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Maitland Centres Study

PREPARED FOR

Maitland City Council

October, 2009

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Terminology

Name	Abbreviation
Australian and New Zealand Standard Industrial Classification	ANZSIC
Lower Hunter Regional Strategy	The Regional Strategy
NSW Department of Planning	DoP
Local Environmental Plan	LEP
Local Government Area	LGA
Australian Bureau of Statistics	ABS
Greater Metropolitan Area (Sydney Illawarra & Hunter)	GMA
Land Quotient	LQ
Transport Data Centre	TDC
Central Business District	CBD
Standard Instrument (Local Environmental Plans) Order 2006	Standard LEP Template

1. EXECUTIVE SUMMARY

In any study of centres, it is important to recognise the dynamic nature of retail, commercial and urban support services. These industries have undergone, and will continue to undergo, significant change in both form and function. They are industries that play a core role in the character and vitality of not just the economy, but also the physical manifestations of urban systems.

The impacts of population and socioeconomic changes, coupled with advances in technology and lifestyle habits, are giving rise to new retail and work place concepts, strategies, formats and experiences. Combining these factors with the significant population growth targeted for Maitland LGA over the next 25 years and the associated demand for employment and services, results in the need to carefully plan and enhance the function of centres and employment lands.

1.1 Study Brief and Background

Hill PDA has been commissioned by Maitland City Council to prepare a Study of centres and employment generating lands within Maitland LGA. This background Study will inform the Maitland Centres and Employment Clusters Strategy. The Study will also assist in the review of the Maitland Urban Settlement Strategy and guide the preparation of the Maitland Local Environmental Plan 2011.

The Study assesses emerging economic and employment trends and demand generated within the LGA up to 2031. The 25 year study period accords with the timescale and principles established by the Lower Hunter Regional Strategy 2006 - 2031¹.

1.2 Background, Analysis and Information for Maitland's Centres Study

Research and economic modelling undertaken by Hill PDA has identified the following key issues and considerations for the Maitland Centres Study.

The Relationship between Population Growth and Employment Demand

As of the 2006 Australian Census, 45% of Maitland LGA's population was active in the workforce. The largest single portion of Maitland's workforce was employed in the LGA. However, 57% of Maitland's workforce (over 15,000 people) travelled outside of the LGA for employment. This proportion is considered high comparative to other LGA's in the Hunter Region. A reduction in the number of persons travelling outside of Maitland LGA for employment will create a number of social, economic and environmental benefits for the resident community.

The Department of Planning has established a dwelling growth projection of 26,500 by 2031 for Maitland LGA. This represents 23% of all new residential dwellings forecast for development with the Lower Hunter Region.

¹ NSW Department of Planning, October 2006

Despite this, Maitland LGA is only forecast by the DoP to gain 8% of all new jobs within the Lower Hunter Region (4,700 jobs) over the same period.

As an alternative mechanism to forecasting potential job growth, Hill PDA commissioned the Transport Data Centre² to provide their employment forecasts for Maitland LGA. The TDC predicted a greater net increase in jobs generated within Maitland LGA than the DoP by 2031 of 6,000 jobs.

Based on existing labour force participation rates, and Council's population projections, Hill PDA undertook an employment assessment from a different perspective. Rather than assessing projected job growth, we assessed the projected growth in job demand for Maitland LGA.

It was found that demand would be generated for an additional 28,000 jobs as a result of the forecast growth in Maitland LGA's resident labour force by 2031. This translates into demand for an additional 12,000 jobs over the same period in order to maintain the existing job containment rate of 43%.

Recommended Job Growth Target

As outlined above, there are two job growth projections for Maitland LGA by 2031. The DoP projection is the lower at 4,700 jobs, and the TDC estimate is the higher at 6,000 jobs.

Hill PDA identifies the need³ for 12,000 additional jobs within the Maitland LGA by 2031 to maintain existing job containment levels. This demand exceeds the DoP and TDC job growth projections by 6,000 and 7,300 jobs respectively.

This job shortfall identifies the need for proactive action by Council and interested government / private parties. It is recommended by Hill PDA that the shortfall is addressed in order to provide Maitland's existing and future community with a range of convenient and accessible employment opportunities commensurate with the skills of the resident labour force.

Maitland LGA's centres and employment lands will play an important role in addressing this shortfall in addition to its employment lands. The availability of land and the sustainability of centres is one factor, however, in attracting businesses and therefore employment opportunities to an LGA. It is therefore recommended that a series of strategies are implemented by Council to address this issue in partnership with other government organisations as well as private organisations. Strategies will need to fundamentally hinge on the attraction of new employment generating industries to Maitland LGA and the expansion of existing businesses to create local jobs.

A range of mechanisms may be applied to achieve this objective. Mechanisms may include a range of fiscal and policy sweeteners to attract businesses and encourage their growth. Such sweeteners could include Council rate exemptions, floorspace bonuses for appropriate / desirable employment generating development, business relocation grants and joint ventures developments with State Government Departments. These mechanisms and their planned implementation should be outlined in detail within an Economic Strategy for the LGA.

