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Coffs Harbour Jetty Foreshore: State-Assessed Planning Proposal – Retail Assessment

Property and Development NSW (PDNSW)

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SGS Economics & Planning

Certified B Corporation

Executive Summary

This retail assessment supports the Planning Justification Report that outlines proposed amendments to the Coffs Harbour Local Environmental Plan (CHLEP) 2013 and will be submitted to the Department of Planning, Housing and Infrastructure (DPHI) as part of a State-Assessed Planning Proposal (planning proposal).

The proposed rezoning at the Coffs Harbour Jetty Foreshore Precinct (The Precinct) has the potential to unlock a mixed-use development that contains a total of approximately 5,000sqm of retail space comprising food & beverage (hospitality) space and retailing. This is accompanied by approximately 250 dwellings that are estimated to house 370 new residents and 200 short stay accommodation rooms.

In addition to introducing more residents and tourists to the area, the retail component of the development would help to activate the foreshore by creating more interest and dwell time in the Precinct. This would create a 2.8 per cent increase in retail floorspace for the LGA overall.

Population growth and tourism will be the main drivers of changes of retail demand within the Coffs Harbour LGA. Population forecasts according to Travel Zone Projections predict that the population within the LGA will continue to be concentrated in the coastal areas. The Coffs Harbour LGA population is expected to rise by 11,169 from 2021 to 2041 to a total of 88,449 (0.7% Compound Annual Growth Rate (CAGR)).

Yielding an approximate additional 370 residents, the proposed development would have a minor impact on LGA wide population but would increase the Coffs Harbor Jetty area population by 10.5 per cent on previously expected 2036 totals. This significant increase to local population is important as it generates demand for local retail. It is also possible that development within the Coffs Harbour Jetty area would create additional demand across the retail system.

SGS modelling indicates that overall retail supply and demand is currently close to equilibrium at just above 180,000sqm. However, demand is expected to increase to over 202,000sqm by 2041. Isolation of specific commodity groups shows an expected undersupply of hospitality floorspace of over 6,000sqm by 2041 with current floorspace levels. While some of this demand could be accommodated within existing precincts, there is still a case for more retail floorspace.

Modelling of the proposed retail and hospitality floorspace within **the Coffs Jetty Foreshore Precinct indicates that the proposed development is unlikely to threaten any established centres and appropriately aligns with projected future demands and retail needs.** Taken in isolation, the impacts when the development comes online are in the 1 to 11% range, which is considered a mild and acceptable impact. When also factoring in background growth in turnover between 2021 to 2036, all centres are expected to experience a net gain in turnover. For specific commodity types in some centres minor negative impacts can be observed but **overall, most established store types and centres are expected to see net growth**, even with the additional retail floorspace proposed for the foreshore.

The Precinct is likely to support an increase in tourism and tourism related expenditure through increased stays and visits across the immediate area and LGA. As the extent of this is unknown, we have adopted a conservative position and this has not been modelled. If additional tourism and demand

were to occur flow on benefits would likely be seen across The Precinct, surrounding area and LGA in the form of increased expenditure and visitation.

Contents

Glossary

Expenditure: Money spent per annum by a resident or tourist group on retail goods and services.

Retail Hierarchy: Overarching network of centres delineated by the role a centre plays in the overall retail landscape. Defines expected size and offer of centre in that context.

RTD: Retail Turnover Density. The average amount of turnover (money) generated by each square metre of retail floorspace per annum.

Retail Floorspace Demand: How much floorspace a local community needs based on its local population, tourism spending, spending profile and other economic factors.

Retail Supply: The current or projected level of floorspace within a specified area.

Turnover: Total annual revenue of a retail store or centre

TZP: Travel Zone Projections. Transport for NSW (TfNSW) small area land use forecasts for employment and population that SGS undertake for TfNSW.

Retail Commodity Types:

Bulky Goods: Large box retailers usually not located in shopping centres selling larger goods including furniture or large appliances.

Clothing: Stores that specialize in selling clothing, usually in centres.

Department stores: Retail outlets that sell across a range of retail categories. Including both discount and non-discount department stores e.g.: Kmart, Myer, Target.

Hospitality: Locations selling food and drinks including cafes, restaurants and bars, often with related dining facilities.

Household Goods: Stores selling goods including cooking equipment, electrical or small appliances.

Other Food: Non-supermarket food retailer including butchers, produce stores, international food sellers and other speciality food stores.

Other Retail: General retail stores that are usually small boutique or specialist stores selling a range of miscellaneous goods.

Supermarket: A major grocery store e.g. Woolworths or Coles

1. Introduction

Property and Development NSW (PDNSW) is continuing to lead the revitalisation of the Coffs Harbour Jetty Foreshore Precinct (the Precinct) on behalf of the NSW Government. SGS Economics & Planning has been engaged by PDNSW to prepare a Retail Assessment that assesses the proposed Coffs Harbour Jetty Foreshore Precinct development for retail potential and impacts on the surrounding retail environment.

This Retail Assessment supports a Planning Justification Report that outlines proposed amendments to the Coffs Harbour Local Environmental Plan (CHLEP) 2013 and will be submitted to the Department of Planning, Housing and Infrastructure (DPHI) as part of a State Assessed Planning Proposal (planning proposal).

As Coffs Harbour continues to grow as a Regional City, the NSW Government and Coffs Harbour City Council have, through various strategic planning exercises, identified four key strategic priorities to reimagine its direction and respond to current and future challenges and opportunities: Delivering a regional economy that is diverse, sophisticated and able to retain businesses and skills

- Deliver a regional economy (CHCC LSPS, 2020; CH Economic Development Strategy, 2017) that is diverse, sophisticated and able to retain businesses and skills

- Evolve the tourism offering (CHCC LSPS, 2020) with improved attractions, activities and accommodation

- Provide more housing (CHCC LSPS, 2020) in accessible locations, including affordable housing

- Provide better connections between places with more sustainable movement choices (CHRCAP, 2021; CHCC, 2020)

As a large, strategically located and wholly government owned site, the Precinct represents a significant opportunity to deliver on each of these key regional priorities. In this planning proposal, PDNSW seeks to celebrate the unique location, history and culture of the Jetty Foreshore to deliver outcomes for the benefit of the Coffs Harbour community. The revitalisation will be staged and funded, over time, to deliver the shared community vision.

1.1   Our shared community vision

Coffs' family playground, a precinct of parks and places, that connects community with Country. The community is and always has been at the heart of creating a thriving regional economy and destination for Coffs Harbour. Shaped with the community, our vision is to ensure The Jetty Foreshore will become a world-class oceanfront precinct through the principles shown in **Figure 1**.

FIGURE 1 VISION FOR THE COFFS HARBOUR JETTY FORESHORE.

1.2 The Precinct

The Precinct, wholly owned by the NSW Government, is strategically significant to the State and to the Coffs Harbour region. The Precinct is located on the traditional lands of the Gumbaynggirr people, in saltwater freshwater Country. It encompasses approximately 62 hectares of foreshore land, 5km east of the Coffs Harbour CBD, located on the Coffs Harbour coast with direct access to the Pacific Ocean. Access is provided on Marina Drive in the north, and Camperdown Street in the south, with Jordan Esplanade bisecting the site north to south. A Precinct map showing existing conditions is provided at **Figure 2**.

The west boundary is generally defined by the railway line and Coffs Harbour Railway Station. To the north the Precinct borders a culturally significant site known as "Happy Valley", which has been returned as freehold land to the Coffs Harbour and District Local Aboriginal Land Council (LALC). Gallows and Boambee Beaches are located to the south of the Precinct, where Littoral Rainforest occurs. Coffs Harbour itself, the Pacific Ocean, Muttonbird Island and South Coffs Island (Corambirra Point) form the eastern boundary.

The Precinct is a popular destination for both locals and tourists offering a variety of attractions and amenities. These include Jetty Beach and extensive parklands with biodiversity value, as well as items of heritage significance such as the Coffs Harbour Jetty and Ferguson's Cottage, owned by the Coffs Harbour LALC. Further, the Coffs Harbour Fisherman's Co-op, the Coffs Harbour Yacht Club, weekly Sunday markets, and community hub building (recently delivered by PDNSW) are located within the Precinct. Various public works including breakwater and boat ramp upgrades have been undertaken over recent years to support the marina function.

There are redeveloped and well-maintained parts in the area however, much can be done to enhance the Coffs Harbour Jetty Foreshore Precinct. A large portion of the Precinct is currently gravelled, and a

large area of residual railway land is fenced off and inaccessible to the public, as shown in **Figure 3**. While gravelled areas provide informal overflow parking, they do not reflect the potential of this foreshore.

