.

Figure 5: Proportion of land or premises vacant or used for a dwelling per commercial area



A number of the smaller centres have high proportions of vacant land or premises and high numbers of dwellings occupying commercial land. In particular, the centres of Broulee, Kianga, Mogo and Surfside have development potential within the existing commercial area. It should be noted that Figure 4 excludes those commercial centres that are not yet developed, such as Sunshine Bay and Long Beach. The centres of Bodalla, Central Tilba, Malua Bay, Nelligen and Tilba Tilba all have high proportions of residential development within the identified centres or villages. The potential for conversion of dwellings to a commercial use is therefore high in these areas.

Industrial Land

A total of 276 businesses were counted in the land use audit in Eurobodalla's industrial areas. The audit identified a diverse range of businesses occupying industrial land, though surprisingly the highest proportion land use was retail and wholesale at nearly 30%. The majority of these businesses were located in the Batemans Bay industrial areas which have become over time the principal bulky goods destination in the Shire, with 34% of businesses in this category. Mechanical repair services (21%), construction operations (13%) and manufacturing businesses (12%) made up the next most numerous business types in industrial areas. The proportion of businesses by industry category across all industrial land is shown in Figure 6, while the number of businesses by industry category across all industrial land is shown in Figure 7.

Figure 6: Business types on industrial land, Eurobodalla Shire, 2010

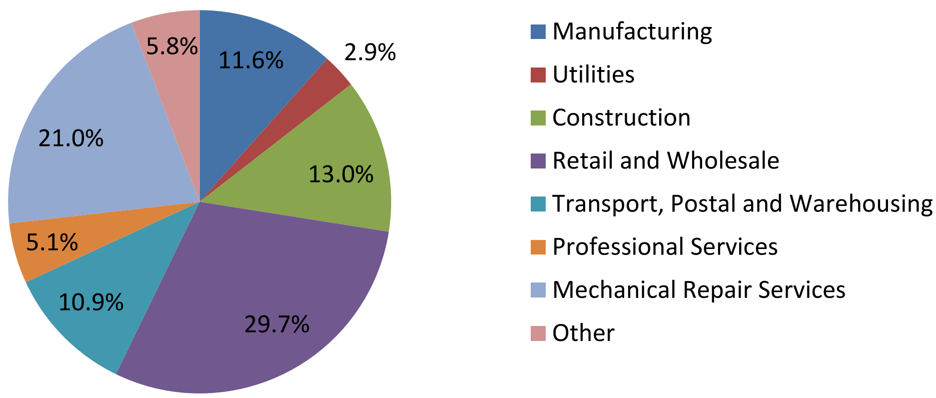
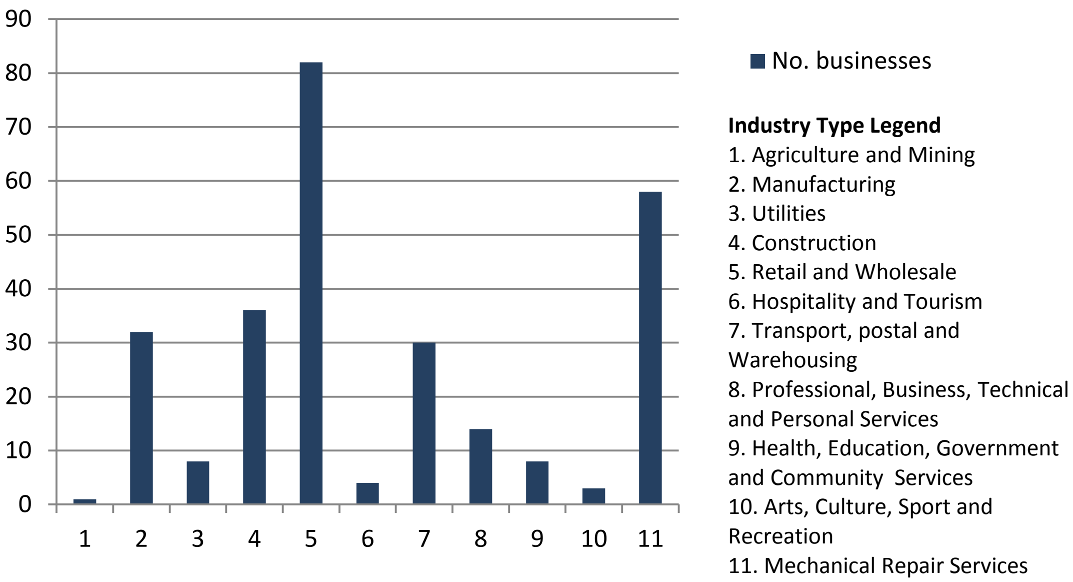


Figure 7: No. businesses per category across all industrial zoned land



When compared to the ABR data, it can be seen that 12% of all registered manufacturing businesses and only 4% of registered construction businesses in the Shire are located in an industrial area, with the majority distributed across the Shire. For construction businesses, many are single-operator, home-based businesses. The low proportion of manufacturing businesses in industrial areas may also be due to some being home-based (eg. small-scale jewellery, clothing or food manufacturing), some operating within commercial centres and some operating as rural industries in various locations across the Shire.

Batemans Bay is the prime industrial centre in the Shire with nearly 62% of all businesses counted in the industrial areas located in the Bay. The two larger Moruya industrial areas combined have 16%, while Narooma's industrial area has 12%. The distribution of businesses by industry category in the three major centres is shown in Figure 8.

Figure 8: Industry Distribution by Major Industrial Area

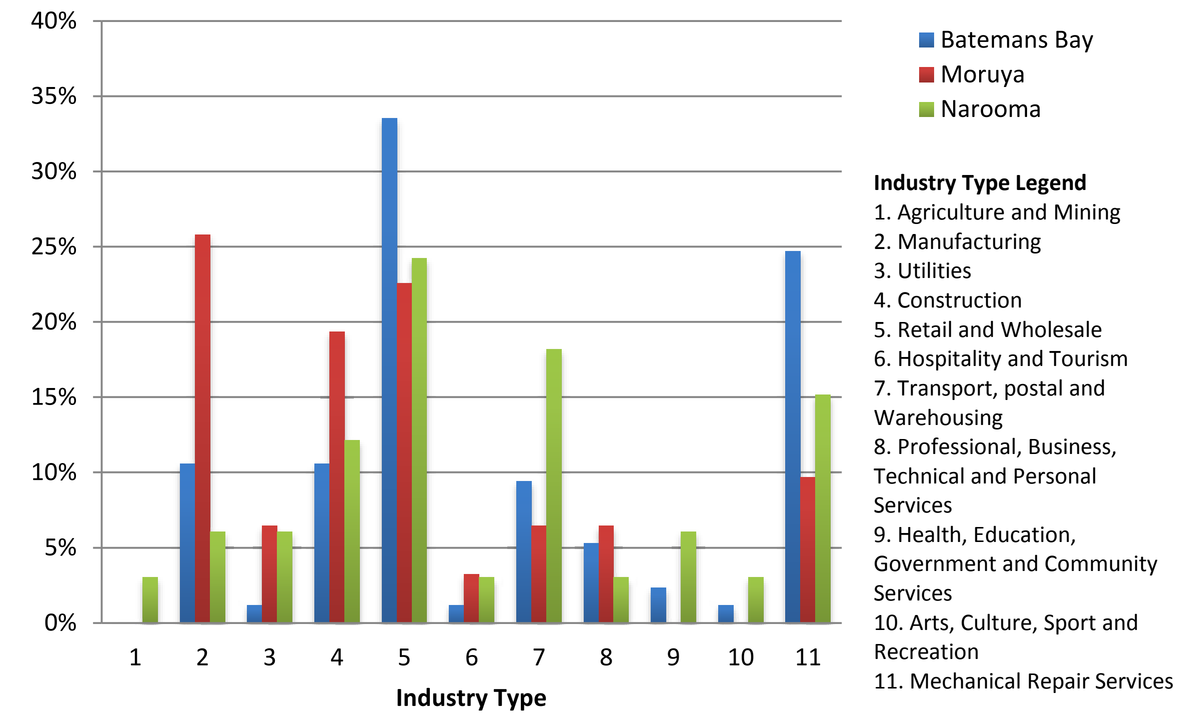
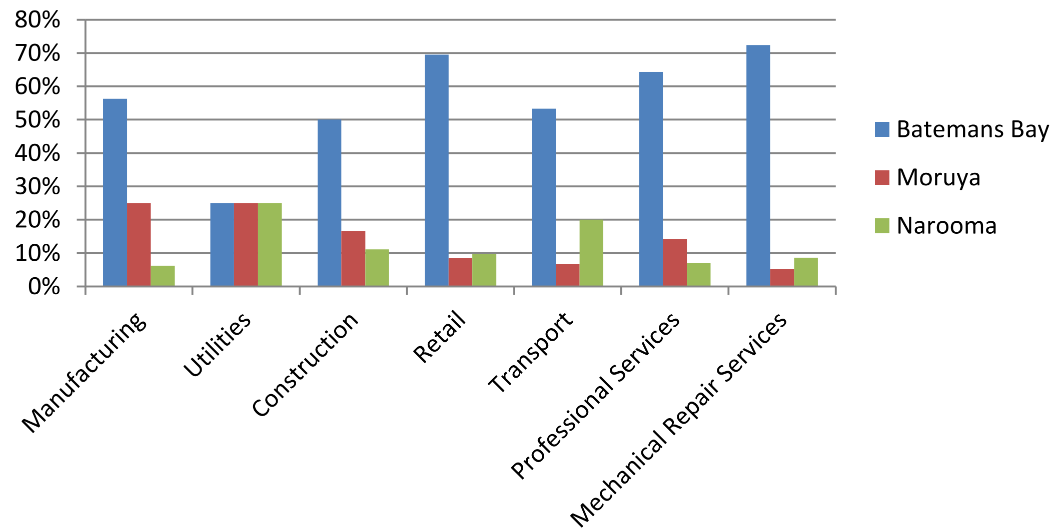


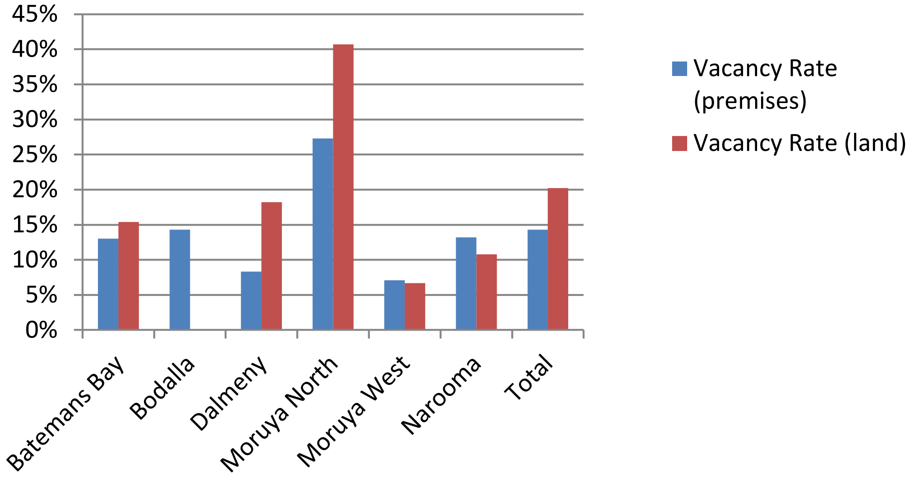
Figure 9 demonstrates the distribution of key industrial business types across the Shire, with a focus on the three main industrial areas. It can be seen that Batemans Bay contains the largest share of all business types. Moruya contains a great proportion of manufacturing businesses compared to Narooma, while Narooma has a greater share of transport businesses.

Figure 9: Proportion of industrial business types in the three major industrial areas, 2010



Across all industrial land in Eurobodalla, there is a 20% vacancy rate in terms of land available for development and an approximately 15% vacancy rate for premises. Like commercial land, not all vacant industrial land is on the market, but may be already held for future industrial development by the land owner. Of the major industrial areas in Eurobodalla, Moruya North has a significant vacancy rate for land (over 40%) and for premises (over 25%). While the proportions across the other industrial areas are lower, it is the actual number of vacant lots or premises that is more telling. Batemans Bay currently has a total of 48 vacant lots or premises, while Narooma has a total of 9. The other industrial areas are relatively small and therefore any vacancies are also small. Across the Shire, there are very few industrial lots currently occupied by dwellings. The vacancy rates for industrial land are shown in Figure 10.

Figure 10: Proportion of land or premises vacant per industrial area



Economic Development and Employment Lands Strategy

Appendix F

Existing Employment Land Opportunities

EXISTING EMPLOYMENT LAND OPPORTUNITIES

Chapter 2.5 of the Strategy briefly summarises the opportunities in existing employment lands in the Eurobodalla. This Appendix provides further discussion in relation to those opportunities.