² A division of the NSW Ministry of Transport, New South Wales

³ Based on Council population projections and existing labour force participation rates

Growing Demand for Retail and Services

As background research for the Study, Hill PDA undertook a detailed floorspace survey of all centres and bulky goods clusters within Maitland LGA. The survey sought to estimate the existing quantum and type of retail and commercial floorspace supplied. As shown in table 1 below, at the time of survey, Maitland LGA provided close to 182,000sqm of retail floorspace and over 34,000 sqm of commercial floorspace.

Table 1 - Breakdown of Floorspace Number and Type of Premises for Maitland LGA

Category	Floor Area (sqm)	Number of Premises
Supermarket & Grocery Store	31,130	18
Specialty Food	6,810	55
Catered Food	11,550	111
Department Store	16,030	3
Apparel	12,070	93
Bulky Goods	71,710	64
Other Non-Food Retail	24,610	171
Personal Services	7,810	78
<i>Total Retail</i>	<i>181,720</i>	<i>593</i>
Vacant Shopfront	10,660	89
Other Commercial	34,130	278
Auto Related Businesses	9,110	70
Other Pubs/Clubs etc	4,700	20
Total	240,320	1,050

Source: Hill PDA 2008

Hill PDA's survey of Maitland's centres also found that:

- 114,150sqm (63%) of Maitland LGA's retail floorspace was provided within its centres in addition to 50,300sqm of non retail floorspace (commercial, pubs and clubs and auto related uses).
- Maitland CBD was the largest centre within the LGA at over 66,000sqm, followed by Greenhills Stand Alone Centre (44,780sqm⁴) and Rutherford Town Centre (16,990sqm).
- The existing supply of retail floorspace within Maitland LGA exceeds demand generated within its trade area by 45,000sqm. This oversupply applies to all retail categories with the exception of specialty food, fast food, restaurants and (to a small degree) department stores. This exception may be a result of the relative appeal of alternate locations in surrounding LGA's for these uses i.e. the Hunter Valley Wine Region and Newcastle CBD.
- Detailed retail modelling undertaken for the Study, based on Councils population projections, found that there would be sufficient demand generated for 302,000sqm of retail floorspace across the LGA by 2031. Taking into account existing supply, this translates into demand for an additional 120,000sqm of retail floorspace. Additional floorspace will be able to be supported across all retail categories (and within all existing centres) with the exception of bulky goods retailing.
- Maitland LGAs out of centre precincts provided 62,800sqm of bulky goods floorspace. Combined with the 8,890sqm of bulky goods floorspace provided within Maitland's Centres, supply exceeded demand by close to 37,000sqm. This oversupply is a likely result of Maitland LGAs central location in the Lower Hunter

⁴ Figure includes indoor shopping centre as well as surrounding retail and commercial uses in the locality.

Region, the significant number of new dwellings being constructed across the Region, and current planning policy permitting bulky goods premises in industrial zones.

- The oversupply of retail floorspace in Maitland LGA highlights the regional role the LGA plays in the provision of retail floorspace (particularly in relation to bulky goods floorspace). The majority of bulky goods premises are located within Rutherford and Thornton Industrial Areas.
- Should the expansion of the indoor shopping centre located within the Greenhills centre be permitted, Maitland LGAs regional retail role will be enhanced as a result of the proposed additional 19,000sqm of department store and discount department store floorspace.
- Maitland LGA's regional retail role results in:
 - the capture of household expenditure from surrounding LGAs to the benefit of Maitland LGAs economy;
 - the retention of a greater share of the expenditure generated by Maitland households by Maitland LGAs centres; and
 - the generation of a significant number of jobs for local residents.

Commercial and Industrial Demand

Based on TDC employment estimates and their translation into floorspace, demand will be generated for an additional 10,000sqm of commercial floorspace within Maitland LGA by 2031. The bulk of this growth will occur in the Property and Business Services Sector consistent with industry trends across NSW. This sector is well suited to centre locations as it requires public access and does not require a component of industrial floorspace.

Consequently, it is recommended that the commercial floorspace growth is directed to Maitland CBD to reinforce its role as the primary civic and commercial centre for the LGA. Development incentives may be utilised to attract commercial businesses to Maitland CBD and encourage appropriate office development.

Based on TDC estimates, there will be a net decline in demand for industrial floorspace over the study period within the LGA. At a more detailed geographic level however, there will be a small increase in demand for industrial floorspace in the Rutherford, Thornton, Tenambit and Bolwarra localities, owing to their existing employment lands and established industries.

To enhance the diversity of employment opportunities in Maitland LGA, it is recommended that Council actively supports the promotion and marketing of the LGA as a place to conduct business. This may be achieved by the marketing of the LGA through Target Tenancy Plans, Council's website and regional promotions. It is also recommended that a diverse range of employment generating uses are encouraged within the LGA, including health and medical services. These industries could be attracted to cluster with Maitland Hospital as a form of magnet infrastructure.

1.3 Conclusion

This Study identifies that Maitland LGA is forecast to experience significant population growth and residential development by 2031. Owing to this growth, there will be a substantial increase in demand for local employment opportunities and service provision.