FIGURE 2 COFFS HARBOUR JETTY FORESHORE PRECINCT

Source: SJB

FIGURE 3 EXISTING STATE OF THE PRECINCT RAIL LANDS AND GRAVELLED AREAS

Source: PDNSW

1.3   The Illustrative Masterplan

The planning proposal is supported by an Illustrative Masterplan (**Figure 4**) that presents a potential development outcome that could be realised at the Coffs Harbour Jetty Foreshore Precinct – it is not prescriptive nor is it determined. The Illustrative Masterplan builds on the shared vision created via extensive community and stakeholder consultation and provides further detail in relation to land use and development outcomes sought for the Precinct.

The Place Principles shown in **Figure 5**Error! Reference source not found., agreed with the community, guided the formation of the Illustrative Masterplan.

The Illustrative Masterplan is broadly organised across six sub-precincts that will each have a distinct character and function. These are identified as:

1.   Foreshore Parklands – with improved amenities, proposed new board walk and nature-based playground.

2.   The Marina – An active marina revitalised to accommodate local marine based businesses that reflect their regional importance.

3.   North Park – Functional open space with recreational courts and formalised parking.

4.   Jetty Hub – A hub of residential and tourist accommodation supporting activation, tourism and regional attraction located adjacent to the current Jetty Walkway, with massing capped at 6 storeys stepping down in scale when closer to public areas.

5.   Activity Hub and Village Green – An active village green that delivers increased public open space connected to the existing foreshore parklands and may include family-friendly food and beverage, community uses and club houses or facilities to support events. A local business activity zone connected to the rail station.

6.   Corambirra Point – A new regional tourist destination on the site of the former Deep Sea Fishing Club site including publicly accessible cafes and restaurants, a function space, activity centre and tourist accommodation.

A precinct map showing the Illustrative Masterplan and the six distinct zones is provided at **Figure 6**.

FIGURE 4 ILLUSTRATIVE MASTERPLAN

Source: SJB

FIGURE 5 COMMUNITY-LED PLACE PRINCIPLES

Gathering place
Become the premier place on the North Coast where all are welcome and feel at home, now and in the future

Seamlessly connected
Tie the city structure and regional networks into the precinct and provide accessibility for all abilities throughout

Sustainable economy
Foster a wider mix of uses that leverage existing industry to create a balance of local employment opportunities and waterfront activation

Resilient environment
Be the exemplar for the North Coast on adapting to climate change by safeguarding existing assets and mitigating future risk

Choice destination
Enhance the precinct as a family friendly collection of local and regional destinations offering an accessible, engaging, safe, comfortable and inclusive environment day and night

Celebrate Country
Ensure opportunities for Gumbaynggirr people to Care for Country and heal Country, with long-term community involvement, cultural activation and education, and protection of significant heritage sites

Source: PDNSW

FIGURE 6 SUB-PRECINCT MAP

Source: SJB

1.4   The planning proposal

The master planning of large-scale precincts follows a highly consultative and stepped approach. The current step, which paves the way for the revitalisation of the Coffs Harbour Jetty Foreshore Precinct, is the application for a State Assessed Planning Proposal, which is a legislated process.

PDNSW is lodging a planning proposal with the Department of Planning, Housing and Infrastructure that seeks approval for:

- Changes to permissible land uses

- Changes to permissible maximum building heights

- Planning controls for future State Significant Development Applications including design guidelines and design excellence processes

This Retail Assessment supports the planning proposal.

The table below outlines the estimated key development yields from the Illustrative Masterplan from an economic perspective. Full development parameters (including community/function spaces, harbour and parking) are documented in Appendix A.

Key activity	Estimated Yield
Residential yield	250 dwellings /21,200sqm
Hotel Accommodation (GFA)	11,500sqm
Retail (GFA)	500 sqm
Food & Beverage (GFA)	4,500sqm

Source: DPHI 2024

1.5   About this Report

To assist with the investigation into those improvements, PDNSW has requested SGS provide an assessment of the potential retail opportunities along with any potential impacts to existing retail centres in the area. This report provides that analysis.

Section 2 gives an overview of the macro and local trends; Section 3 analyses demand and supply dynamics to arrive at a position of whether the development is needed; Section 4 concludes with an impact assessment on existing traders.

2. Trends and Drivers

In this section, we contextualise the retail assessment with a discussion on the latest trends and drivers at both a macro/economy-wide level and a local level. Discussion is provided for what this means for the proposed development.

2.1 Macro trends

The following matrix summarises the key contemporary trends in the retail economy – covering the types of stores that are struggling, and growth opportunities. Each trend has direct implications for how a retail place operates, and therefore, how new retail floorspace could operate within the Precinct.

Key Retail Trends	What it means The Precinct	Possible Responses
Overall retail expenditure growth (driven by population growth, increased wealth/spending)	A growing retail economy generally does mean more floorspace demand. But if there are constraints to floorspace supply, it can lead to overtrading (high profits) which is positive in that businesses do thrive but negative in that it is generally associated with congestion if transport/parking issues are not managed well.	Above all else, having a strong grasp of how demand is tracking against supply will inform the extent to which new retail floorspace is appropriate. This is addressed in Section 4 for The Precinct in terms of the overall demand and supply equation. From there it is about providing targeted opportunities for more retail floorspace in the right locations, closest to where the demand is today and will be in the future.
Strong hospitality sector growth	Cafés and restaurants now account for approximately $3.5 billion (14 per cent) of retail expenditure across Australia, up from $2.5 billion in 2009[1]. This highlights a likely continuing growing desire for a hospitality offer.	The streetscaping and urban design response should reflect the hospitality opportunities that businesses are pursuing. The floorspace should also increasingly transition away from traditional shops towards restaurants, bars, cafés. The proposed floorspace in the Jetty Foreshore responds well in that respect.
Growth of online retail (and reduction in RTDs)	COVID-19 has seen a big jump in the use of online retail[2]. Post-COVID, the share of online trade has returned to	Limit the size of centres to sensible levels to prevent mass vacancies that then generate urban blight.

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[1] IBISWorld, 2018, 'Cafes and coffee shops in Australia', www.ibisworld.com.au
[2] ABS 2020, 'Online sales, October 2020 - Supplementary COVID-19 analysis', https://www.abs.gov.au/articles/online-sales-october-2020-supplementary-covid-19-analysis

	the growth trend but from a higher base. Increasing shares of expenditure going to online trade can result in a loss of spending in certain strips especially where clothing and general merchandise feature prominently.	Transition centres away from merchandise towards other types of retail. In the Precinct context, this is complex. On the one hand, most of the floorspace being proposed is not susceptible to online competition. On the other hand, some of the traders in the existing Coffs Harbour Town Centre are – which means that Town Centre could be more vulnerable in the long run.
Omni channel retailing & experiences; Growth of non-product retailing (incl. services, health/wellness/exercise, entertainment, night time)	New business models and new store formats will continue to emerge over time beyond desiring more than the traditional 150sqm rectangular shop.	Retail space should consider the evolving desires of consumers and allow for new types of retail. Newer precincts have an advantage if master-planned well.
Decline of department stores vs rise of mini-majors	Important to understand why – because mini-majors are better at targeting specific customers and products, and do a better job at branding themselves for those specific audiences rather than trying to be everything to everyone. The same goes for places – who do we want to attract and therefore what place brand are we in need of to move the dial on that front.	No department stores in Coffs Harbour, but still increasingly important to give stronger consideration to place branding alongside floorspace quantum's when laying the foundations of a structure/master plan.

2.2   Local Trends

Tourism

Tourism is an important part of the Coffs Harbour economy. In 2017 the LGA received a tourism spend of $525 million from over 1.5 million visitors[3]. Holidays are the main source of tourist activity for the greater North Coast region accounting for 51% of trips. Commercial accommodation was used for 49% of nights stayed in the North Coast Region[4].

Levels of tourism reduced due to lockdowns and other COVID-19 related restrictions since early 2020. Across Australia domestic visitation is forecast to return to its pre-pandemic level in 2022-23, then surpass that previous peak in 2023-24[5]. Total domestic visitor expenditure is expected to grow by 5.9 per cent on average in each of the two years from 2023-24. Travel for business purposes is expected to be slower to recover than travel for leisure.

So overall, local tourism is expected to grow over the next 10 to 20 years – the caveat being another pandemic or severe economic downturns during that period.

Local floorspace

Over the next 20 years, Coffs Harbour City Council (Council) expects the demand for additional retail floorspace is expected to reach around 52,500 square meters (sqm)[6]. Demand for additional business and office space would be around 72,000 sqm[7]. It is understood that most of this demand will be able to be accommodated under existing planning controls and/or vacancies.

It is noted in Council's growth strategy that outdoor dining is likely to see a continued rise in popularity. This wider trend if supported in the LGA offers opportunities to expand the night-time economy and support the growth of new opportunities in centres – which this planning proposal is aiming for and is the subject of this report.

2.3   Implications

Overall, the emerging, long run retail trends of the 2020s can support existing retail opportunities with the Coffs Harbour region. Coffs Harbour's key strengths in tourism and hospitality are also some of the strongest retail growth sectors in the economy. Barring any further economic shocks, the key will be to develop the right amount of floorspace to accommodate growth whilst avoiding oversupply.