North Eurobodalla

Batemans Bay Regional Centre

The Batemans Bay Regional Centre is a local and regional retail and service hub, and a focal point for tourists visiting the wider Batemans Bay region. It is well located with respect to highway access and to take advantage of the surrounding natural assets and is a compact centre with good pedestrian connectivity. The town has a vibrant economy but has limited physical room for expansion. It struggles with seasonality and is very quiet out of business hours. Growth opportunities will principally be based on redevelopment of existing land, and expansion upwards into three and four storey development where appropriate.

There are opportunities to introduce more varied and longer operational activities such as restaurants, bars and cultural spaces, which would increase activity levels and a sense of vibrancy and safety within the centre. Extended operating hours of existing retail businesses, particularly on weekends, would also increase activity levels, however it is noted that the town centre does not currently accommodate a sufficient in-town residential population to support extended operating hours or a more varied mix of out-of-hours entertainment options. A greater level of mixed-use development with higher densities of residential accommodation will increase activity levels to support business growth, particularly outside of the peak tourist season.

The Town Centre currently supports in excess of 65,000m² of active retail/ commercial floor space and has demand to 2026 for more than 18,000m² of additional floorspace (Wakefield Planning 2006). Some of this additional demand will be taken up by the new Batemans Bay Community Hub development that will contain a new Centrelink call centre and other government services, and the future redevelopments of the Bridge Plaza shopping centre and the Woolworths site at Flora Crescent. In addition, the Rural Fire Service has recently commenced operations in a new southern region customer service centre in Batemans Bay. These developments may act as a catalyst for other potential redevelopments to become viable, particularly those that involve a mix of retail, commercial and residential developments. However, the scale of these new developments should be appropriate having regard to the demand for retail and commercial development at the time of the redevelopment, so as not to saturate the local market or cause the decline of retail or commercial businesses in other parts of the centre.

To the south of the centre is an area referred to as the Vesper Street area which covers approx 13,500m² of land fronting the Princes Highway. Subject to the provision of a service lane, this area could be an ideal location to locate large retail stores, fast food outlets, service stations with the potential to also increase Batemans Bay's office space.

Batemans Bay Industrial Area

The Batemans Bay industrial area has a number of current vacant lots and some vacant premises. When these vacancies are exhausted, there is no further expansion opportunity, aside from a small potential expansion on Gregory Street, and redevelopment potential is not likely to be significant in the short to medium term. However, it is likely that there will be continued pressure for the conversion of some sites (within existing buildings) from a traditional industrial use to a bulky goods retail or wholesale use. This conversion has been underway for some time, principally due to the lack of appropriate alternative land for such activities. The Surf Beach employment lands are designed to accommodate these types of land uses and may therefore reduce this pressure on the Batemans Bay industrial area. The vacant land on Vesper Street referred to above may also provide an alternative location for these types of land uses. The potential relocation of some bulky goods development, such as Bunnings, from the Batemans Bay industrial area to Surf Beach or Vesper Street will provide opportunities for new industrial development to establish in this area.

Surf Beach Employment Lands

The Surf Beach Employment Lands site is located on the western side of George Bass Drive near its intersection with Beach Road in Surf Beach. The site currently contains Council facilities including a landfill waste depot and a sewerage treatment plant. The remainder of the site is bushland. Currently zoned for industrial purposes, planning for the use of the site for various employment purposes is underway. In particular, negotiations for a bulky goods precinct and development of a small industrial subdivision is progressing. In order to progress these employment developments further, a proportion of the site must be retained as bushland to offset the removal of habitat required to facilitate the development. Construction of a new expanded NSW Ambulance Station to serve the greater Batemans Bay area is currently underway.

Batemans Bay Marina

The Batemans Bay Marina is a critical piece of marine infrastructure for the Eurobodalla region, being the only significant marina along the Eurobodalla coast. There is both the demand and the potential for an expansion of the marina to increase the number of berths and improve the supporting infrastructure and activities, including marine service industries, commercial activities and tourist facilities. An application has been made to the Department of Planning and Infrastructure for an expansion to the marina to increase the capacity to 250 boats and provide improved maintenance facilities, commercial development and tourist accommodation. At this stage the proponent has not progressed the application process through to approval.

Hanging Rock Recreation and Community Hub

Located between Batemans Bay and Batehaven, Hanging Rock is a regional community, educational and sports complex. Facilities provided at Hanging Rock include the Batemans Bay library, a University of Wollongong campus, a campus of the Illawarra Institute of TAFE, an indoor sports centre, tennis courts, a skate park and a number of playing fields and clubhouses. Expansions to the library and educational campuses are currently in planning and will increase both employment and educational opportunities for local residents.

Batehaven Neighbourhood Centre

There will be demand for additional retail floorspace (over 2,500m²) at Batehaven in the future (Wakefield, 2006). However, there are currently no vacant commercial sites in the centre and very few vacant shops. The Draft LEP proposes to extend the commercial zone to land on the north-western side of Edward Street. However there are only two properties in this area not already developed for commercial purposes, so this zone expansion will not accommodate any significant growth. Much of the building stock in the centre is relatively old and a large central area is currently used for car parking. To maintain a compact centre, redevelopment of the existing centre with more two and potentially three storey development including decked parking may be the most appropriate way to increase floorspace to meet the demand. However, this may prove difficult given fragmented land ownership. Any demand for a new full-line shopping centre outside of the Batemans Bay Town Centre should be provided at Batehaven, in order to maintain the integrity of the hierarchy and inject some alternative shopping options into the local area. However, the potential difficulties in redeveloping Batehaven may mean that this is a medium to long-term option.

Sunshine Bay Neighbourhood Centre

The Sunshine Bay site was created to provide local convenience shopping for the residents of a new residential area. The site has not yet been developed. Council has defined the centre as a Small Urban Neighbourhood in the centres hierarchy. The two nearest centres are Batehaven (defined as a Large Urban Neighbourhood) and Surf Beach (defined as a Small Urban Neighbourhood). As mentioned above, Batehaven has demand for additional floorspace and would be the most appropriate centre for any new full-line supermarket development, while Surf Beach has little capacity and no demand for additional retail. Currently, both Batehaven and Surf Beach have small supermarkets, of the same brand (IGA). As a Small Urban Neighbourhood, Sunshine Bay would also provide a small supermarket of the same size as currently provided at Batehaven and Surf Beach (though not necessarily of the same brand).

Mogo Village

There will be demand for additional retail floorspace (over 1,500m²) at Mogo in the future (Wakefield, 2006). A new car park has recently been developed by Council in the Charles Street road reserve and this has facilitated new commercial development opportunities on land fronting Charles Street. An improved pedestrian link from the Princes Highway through to Charles Street will assist further development opportunities. Mogo is principally a tourist town and businesses are heavily reliant on the tourist trade. Businesses are predominantly retail with some food premises. To improve the diversity of the business mix, some small scale boutique industries, such as arts and crafts, jewellery and clothing manufacturing, along with some commercial services, could be provided. Land to the south of Tomakin Road and along the western side of James Street is identified in this Strategy for such an opportunity.

Malua Bay Neighbourhood Centre

The Malua Bay Neighbourhood Centre is identified in the centres hierarchy as a Medium Village Neighbourhood. This places Malua Bay lower in the hierarchy order than Batehaven but higher than Surf Beach. Malua Bay is at the southern extent of the Batemans Bay residential suburbs and the Malua Bay Neighbourhood Centre will, when fully developed, provide a weekly convenience service to the surrounding communities. There is significant redevelopment potential of the Malua Bay Neighbourhood Centre, particularly on the disused service station site at the corner of George Bass Drive and Kuppa Avenue and the proposed extension in the Draft LEP of the commercial zone along Kuppa Avenue.

Surfside Neighbourhood Centre

The Surfside Neighbourhood Centre is identified in the centres hierarchy as Convenience Shops. Given the proximity of the centre to Batemans Bay, the relatively small local population catchment and the impacts on the site of sea level rise, no significant change to the nature of the centre is warranted or likely. However, there is potential for a mixed-use redevelopment of the centre, along both sides of The Vista from Wallaringa Street to Myamba Parade. Any redevelopment of the centre could incorporate a small number of convenience retail shops, food and drink premises, professional services and community activities, along with medium density residential development, generally in the form of shop-top housing.

Central Eurobodalla

Moruya Town Centre

Moruya is the principal administration centre of the Eurobodalla, but also provides the main rural service centre for the Shire. As a consequence of its central location and accessibility, Moruya is a prime location for businesses and industries that serve the entire Shire. Centred on Vulcan Street (Princes Highway), the Moruya town centre is a compact centre with good accessibility due to the historic grid pattern street layout and traditional main street design.

The Wakefield Report (2006) states that Moruya has an adequate amount of zoned business land to meet current and medium-term future needs, however there is a slight shortfall in current commercial floor space to meet demand to 2026. An additional 1,532m² of commercial floorspace will be needed by 2026. Commercial expansion opportunities are currently available in the eastern part of the town, however this area is affected by the Moruya River floodplain and this constraint may limit the capacity to take up these opportunities. The Moruya Structure Plan (2007) identifies a number of potential redevelopment sites in the eastern part of the town centre, including the Luhana Motel site and the Adelaide Hotel car park. In addition, a tourist precinct was identified along Shore Street. To the west of the town centre, Page Street was identified as a Special Character Area given the significant heritage assets located on this street.

Like Batemans Bay, Moruya could increase activity levels with extended operating hours to add to the vibrancy and safety within the centre. There may be potential in Moruya for expansion of higher education facilities, possibly with a focus on agricultural and marine studies. In recent times, there has been an increase in the number of restaurants and boutique retail businesses in the Moruya Town Centre.

Moruya North Industrial Estate

The Moruya North industrial estate is the principal area for large industrial activities in the Shire. However growth is relatively slow and a significant number of vacant lots remain in the estate (40%). Notwithstanding the current vacancy rate, the Eurobodalla Settlement Strategy identified the need to expand the Moruya North industrial area to cater for long-term growth in industrial development in the Shire, particularly given the lack of expansion opportunity at Batemans Bay. This expansion is now being accommodated through a rezoning proposal in the Draft Local Environmental Plan (LEP).

Moruya East Industrial Estate

Vacant land zoned industrial to the east of the Moruya township on the Princes Highway at Albert Street has recently received consent for a 10 lot industrial subdivision with lots ranging from 1000m² to 4000m². It is estimated that this development on these new industrial lots could provide for approximately 60 new jobs.

Yarragee Industrial Area

The Yarragee industrial area to the west of the Moruya township is an older industrial estate that accommodates a number of depots and manufacturing industries. A number of the lots in this area are relatively large and the sites are not developed to full potential. Redevelopment of some of the land in this area in the future may increase the development yield and employment capacity. Expansion of this area is not proposed given the land is surrounded by rural residential and potential future residential development.

Moruya Airport

In 2006, Eurobodalla Shire Council adopted a concept plan for redevelopment of the Moruya Airport. Commencement of the airport redevelopment is (in part) pending the finalisation of the Draft Eurobodalla Local Environmental Plan which will allow delivery of the concept plan through appropriate zoning of the land. However, as the concept plan is now five years old, a review will be required in order to ensure the components of the concept plan remain relevant having regard to current aviation industry issues and trends and to seek further feedback from the community on the future of the Moruya Airport.

Broulee

The hamlet of Broulee is one of a number of coastal hamlets located to the south of the residential area associated with Batemans Bay. Large areas of potential residential development at Tomakin and Rosedale, as well as further residential development opportunities within Broulee itself, will provide growing demand for additional commercial facilities in the local area. An area of land zoned business exists in Broulee on Train Street near George Bass Drive for commercial development to meet this demand. However, a previous approval for a supermarket on land to the north of Broulee at The Moorings may reduce the viability of a supermarket at the Train Street site. A child care centre has recently been approved for development on part of this land. Broulee is also a popular tourist spot, however there are few commercial facilities, such as cafes and restaurants that cater to the tourist market as well as to permanent residents. A proposed extension to the Broulee Surf Club may provide some limited facilities through a new kiosk. In addition, any future redevelopment of the small neighbourhood centre on Coronation Drive could be designed to provide more facilities for tourists and residents.

Bimbimbie and surrounds

Land at the corner of Bimbimbie Road and the Princes Highway contains a Rural Fire Service Training Facility and an asphalt manufacturing industry. In addition, there are a number of quarry sites in the Bimbimbie area. These lands may provide for future industrial development opportunities, but are not included as investigation areas in this Strategy given there are more suitable alternative sites to consider at this stage. In the longer term, these sites may become investigation areas.