Given the scale of growth in demand for retail floorspace, we do not anticipate that any one centre is at risk of decline. Notwithstanding this, centres such as Maitland CBD require detailed structure planning to ensure that they can successfully compete for businesses and sustainable growth in light of potential competing centres in Maitland LGA and the Lower Hunter Region. Potential new or emerging centres within Maitland LGA will also require structure planning to ensure they create attractive and sustainable retail options for the communities they serve, without adversely affecting other centres in Maitland's Centre Hierarchy.

Based on the research and modelling conducted within this Study, we forecast demand for over 12,000 additional jobs within the LGA by 2031. This job target will maintain the existing level of job containment. Maintaining the existing level of job containment (as a minimum) is considered desirable for a range of important social, economic and environmental reasons.

The challenge for Maitland LGA relates to the significant difference between the 12,000 jobs required to maintain existing levels of employment containment, and the DoP projection for job growth of 4,700 over the study period. The TDC job growth estimate for the LGA is slightly higher at 6,000 jobs, however it still falls at close to half the target recommended by this Study.

Maitland LGA's employment challenge will be compounded by the projected decline in industrial jobs across the LGA and the modest increase in commercial jobs by 2031. Retail will be the main industry of employment generation in the LGA by 2031 highlighting the important role of Maitland's centres to not only service provision by local jobs.

For Maitland LGA to achieve a significantly greater share of employment growth over the Study period, it will be important for the LGA to proactively target industries to move to the Maitland LGA or existing industries to expand. To achieve this, Maitland Council will need to proactively work with State Government and other government / non government organisations to support sustainable business and employment growth commensurate with the skills of Maitland's existing and emerging resident labour force. These objectives will need to be achieved in light of this studies recommendation to protect and enhance the viability and functionality of Maitland's Centre Hierarchy.

2. INTRODUCTION

Maitland LGA is located within the Lower Hunter Region of NSW. With close proximity to transport corridors, Newcastle Regional Centre and greenfield land with potential for urban release, the LGA is anticipated to experience significant population growth over the next 25 years. This expectation is supported by the significant population growth experienced over recent years, with the LGA being the fastest growing LGA in NSW between 2004 and 2005. Between 2005 and 2006, Maitland City was in fact was the fastest growing city in NSW.

To accommodate population growth, Maitland City Council adopted the *Maitland Urban Settlement Strategy 2001-2020: A strategy for urban growth in the Maitland Local Government Area* in 2001. This Strategy set the framework for population growth within the LGA. The Strategy required, amongst other things, the protection and strengthening of existing centres within the LGA and the provision of suitable commercial and employment land in strategic areas within the LGA. Of critical importance, the Strategy also identified the need to provide a range of employment opportunities within the LGA to meet the needs of the growing population.

2.1 Study Objectives

Hill PDA has been commissioned by Maitland City Council to prepare a Study of centres and employment generating lands within the Maitland LGA. This background Study will inform the Maitland Centres and Employment Clusters Strategy. The Study will also assist in the review of the Maitland Urban Settlement Strategy and guide the preparation of the Maitland Local Environmental Plan 2011.

The objectives of the Study include the following:

- to identify the number, type and location of centres in Maitland, considering future population growth and development, as well as regional influences;
- to establish the principles for a hierarchy of centres in Maitland to service regional, local, and neighbourhood needs;
- to promote the regional role of the Maitland's Central Business District, to protect and strengthen other key centres and to limit the development of retail and commercial uses outside of centres;
- to anticipate and accommodate population growth, facilitate a diversity of employment opportunities and support clusters of civic, educational, medical and entertainment clusters; and
- to identify measures for centres at risk of decline.

The key tasks involved in the preparation of the Study included the following:

- analysis of employment and retail trends and issues;
- survey of centres and employment zones to define their key characteristics, opportunities and constraints;
- definition of a centres hierarchy;
- review of relationships between centres;

- stakeholder discussions; and
- demand analysis and forecasting.

The Study focuses on a range of areas including commercial, industrial, business parks and bulky good clusters. These centres, clusters and employment lands within the LGA are generally designated within the following zones: Zone 3(a) General Business, 3(b) Support Business, 3(c) Special Business, 4(a) General Industrial and 4(b) Light Industrial.

For the purposes of the Study, centres may be defined as:

*"a concentration of activity generators with a higher density of housing, employment, service and public facilities than other urban areas. A successful centre should contain a mix of land uses, and be the natural focus for the community identification."*⁵

Also of relevance to this Study are the following definitions:

Employment Lands: *"industrial areas, which predominantly accommodate manufacturing, distribution and non-centre urban services such as panel beating and concrete batching plants. The emergence of business parks and technology parks, which may contain a mixture of research, manufacturing, distribution and office activities also falls under this classification"*⁶.

Bulky Goods Premises: *"means a building or place used primarily for the sale by retail, wholesale or auction of (or for the hire or display of) bulky goods, being goods that are of such a size or weight as to require:*

- a large area for handling, display or storage, or*
- direct vehicular access to the site of the building or place by members of the public for the purpose of loading or unloading such goods into or from their vehicles after purchase or hire,*

*but does not include a building or place used for the sale of foodstuffs or clothing unless their sale is ancillary to the sale or hire or display of bulky goods"*⁷.