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3 Coffs Harbour City Council, 2020, 'Coffs Harbour Local Strategic Planning Statement'
https://www.coffsharbour.nsw.gov.au/files/sharedassets/public/building-and-planning/growth-strategies/local-strategic-planning-statement-2020/coffs-harbour-lsps-2020-final.pdf
4 Tourism research Australia, 2021, 'North Coast Region Profile', https://www.tra.gov.au/Regional/tourism-regional-profiles
5 Tourism Research Australia, 2021, 'Domestic Tourism Forecast', https://www.tra.gov.au/Domestic/domestic-visitor-profiles
[6] Coffs Harbour City Council, 2020, ' Coffs Harbour Local Growth Management Strategy 2020', Local Growth Management Strategy | Coffs Harbour City Council (nsw.gov.au)
[7] Coffs Harbour City Council, 2020, ' Coffs Harbour Local Growth Management Strategy 2020', Local Growth Management Strategy | Coffs Harbour City Council (nsw.gov.au)

3. Key retail supply and demand parameters

In this section we assess existing and projected demand and supply in Coffs Harbour – both with and without the revitalisation of the Coffs Harbour Jetty Foreshore. The analysis looks at the quantum and location of retail floorspace. These supply and demand figures feed directly into the impact modelling that is discussed in Section 4.

This section is structured as follows:

- Section 3.1 focuses on retail floorspace supply. This includes existing supply, supply proposed through the development at the Precinct and also recognises the distribution of that supply across the LGA and Coffs City Centre.

- Section 3.2 then turns to demand. The initial discussion is around the distribution and growth of population across the LGA, before that is converted to expenditure/turnover/spending and then finally demand for retail floorspace.

- Section 3.3 rounds out the discussion by comparing demand and supply. This is different from an impact assessment in that it only compares the total volume of demand with supply, without making a judgement on whether the impacts are too high or low (that is discussed in detail in Section 4). Nonetheless it is informative to understand the overall demand and supply equation so that the planning proposal understands where there is already too much or too little retail floorspace in the LGA, and whether changes such as population growth could shift that balance as well.

Retail Supply

Existing supply in Coffs Harbour

The map below shows the existing spatial distribution of retail floorspace across the LGA. The current supply of retail floorspace in the LGA is concentrated around the coast – in particular in the Coffs Harbour City Centre itself (including the centres of Park Beach Plaza, Coffs Harbour City Centre, Park Beach Bulky Goods and Pacific Highway North). The rest of the LGA has much less retail provision – but this is largely consistent with the settlement patterns of the LGA.
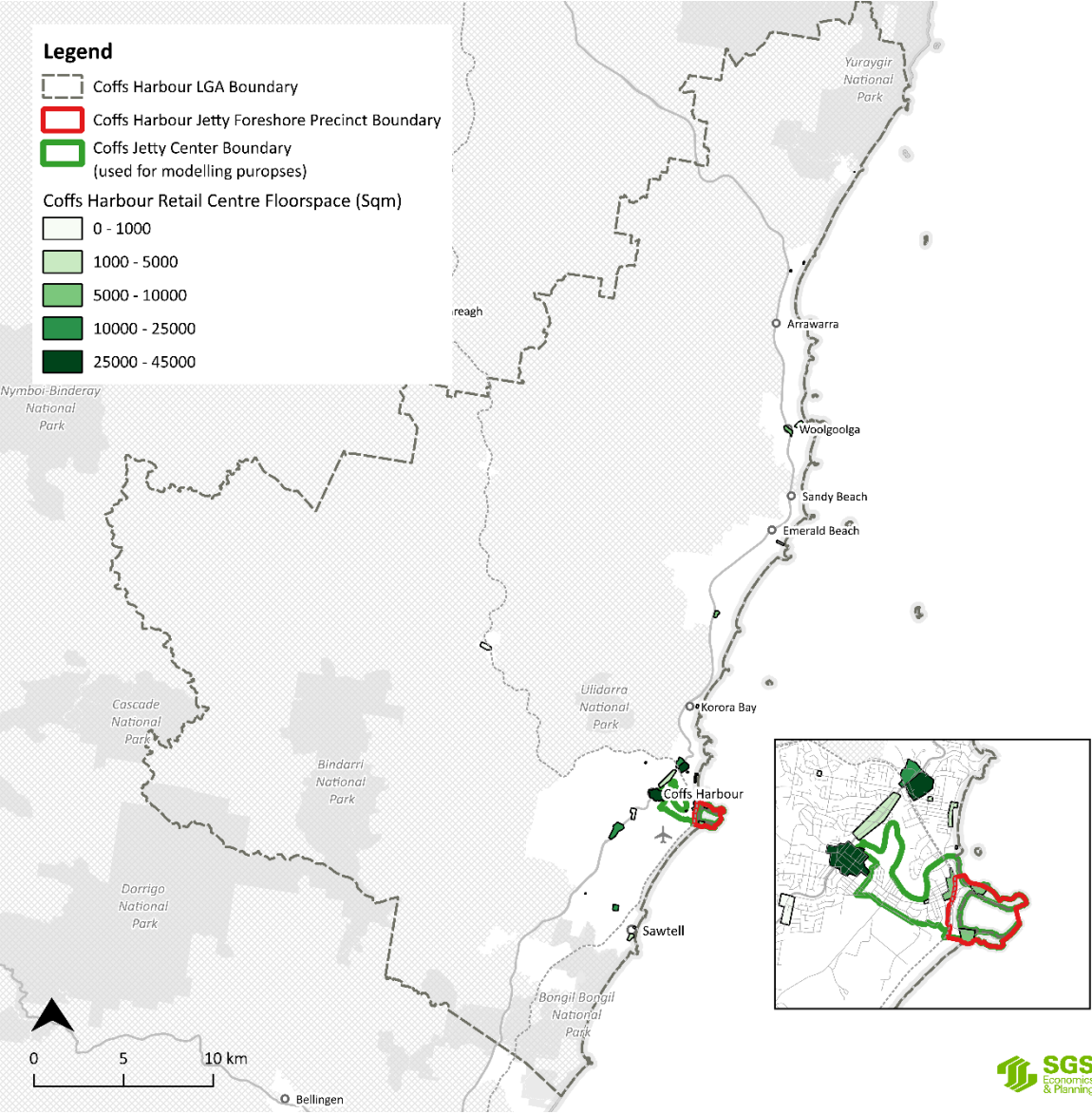
FIGURE 7: CURRENT SUPPLY OF RETAIL FLOORSPACE IN COFFS HARBOUR TRAVEL ZONES (TZ22)
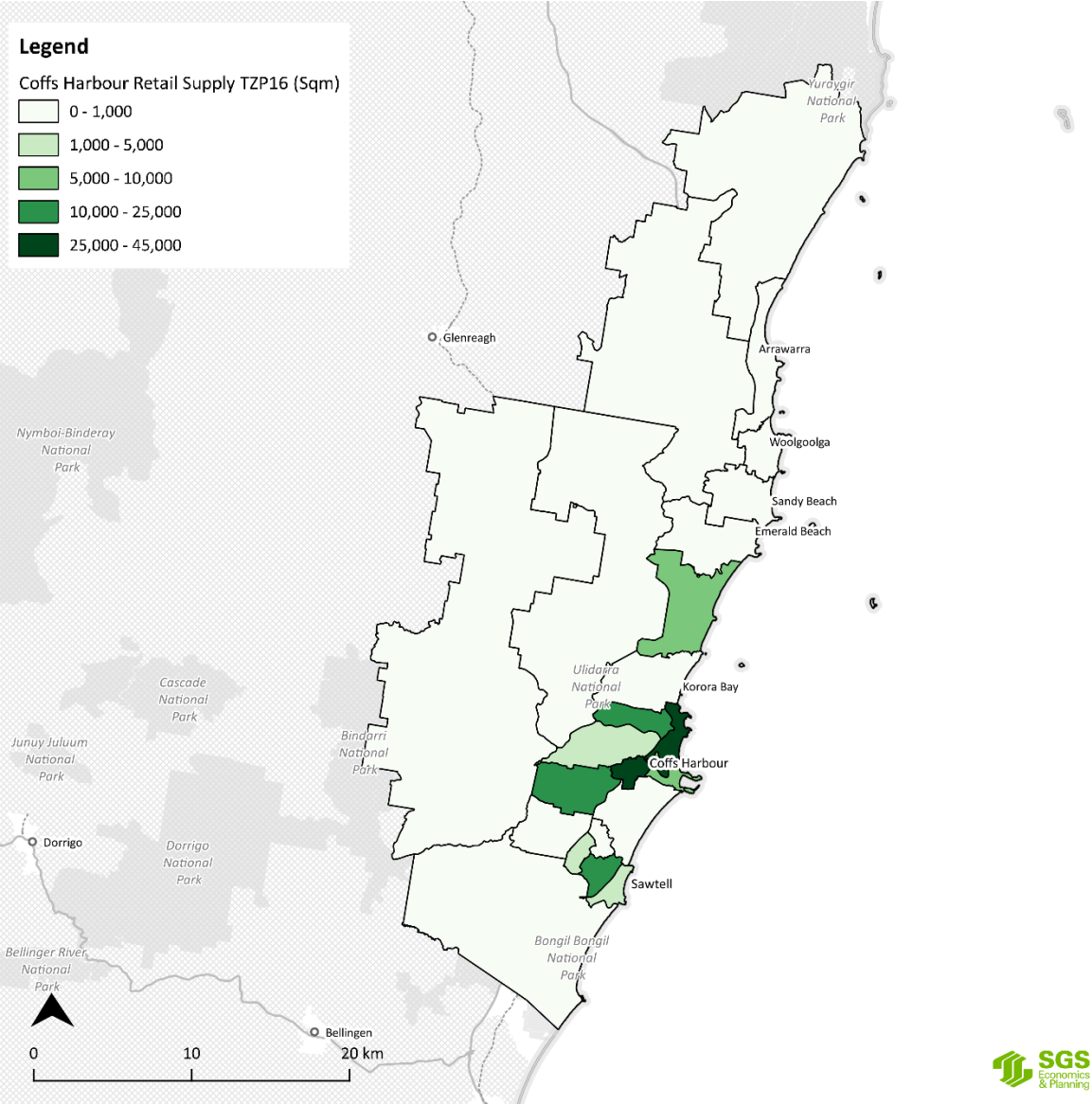
Source: SGS Economics and Planning 2024