South Eurobodalla

Narooma Town Centre

Narooma is the key town centre in the southern part of Eurobodalla, providing mainly retail shops and commercial services to the local population. Narooma is also a centre for tourists visiting the wider region, given the spectacular natural environment of the coastline and its proximity to the historic villages of Bodalla, Central Tilba and Tilba Tilba.

Unlike Batemans Bay and Moruya, Narooma is not a compact centre, but is composed of three small commercial precincts located along the Princes Highway as it snakes its way through the town, along with a number of other commercial/industrial sites, such as the waterfront areas at Riverside Drive (Forsters Bay) and Bluewater Drive. The fragmented nature of commercial development in Narooma is a response to topographic influences and Narooma's commercial history. The topography and history of the place are however important natural and cultural assets, providing both visual and historical interest in the town. The street pattern is a modified grid designed to take advantage of scenic vistas and generally provides good access and circulation, notwithstanding the challenging topography.

Given the relatively scattered nature of commercial development, Narooma enjoys a greater mix of land uses than in Batemans Bay and Moruya, with more residential development and tourist accommodation in close proximity to each of the commercial areas. The Narooma Plan (2005) provides for each of the commercial areas in Narooma to have complementary roles and distinct identities. Development that supports the commercial areas, including home-based businesses, professional offices within existing dwellings and tourist accommodation are identified for certain land between the commercial centres. This strategy supports this approach and confirms the area between the Narooma Hill centre and Narooma Plaza as the most appropriate location for such development.

Redevelopment opportunities in Narooma should be focused within the existing commercial centres. In addition, redevelopments for mixed commercial and residential purposes should be located on land identified for medium density residential development in close proximity to the centres. Development consent has been granted for an expansion of the Narooma Plaza and there may be mixed-use redevelopment opportunities on the land fronting Campbell Street north of the Narooma Hill centre.

The natural assets in and around Narooma provide opportunities for new tourist-related businesses and environmentally-based technical service businesses, such as research facilities and 'green' industries. The strong rural base in the southern part of the Shire also provides opportunities for rural service businesses to establish in Narooma.

Narooma Industrial Area

The Narooma Industrial area is a relatively small local service industry centre that is almost fully developed. A few sites remain vacant within the industrial area and a strip of land along the southern side of Glasshouse Rocks Road is earmarked for a minor expansion of the industrial area. The Narooma Plan (2005) states that no further expansion of the Narooma industrial area is warranted or proposed, and that the industrial area should remain a local service centre. The small expansion area is currently heavily vegetated and investigations of the environmental values of the land need to be undertaken prior to any development of the land for industrial purposes.

Dalmeny Industrial Area

The Dalmeny Industrial area is also a relatively small local service industry centre that is almost fully developed. The only land zoned for potential industrial redevelopment is an area at the eastern end of Acacia Close, currently occupied by a Council depot. A further small expansion opportunity to the south is being facilitated through a rezoning under the Draft LEP 2011. Both of these areas are heavily constrained and such constraints will limit the redevelopment capacity.

A further expansion opportunity to the west of the existing industrial estate is being explored in this Strategy.

Bodalla

Bodalla is identified in the centres hierarchy as a Tourist Neighbourhood, with the preferred future status as Tourist Neighbourhood/Convenience. There are opportunities within the existing commercial land in the village for additional tourist-based and convenience shops, services and food and drink premises. The site of the former Bodalla Big Cheese facility to the north of the village has potential for redevelopment for a new tourism-based operation.

The current small industrial area on Potato Point Road to the south of the village is currently underutilised and has potential for redevelopment for small service or rural-based industries.

Brou Tip

The Brou Tip is one of Eurobodalla’s waste facilities currently containing a landfill for general waste, a steel recycling facility and a concrete crushing facility. The Brou Tip also produces green waste for sale as a raw mulch. Located within a State Forest, on land licensed to Council for waste purposes, the Brou Tip is in a location removed from residential areas. As stages of the land fill component of the facility are completed over time, there are opportunities for expansion of the green waste recycling and the addition of food waste recycling to generate a quality compost product for sale. This type of waste recycling is more labour intensive than a landfill facility, providing for increased employment opportunities at the site.

eurobodalla shire council

Economic Development and Employment Lands Strategy

Appendix G

Employment Land Supply and Demand Analysis

EMPLOYMENT LAND SUPPLY AND DEMAND ANALYSIS

Chapter 2.6 of the Strategy summarises the results of a detailed employment land supply and demand analysis. The full detail and analysis is provided in this Appendix.

Modelling of the demand for future employment land on the basis of anticipated population growth and the current job mix has defined that a total of 104ha of employment land is required by 2030 to meet the job target identified in the South Coast Regional Strategy. This employment land covers commercial (16ha), industrial (30ha), education (38ha) and health (20ha) land. This Strategy focuses only on land for commercial and industrial development, as the identification of land for schools and health care facilities will be determined by the relevant government agencies in accordance with their own forward planning programs.

Further analysis of the commercial and industrial employment land demand was then undertaken, taking into account existing vacant land and assumptions of redevelopment potential. The need to plan for an oversupply of employment land, having regard to the potential reduction in developable areas due to environmental or servicing constraints, was also factored in to the analysis.

Estimate of land area required based on business growth

At an average of 3.6 employees per business, the projections suggest that another 1,000 to 1,500 businesses will be created in the Shire in the next 20 years. If current ratios of home-based business to centre-based business continue, 650-1,000 of these new businesses will be home-based and 350-500 businesses will require some form of employment land or premises. Assuming a rate of conversion of home-based businesses to centre-based businesses of 10%, a further 35 to 50 businesses will require some form of employment land or premises. Using the proportions of businesses identified across all centres from the Employment Lands Audit, the new business breakdown by category and the estimated land area required can be estimated. Based on the 2010 land use mix across all employment zones, and an estimated average land area per business category, the land area required to meet the needs of new businesses over the next 20 years will be between 39.4ha and 56.4ha.

Table 1 provides a reasonable estimate of the land area required to meet the demand of new businesses expected to be established in Eurobodalla's commercial and industrial areas by 2031. The average land area per business has been estimated on the basis of the business to area ratio in existing commercial centres and industrial areas in Eurobodalla. Different centres and industrial areas had different business to area ratios, so it was necessary to derive an average across a number of centres or areas. For the Hospitality and Tourism category, an average land area was derived from the size of a number of lots currently occupied by restaurants, motels and hotels within centres. For the Health and Education category, only the average size of health and education services located within centres were considered.

Table 1: Employment land area estimate based on predicted business growth

Business category	2010 land use mix	No. of new businesses		Average land area per business (m²)	Estimated land area required (ha)	
		Minimum	Maximum		Minimum	Maximum
Retail	36%	138	197	400m²	5.5	7.8
Professional Services	20%	78	112	700m²	5.4	7.8
Hospitality and Tourism	14%	55	79	2000m²	11	15.8
Health and Education	10%	37	52	1000m²	3.7	5.2
Manufacturing	3%	13	18	2000m²	2.6	3.6
Construction	3%	13	18	2000m²	2.6	3.6
Repair Services	6%	23	33	2000m²	4.6	6.6
Warehousing	3%	13	19	2000m²	2.6	3.8
Other	4%	14	22	1000m²	1.4	2.2
Total	**100%**	**384**	**550**		**39.4**	**56.4**

Estimate of land area required based on job growth

An alternative measure of employment lands demand is to calculate the expected job growth by business category and the land area required to meet that growth. Based on the DoP ELDAM (Employment Lands Development Assessment Modelling) estimate of 4,000 new jobs by 2031 to keep pace with forecast population growth and the higher South Coast Regional Strategy target of 6,200 new jobs by 2031, an additional 67 to 104 hectares of land will be required by 2031 to meet the jobs targets. With 309.5 hectares of employment land (commercial and industrial) currently in the Shire, this represents a 22-34% increase in employment land over current levels.

Table 2 identifies the base land area required to meet the employment demand, based on the projected increase in job numbers. Some of this land will be required for commercial development, some for industrial development and some for education and health facilities. In addition to this new land, jobs will be provided on existing land through home occupations, home industries and through redevelopment of existing commercial and industrial areas. Therefore, not all new jobs require new land.

Detailed comparisons between this approach and the previous approach based on business growth are limited given the assumptions made and the different categorisations between business types and job types. However, when out of centre employment generating developments such as hospitals and schools are excluded, the total land area required by both approaches are not significantly different, with both identifying an upper range need for between 50 and 60ha of employment land in commercial centres and industrial areas.

Table 2: Employment land area estimate based on predicted job growth

Job Type	2006 job mix	Jobs target		Land use	Land required (ha)	
		4,000	6,200	sqm/job	Minimum	Maximum
Home based (est 28% of jobs being home-based jobs in 2006)		1,120	1,736	n/a	n/a	n/a
White collar/clerical	22.7%	654	1014	30	2	3
Manufacturing(incl hi tech)	6.3%	182	282	125	2	4
Warehousing/storage	5.2%	149	230	753	11	17
Retail	33.6%	967	1,499	85	8	13
Construction	7.5%	216	335	250	5	8
Repairs	2.8%	82	127	90	1	1
Sub Total		**2,250**	**3,488**		**29**	**46**
Schools	8.5%	246	381	1,000	25	38
Health care	13.3%	384	595	333	13	20
Sub Total		**630**	**976**		**38**	**58**
TOTAL		**2,880**	**4,464**		**67**	**104**

Detailed analysis

To determine the actual area of new commercial and industrial land to be set aside for new development and job creation, a number of land development assumptions need to be made. Firstly, it is important to plan for a larger area than required, given the potential for areas within identified sites to not be developed for one or another reason (such as environmental constraints, delay in infrastructure provision, costs associated with development or because the land owner decides not to develop the land). Having regard to the location of potential new commercial land, being adjacent to existing town centres, it is proposed to plan for double the area required. Given that potential future industrial development will be on greenfield land with greater potential development constraints, it is proposed to plan for triple the area required. Once this total area has been determined, it is appropriate to subtract existing vacant commercial or industrial land from the total area required and factor in an assumption about the use of vacant premises and redevelopment of existing employment lands. This more detailed analysis refines the employment demand analysis and shows that, for the higher job target, 14.7ha of new commercial land and 44ha of new industrial land is required by 2030, as shown in Table 3.

Table 3: Employment land area estimate based on more detailed analysis

Job Category	Base Land Area Required (ha)		Oversupply (Area x 2 or 3)		Less Existing Vacant Land (ha)	Less use of vacant premises and redevelopment	Total Land Area Required (ha)	
	Min.	Max.	Min.	Max.			Min.	Max.
White collar/ clerical	2	3	4	6				
Retail	8	13	16	26				
Total Commercial	**10**	**16**	**20**	**32**	**11ha**	**30%**	**6.3**	**14.7**
Warehousing/ storage	11	17	33	51				
Manufacturing (incl. hi tech)	2	4	6	12				
Construction	5	8	15	24				
Repairs	1	1	3	3				
Total Industrial	**19**	**30**	**57**	**90**	**35ha**	**20%**	**17.6**	**44**
Schools	25	38	n/a	n/a	n/a	n/a		
Health care	13	20	n/a	n/a	n/a	n/a		
Total Community	**38**	**58**	**38**	**58**	**n/a**	**n/a**	**38**	**58**
TOTAL	**67**	**104**	**115**	**180**			**61.9**	**116.7**

Employment capacity of existing and proposed employment lands

To confirm the outcomes of the employment lands demand analysis and to demonstrate the need for additional employment land, the employment capacity of development on existing vacant land has been considered. The full development of all vacant commercial and industrial land in the Shire will yield approximately 1400 jobs, the majority of these in the Batemans Bay Town Centre, the Batemans Bay industrial area and the Moruya North industrial area, as identified in Tables 4 and 5.

The total job capacity in existing commercial and industrial lands represents approximately 23% of the jobs required to meet the target identified in the South Coast Regional Strategy. Not all jobs will be provided in a centre, with a proportion based from home and in agricultural and tourism developments scatters around the Shire. However, analysis suggests that approximately 56% of the jobs target will be in businesses usually located in centres or industrial areas. Therefore, land to accommodate another 33% of the jobs target, or just over 2000 jobs will be required.