2.2 Study Area Description

Maitland LGA is located approximately 35km from Newcastle and 170km from Sydney. The LGA is situated within the Lower Hunter Region of NSW. The 396km² area had a total population of 61,880 as of the 2006 ABS census.

The main existing centres within Maitland LGA are focused along the New England Highway and the Hunter River. The New England Highway is the major transport route through the LGA. The location of centres such as Maitland CBD is reinforced by the passenger and freight railway line which runs from Newcastle in the south-east to the north-west of Maitland LGA. The line divides west of Maitland to Scone in the north-west and Dungog in the north.

⁵ Maitland City Council Project Brief 2008

⁶ Action Plan for Sydney's Employment Lands 2007

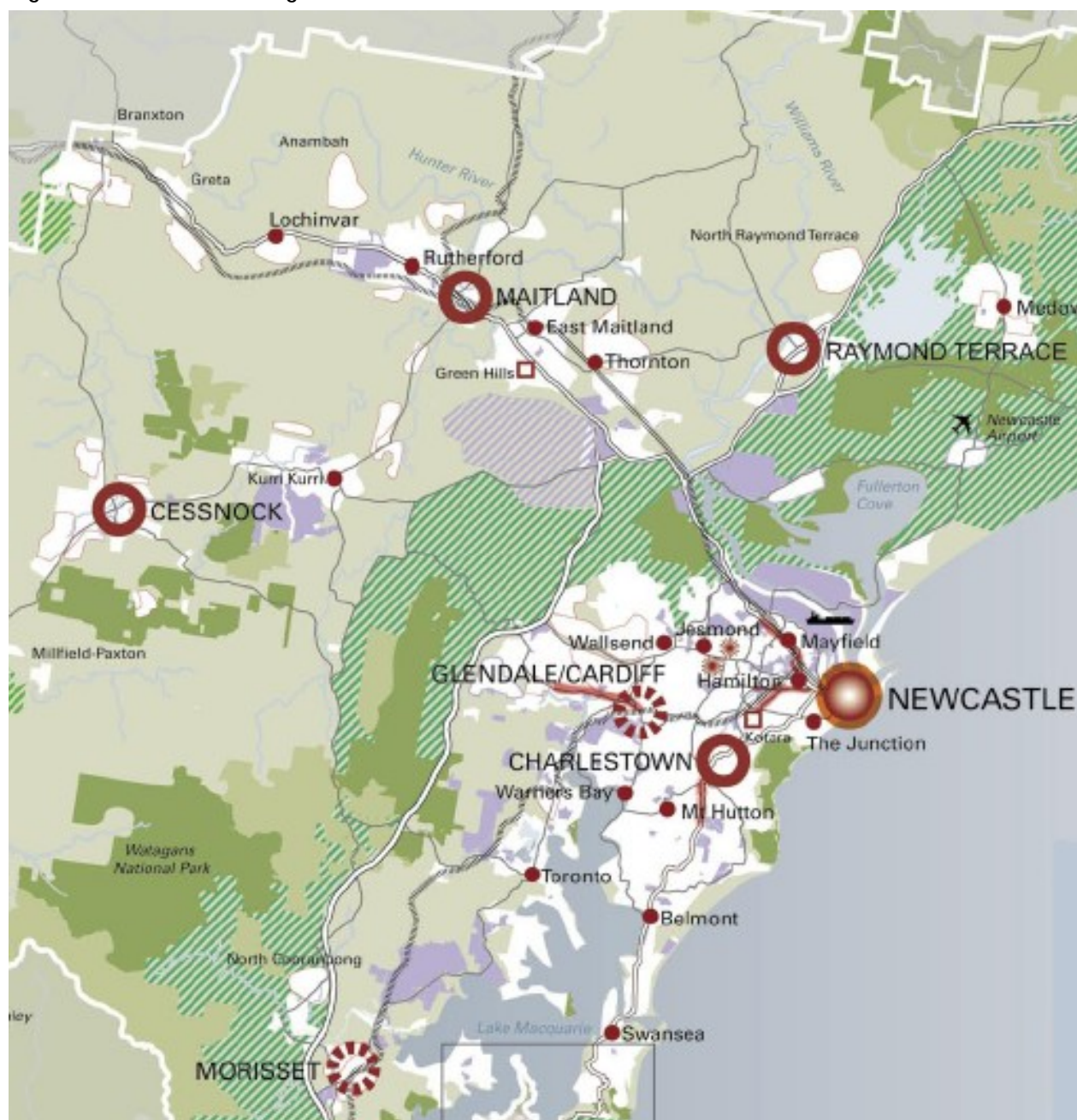
⁷ Standard Instrument – Principal LEP 2006

Maitland CBD is the Major Regional Centre of the area. Other centres noted by the NSW Government's Lower Hunter Regional Strategy are the towns of East Maitland, Rutherford, Thornton and Lochinvar (emerging), with Green Hills identified as a Stand Alone Shopping Centre.

The LGA has long been recognised as being rich in natural resources such as coal, agricultural land and other mineral deposits and metals. The area also has established industrial businesses, helped by its close proximity to the cities of Newcastle and Sydney and the raw materials mined in the region.