Figure 8 shows the exact location of that floorspace across the Coffs Harbour LGA, with an inset for the nodes in the Coffs City Centre itself.

FIGURE 8: CURRENT SUPPLY OF RETAIL FLOORSPACE IN COFFS HARBOUR

Source: SGS Economics and Planning 2024

Table 1 displays the top ten centres in Coffs Harbour LGA in terms of current retail floorspace. The complete list of centres can be found in Appendix C.

TABLE 1: CURRENT SUPPLY OF RETAIL FLOORSPACE IN COFFS HARBOUR – TOP 10 CENTRES

Centre	Hierarchy	Supermarket	Other Food	Hospitality	Clothing	Household Goods	Other Retail	Department Store	Total retail floorspace (sqm)
Park Beach Plaza	Regional	8,161	773	1,869	4,161	2,019	1,062	23,778	41,822
Coffs Harbour City Centre	Sub-regional	6,920	3,668	8,775	4,455	7,342	2,120	5,420	38,700
Park Beach Bulky Goods	Bulky goods	0	0	59	274	21,798	1,789	0	23,921
Toormina Gardens	Neighbourhood	8,885	1,517	1,663	1,134	1,704	1,003	7,213	23,121
Pacific Highway Coffs South	Bulky goods	495	224	1,692	0	18,285	160	0	20,857
Coffs Jetty	Strip	1,132	1,368	3,341	0	1,013	266	0	7,120
Moonee Beach	Neighbourhood	4,799	1,062	573	211	0	217	0	6,863
Woolgoolga Strip	Strip	0	1,088	2,620	633	769	920	0	6,029
Woolgoolga Clarence Street	Strip	3,140	1,466	845	77	0	122	0	5,650
Sawtell Strip	Strip	0	635	2,649	615	191	347	0	4,437
LGA Total		35,917	13,791	27,037	12,204	53,522	10,449	36,411	189,330

Source: SGS Economics and Planning 2024

Proposed supply in Coffs Harbour

The future supply of retail floorspace resulting from the proposed development at in the Precinct is shown below. This new development is proposed to deliver an approximate additional 5,000 sqm of retail floorspace. Full details of the planning proposal can be found in Appendix A.

TABLE 2: PROPOSED SUPPLY OF RETAIL FLOORSPACE IN COFFS HARBOUR

Existing total retail floorspace (sqm)	Proposed total retail floorspace (sqm)	Change (sqm)	Change (%)
189,330	194,330	5,000	2.6

Source: SGS Economics and Planning 2024

The location of new retail floorspace is shown in Figure 9. Note how the area surrounding the proposed development does already possess ample retail opportunities. That said, the Precinct would only represent a 2.6 per cent increase in retail floorspace for the LGA.

FIGURE 9: PROPOSED SUPPLY OF RETAIL FLOORSPACE IN COFFS HARBOUR AS PER ILLUSTRATIVE MASTERPLAN
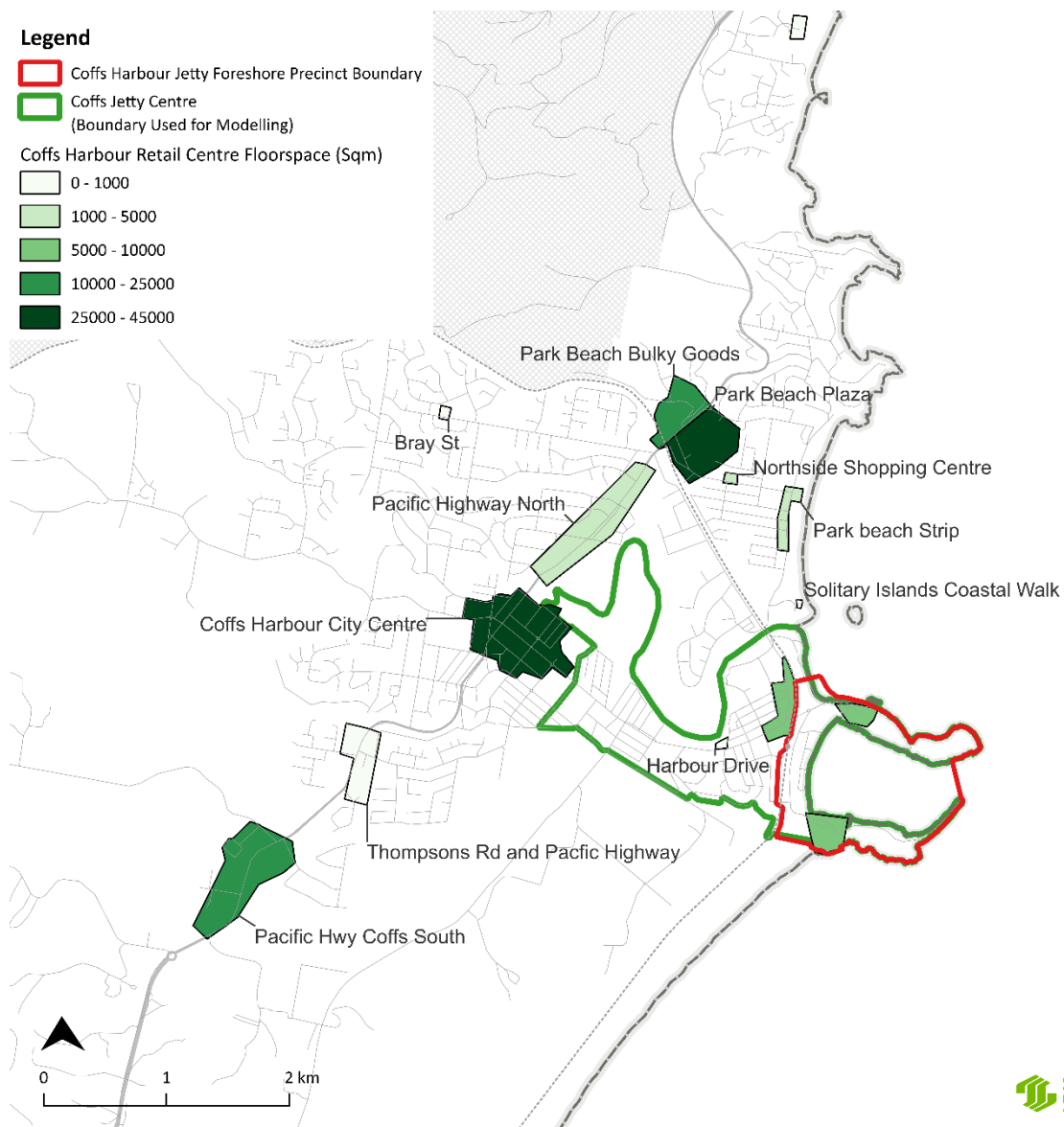
Source: SGS Economics and Planning 2024

3.1   Retail Demand

Existing & projected population in Coffs Harbour LGA

We now turn our attention to demand. The greatest driver of retail demand is from population growth.

The population forecasts used here are from SGS's official 2022 TZP (Travel Zone Projections) Estimated Residential Population (ERP) for NSW Government's Department of Transport[8]. ERP is comprised of both Private and Non-Private Dwellings. Residential Non-Private Dwellings include aged care facilities, defence force, hospitals, prisons, staff quarters and boarding houses. All of these facilities generate demand for and expenditure at retail facilities and are therefore routinely included in any retail assessment.