Table 4: Employment Capacity on Existing Commercial Land

Employment Land	Area (m^2)	FSR	Development Area (m^2)	Job Ratio	Jobs
Batemans Bay	20960	1:1	20960	1 per $63m^2$	333
Moruya	3233	1:1	3233	1 per $63m^2$	51
Narooma	683	1:1	683	1 per $63m^2$	11
Kianga	1100	1:1	1100	1 per $63m^2$	17
Mogo	14620	0.5:1	7310	1 per $63m^2$	116
Surfside	733	1:1	733	1 per $63m^2$	12
Broulee (Pre-School)		n/a		n/a	12
Broulee (Other)		n/a	3000	1 per $63m^2$	48
Durras South		n/a	600	1 per $63m^2$	10
Central Tilba	1138	1:1	1138	1 per $63m^2$	18
Sunshine Bay		n/a	2000	1 per $63m^2$	32
Long Beach		n/a	1020	1 per $63m^2$	16
Sub Total					**676**

Table 5: Employment Capacity on Existing Industrial Land

Employment Land	Land Area (m^2)	FSR	Development Area (m^2)	Job Ratio	Jobs
Dalmeny	28844	0.75:1	21633	1 per $312m^2$	69
Narooma	25789	0.75:1	19342	1 per $312m^2$	62
Moruya North	84957	0.75:1	63718	1 per $312m^2$	204
Batemans Bay	68872	0.75:1	51654	1 per $312m^2$	166
Bodalla	7188	0.75:1	5391	1 per $312m^2$	17
Moruya (Other)	25805	0.75:1	19354	1 per $312m^2$	62
Surf Beach (Bulky Goods)		n/a	19956	1 per $312m^2$	64
Surf Beach (Industrial)	51500	0.75:1	38625	1 per $312m^2$	124
Total					**768**

The potential job yield of the identified potential future employment lands was then assessed to determine whether the combination of development on existing and potential employment lands would meet the total job target. Tables 6 and 7 provide details of the employment capacity of the potential future employment lands.

Table 6: Employment Capacity on Potential Commercial Land

Employment Land	Land Area (m^2)	FSR	Development Area (m^2)	Job Ratio	Jobs
Batemans Bay	30000	1:1	30000	1 per 63m^2	476
Mogo	10000	0.5:1	5000	1 per 63m^2	79
Moruya	27000	1:1	27000	1 per 63m^2	429
Narooma	39000	1:1	39000	1 per 63m^2	619
Total					**1603**

Table 7: Employment Capacity on Potential Industrial Land

Employment Land	Land Area (m^2)	FSR	Development Area (m^2)	Job Ratio	Jobs
Mogo	45000	0.75:1	33750	1 per 312m^2	108
Bodalla	117000	0.75:1	87750	1 per 312m^2	281
Dalmeny	27000	0.75:1	20250	1 per 312m^2	65
Moruya North	120000	0.75:1	90000	1 per 312m^2	288
Sub Total					**742**

A total of 2345 jobs may be able to be provided on the potential future commercial and industrial employment lands by 2030. This exceeds the need for approximately 2000 jobs on new employment lands referred to above, however given the employment capacity analysis is based on average assumptions regarding the job ratios on commercial and employment land, a potential oversupply is a positive result.

Breaking down the total job capacity on existing and potential employment lands by broad job types, as shown in Table 8, it can be seen that the job capacity on commercial land falls slightly short of the target, while the job capacity on industrial land exceeds the target. As demonstrated by the Employment Land Audit, a number of retail jobs (bulky goods retail, wholesale retail) are provided in industrial areas, so an undersupply of jobs on commercial land and an oversupply on industrial land is appropriate. The total job capacity also represents an oversupply compared to the job target.

Table 8: Comparison between Job Target and Estimated Job Capacity, Eurobodalla, 2030

Job Type	Job Target	Job Capacity
Commercial	**2513**	**2279**
Industrial	**974**	**1510**
Home-based	1736	1736
Health	595	595
Education	381	381
Total	**6199**	**6501**

Where is the Demand?

Given the nature of Eurobodalla's settlement, with three major centres located to the north, centre and south of the Shire, each with their own related industrial areas, and a spread across the Shire of smaller villages and neighbourhood centres, the location of future businesses and employment opportunities will be determined by the preference of the business owner for a particular location and the availability of land in that location. For this reason, opportunities need to be provided across the Shire, with the amount of land to be made available in each area driven by the centres hierarchy. The type of land to be provided in each part of the Shire (eg. small expansions of commercial centres, new Greenfield industrial areas, etc) will also need to be based on the centres hierarchy and business locational trends.

***North Eurobodalla* –** The northern part of Eurobodalla contains the Shire's major regional centre, the principal employment area and the largest population catchment. Major commercial developments, corporate head or regional offices and government departments or agencies are best located within the major regional centre of Batemans Bay. Major health, education and recreation facilities are also suited to a location in the northern part of the Shire given the close proximity to a large proportion of the population. Businesses that service population growth, such as construction businesses and bulky goods retail businesses and also suited to the north of the Shire.

***Central Eurobodalla* –** The central part of Eurobodalla provides the administration centre of the Shire, but is also in large part the rural centre of the Shire. With good access from all parts of the Shire, the central area which is based around Moruya is a prime location for businesses and industries that serve the entire Shire. Large industrial businesses, transport logistics businesses, government facilities, health, education, recreation and airport facilities are best located in the centre of the Shire. Rural industries would also be suited to a central location in the Shire, where access to rural activities and potential employees is optimised.

***South Eurobodalla* –** The southern part of Eurobodalla has the smallest population catchment and is therefore mostly suited to local service businesses. However, there are also significant natural assets in the southern part of the Shire that attract tourists and there is capacity for growth in tourist service businesses in and around Narooma, along the coastline and in the historic Tilba villages. These natural assets may also attract technical service businesses, such as research facilities and 'green' industries to the area. There is also a strong rural base in the southern part of the Shire.

Table 9 identifies the proportions of commercial and industrial jobs to be provided in each of the three precincts in Eurobodalla, north, central and south. Appropriately, the bulk of commercial jobs are targeted for the northern precinct, in and around Batemans Bay, while the distribution of industrial jobs across the Shire is more evenly spread amongst the three regions.

Table 9: Location of New Jobs, Eurobodalla, 2030

Location	Commercial Jobs	Industrial Jobs
North	**47.1%**	**30.6%**
Central	**23.7%**	**37.8%**
South	**29.2%**	**31.6%**

eurobodalla shire council

Economic Development and Employment Lands Strategy

Appendix H

Economic Development Strategies

BATEMANS BAY CHAMBER OF COMMERCE AND INDUSTRY INC.

ECONOMIC DEVELOPMENT STRATEGIES

Chapter 3.1 of this Strategy briefly identifies a number of recommendations contained in the Strategic Influences Report to support Council's current Economic Development Strategy in 2009. This Appendix provides more discussion on each of the following recommendations:

1. Narrow marketing focus to strategic advantages and target businesses that can profit from those advantages;
2. Link economic development actions to educational, social and environmental infrastructure;
3. Work closely with businesses in knowledge intensive service sector to help that sector expand; and
4. Actively facilitate innovation across the Shire's economy.

Narrow marketing focus to strategic advantages and target businesses that can profit from those advantages

Eurobodalla competes with surrounding regions and other places across NSW and Australia for business development, particularly for manufacturing industries, professional service businesses, technology businesses and for regional headquarters of large companies and government agencies.

There are a number of factors that businesses take into consideration in determining where to locate. One of the key factors is the availability and skills of the local workforce. It is also important for businesses to consider transport and other logistical issues when determining where to locate, as is the availability and proximity of other businesses that provide material inputs and services to the business. The availability of business infrastructure is another critical factor in making a decision on the business location.

Beyond these principally economic factors, businesses take into consideration the qualities and characteristics of the area. Where all economic factors are suitable in a number of locations, the deciding factor can come down to the strategic advantages of one location over another. For example, businesses that require access to the waterfront could choose any coastal location that has the appropriate marine infrastructure, services and available workforce, however the deciding factor on location may come down to one specific strategic advantage.

Eurobodalla has a number of strategic advantages including:

- Easy access by road and air transport to Sydney and Canberra;
- Excellent coastal and rural lifestyle opportunities;
- Significant areas of National Park and State Forest;
- Productive agricultural lands and coastal areas;
- A rich and diverse economic history relating particularly to mining, timber and agriculture;
- A regional service and administrative centre role;
- Positive trends in population growth and diversity;
- A community with a strong sense of identity, community spirit and a desire for sustainable growth; and
- Popularity as a tourist region.

Marketing the Eurobodalla to attract new industry and business should focus on these and other strategic advantages.

Link economic development actions to educational, social and environmental infrastructure

A number of the actions in the Eurobodalla Economic Development Strategy 2009 relate to the role of businesses, education providers, employment agencies, Council and other government agencies, and partnerships between these groups to foster economic development. As an integral part of discussions between these agencies, the link between any proposed economic development actions and existing or planned educational, social and environmental infrastructure needs to be understood.

For example, any actions relating to the support for new industry opportunities should have regard to the availability of skills relevant to specific industries and the training capacity of educational institutions to provide the necessary skills. Actions relating to or associated with labour market planning, such as the retention of skilled young people in the local area or the retention of older persons in the workforce, should have regard to the services and facilities that are available to support people both in employment and socially.

Similarly the benefits of existing or planned infrastructure to the attraction and growth of businesses should be understood and communicated. The benefits of implementing the National Broadband Network in Eurobodalla to businesses, the education and health sectors and the wider community need to be understood in order to capitalise on the potential economic development outcomes.

Being aware of these linkages will identify the best use of existing or planned educational, social and environmental infrastructure and any improvements that can be made to further the aims of the economic development actions.

Work closely with businesses in knowledge intensive service sector to help that sector expand

The knowledge intensive service sector, including professional services, finance and information technology, will be the strongest job growth industries across New South Wales and Australia as a whole. Eurobodalla has seen some modest growth in businesses in this sector over recent years, but this growth is from a low base and the proportion of businesses in this sector remains low.

The 'helping our businesses grow' actions in the Eurobodalla Economic Development Strategy 2009 appropriately apply across all industry sectors. However a strong focus on working with businesses in the knowledge intensive service sector would have benefits across the entire economy, as the services these businesses provide will assist other businesses to become more efficient, innovative and productive. Businesses in this sector also generally provide higher wages and contribute to the increase of skills across the workforce.

The NSW Business Sector Growth Plan (2010) identifies the finance, insurance and professional services sector as being "*responsible for driving significant innovation, productivity and efficiency across the economy, through creating and applying world class approaches to management, research and technology*". This statement applies equally to the Information and Communication Technology sector.

Actively facilitate innovation across the Shire's economy

Innovation is a key driver of economic growth. The capacity to innovate and actual innovation activities within a place are key drivers of continued and greater innovation activity. In other words, innovation feeds innovation. Innovation can develop with or without guidance or facilitation, however the capacity for innovation to take place will be dependent on the environment within which businesses operate. The NSW Regional Innovation Strategy (2010) identifies two drivers of innovation and two enablers of innovation. The drivers are the 'pressure to innovate' and the 'willingness to innovate'. These relate to the attitude and desire of business owners and operators to innovate.

The enablers of innovation relate to the business environment and are the 'implementation tools' and 'access to knowledge'. The implementation tools include the availability of professional services, finance, information technology, logistics and government support. Access to knowledge relates to the availability of skills and education opportunities, the development of networks and other interactions between businesses and access to research institutions. Where the drivers and enablers of innovation are all present, the capacity to innovate is enhanced.

Innovation will facilitate economic growth to a level over and above that generated by population growth. Reliance on population growth alone will not deliver the level of employment growth required to achieve a truly prosperous economy.

A number of actions in the Eurobodalla Economic Development Strategy 2009 relate to the enablers of innovation, particularly in relation to the development of business networks, the provision of information to businesses and the improvement of local skills. These actions should be continued, with the goal of enabling innovation as a key component of each action.

Economic Development and Employment Lands Strategy

Appendix I

Employment Land Planning Principles

EMPLOYMENT LAND PLANNING PRINCIPLES

Chapter 3.2 of the Strategy lists the key employment land planning principles. This Appendix provides an explanation of each of the planning principles.

Principle No. 1

That all appropriate efforts should be made to facilitate the development of existing vacant commercial or industrial land, prior to the release of any further significant areas of commercial or industrial land to the market.

Sufficient vacant land currently exists within all major centres, a number of the neighbourhood centres and most existing industrial employment lands, along with the development potential at the Surf Beach employment lands, to satisfy any immediate demands for employment generating development. Some of this vacant land has been vacant for some time, suggesting either the demand for additional development is not yet sufficient to warrant the investment, or there are impediments to the development of the land.

Consistent with the commercial and retail principles in the NSW Government's Settlement Planning Guidelines for the South Coast Regional Strategy, consideration should be given to a range of incentives and strategies to consolidate and support office and retail development within existing commercial centres. In this Strategy, the same considerations will also apply to existing industrial lands.

Principle No. 2

That planning for employment land supply into the long term should be commenced within the next 5 years and that the release of land should be undertaken ahead of the market but in an orderly and efficient manner to avoid market saturation.