The Hunter River runs directly through the centre of the LGA from north-west to south-east. Two tributaries connect to the Hunter River within the LGA, the Paterson River from the north and the Wallis Creek from the south-west. Due to the flat topography of the Maitland LGA, some locations are prone to regular flooding. The Hunter River has therefore also had an influence on the spatial distribution of development within the LGA since early growth in the 19th Century.

Figure 1 - Lower Hunter Region



Source: Lower Hunter Regional Strategy, DoP

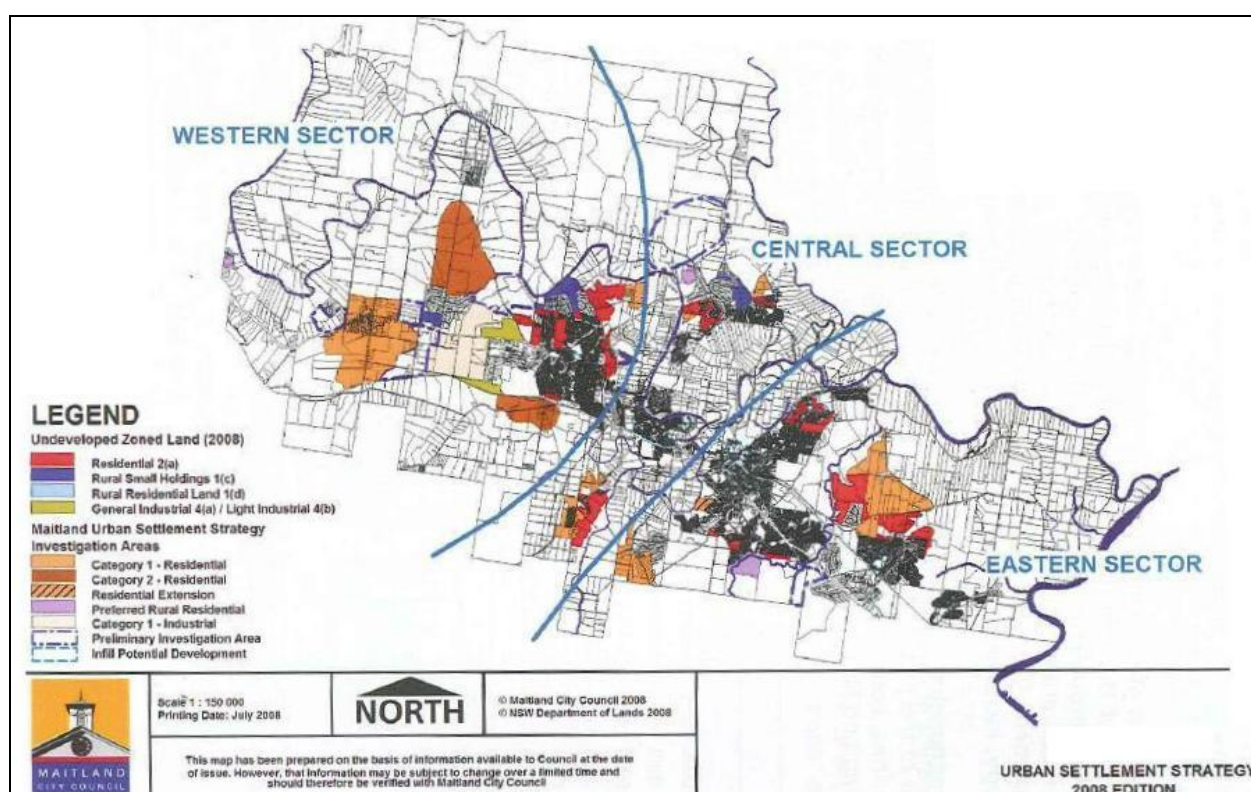
The Urban Settlement Strategy breaks Maitland LGA into three geographic sectors – the East, Central and West sectors. To accord with this approach, where possible, this Study has also referred to these three geographic regions.

As shown below, the Eastern Sector comprises of the area east of the floodplain corridor at East Maitland. It contains the areas of East Maitland, Morpeth, Raworth, Tenambit, Ashtonfield, Metford, Thornton, Chisholm and Woodberry.

The Central Sector comprises of urban development north and south of Maitland CBD. The district includes the Local Centre of Gillieston Heights, Lorn, Bolwarra and Largs.

The Western Sector comprises of the area west of Maitland and south west of the Hunter River. The sector includes the suburbs of Telarah, Rutherford, Aberglasslyn and Lochinvar.

Figure 2 - East, Central and West Sectors of Maitland



Source: Maitland City Council, Urban Settlement Strategy 2008, Draft as Exhibited

2.3 Study Background

On 31 March 2006, the NSW Government gazetted the Standard Instrument (Local Environmental Plans) Order 2006 for preparing Local Environmental Plans (LEPs). The Instrument establishes standard formats, zones and definitions for all Councils to apply when preparing new LEPs for their local government area. All Councils in NSW are required to prepare new LEPs in accordance with the Template by 2011.