 A range of assumptions have been considered as part of these forecasts including:

- COVID-19 and post-COVID-19 trends and drivers
- NSW housing supply forecasts
- Net overseas migration and net internal migration
- Natural increases (balance of births and deaths)

The following table indicates the estimated residential population forecast in Travel Zones in Coffs Harbour LGA over the next 20 years. Comparing the estimated population forecast for 2041 to a 2021 baseline, the Travel Zones in Coffs Harbour LGA are expected to grow at a compound annual growth rate (CAGR) of 0.7 per cent, which also means that there will be growing demand for retail floorspace throughout this time.

The forecasts show that with the impact of COVID-19, population growth in Greater Sydney is now expected to be approximately 1 million lower than under pre-COVID forecasts, whilst the population of Regional NSW is now 200,000 higher than under pre-COVID forecasts. In Regional NSW, development is expected to be heavily focused around existing settlements and regional towns (as well as on the fringes of Greater Sydney).

Coffs Harbour South is expected to grow the fastest at a CAGR of 9.6 per cent, while areas like Boambee, Boambee East, Toormina, Sawtell and Bonville are anticipated to experience a slight decrease, at 0.6 per cent. Coffs Harbour Jetty is predicted to grow at a CAGR of 1.6 per cent, which means a relatively greater need for goods and services compared to other areas.

The comprehensive list of Travel Zones by population forecast can be found in Appendix B.

Tourism Generated Demand

The Precinct is likely to attract additional tourism both through gaining a higher share of existing tourism within the LGA and generation of new tourism expenditure. As the extent of this is unknown, we have taken a conservative position and additional expenditure beyond the existing LGA tourism has not been modelled but if to occur would bring benefits to The Precinct and wider LGA. However, **Scenario 2** does model the impact of the Precinct development by 2036 but goes on to assume that the Precinct captures a **higher proportion** of the LGA's retail expenditure by tourists in line with the increased floorspace, meaning that other centres capture less tourism expenditure. Some of this

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[8] DoT's Advanced Analytics and Insights (AAI) team.

increased capture of tourism spend is likely to occur from the over 200 rooms of accommodation proposed within The Precinct.

TABLE 3: POPULATION FORECAST (ESTIMATED RESIDENTIAL POPULATION) IN COFFS HARBOUR TRAVEL ZONES OVER THE NEXT 20 YEARS (TZP22) – TOP 10 TRAVEL ZONES WITH THE GREATEST CHANGE

Travel Zone	2021	2026	2031	2036	2041	CAGR 2021 to 2041 (%)
Coffs Harbour South	169	376	626	853	1,051	9.6%
Moonee Beach	3,447	4,090	4,854	5,642	6,437	3.2%
Korora South	559	672	805	919	1,010	3.0%
North Boambee Valley	1,757	2,028	2,354	2,653	2,916	2.6%
Emerald Beach	3,230	3,679	4,210	4,757	5,310	2.5%
Korora	3,709	4,037	4,428	4,832	5,240	1.7%
Coffs Harbour Jetty	2,738	2,972	3,260	3,522	3,752	1.6%
Coffs Harbour North	12,365	12,731	13,166	13,545	13,849	0.6%
Coffs Harbour	6,035	6,199	6,404	6,592	6,758	0.6%
Sandy Beach	2,648	2,732	2,822	2,898	2,961	0.6%
Total of LGA	**77,280**	**79,937**	**83,069**	**85,929**	**88,449**	**0.7%**

Source: Transport for NSW 2022

Figure 10 shows the projected population distribution, the main finding being that the future population will continue to be concentrated along the coast. The strongest growth is still expected to be in and around the Coffs Harbour Town Centre – which would reinforce the centrality of that area as the main retail, service and tourism node in the LGA.

FIGURE 10:   POPULATION FORECAST ESTIMATED RESIDENTIAL POPULATION IN COFFS HARBOUR TRAVEL ZONES IN 2041 (TZP22)
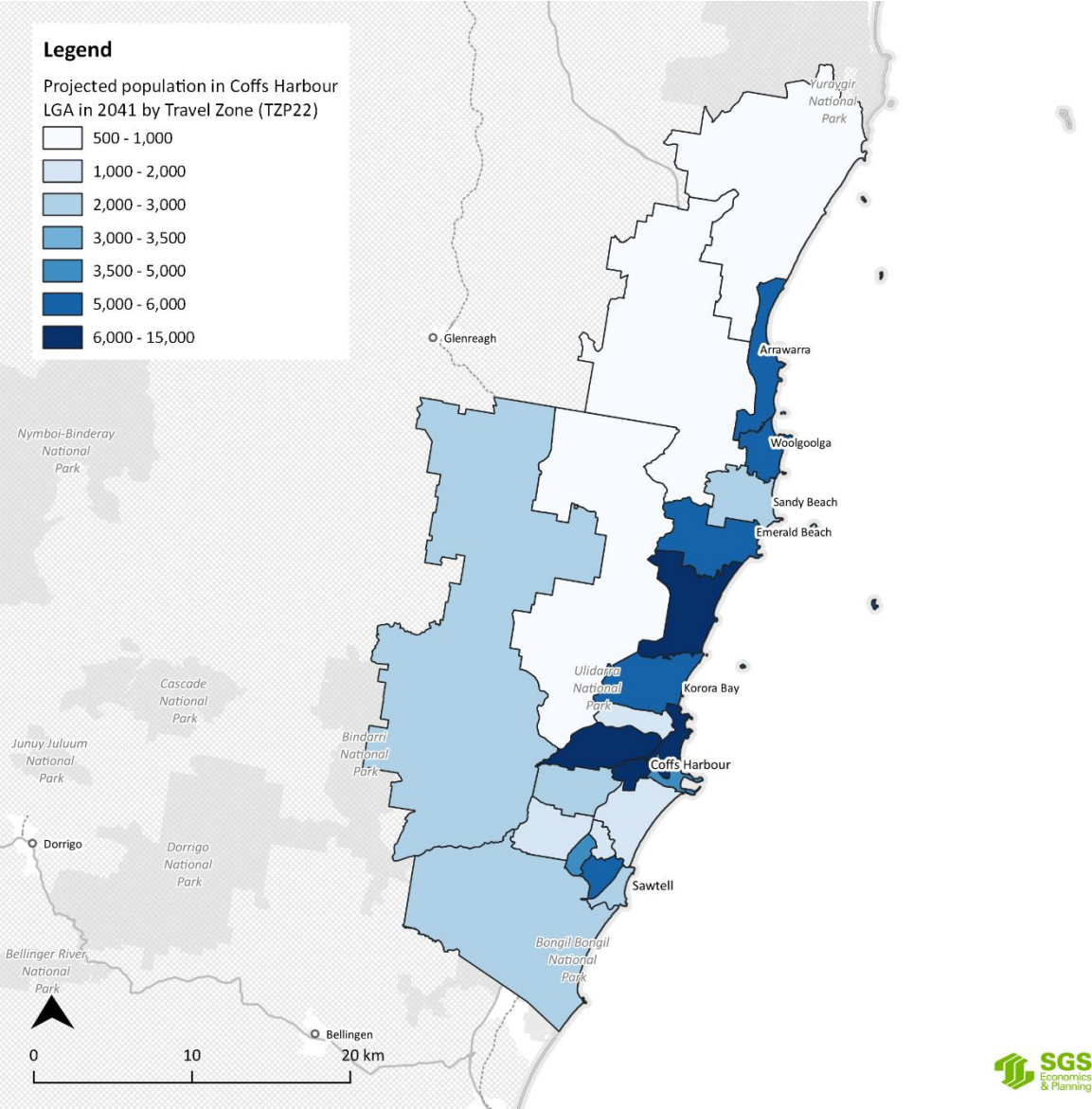
Source: SGS Economics and Planning 2022

The planning proposal (yielding approximately 370 residents) is expected to have a minor impact on the total population in Coffs Harbour LGA as a whole, although it would result in a 10.5 per cent increase in the population of the Coffs Harbour Jetty area (Table 4).

TABLE 4: CHANGES TO ESTIMATED RESIDENTIAL POPULATION IN 2036 WITH ADDED POPULATION YIELD

Travel Zone	2036 (current)	Estimated 2036 (new)	Estimated Change	Change (%)
Coffs Harbour Jetty	3,522	3,892	370	10.5
Total of LGA	85,929	86,299	370	0.4

Source: SGS Economics and Planning 2024

Population to retail expenditure & floorspace conversions

From here we convert that population growth/yield to demand for retail floorspace.

The population projections are multiplied by per capita expenditure to generate an estimated total expenditure on retail. This number was then divided by a benchmark Retail Turnover Density (RTD) to calculate the floorspace demand.

RTD is the amount of money generated by a square metre of floorspace. It is an indication of how much people are capable of spending per sqm of floorspace and so by dividing expenditure by RTD, we determine ultimately how much retail space they would demand. Note that this figure varies according to store type.