The current planning for future employment generating lands does not cater for the long-term employment needs of the Shire. For commercial development, the only significant expansion under planning consideration is for bulky goods type development at the Surf Beach employment lands and a number of additional small neighbourhood centres. In existing commercial centres, there are some potential significant redevelopments, though the timing of these is dependent upon market conditions. For industrial development, the only significant expansion under planning consideration is the extension to the Moruya North industrial area, however detailed economic and environmental studies are yet to be done for this land. Development on these lands, if they proceed, will principally satisfy short to medium-term demands. Additional land is required for long-term development needs and to provide alternative employment land development options.

This principle is consistent with General Principle 1 in the NSW Government's Settlement Planning Guidelines for the South Coast Regional Strategy to "*ensure an adequate supply of employment land to encourage sustainable regional economies and promote the Regional Strategy centres hierarchy*".

Principle No. 3

That the need for provision of employment lands be balanced with the need to protect important environmental areas, so that development outcomes can satisfy both needs as much as is practicable in the circumstances of each case.

Areas currently identified for employment lands (Moruya North and Surf Beach) are heavily constrained by significant environmental qualities. However, planning for appropriate development footprints is continuing, recognising the need to balance land supply for job growth with environmental protection. The same need to balance land supply with environmental protection will apply to the lands identified as potential investigation areas in Chapter 9, as these lands also contain some environmental constraints. In particular, a number of the areas contain riparian corridors and endangered ecological communities and area proximate to significant wetlands.

This principle is consistent with General Principle 2 in the NSW Government's Settlement Planning Guidelines for the South Coast Regional Strategy to "*cluster businesses and industries with similar environmental impacts…to reduce land use conflicts…*".

Principle No. 4

That land uses and subdivision controls for employment lands be designed to facilitate the maximisation of employment generating land uses.

Given the environmental constraints that limit the extent of development on employment lands, it is necessary to maximise the employment generation potential of the land that is available for development. This can be achieved partly through the subdivision pattern of the employment land and partly through the allocation of land uses that are permissible on the land. A mix of lot sizes encourages a variety of types of development, as opposed to a more consistent lot size that may limit development options. A mix of permissible land uses similarly encourages a variety of types of development, from those that employ relatively large numbers of people (eg. vehicle repair stations) to those that employ relatively few people (eg. warehouses). A further tool to maximise employment generation is to encourage the location of large floor plate but low employment generating development (eg. large warehouses) in the larger employment land areas and restrict them from smaller employment areas.

This principle is consistent with General Principle 4 in the NSW Government's Settlement Planning Guidelines for the South Coast Regional Strategy to "*ensure new urban/greenfield release provides adequate supply and mix of employment land that is flexible in use to meet long term employment demand*".

Principle No. 5

That future employment lands be provided in accessible locations to service the three distinct population centres in the north, central and southern parts of the Shire and that transport connections between the centres be improved.

Eurobodalla as a Shire is relatively isolated from major population centres in the south-eastern corner of Australia, principally due to distance and inadequate transport infrastructure connecting Eurobodalla with surrounding areas. In addition to the above, the size of Eurobodalla and the location of the three major centres means that each centre is relatively isolated from each other and that the distance between people's homes and potential workplaces can be significant. Employment opportunities therefore need to be provided in three distinct areas of the Shire, in the north around

Batemans Bay, centrally near Moruya and in the South around Narooma. In addition, transport connections between the three major centres and to surrounding centres need to be improved.

This principle is consistent with General Principle 3 in the NSW Government's Settlement Planning Guidelines for the South Coast Regional Strategy to "*consolidate major trip generating businesses around public transport nodes to provide the economies of scale required to support public transport infrastructure*".

Principle No. 6

That future employment lands be determined having regard to the need to increase economic and employment diversity, by basing employment land decisions on known or anticipated business location needs and the potential for business clusters to establish and grow.

Eurobodalla Shire has a relatively diverse local service economy, however beyond the local services sector, economic and employment diversity is relatively low. Improving economic and employment diversity requires implementation of a range of economic development measures, from business attraction to skills development, but can also be assisted by employment lands decisions. In particular, the designation of employment lands in the right locations to facilitate the clustering of similar businesses and improving economies of scale can facilitate growing diversity.

This principle is consistent with General Principles 2 and 4 in the NSW Government's Settlement Planning Guidelines for the South Coast Regional Strategy relating to both the opportunities for clustering businesses and ensuring an adequate supply and mix of employment land.

Principle No. 7

That the existing and preferred future centres hierarchy be protected through appropriate zoning and development controls and that proposed developments that are compatible with the hierarchy be facilitated and supported.

The existing and preferred future hierarchy of centres in Eurobodalla remains appropriate for the foreseeable future. Commercial, industrial and residential development should all protect and promote that hierarchy. New shopping centre developments should be located in the higher order centres and lower order centres should continue to provide convenience services to the local community. Higher density residential development should focus in and around the higher order centres, while medium density residential development should be located adjacent to the lower order centres, where zoning permits. Retail development that is most appropriately located in commercial areas should not expand into industrial areas.

This principle is consistent with General Principle 6 in the NSW Government's Settlement Planning Guidelines for the South Coast Regional Strategy to "*support regional strategy commercial centres hierarchies with mechanisms to promote this hierarchy at a regional and local government area level*".

Principle No. 8

That centres remain compact in form and land use, particularly for core retail and commercial activities, with opportunities for non-core retail and commercial development to be provided in appropriate locations adjacent to centres.

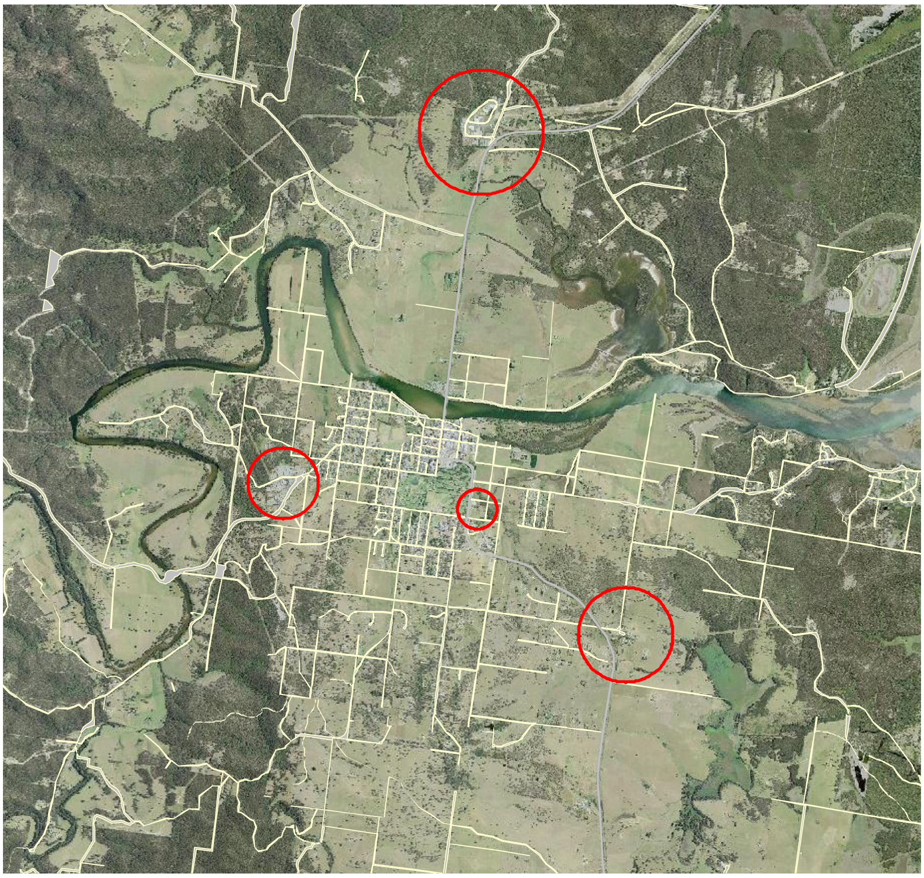
The compactness of centres is a critical element in the success of centres in both economic and social terms. Compact centres encourage walkability and promote public transport use, they increase pedestrian activity and passive surveillance, improving safety and amenity. The Batemans Bay and Moruya Town Centres are relatively compact centres in their current form, however the Narooma commercial area is spread out along the Princes Highway and has evolved into three distinct centres. For Batemans Bay and Moruya, any expansion of the commercial area must be adjacent to the current area and within easy walking distance. However, there is an opportunity to provide non-core retail and commercial development along the Old Princes Hwy connecting the centre with the industrial area to the south. For Narooma, each of the three distinct centres should be consolidated, however there is an opportunity to connect the Narooma Hill centre with the Narooma Plaza centre through the location of non-core retail and commercial development along the Princes Highway between these two centres.

This principle is consistent with the commercial and retail principles in the NSW Government's Settlement Planning Guidelines for the South Coast Regional Strategy, relating to protecting the commercial core of centres, planning for centre growth and restricting out-of-centre retail developments.

Economic Development and Employment Lands Strategy

Appendix J

Employment Land Locational Criteria



EMPLOYMENT LAND LOCATIONAL CRITERIA

Chapter 3.3 of the Strategy lists the key employment land locational criteria for determining future employment lands. This Appendix provides an explanation of each of the locational criteria.

Criteria No. 1: Proximity to existing populations and infrastructure

Most businesses would prefer to be located close to a potential workforce and customer base. In addition, most people would prefer to live within a reasonable distance of work and have good access to businesses and services. Eurobodalla has three major population bases, two of which are relatively compact (Moruya and Narooma) while the Batemans Bay population catchment is spread along the coastline. Only one population base (Moruya) is centrally located, being within one hour's drive from the majority of Shire residents.

Businesses would also prefer to be located in accordance with their specific business needs, rather than on the basis of available land or premises. Therefore, decisions about future employment land must have regard to the locational needs of businesses. For example, land for retail businesses is best located where there are high pedestrian movements. On the other hand, land for large floor-plate warehouses that attract heavy vehicles is best located adjacent to residential areas to avoid traffic conflicts but still be relatively close for employee access.

Future employment lands should also be located where it is cost effective to service with reticulated water and sewer and other essential infrastructure and services.

Criteria No. 2: Accessibility and proximity to the Princes Highway

Good accessibility is only partly achieved by being in close proximity to population bases. The directness of access from the population bases to the employment lands is also important, as is the safety of access. Choice of access is also an important consideration, with the more options available (walking, cycling, driving, public transport), the greater the accessibility. For direct heavy vehicle access and ease of access from all parts of the Shire, proximity to the Princes Highway is a critical consideration.

Criteria No. 3: Minimal environmental constraints

All land in Eurobodalla is constrained to some degree by environmental assets or hazards, or by proximity to environmental features. Significant areas of natural bushland which contains endangered species and is bush fire prone constrain development potential. Much of Eurobodalla's urban lands are located along the coastline and are potentially subject to inundation through sea level rise or are in close proximity to important waterways or wetlands.

Sites which are the least affected by environmental constraints are preferred for employment lands, or for other urban development, depending upon other factors such as topography and accessibility.

Criteria No. 4: Minimal impact on adjoining properties

The location and design of employment lands must have regard to the impact of development in those lands on adjoining properties. Considerations in the location of employment lands should include adequate separation distances to sensitive land uses such as dwellings and environmental areas. The potential visual impact of employment development from public places, particularly from roads, and from residential properties is an important consideration. In particular, the view of employment areas across rural landscapes must be considered.

In terms of the design of employment areas, consideration should be given to the location of access points, internal roads, land uses and building form. Landscaped buffers along sensitive edges of employment lands should be provided.

Criteria No. 5: Expansion opportunity

Large sites that have the potential capacity for longer-term expansion are ideal, particularly for industrial developments and particularly near large population catchments where population growth is forecast into the future. Small sites that have no expansion potential may be suitable employment lands in locations where future population growth is not anticipated or is forecast to be low.

Criteria No. 6: Avoidance of out-of centre or strip employment outcomes

Maintaining compact centres to achieve vibrant and walkable commercial areas requires strong planning controls to prevent inappropriate development away from the centres. Developments that generate high pedestrian movements, such as supermarkets, are best located within centres, particularly where common parking areas can be utilised for multi-purpose trips. Stand-alone supermarkets encourage single-purpose trips which can lead to higher car use and less activity within the centre.

Land at the edge of centres, usually residential in nature, can often be converted to commercial use through the use of dwellings as home businesses or professional offices. Once this practice is established, there is pressure to zone the land for commercial purposes and allow purpose-built commercial developments to replace the older dwellings. Strip development can then result, particularly along major roads leading into and out of the centre. The use of dwellings for commercial purposes on land adjacent to centres is positive as it provides business start-up opportunities, however when businesses grow they should be encouraged to relocate into the centre rather than seek to rebuild in the edge of centre location.

Assessment of Potential Employment Lands

All of the potential future employment lands identified in the Strategy have been assessed having regard to the five employment land locational criteria. The following table presents the findings of this assessment.