As part of the preparation of the new LEP, Maitland Council must determine the strategic underpinnings for land zonings in the LGA, including residential, commercial, industrial, recreational and rural use. As part of this process Maitland Council prepared the Maitland Urban Settlement Strategy 2001-2020 in 2001. The Strategy sets the framework for sustainable development and growth within the LGA.

One of the relevant policies of the Settlement Strategy states that suitable commercial sites and employment lands should be provided in strategic areas, so as to maintain a 10 to 15 year supply of zoned employment land, which has appropriate infrastructure.

Other policies from the Maitland Urban Settlement Strategy, relevant to this Study are:

- *Centres are to be protected and strengthened with the use of development guidelines and incentives. The hierarchy of centres is to be maintained, but will be subject to review and analysis;*
- *Encourage employment growth in Central Maitland, whilst maintaining and facilitating specialized civic, educational, medical and entertainment functions;*
- *Limit retail and commercial development outside Central Maitland and Greenhills; and*
- *Concentrate retail activities in centres and identify and strengthen industry clusters.*

This Study follows on from the findings of the Maitland Urban Settlement Strategy, providing additional background information and analysis.

3. POLICY CONTEXT

The following section of this Study identifies and briefly describes the key policies and strategies that relate to Maitland LGA. These policies have been considered in detail in the preparation of this Study.

State Plan

The NSW State Plan identifies challenges and opportunities facing NSW whilst recognising the need for Governments to *'reconcile competing demands in an environment of constant social and economic change'*. The Plan sets out the following key goals and priorities relevant to this Centres Study.

- NSW open for businesses:
 - Increase business investment;
 - Maintain and invest in infrastructure;
 - Cutting red tape; and
 - Facilitate more people participating in education and training throughout their life.
- Stronger rural and regional economies:
 - Increased business investment in rural and regional NSW; and
 - Better access to training in rural and regional NSW to support local economies.
- Improve urban environments through:
 - Jobs closer to home;
 - Housing affordability;
 - Improve the efficiency of the road network; and
 - More people using parks, sporting and recreational facilities and participating in the arts and cultural activity.

State Infrastructure Strategy (NSW) 2006 / 07 to 2015 / 16

The State Infrastructure Strategy lists the infrastructure projects that are funded or will be funded as of the 2006-07 financial year. According to the Strategy, the NSW State Government will invest almost \$10 billion on infrastructure throughout the State. This infrastructure includes projects relating to Human Services, Transport, Electricity, Justice and Water.

According to the Strategy, the increase in demand for infrastructure will be a result of the following things:

- Population growth and distribution;
- Ageing and longevity;
- Technological change;
- Industrial and commercial developments;
- Cost pressures;

- Infrastructure renewal; and
- Environmental issues.

The Strategy divides the State into smaller, more manageable regions. Maitland forms part of the Hunter Region.

According to the Strategy, the Hunter's economic base is rapidly diversifying, shifting from reliance on traditional primary and secondary industries to a wide range of service industries.

The Strategy includes funding for the following projects within the Maitland LGA:

- Maitland TAFE – replacement accommodation for information & communication technology and upgrade;
- Upgrades to the New England Highway;
- Hunter River third crossing at Maitland;
- A new electricity substation at Thornton;
- Refurbishment and capacity increase of the Telarah zone substation;
- Upgrades to the waste water treatment works at Morpeth; and
- Construction of the Lochinvar sewage scheme.

Hunter Regional Environmental Plan 1989

The Hunter Regional Environmental Plan 1989 identifies emerging issues, strengthens and adds to the provisions that existed in REP No. 1, identifies future urban lands, and includes Maitland LGA. The plan also revokes the majority of section 117 directions as they apply to the Hunter.

The Industrial objectives of the Plan are:

- (a) to ensure that sufficient zoned and serviced industrial land is provided in locations appropriate to the needs of industry, while ensuring protection of the environment; and
- (b) to promote the distribution of employment in secondary industry in a manner compatible with the availability of services and distribution of population.

The Commercial objectives of the Plan are:

- (a) to ensure that commercial service centres are developed to suit the convenience of consumers and to optimise public and private investment, and
- (b) to promote the distribution of employment in the tertiary sector in a manner compatible with the distribution of population.

Further to the abovementioned objectives, the Plan lists a number of "Policies for plan preparation" and "Principles" for Commercial and Industrial developments, and a range of other types of developments.

As the Maitland Centres Study will help guide the preparation of the Maitland Local Environmental Plan 2011, the Study has taken the Hunter REP 1989 into consideration.

Standard Instrument (Local Environmental Plans) Order 2006

In order to simplify and unify the NSW Planning System, the DoP prepared the Standard Instrument (Local Environmental Plans) Order 2006 (hereafter referred to as the Standard LEP Template). The Standard LEP Template established standard planning zones and land use definitions to be adopted by all Councils within NSW.

The various zones that facilitate employment generating uses and that are of relevance to this Study are listed in the accompanying table.