$RTD = \dfrac{\text{Total retail turnover}}{\text{Floorspace}}$	Population x Per capita expenditure = Expenditure demand $\dfrac{\text{Expenditure demand}}{\text{RTD}} = \text{Floorspace}$

Table 5 shows two sets of RTDs used in this study. The first set (SGS RTD Benchmarks) are used in the gravity modelling applied for impact testing in Section 4 and are our standard benchmarks. These are SGS's standard industry benchmarks used across Australia.

TABLE 5: SGS RTD BENCHMARKS (TURNOVER ($) PER SQM)

SGS RTD Benchmarks							
	Supermarket	Other Food	Hospitality	Clothing	Household Goods	Other Retail	Department Store
Major Regional	$12,082	$19,335	$14,331	$19,335	$19,335	$19,335	$3,659
Regional	$13,207	$14,760	$13,156	$14,760	$14,760	$14,760	$3,381
Sub-Regional	$13,298	$10,617	$9,417	$10,617	$10,617	$10,617	$3,529
Neighbourhood	$13,094	$9,857	$7,798	$9,857	$9,857	$9,857	$3,617
Strip	$12,025	$8,578	$7,649	$8,578	$8,578	$8,578	$3,108
Bulky goods	$12,025	$4,500	$7,649	$4,500	$4,500	$4,500	$3,180

Source: SGS Economics and Planning 2024

We do recognise however, that in this location, traders may be able to survive on lower trading levels due to lower rents being charged by local landlords. Research was undertaken for leasing rates across Coffs City Centre which found it to be on average 16 per cent lower than for capital cities. A rent reduction has therefore been applied to the standard RTD as an alternative demand calculation to recognise the local trading and real estate conditions. The lower, rent adjusted set of RTDs are shown in Table 6.

TABLE 6: RENT ADJUSTED RTD BENCHMARKS (TURNOVER ($) PER SQM)

	Supermarket	Other Food	Hospitality	Clothing	Household Goods	Other Retail	Department Store
Rent adjusted benchmarks							
Major Regional	$11,430	$18,212	$17,372	$12,476	$11,072	$23,816	$2,503
Regional	$12,494	$13,903	$15,948	$9,524	$8,452	$18,181	$2,313
Sub-Regional	$12,580	$10,000	$11,415	$6,851	$6,080	$13,078	$2,414
Neighbourhood	$12,386	$9,284	$9,452	$6,360	$5,644	$12,141	$2,474
Strip	$11,375	$8,080	$9,272	$5,535	$4,912	$10,566	$2,126
Bulky goods	$11,375	$4,239	$9,272	$2,904	$2,577	$5,543	$2,126

Source: SGS Economics and Planning 2024

The demand results are shown below, along with injections from beyond the LGA (mainly from Bellingen) as well as tourism induced demand (more about that in section 4).

TABLE 7: FLOORSPACE DEMAND PROJECTIONS (SQM)

Floorspace demand	2021	2026	2031	2036	2041
Population	146,347	144,601	144,642	143,341	146,093
Injections	8,187	8,853	8,564	9,308	8,963
Tourism	35,819	38,363	41,870	45,609	47,503
Total	189,330	191,817	195,076	198,258	202,558

Source: SGS Economics and Planning 2024, ABS Census 2021, City of Coffs Harbour LGA, Tourism Research Australia

One component of tourism that may be of relevance is the number of visitors who are passing through Coffs on their way between various settlements that lie on the eastern coast from Brisbane to Sydney. Retail spending within this sub-set will be driven by their need to stop at cafes/restaurants, overnight bed and breakfast and/or local playgrounds and parks for a rest. While we know that passers-by make up around 6 per cent of total Coffs Harbour LGA visitation there is no data for the breakdown by commodity type nor do we know the likelihood of the development will capturing additional passers-by who would otherwise have not stopped at Coffs LGA at all. Highway bypass of Coffs Harbour would likely see a reduction to some extent of the capture of retail expenditure by these travellers. This would likely reduce the overall retail demand within the Coffs Harbour City Centre and LGA. For these reasons we have not separately quantified this component.

3.2   Demand and supply alignment

We now compare floorspace demand (from section 3.2) with the supply (from section 3.1). Using the rent adjusted benchmarks, we find that for the Coffs LGA, demand and supply is currently (in 2021) relatively even, or at close to equilibrium around the mid to high 180,000 sqm mark.

The numbers have been produced at the LGA level as retail and hospitality in the Coffs township serves a much broader catchment than just the town residents.

TABLE 8: TOTAL RETAIL FLOORSPACE IN COFFS HARBOUR LGA – ADJUSTED (SQM)

	2021	2031	2041	2041 (Scenario 1)	2041 (Scenario 2)
Supply	189,330	-	-	194,730	194,730
Demand	185,484	195,076	202,558	202,637	202,765

Source: SGS Economics and Planning 2024

Now we focus on hospitality specifically (which is the main form of floorspace that the Precinct would produce).

The following table shows that there is currently sufficient hospitality floorspace in the LGA.

TABLE 9: HOSPITALITY FLOORSPACE IN COFFS HARBOUR LGA – ADJUSTED (SQM)

	2021	2031	2041	2041 (Scenario 1)	2041 (Scenario 2)
Supply	27,037	-	-	31,637	31,637
Demand	26,637	29,965	33,469	33,571	33,697

Source: SGS Economics and Planning 2024

Overall, there are **two key findings** to the demand and supply analysis in this section:

1. The Coffs Harbour Town Centre possesses sufficient floorspace to be self-sufficient, but as it plays a broader role in servicing the whole LGA and tourism generated demand, it needs to provide more retailing opportunities.

2. Similarly, hospitality supply (whilst currently around equilibrium) is expected to be undersupplied in the long run – even with the proposed future development in the Precinct.

This provides a contextual understanding of the supply and demand economics of the local region. Section 4 tests the true impact of the proposed development on existing traders.

4. Impact assessment

This section focuses on the assessment of impacts using the demand and supply figures from Section 3.

4.1   Method (Retail Gravity Model)

SGS has used a retail gravity model to project and assess future retail spending and floorspace dynamics in the Coffs Harbour LGA. The SGS Retail Model is built on previous research as well as the extensive experience SGS has gained conducting many retail studies. The SGS retail model takes the following approach:

$$\text{Propensity to shop at a centre} = \frac{\text{"Attractiveness" of centre} \times \text{Floorspace of shopping centre}}{\text{Travel time to the shopping centre}^2}$$

This formula recognises that an individual is more likely to go to more 'attractive' and larger centres and less likely to go to small, lower-quality centres that are further away.

The 'attractiveness' of a shopping centre refers to a range of visual and functional attributes. Unlike other gravity models, the SGS model does not explicitly measure the effects of design layout or product mix. Instead, it uses the shopping centre's current turnover and the distribution of current demand as a basis to establish a 'current attractiveness value' for each centre. This current attractiveness value is then used to forecast how the shopping centre will perform in the future given changes to floorspace (in either that centre or surrounding ones) and demand.

Why use a gravity model?

Other demand approaches (such as survey-based assessments) are expensive and data intensive and only consider current population and behaviour. Simplified 'shift-share' approaches typically focus on one or a few centres and heavily rely on judgement-based catchments with exaggerated market share thresholds.

Gravity models, on the other hand, present the following benefits:

- All spending across the retail system is accounted for once and only once;
- Catchments are generated through data analysis rather than through the judgement of consultants; and
- A gravity model captures the continuous and dynamic nature of catchments, based on changing demand, supply, and transport infrastructure.

4.2 Key Parameters/Assumptions

Retail expenditure forecasts

Total retail expenditure is forecast using estimates of the profile of household spending. The primary source of this is the MarketInfo estimates of expenditure per capita for different commodity types across all of Australia. This information is derived by MarketInfo from the ABS Household Expenditure Survey, which provides information on the market activities of households, and is based on demographic characteristics. MarketInfo is regarded as an industry standard.

The retail spending profiles prepared by MarketInfo are provided in a per capita format, by several different commodity categories. It is reported at the Statistical Area 1 (SA1) level to enable fine-grained estimates for retail expenditure forecasting.

These small area expenditure estimates are projected forward to 2036 using data from the ABS Retail Trade series for NSW. The Retail Trade series provides data on historical growth of real consumption by commodity category. These rates of growth are used to forecast change in real expenditure (i.e. excluding inflation).

Per capita forecasts are then used to calculate forecasts of total residential retail expenditure using the NSW Government's TZP small area population and employment forecasts for the Coffs Harbour LGA.

The following issues are accounted for, and steps are taken to derive a forecasted retail expenditure for the local retail system:

- An adjustment for online expenditure is applied by each commodity category to account for online retail purchases.

- Adjustments are made to account for workers within the retail trade area.

Tourism expenditure

Additional expenditure was added to the retail system in the Coffs Harbour LGA to account for the money spend by tourists visiting the region.