Employment Land	***Criteria No. 1*** **Proximity to existing populations and infrastructure.**	***Criteria No. 2*** **Accessibility and proximity to the Princes Highway.**	***Criteria No. 3*** **Minimal environmental constraints.**	***Criteria No. 4*** **Minimal impact on adjoining properties.**	***Criteria No. 5*** **Expansion opportunity.**	***Criteria No. 6*** **Avoidance of out-of centre or strip employment outcomes.**
North Eurobodalla						
Beach Road, Batemans Bay						
Old Princes Hwy, Batemans Bay						
Tomakin Rd and James St, Mogo						
Central Eurobodalla						
Campbell St and Page St, Moruya						
Moruya North Industrial Area						
South Eurobodalla						
Princes Hwy, Narooma						
Dalmeny Industrial Area						
Bodalla Industrial Area						

High Suitability
Moderate Suitability / Requires further detailed studies
Low Suitability

Economic Development and Employment Lands Strategy

Appendix K

Potential Future Employment Lands

POTENTIAL FUTURE EMPLOYMENT LANDS

Chapter 3.4 of this Strategy identifies eight potential future employment lands for the Eurobodalla Shire. For each area, a desktop analysis has been undertaken to determine potential suitability for future development based on location, site characteristics, site constraints and accessibility. A Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis has been conducted for each site along with a site analysis. Each site has been categorised as high, medium or low priority for development in the short (1-5 years), medium (5-10 years) or long (10-20 years) term. This Appendix provides details of the SWOT Analysis and the Site Analysis for each area.

Based on directions in the South Coast Regional Strategy, no new commercial centres are being investigated. For future commercial land development, the focus will be on expansion and redevelopment opportunities in existing centres. For future industrial land development, both new land areas and expansion and redevelopment opportunities in existing industrial areas have been investigated.

Tables 1 and 2 provide a summary of the land area provided in each potential investigation area and, making assumptions about how much of each land area could be developed within 20 years, the contribution of that land area to achieving the employment land demand.

Table 1: Potential Commercial Land Supply

Site	Total Area Required in next 20yrs	Assumed Developable Area	Assumed % Developed within 20yrs	Assumed Area Developed in 20 years	% of total area required
Narooma	14.7ha	5.2ha	75%	3.9ha	26.5%
Moruya		3.7ha	75%	2.8ha	19%
Batemans Bay – Beach Road		1.0ha	90%	0.9ha	6.1%
Batemans Bay – Old Princes Hwy		2.8ha	75%	2.1ha	14.3%
Mogo		1.3ha	100%	1.3ha	8.8%
Total	**14.7ha**	**14ha**		**11ha**	**74.7%**

Table 2: Potential Industrial Land Supply

Site	Total Area Required in next 20yrs	Assumed Total Site Developable Area	Assumed % Developed within 20yrs	Assumed Area Developed in 20 years	% of total area required
Mogo	44ha	4.8ha	75%	3.6ha	8.2%
Bodalla		29.2ha	40%	11.7ha	26.6%
Dalmeny		3.6ha	75%	2.7ha	6.1%
Moruya North		30.2ha	40%	12.1ha	27.5%
Total	**44ha**	**67.8ha**		**30.1ha**	**68.4%**

The identified potential future commercial areas will only achieve 74.7% of the land area required to meet the demand for new commercial employment land. However, as shown in the Employment Land Audit, a number of retail jobs are provided in industrial areas, principally through bulky goods retail development and wholesale retail premises. The Audit found that 30% of industrial lots were occupied by a retail or wholesale business.

The identified potential future industrial areas will only achieve 68.4% of the land area required to meet the demand for new industrial employment land. However, as this result is based on relatively low assumed development rates in the two larger areas, there may be capacity within these identified employment lands to meet more of the anticipated demand.

North Eurobodalla Opportunities

The existing employment opportunities in the north of Eurobodalla are principally limited to retail and commercial redevelopment in existing centres, bulky goods retail and some small-scale industrial development at the new Surf Beach employment lands and marine-related development at the Batemans Bay Marina. Growth in edge-of-centre commercial development, mixed-use development and industrial development is currently limited in this area.

Given environmental constraints, there is no suitable land that has the potential for development as a new industrial estate in close proximity to the Batemans Bay Regional Centre. Land to the north of the Clyde River is either already developed or proposed to be developed for residential purposes, or is State Forest or National Park. The land between Batemans Bay and Mogo along the Princes Highway is almost entirely State Forest. Land along Beach Road south of Batemans Bay is principally residential, with land close to the foreshore constrained by tidal inundation and the impacts of predicted sea level rise.

With the exception of a small potential expansion of industrial land on Gregory Street, Batemans Bay, the only land that may be suitable for industrial development in close proximity to an existing centre in the north of Eurobodalla is at Mogo. Land on the southern side of Tomakin Road and on the western side of James Street has potential for redevelopment as a small industrial area or a future expansion of the commercial area. This land could provide business and employment opportunities for residents in and around the Mogo township.

Land for edge-of-centre development (otherwise known as 'town centre support' development) should be limited to the edge of the regional centre of Batemans Bay. No other centre in the north of Eurobodalla warrants town centre support functions. Mixed-use commercial and residential developments are also best located at the Batemans Bay Regional Centre, however shop-top housing developments are suitable at most centres.

Two areas are designated for mixed-use development or edge-of-centre commercial development in this Strategy. The first area is along the southern side of Beach Road between the Princes Highway and Commercial Lane and the second area is along the Old Princes Highway and Orient Street between Museum Place and South Street.

Central Eurobodalla Opportunities

The existing employment opportunities in central Eurobodalla are limited to the taking up of existing vacant industrial land at the Moruya North industrial area and development of the recently approved Moruya East industrial area. Given heritage issues and flooding constraints, there is limited potential for redevelopment of land in the commercial core of the Moruya township.

While there is more available industrial land in the central area of Eurobodalla (compared to the northern and southern parts of the Shire), it is also the area where there is more potential for provision of new industrial lands. Being central in the Shire, it is the area that has the best access for the majority of the Shire's residents. Notwithstanding, there are environmental and land use constraints that limit the options for potential new employment lands, including flooding issues, location of wetlands and the need to retain productive agricultural land.

Land to the west of the Moruya North industrial area has already been identified by Council as a potential expansion of the employment area. Further investigations have revealed a number of environmental constraints, including flooding and threatened species issues. Notwithstanding those constraints, this strategy supports the continued investigation of this land to define the extent of potentially developable land and rezone for industrial development.

Additional commercial development in the central area of Eurobodalla should be focused on the Moruya township. The only flood free land in close proximity to the commercial core is along Campbell and Page Street immediately west of the centre. However, this area is also the heritage and cultural precinct of Moruya, unsuited to major redevelopment or large floor-plate developments. This area has already undergone some conversion to edge-of centre commercial development and the expansion of this form of redevelopment is considered appropriate.

South Eurobodalla Opportunities

The existing employment opportunities in the south of Eurobodalla are extremely limited. Environmental constraints, including vegetation, flooding, the impacts of sea level rise and topography, along with heritage conservation and the retention of productive rural activities are particularly important in this area, but restrict the potential for new employment lands and redevelopment of existing commercial areas.

Additional commercial development in the southern area of Eurobodalla should be focused on the Narooma township. The most suitable land for expansion of commercial development is along the Princes Highway between the Narooma Hill shopping area and Narooma Plaza. Some lots within this area have already been converted to edge-of centre commercial development and the expansion of this form of redevelopment is considered appropriate.

A small expansion of the Dalmeny industrial area may be able to be accommodated between the existing industrial area and the Princes Highway, though this land is currently part of the Dampier State Forest and would need to be excised from the State Forest before any development could be considered. In addition, the land surrounding the existing small industrial area at Potato Point Road, Bodalla may provide for additional employment land development.

The combination of some redevelopment within existing centres, additional edge-of-centre commercial development between the Narooma Hill and Plaza and expansion of the Dalmeny industrial area is considered the minimum required to satisfy local demands for employment growth in the short to medium term. For the longer term, larger employment land opportunities at Bodalla and Moruya may be sufficient to satisfy demands for residents in and around Narooma. Alternatively, opportunities may arise in the longer term as a result of the potential realignment of the Princes Highway, and this would need to be the subject of a future employment land strategy review.

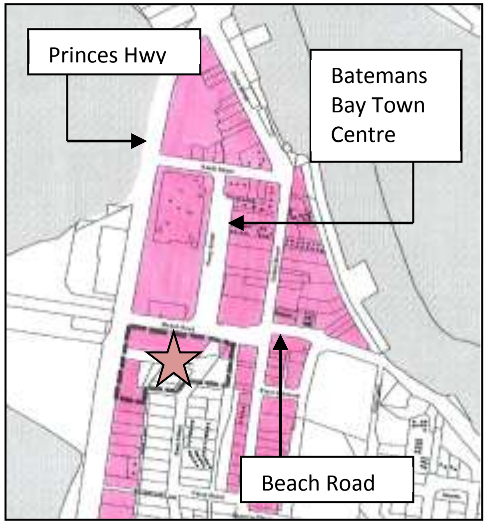
North Eurobodalla Area No. 1 – Extension of Employment Lands at Batemans Bay – Beach Road

Description of the subject land

The subject land includes the site of the Batemans Bay Visitor Centre and the parking area to its east, along the southern edge of Beach Road. The eastern edge of the area is Commercial Lane and the area extends to the south to Bent Lane.

Land Area: 2.0ha

Location Map



SWOT Analysis of Batemans Bay Expansion Area – Area A

	Positive Factors	Negative Factors
Internal Factors	**Strengths** • Most of land owned by Council. • Significant underutilisation of land, given location. • Land is adjacent to major shopping centre. • Land is located at major entrance to Batemans Bay – Cnr Princes Highway and Beach Road. • Much of land already proposed to be rezoned to Mixed Use Zone.	**Weaknesses** • Land is flood prone. • Significant level changes across site with large retaining walls. • Relatively small site, commercial yield may not make development viable.
External Factors	**Opportunities** • Development of signature building at corner of Princes Hwy and Beach Road. • Provision of additional parking at ground level, including for long vehicles and trailers. • Development of new public open space areas (incorporating heritage gravesites). • Urban design outcomes, including features that anchor the vista along Perry Street. • Opens up northern part of Bent Street for additional commercial development, mixed use development or high-density residential development.	**Threats** • Cost of re-forming the land and construction of new retaining walls. • Insufficient commercial floorspace opportunity. • Achieving quality design, particularly along Beach Road. • Potential objections to changes to access arrangements, particularly relating to access to McDonalds.

Site Analysis – Batemans Bay Centre Expansion Area – Beach Road

North Eurobodalla Area No. 2 – Extension of Employment Lands at Batemans Bay – Old Prince Highway

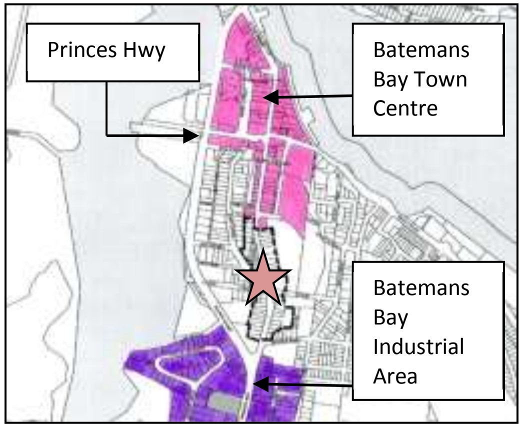
Description of the subject land

The subject land extends along the Old Princes Hwy from the existing commercial area to the north to the industrial area to the south. The old Princes Hwy follows a ridge line, with the land sloping down to the east and west.

Predominantly residential, the area is already undergoing some conversion to commercial, mostly with professional offices within existing dwellings.