Table 2 - Standard LEP Template Zones

EMPLOYMENT ZONES	Mandated Uses
IN1 – General Industrial Zone	Depots; Freight Transport facilities; Light industries; Neighbourhood shops; Warehouse or distribution centres.
IN2 – Light Industrial Zone	Depots; Light industries; Neighbourhood shops; Warehouse or distribution centres.
IN3 – Heavy Industrial Zone	Depots; Freight transport facilities; Hazardous industries; Hazardous storage establishments; Heavy industries; Offensive industries; Offensive storage establishments; Warehouse or distribution centres.
RU1 – Primary Production	Dwelling houses; Extractive activities; Mining
B1 – Neighbourhood Centre	Business premises; Child Care Centres; Community facilities; Neighbourhood shops; Shop top housing.
B2 – Local Centre	Business premises; Child Care Centres; Community Facilities; Educational establishments; Entertainment Facilities; Function centres; Information and education facilities; Office premises; Passenger transport facilities; Recreation facilities (indoor); Registered clubs; Retail premises; Service stations; Shop top housing; Tourist and visitor accommodation.
B3 – Commercial Core	Business premises; Child Care Centres; Community Facilities; Educational establishments; Entertainment Facilities; Function centres; Hotel accommodation; Information and education facilities; Office premises; Passenger transport facilities; Recreation facilities (indoor); Registered clubs; Retail premises.
B4 – Mixed Use	Boarding houses; Business premises; Child care centres; Community facilities; Educational establishments; Entertainment facilities; Function centres; Hotel accommodation; Information and education facilities; Office premises; Passenger Transport facilities; Recreation facilities (indoor); Registered clubs; Retail premises; Seniors housing; Shop top housing.
B5 – Business Development	Child care centres; Passenger transport facilities; Warehouse or distribution centres
B6 – Enterprise Corridor	Business premises; Community facilities; Hotel accommodation; Landscape and garden supplies; Light Industries; Passenger transport facilities; Timber and building supplies; Warehouse or distribution centres.
B7 – Business Park	Child care centres; Light Industries; Neighbourhood shops; Office Premises; Passenger transport facilities; Warehouse or distribution centres
SP1 – Special Activities	The purpose shown on the Land Zoning Map, including any development that is ordinary incidental or ancillary to development for that purpose.
SP3 – Tourist	Food and drink premises; Tourist and visitor accommodation.

Each Council in NSW is required to amend their local development plans to accord with the LEP Standard Template by 2011. The amended LEPs should also accord with the objectives of the Regional Strategies prepared by the DoP.

Council is currently preparing draft Maitland Local Environmental Plan 2011. The 'MLEP 2011' is a new, comprehensive, principal LEP for the Maitland LGA to conform to the NSW Government's Standard Instrument (Local Environmental Plans) Order 2006. MLEP 2011 is expected to be gazetted in 2011 and will repeal Maitland LEP 1993 at that time.

The preparation of MLEP 2011 is timely with the recent review of the Maitland Urban Settlement Strategy, and the adopted Maitland Rural Strategy, Maitland Greening Plan and other local and regional land use planning strategies, particularly the Lower Hunter Regional Strategy. Key directions in these documents will guide the provisions of the MLEP 2011, as will the outcomes of the centres policy. The current provisions of MLEP 1993 will also be reviewed, and a comprehensive land use analysis will be undertaken as part of its preparation.

Council expects that public exhibition of the draft MLEP 2011 will occur in the second half of 2010. The Maitland Centres Study will help guide the preparation of the new Maitland Local Environmental Plan.

Lower Hunter Regional Strategy, 2006-31

The Regional Strategy represents an agreed NSW Government position on the future of the Lower Hunter. It is the pre-eminent planning document for the Lower Hunter Region and has been prepared to complement and inform other relevant State planning instruments.

Prepared by the NSW DoP, the Regional Strategy applies to the five local government areas within the Region being Newcastle, Lake Macquarie, Port Stephens, Maitland and Cessnock.

The primary purpose of the Regional Strategy is to ensure that adequate land is available and appropriately located to sustainably accommodate the projected housing and employment needs of the Region's population over the next 25 years.

The Regional Strategy incorporates the specific regional infrastructure requirements identified in the State Infrastructure Strategy 2006–07 to 2015–16.

Targets established by the Regional Strategy to be jointly achieved by the five LGAs include:

- population growth of 160,000 people;
- the provision of up to 115,000 new dwellings by 2031; and
- to accommodate up to 85% of the anticipated 66,000 jobs required by 2031 within employment zones, major centres and strategic centres.

Some of the economic challenges identified for the Region are to:

- maximise the economic opportunities associated with the Region's competitive advantages, in particular its economic infrastructure and specialised centres;
- ensure sufficient employment lands are available in appropriate locations to provide sufficient capacity to accommodate growth in existing and emerging industries and businesses;
- maintain or improve the employment self sufficiency of the Region; and
- ensure activity within the Lower Hunter complements rather than competes with the economies and communities of adjoining Regions.

The Regional Strategy recognises that the region has a high level of employment self sufficiency and strong economic links with adjoining regions, including the Central Coast, Mid-North Coast and Upper Hunter.

The predicted population increase will require the creation of 66,000 additional jobs by 2031 within the region to maintain current employment rates. The Regional Strategy aims to facilitate job growth opportunities and reinforce the concentration of jobs in larger centres and employment lands, by creating the capacity for 85 percent of new jobs to be located in these areas. The remaining jobs are to be accommodated by methods such as home-based businesses.