According to Tourism Research Australia (TRA), on average between 2016-2019, international and domestic tourists spend around $605 M in the Coffs Harbour LGA each year. Tourism (particularly international tourism) was impacted by the COVID-19 pandemic, but it has since rebounded, and these statistics were regarded as a good baseline for estimating tourist retail expenditure. They are also the most recent data available at the required level of detail.

This expenditure includes accommodation, activities and a wide range of other things which are not part of the retail system, as well as retail and hospitality. SGS estimated the breakdown of expenditure using average expenditure by visitor type data from TRA[9], and then converted this to retail commodity types using high-level assumptions regarding what kinds of money tourists are likely to buy different kinds of goods in.

Tourism across Australia is forecast to continue to increase in the future, with TRA estimating that international visitation will grow at around 3.2 per cent per year for NSW in the future[10]. SGS assumed

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[9] Sourced from the TRA 2022 National Visitation Survey
[10] https://www.tra.gov.au/international/international-tourism-forecasts/international-tourism-forecasts

that this growth rate would also apply to international tourism in Coffs Harbour. Domestic tourism to Coffs Harbour was estimated to occur in line with forecast population growth rates from the ABS (with rates for each state in Australia included in line with their percentage contribution in visitation to Coffs Harbour) according to Council commissioned internal research.

It was also assumed that the amount of money that each tourist spends on average will spend will grow by between 0.5 - 1 per cent per year, varying by retail commodity types, as economic growth occurs in other parts of the world.

Altogether, SGS estimates baseline tourist expenditure in retail and hospitality premises in Coffs Harbour of around $265 M per year, growing to $383 M in 2036. Around half (50 per cent) of this expenditure is estimated to be in hospitality premises, with supermarkets, bottle shops and clothing stores receiving the next largest shares. It is assumed that this retail turnover will be distributed to retail centres roughly in line with their expected baseline turnover in each commodity type (so bigger centres in a particular commodity will receive more turnover).

Initial turnover

Initial turnover in each centre in Coffs Harbour was estimated according to their 2021 floorspace amounts, and average retail trading density values sourced from the Urbis Shopping Centre Benchmarks 2018. These initial turnovers were adjusted to align with the total retail expenditure in Coffs Harbour in 2021,and used to estimate the retail attractiveness of each centre.

Online Market Retail Share

SGS has created forecasts of overall online retail growth scenarios which are based on experimental time-series statistics of online retail market share produced by the ABS.

Online retail market share was broken down into shares for each retail commodity based on reported market shares for various goods and services from a variety of third-party research sources, including NAB, IBIS World, and Australia Post. These shares are lowest for supermarkets and hospitality and highest for department stores and clothing. Shares for every commodity were assumed to grow in the future, although the highest growth is expected to occur in those commodities which have the highest current online retail market penetration (department stores, clothing and household goods).

Existing floorspace & turnover

The current retail supply in the Coffs Harbour LGA has been estimated at around 189,000 square metres in total, spread across a variety of activity centres. The turnover in each centre in each year has been modelled with and without the proposed changes in the Precinct (with the planning proposal contributing additional floorspace as well as population and related additional expenditure to the retail system).

A measure of the retail performance of stores is given by the turnover per square metre of floorspace. This statistic has been calculated for the Coffs Harbour Jetty Centre to gauge the impact of the proposed development on the existing retailers and the centre as a whole.

4.3   Results

Impact of the planning proposal and Illustrative Masterplan

Three scenarios have been modelled:

- **Base Case** – The base scenario models a Coffs Harbour retail network by 2036 without the proposed development on the Coffs Jetty foreshore and its additional residential and retail floorspace. This should be interpreted as a business-as-usual outcome.

- **Scenario 1** – Unchanged tourism: This scenario models the impact of the Coffs Jetty development by 2036 in a conservative scenario where the share of Coffs Harbour LGA's tourism expenditure occurring at the Precinct does not change following development, despite the additional floorspace. This means that impacts on other centres would be minimised.

- **Scenario 2** – Tourism uplift: This scenario also models the impact of the Precinct development by 2036 but goes on to assume that the Precinct captures a higher proportion of the LGA's retail expenditure by tourists in line with the increased floorspace, meaning that other centres capture less tourism expenditure.

2036 was chosen as the year for comparison within the modelling as that is the first modelled time period that after the expected development has been realised. Impacts shown in the modelling from the new retail floorspace are likely to be at their most extreme. Impacts are likely to reduce in future years as overall expenditure across the system increases. If the development was to occur at a later date stated impacts are also likely to see a reduction.

The two columns on the left-hand side of Table 10 overleaf provides a comparison as percentage change of turnover of scenarios 1 and 2 against the base case in the year, the Precinct will gain significant levels of trade under both scenarios 1 and 2. This will be at the expense of other centres in the network. Specifically the greatest decrease is (seen in Scenario 2 – tourism uplift) in the Pacific Highway North, Corindi Beach Pacific Street, Sawtell Strip, and Emerald Beach Friedmans Road centres. But the impacts ranging from 1 to 11% are considered mild.

The other three columns to the right-hand side of the table then show what the change in turnover is overall if accounting for background growth in retail turnover from 2021 to 2036. This is an important measure because trade diversions that happen well into the future need to account for changes in trading conditions that occur within that time period, not just the impact on the final day of the project. This measure finds that despite trade diversion impacts from the proposed development in the Precinct, all centres in the local region are expected to record a *net gain* in turnover by 2036, with the Precinct development merely tempering that growth once it comes online in the 2033-36 period.

Logically it is likely The Precinct would further boost turnover through additional tourism not just at the Precinct but also within surrounding centres in the local region. For the sake of conservatism, this modelling has not accounted for any potential induced tourism into the region as a result of the proposed development in the Precinct. This is not modelled because it is difficult to establish a quantitative relationship between the subject development and impacts to factors such as local brand value and tourist numbers. However, if this was to occur overall performance of centres across the LGA that see any of this additional expenditure would be improved. Negative impacts from the new floorspace would also be scaled down.

TABLE 10 CENTRE TURNOVER IMPACT SCENARIOS

	% Change in Turnover Static (Compared to Base Scenario in 2036)		% Change in turnover 2021 – 36 Accounting for background growth		
	S1 - Development vs Base	S2 - Development + Tourism Boost vs Base	Base	S1 (Development)	S2 (Development + Tourism Boost)
The Precinct	23%	61%	27%	56%	105%
Pacific Highway North	-5%	-11%	23%	17%	10%
Corindi Beach Pacific Street	-2%	-10%	21%	18%	9%
Sawtell Strip	-2%	-9%	13%	11%	3%
Emerald Beach Friedmans Road	-3%	-8%	31%	27%	20%
Woolgoolga Strip	-1%	-6%	18%	17%	11%
Coffs Harbour City Centre	-2%	-6%	24%	21%	17%
Northside Shopping Centre	-4%	-6%	5%	1%	-1%
Pacific Hwy Coffs South	-2%	-4%	17%	15%	12%
Bray St	-2%	-3%	20%	18%	16%
Coramba	-2%	-3%	10%	8%	6%
Park Beach Plaza	-1%	-2%	19%	17%	16%

Source: SGS Economics and Planning, 2024

Table 11 and Table 12 shows the turnover change between 2021 and 2036 under Scenario 2 where the Precinct captures a larger share of the LGA's proportion of tourism. Most centres under this scenario are still projected to have an increase in turnover between 2021 and 2036 despite the increased capture by the Precinct. Under this scenario impacts to the 'Other Retail' commodity type show decline in turnover for most other centres as the Precinct would capture a higher percentage of the spend this is also contributed to by the decline in turnover within the 'Other Retail' commodity across the LGA as explained above. However, for many of these centres the provision of other retail floorspace is low. In the cases where 'Other Retail' floorspace is more significant the centre overall is still expected to see turnover improvement with the expectation of Northside Shopping Centre which is expected to stay near stable.

Table 12 show the turnover change from 2021-2036 by store type for the top 10 impacted centres. Under Scenario 1 that sees no tourism boost to the Precinct the only commodity type that is forecast to see any reduction in turnover between 2021 and 2036 is 'Other Retail' which is mostly comprised of general merchandise (which in this context is most likely to be tourist souvenirs). Within the Base Case (no development) decline in overall turnover across the LGA has been observed within the 'Other

Retail' commodity type between 2021 and 2036. This decline unrelated to additional floorspace is likely due to macro factors such as changing consumer preferences. The addition of new 'Other Retail' floorspace may slightly enhance the effects of this within the Coffs Harbour LGA retail network although, across majority of centres affects are minimal. Sawtell Strip is expected to see the largest decline at -19 per cent, but the centre overall will still grow its turnover volume. All other centres and categories are expected to see turnover growth despite the addition of the new Precinct floorspace. This is supported by overall expenditure and population growth in the area in the coming decade.