Land Area: 4.7ha

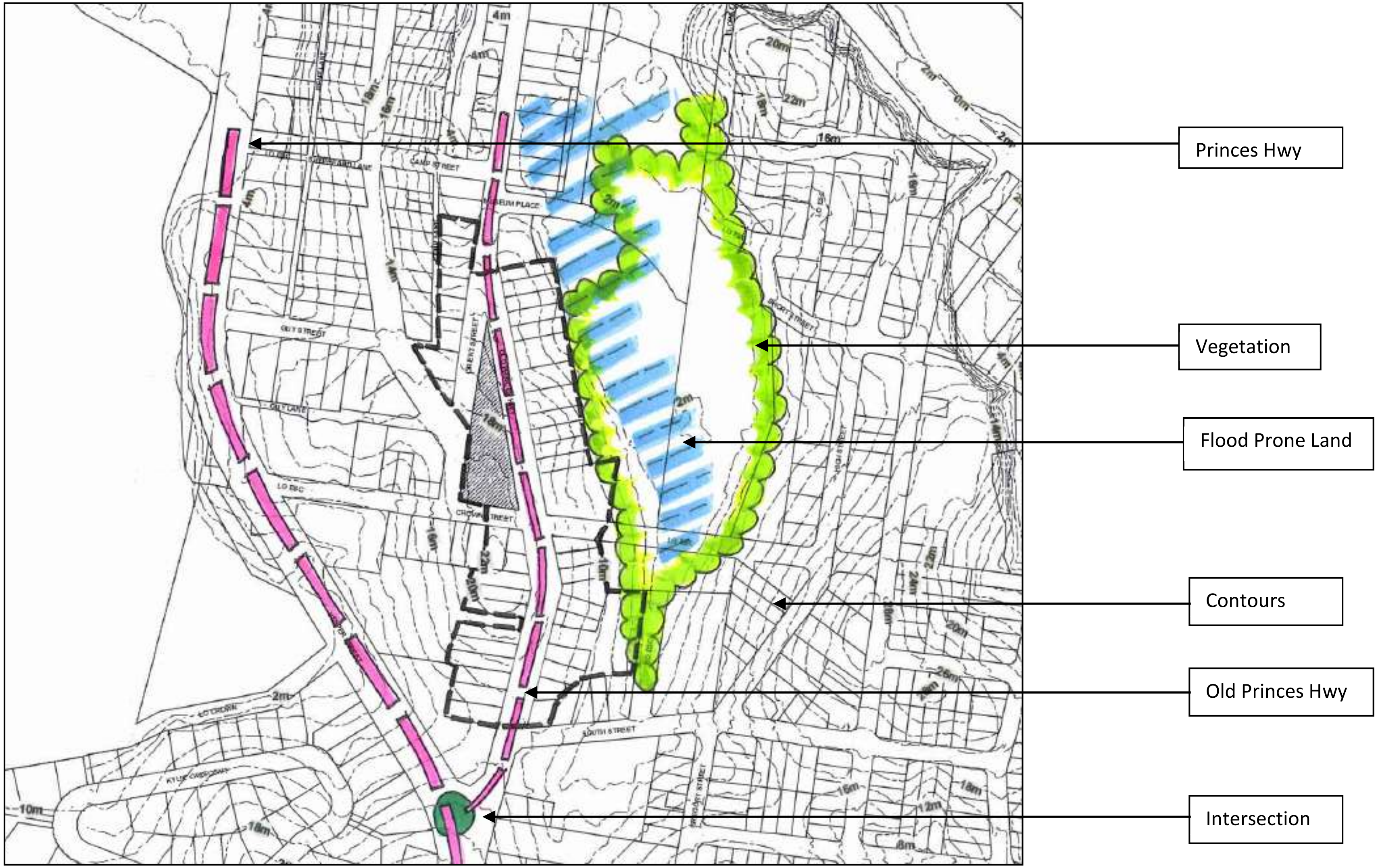
Location Map



SWOT Analysis of Batemans Bay Expansion Area – Area B

	Positive Factors	Negative Factors
Internal Factors	**Strengths** • Land is located on busy road connecting Town Centre to Princes Hwy and to the Batemans Bay industrial area. • Conversion of dwellings to commercial use has commenced. • Land is elevated above flood prone area.	**Weaknesses** • Land is fragmented into relatively small lots. • Land is extending beyond walking distance from town centre. • Lack of available parking.
External Factors	**Opportunities** • Continued conversion of dwellings to commercial use. • Redevelopment of sites for commercial activities that do not need to be located within a centre, such as offices, boutique craft industry, jeweller, etc. • Potential redevelopment of northern part of Forests NSW site at 2 Crown Street and realignment or closure of Orient Street.	**Threats** • Given distance from town centre, pressure for inappropriate commercial development may threaten viability of town centre. • Parking issues not adequately resolved.

Site Analysis – Batemans Bay Centre Expansion Area – Old Princes Highway



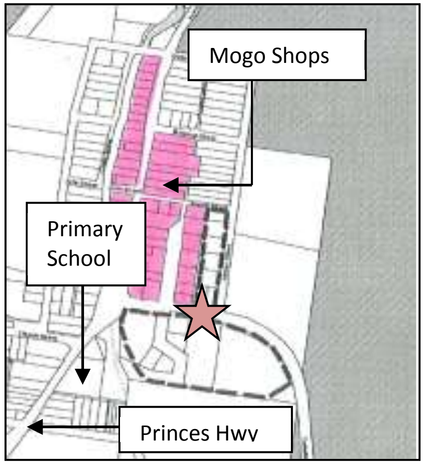
North Eurobodalla Area No. 3 – Extension of Employment Lands at Mogo

Description of the subject land

The subject land comprises the land along the western edge of James Street (between Tomakin Road and Annett Street) and the southern edge of Tomakin Road (from the corner of the Princes Hwy to the eastern boundary of 24 Tomakin Road). The southern boundary of the area follows the unformed Mogo Fire Shed Road. Relatively flat, the land drains mostly towards Tomakin Road, with the some steep sections toward the south.

Land Area: 7.7ha

Location Map



SWOT Analysis of Mogo South Area

	Positive Factors	Negative Factors
Internal Factors	**Strengths** • Land adjacent to existing commercial area of Mogo. • Land has access and road frontage. • Land is relatively flat and unconstrained. • Some existing industrial activities on land. • Land is close to Princes Highway. • Some land owned by Council. • Existing unformed road exists, located well for access to land.	**Weaknesses** • Relatively small land area, not a significant yield likely. • Limited expansion opportunity. • Some potential flooding constraint over small portion of subject land. • Land is heavily vegetated in part. • Fragmented land ownership. • Need to relocate some existing improvements upon the land (public toilet, parking area, fire station. • Land is within Bushfire Prone –Vegetation Category 1 and Buffer Zone.
External Factors	**Opportunities** • Good access opportunities from Tomakin Road. • Minimal development costs likely. • Services exist or are close to subject land. • Good visibility from Princes Highway. • Opportunity for estate signage at corner of Tomakin Road and Princes Highway.	**Threats** • Cost of upgrading intersection of Tomakin Road and Princes Highway and any required pedestrian crossing facilities in Tomakin Road. • Need to define extent of any flooding impact upon land. • Need to investigate if any threatened species may exist.

Site Analysis – Mogo South Area

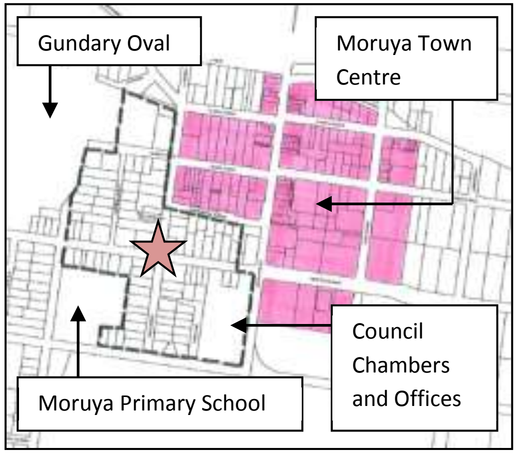
Central Eurobodalla Area No. 1 – Extension of Employment Lands at Moruya

Description of the subject land

The subject land extends to the west of the existing Moruya Town Centre, focused along Campbell Streets towards Evans Street and Page Street towards Murray Street. Elevated above the Moruya River floodplain, the land, particularly along Page Street is the original civic precinct of Moruya and many significant heritage items remain. The area currently has a mix of residential, commercial and cultural activities, with much of the commercial development being professional offices within existing dwellings.

Land Area: 12.9ha

Location Map



SWOT Analysis of Moruya Expansion Area (Campbell and Page Streets)

	Positive Factors	Negative Factors
Internal Factors	**Strengths** • Most of land is flood free. • Existing commercial development within subject area, including Council Chambers and Offices and a number of medical and community offices. • Strong character and heritage within subject area. • Road network in place. • All services available.	**Weaknesses** • Significant number of heritage items may limit development potential. • Some land is flood prone at edges of subject area. • Land is fragmented. • Limited number of development sites available. • Lack of available parking.
External Factors	**Opportunities** • Potential use of flood prone land for additional town centre parking. • Development of area provides a strong connection between town centre and Gundary Oval. • Consolidation of lots possible to improve size of development sites.	**Threats** • Cost of consolidation of lots or inability to consolidate lots into developable parcels. • Potential negative impact of development of heritage character of area. • Parking issues not adequately resolved.

Site Analysis and Potential Development Pattern – Moruya Centre Expansion Area

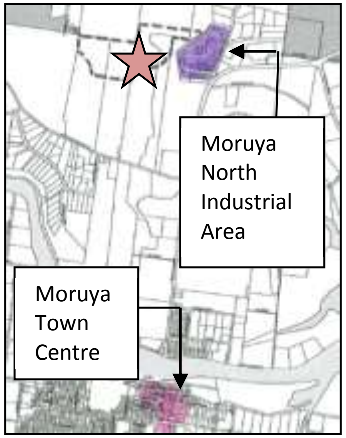
Central Eurobodalla Area No. 2 – Extension of Employment Lands at Moruya North

Description of the subject land

The subject land is to the west of the existing Moruya Industrial Area and has already been identified as potential industrial land. The land extends across portions of four properties to the west of the existing industrial area. Parts of the land are heavily vegetated, including with identified threatened species and the subject area is limited by the extent of the Moruya River floodplain. Extensive environmental studies to establish potential suitability for future industrial use will be required.

Land Area: 40.3ha

Location Map



SWOT Analysis of Moruya North Area

	Positive Factors	Negative Factors
Internal Factors	**Strengths** • Adjacent to existing Industrial area of Moruya North • Not adjoining residential area, so no direct impacts on residential amenity. • Close to Princes Hwy. • No significant slope over land.	**Weaknesses** • Portions of the subject land is heavily vegetated, some with Endangered Ecological Communities. • Category 2 Creeks cross the land. • Much of land is low lying and subject to inundation. • Land drains to a significant wetland. • Most of land is Bushfire Prone – Vegetation Category 1 and Buffer. • Access to land requires crossing of creek corridor and disturbance to EEC.
External Factors	**Opportunities** • Expansion of existing industrial area providing growth opportunity near major town.	**Threats** • Cost of bridging over creek. • Potential impacts on EEC and cost of mitigating such impacts. • Studies identify further environmental constraints. • Landowners intention to continue agricultural activities on the land.

Site Analysis – Moruya North Area

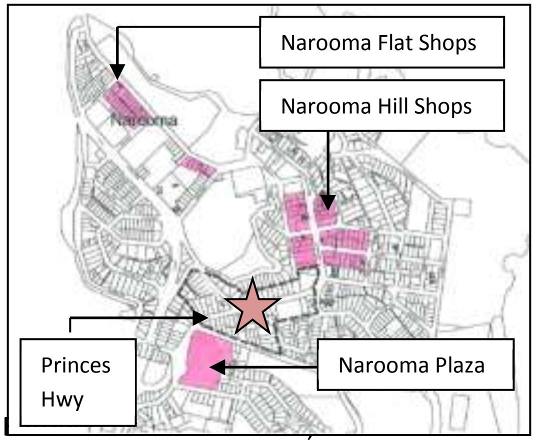
North Eurobodalla Area No. 1 – Extension of Employment Lands at Narooma

Description of the subject land

The subject land stretches along the Princes Hwy between the Narooma Hill retail area and the Narooma Plaza. The Princes Hwy follows a ridge line, with the land sloping down to the north and south. At the eastern end of the area, only the properties fronting the Princes Hwy are included, however at the western end, the area extends to Willcocks Avenue to the south and to Barker Parade and the proposed re-alignment of the Princes Hwy (Taylor Street) to the north and west. A scattering of commercial activity already exists along the highway in this area.