TABLE 11 SCENARIO 1 TURNOVER CHANGE 2021-2036 BY STORE TYPE

	Supermarket	Other Food	Hospitality	Clothing	HH Goods	Other Retail	Department Store	Total
The Precinct	24%	29%	82%	-	14%	82%	-	56%
Pacific Highway North	-	-	24%	20%	16%	-5%	-	17%
Corindi Beach Pacific Street	-	-	25%	-	-	-7%	-	18%
Sawtell Strip	-	-1%	18%	11%	-2%	-19%	-	11%
Emerald Beach Friedmans Rd	24%	19%	32%	-	-	-	-	27%
Woolgoolga Strip	-	14%	27%	19%	14%	-6%	-	17%
Coffs Harbour City Centre	25%	14%	32%	28%	14%	-5%	8%	21%
Northside Shopping Centre	-	15%	20%	-	-	-3%	-	1%
Pacific Hwy Coffs South	27%	13%	25%	-	11%	-5%	-	15%
Bray St	24%	14%	24%	-	-	-5%	-	18%
Coramba	-	6%	17%	-	9%	-	-	8%
Park Beach Plaza	25%	15%	20%	22%	17%	-3%	5%	17%

Source: SGS Economics and Planning, 2024

Table 12 shows the turnover change between 2021 and 2036 under Scenario 2 where the Precinct captures a larger share of the LGA's proportion of tourism. Most centres under this scenario are still projected to have an increase in turnover between 2021 and 2036 despite the increased capture by the Precinct. Under this scenario impacts to the 'Other Retail' commodity type show decline in turnover for most other centres as the Precinct would capture a higher percentage of the spend this is also contributed to by the decline in turnover within the 'Other Retail' commodity across the LGA as explained above. However, for many of these centres the provision of other retail floorspace is low. In the cases where 'Other Retail' floorspace is more significant the centre overall is still expected to see turnover improvement with the expectation of Northside Shopping Centre which is expected to stay near stable.

TABLE 12 SCENARIO 2 TURNOVER CHANGE 2021-2036 BY STORE TYPE

	Supermarket	Other Food	Hospitality	Clothing	HH Goods	Other Retail	Department Store	Total
The Precinct	24%	32%	180%	-	14%	86%	-	105%
Pacific Highway North	-	-	13%	20%	16%	-6%	-	10%
Corindi Beach Pacific Street	-	-	14%	-	-	-7%	-	9%
Sawtell Strip	-	-1%	6%	11%	-2%	-19%	-	3%
Emerald Beach Friedmans Road	24%	19%	21%	-	-	-	-	20%
Woolgoolga Strip	-	14%	15%	19%	14%	-6%	-	11%
Coffs Harbour City Centre	25%	14%	15%	28%	14%	-5%	8%	17%
Northside Shopping Centre	-	14%	9%	-	-	-3%	-	-1%
Pacific Hwy Coffs South	27%	13%	13%	-	11%	-5%	-	12%
Bray St	24%	14%	13%	-	-	-6%	-	16%
Coramba	-	6%	5%	-	9%	-	-	6%
Park Beach Plaza	25%	14%	9%	22%	17%	-3%	5%	16%

Source: SGS Economics and Planning, 2024

Implications

The modelling of the trade diversion impacts shows that the proposed development at the Precinct is unlikely to threaten any established centres in the local region. Taken in isolation, the impacts when the development comes online are all under 11%; and when background growth in turnover is accounted for between 2021 to 2036, all centres are expected to experience a net gain in turnover. However, neither modelling scenario accounts for the possibility of the development attracting more tourism expenditure for the LGA. If additional tourism expenditure was to eventuate performance impacts shown above would be minimised.

For specific store types, some minor negative impacts are seen in the other retail category but overall, most store types are still expected to experience net growth. These results would indicate that under this scenario the Precinct would have an acceptable level of impact on other centres.

Appendix A: The Precinct Estimated Development Yields

		Approximate Yield
Residential GFA	GFA	21,200
Residential Dwelling Yield	One Bedroom	110
	Two Bedroom	100
	Three Bedroom	40
	Total	250
Resident Estimation	One Bedroom	130
	Two Bedroom	160
	Three Bedroom	80
	Total	370
Accommodation	GFA	11,500
	Yield	250
Retail and Food & Beverage	GFA	5,400
Non- Food & Beverage Retail	GFA	800
Food & Beverage	GFA	4,600
Community	GFA	1,900
Function	GFA	1,100
Working Harbour	GFA	4,900
Total Parking	Spots	1,596
Total GFA	GFA	46,000

Appendix B: Existing floorspace and population forecasts

The following table presents the current supply of retail floorspace across Coffs Harbour by centre and retail category.

TABLE 13: CURRENT SUPPLY OF RETAIL FLOORSPACE IN COFFS HARBOUR

Centre	Hierarchy	S'market	Other Food	Hospitality	Clothing	Household Goods	Other Retail	D'ment Store	Retail floorspace (sqm)
Bray St	Strip	140	128	64	-	-	40	-	372
Coffs Harbour City Centre	Sub-regional	6,920	3,668	8,775	4,455	7,342	2,120	5,420	38,700
Coffs Jetty	Strip	1,132	1,368	3,341	-	1,013	266	-	7,120
Coramba	Strip	-	623	65	-	127	-	-	816
Corindi Beach Pacific Street	Strip	-	-	220	-	-	58	-	278
East Boambee Shopping Centre	Neighbourhood	2,199	-	143	-	-	194	-	2,536
Emerald beach Friedmans Road	Strip	45	245	352	-	-	-	-	642
Moonee Beach	Neighbourhood	4,799	1,062	573	211	-	217	-	6,863
Mullaway	Strip	-	-	-	-	-	-	-	-
Northside Shopping Centre	Strip	-	76	296	-	-	1,326	-	1,698
Pacific Highway North	Bulky goods	-	-	1,412	643	273	824	-	3,152
Pacific Hwy Coffs South	Bulky goods	495	224	1,692	-	18,285	160	-	20,857
Park Beach Bulky Goods	Bulky goods	-	-	59	274	21,798	1,789	-	23,921
Park Beach Plaza	Regional	8,161	773	1,869	4,161	2,019	1,062	23,778	41,822

Park beach Strip	Strip	-	1,316	-	-	-	-	-	1,316
Sawtell Strip	Strip	-	635	2,649	615	191	347	-	4,437
Thompsons Rd and Pacific Highway	Bulky goods	-	-	-	-	-	-	-	-
Toormina Gardens	Neighbourhood	8,885	1,517	1,663	1,134	1,704	1,003	7,213	23,121
Twentieth Ave Sawtell	Strip	-	-	-	-	-	-	-	-
Woolgoolga Strip	Strip	-	1,088	2,620	633	769	920	-	6,029
Woolgoolga Clarnece St	Strip	3,140	1,466	845	77	-	122	-	5,650
Total		35,917	14,191	26,637	12,204	53,522	10,449	36,411	189,330

Source: SGS Economics and Planning 20

TABLE 14: ESTIMATED RESIDENTIAL POPULATION FORECAST IN COFFS HARBOUR TRAVEL ZONES OVER THE NEXT 20 YEARS (TZP22)

Travel Zone	2021	2026	2031	2036	2041	CAGR from 2021 to 2041 (%)
Korora South	559	672	805	919	1,010	3.0%
Coffs Harbour North	12,365	12,731	13,166	13,545	13,849	0.6%
Coffs Harbour Jetty North	5,780	5,934	6,116	6,271	6,396	0.5%
Coffs Harbour	6,035	6,199	6,404	6,592	6,758	0.6%
North Boambee Valley	1,757	2,028	2,354	2,653	2,916	2.6%
Coffs Harbour Jetty	2,738	2,972	3,260	3,522	3,752	1.6%
Coffs Harbour South	169	376	626	853	1,051	9.6%
Bucca	979	971	951	926	900	-0.4%
Coramba Nana Glen	3,004	2,977	2,913	2,838	2,759	-0.4%
Emerald Beach	3,230	3,679	4,210	4,757	5,310	2.5%
Moonee Beach	3,447	4,090	4,854	5,642	6,437	3.2%
Korora	3,709	4,037	4,428	4,832	5,240	1.7%
Boambee	1,628	1,584	1,531	1,473	1,411	-0.7%
Bayldon	1,745	1,707	1,666	1,622	1,569	-0.5%
Boambee East	4,431	4,309	4,167	4,009	3,839	-0.7%
Toormina	5,949	5,786	5,595	5,384	5,156	-0.7%
Sawtell	3,360	3,269	3,164	3,047	2,920	-0.7%
Bonville	2,776	2,700	2,611	2,513	2,407	-0.7%
Red Rock	594	596	598	600	601	0.1%
Upper Corindi	598	601	603	605	607	0.1%
Arrawarra	4,869	4,976	5,092	5,191	5,273	0.4%
Woolgoolga	4,909	5,014	5,132	5,238	5,326	0.4%
Sandy Beach	2,648	2,732	2,822	2,898	2,961	0.6%
Total of LGA	77,280	79,937	83,069	85,929	88,449	0.7%

Source: SGS Economics and Planning 2024