Land Area: 7.95ha

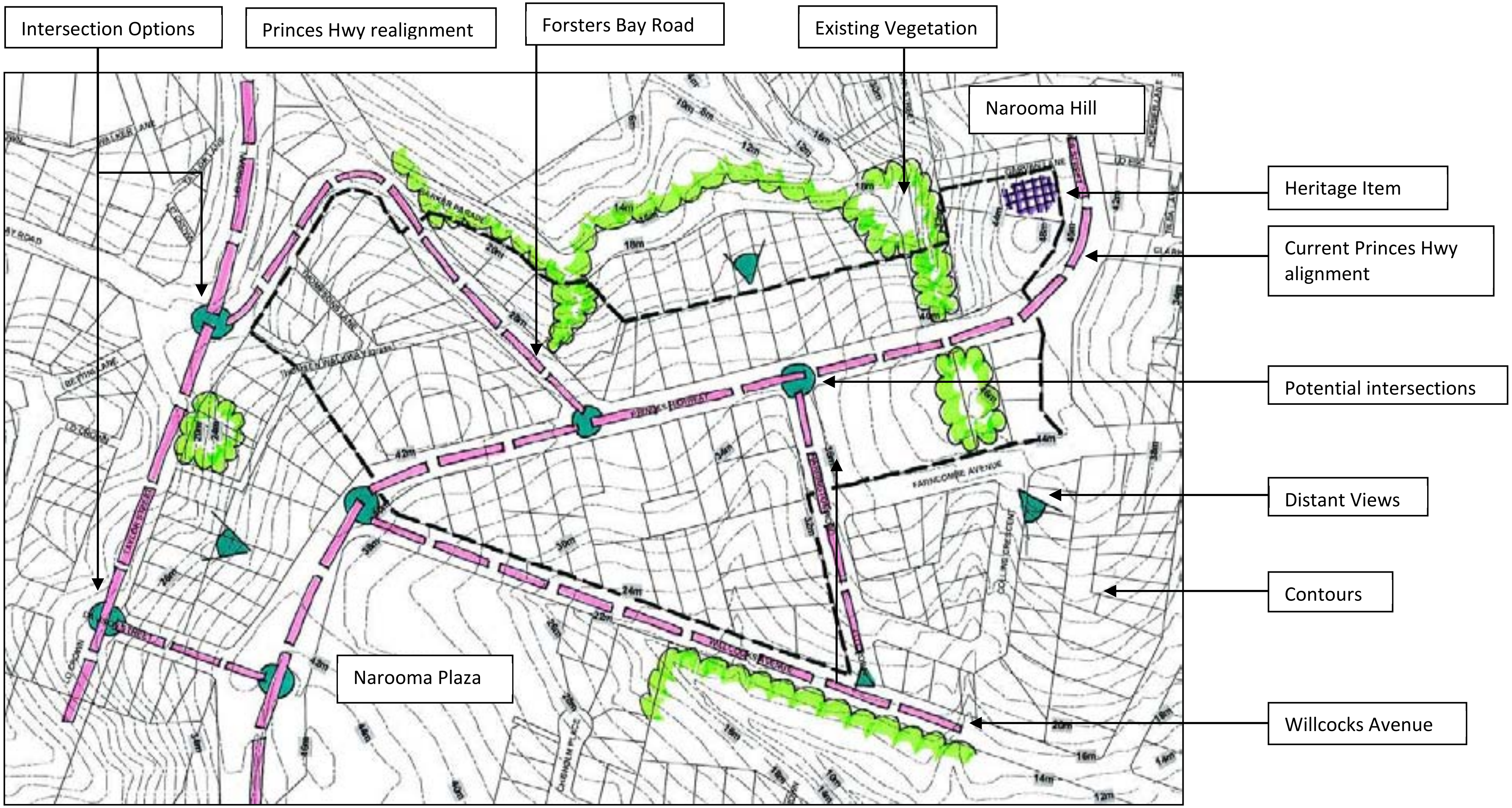
Location Map



SWOT Analysis of Narooma Expansion Area

	Positive Factors	Negative Factors
Internal Factors	**Strengths** • Land has good exposure to Princes Highway. • Provides a continuous development connection between two main retail areas of Narooma. • Land to rear of lots fronting Princes Hwy is less exposed, but has good access. • Limited recent redevelopment of area, many older homes remain. • Some recent residential or tourist developments are designed to enable conversion to commercial use.	**Weaknesses** • Fragmented land, some with further fragmentation by strata subdivision. • Relatively large area of land compared to existing retail centres of Narooma – may result in haphazard development outcomes. • Bulk of land within Bushfire Buffer Zone. • Lack of available parking.
External Factors	**Opportunities** • Minimal development costs would be required to enable commercial development to take place. • Potential for direct connection to future realigned Princes Hwy. • Existing rear lanes and internal roads provide good service access and allows location of rear parking areas. • Consolidation of lots possible to improve size of development sites.	**Threats** • Allowing retail activities within expansion area could threaten viability of main retail centres. • Existing and recently built residential or tourist developments may hinder redevelopment of area. • Potential difficulty gaining access to the Princes Hwy for any redevelopment. • Potential difficulty consolidating land. • Parking issues not adequately resolved.

Site Analysis – Narooma Centre Expansion Area



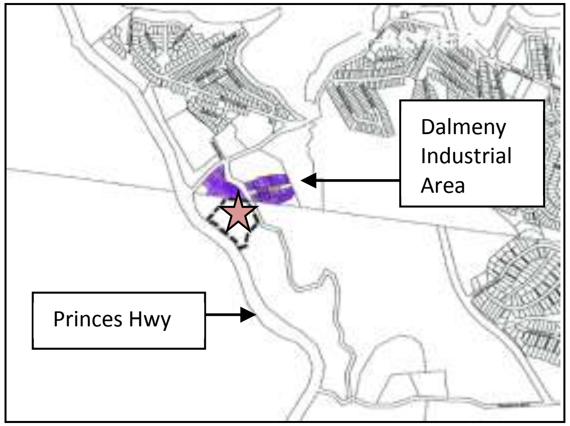
North Eurobodalla Area No. 2 – Extension of Employment Lands at Dalmeny

Description of the subject land

The subject land extends to the south of the existing Dalmeny Industrial Area along the Princes Hwy. Currently part of the Dampier State Forest, the subject area is separated from the bulk of the State Forest area by the Princes Hwy. Heavily vegetated, with two creek corridors running through the site, the land will require extensive environmental studies to establish potential suitability for conversion to industrial use.

Land Area: 4.2ha

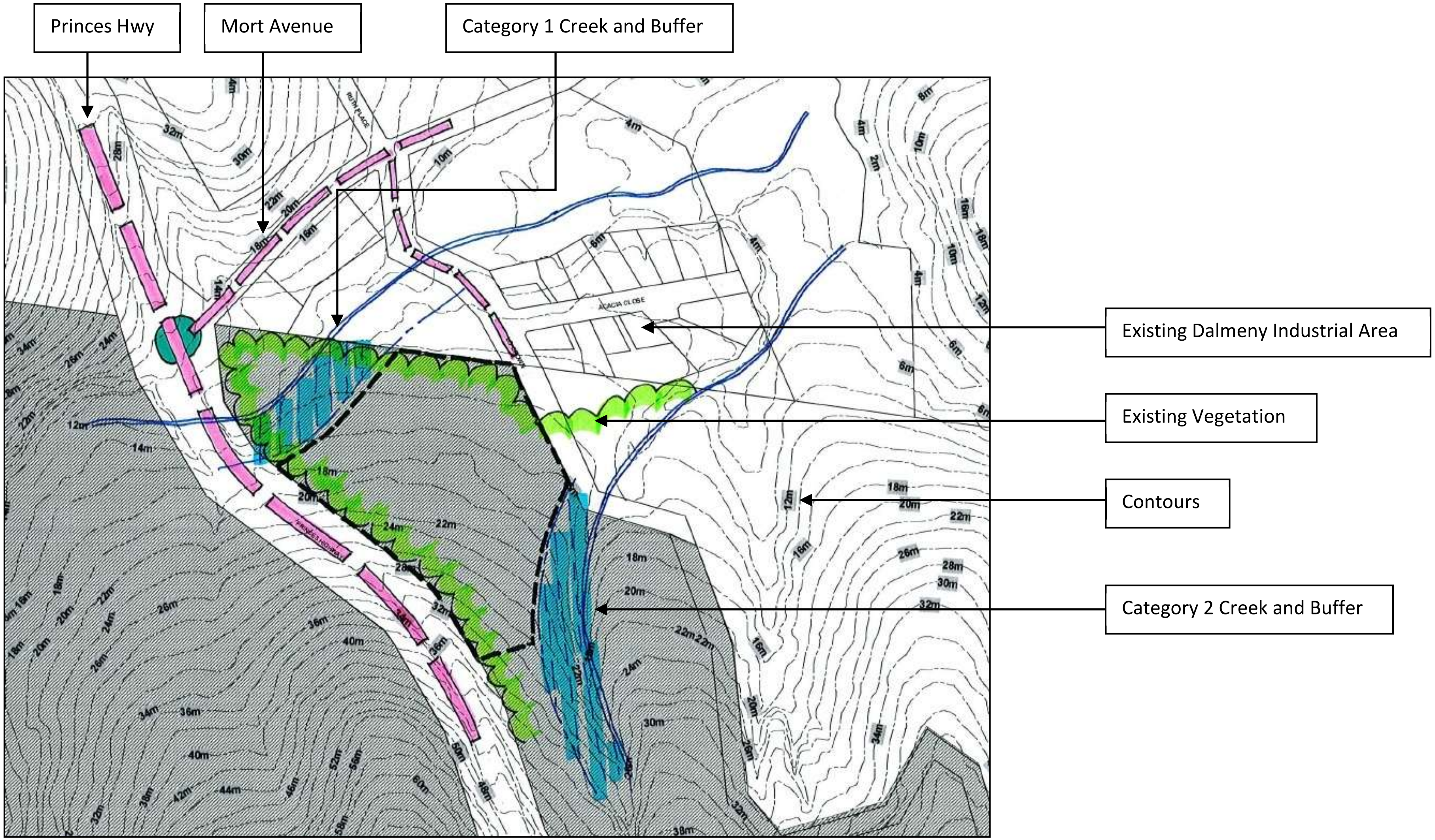
Location Map



SWOT Analysis of Dalmeny Expansion Area – Area A

	Positive Factors	Negative Factors
Internal Factors	**Strengths** • Adjacent to existing industrial estate. • Close access to Princes Hwy. • Land is relatively flat with a central area of relatively unconstrained land.	**Weaknesses** • Currently part of State Forest • Land is heavily vegetated with two creeks traversing to the north and south of subject area. • Land is Bushfire Prone – Vegetation Category 1.
External Factors	**Opportunities** • Potential land swap opportunity (given land is separated from bulk of State Forest land by the Princes Hwy). • Opportunity to double the size of the existing Dalmeny Industrial area without impacting on Creek corridors. • Potential to expand industrial area to the east or south-east of the current Industrial area (into an urban investigation area), subject to detailed studies being undertaken.	**Threats** • Inability to secure land swap with State Government. • Potential identification of threatened species within subject land. • Permission to clear land not granted. • Studies identify further environmental constraints.

Site Analysis – Dalmeny Expansion Area



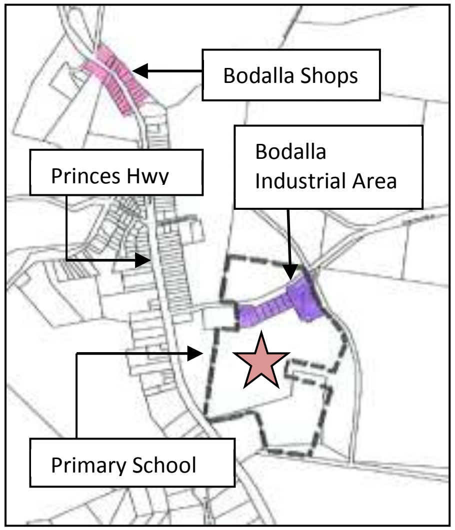
South Eurobodalla Area No. 3 – Extension of Employment Lands at Bodalla

Description of the subject land

The subject land comprises a part of 184 Princes Hwy, the whole of 186 Princes Hwy and a small portion of 220 Princes Hwy. Gently sloping and mostly cleared, the land surrounds the existing Bodalla Industrial Area on Potato Point Road. Part of the site adjoins the Bodalla Public School and Bodalla Playing Fields. The southern and eastern boundaries are defined by existing unformed Crown Roads.

Land Area: 34.3ha

Location Map



SWOT Analysis – Bodalla Area

	Positive Factors	Negative Factors
Internal Factors	**Strengths** • Land adjacent to existing employment area and other educational and recreational developments. • Land gently sloping with no significant slope constraints. • Minimal environmental constraints. • Some frontage to Princes Hwy. • Land not exposed to distant views. • Large area of land with good yield potential.	**Weaknesses** • Bulk of land predominantly land-locked with potentially limited access opportunities. • Some Bushfire Prone Land – Vegetation Category 1 and Buffer Zone. • Distance from supporting population base.
External Factors	**Opportunities** • Negotiated access to Potato Point Road and Princes Highway would provide excellent access arrangements and internal road configuration. • Retention of Category 2 creek and part of Category 3 creek would provide good environmental outcomes and opportunities for stormwater detention. • Improved access to playing fields may be possible. • Potential for future expansion of employment area to south or east. • Mix of lot sizes possible given large land are and relatively flat land.	**Threats** • Inability to negotiate access will limit development potential. • Improvements to intersections with Princes Hwy may be costly. • Piping of portion of Category 3 Creek may not be permitted by DECCW. • Studies identify further environmental constraints. • Expansion may not be viable given distance from supporting population bases.

Site Analysis – Bodalla Area