In addition to the existing employment lands, the largest potential employment area proposed by the Regional Strategy, which is likely to provide jobs for the residents of Maitland LGA, is located on the LGA boundary to the south of Greenhills. The area is identified as a "Future Freight Hub and Employment Lands". The land would provide an opportunity for the storage, transfer and distribution of containerised freight and associated employment.

The Regional Strategy has identified Maitland as a "Major Regional Centre". East Maitland, Rutherford, Thornton and Lochinvar are categorised as "Towns", although it should be noted that Lochinvar has been listed as emerging and is yet to be developed. Green Hills is identified as a "Stand Alone Shopping Centre".

Of particular relevance to this study, the Regional Strategy seeks to achieve:

- strong and vibrant centres;
- a centre hierarchy that supports the order established by the Strategy;
- an additional 3,200 new jobs and 1,300 new dwellings within the major regional centre of Maitland;
- an additional 1,500 new jobs within the stand-alone shopping centre of Green Hills; and
- an additional 26,500 new dwellings within the Maitland LGA.

Section 117 Directions

Under Section 117 of the Environmental Planning and Assessment Act 1979, the Minister for Planning can give directions to Councils regarding the principles, aims, objectives or policies to be achieved or given effect to, in the preparation of draft local environmental plans (LEPs). As this Centres Study will help guide the preparation of the Maitland Local Environmental Plan 2011, it is important that the Strategy recognises these directions.

Directions of particular relevance to this Study are the need:

- to encourage employment growth in suitable locations;
- to protect employment land in business and industrial zones;
- to support the viability of identified strategic centres;
- to protect the agricultural production value of rural land;
- to encourage the carrying out of low-impact small businesses in dwelling houses;
- to improve access to housing, jobs and services by walking, cycling and public transport;

- to ensure that the development of flood prone land is consistent with the NSW Government's Flood Prone Land Policy and the principles of the Floodplain Development Manual 2005;
- to ensure that the provisions of an LEP on flood prone land is commensurate with flood hazard and includes consideration of the potential flood impacts both on and off the subject land; and
- to give legal effect to the vision, land use strategy, policies, outcomes and actions contained in regional strategies (including the Lower Hunter Regional Strategy).

The Centres Study has taken the abovementioned directions and others into consideration.

NSW Draft Centres Policy: Planning for Retail and Commercial Development

In April 2009, the NSW Department of Planning released a consultation draft of the above mentioned policy. The policy was prepared and released in response to changes in the global economic climate and the recognised need for planning to provide greater support to retail competition. The draft policy is focused around six key principles being:

Principle 1 – Retail and commercial activity should be located in centres to ensure the most efficient use of transport and other infrastructure, proximity to labour markets, and to improve the amenity and liveability of those centres.

Principle 2 – The planning system should be flexible enough to enable centres to grow, and new centres to form.

Principle 3 – The market is best placed to determine the need for retail and commercial development. The role of the planning system is to regulate the location and scale of development to accommodate market demand.

Principle 4 – The planning system should ensure that the supply of available floorspace always accommodates the market demand, to help facilitate new entrants into the market and promote competition.

Principle 5 – The planning system should support a wide range of retail and commercial premises in all centres and should contribute to ensuring a competitive retail and commercial market.

Principle 6 – Retail and commercial development should be well designed to ensure it contributes to the amenity, accessibility, urban context and sustainability of centres.

At the time of preparing this Study, the draft Centres Policy has been to public exhibition. The Department of Planning is reviewing submissions received with the intention of releasing the final policy at the end of 2009.

Maitland Local Environmental Plan 1993

The Maitland Local Environmental Plan 1993 is an environmental planning instrument used to manage development and conservation in the Maitland LGA. In the hierarchy of Council's environmental planning documents it is the key document, providing broad direction.

Maitland City Council is required by the Standard Instrument (Local Environmental Plans) Order 2006 to amend this LEP by 2011. As this Centres Study will help to inform the preparation of the new LEP, it is important to note the existing LEP and previous objectives which helped shape to current environment within Maitland LGA. The Maitland Local Environmental Plan 1993 has been taken into consideration in the development of this Centres Study.

The Maitland Urban Settlement Strategy 2001-2020: A strategy for urban growth in Maitland LGA

The Maitland Urban Settlement Strategy 2001-2020 was published in 2001 by Maitland City Council and is reviewed every two years. The Strategy has been developed to provide the over-arching framework for urban growth in the City during this period.

The Strategy developed a number of key policies for urban and employment land growth and development, which would be used to guide the identification of investigation areas.

One of the relevant policies of the Settlement Strategy stated that suitable commercial sites and employment lands should be provided in strategic areas, so as to maintain a 10 to 15 year supply of zoned employment land, which has appropriate infrastructure.

Other Settlement Strategy policies relevant to this Study include:

- the need to ensure centres are protected and strengthened with the use of development guidelines and incentives. The hierarchy of centres is to be maintained, but will be subject to review and analysis;
- the need to encourage employment growth in Central Maitland, whilst maintaining and facilitating specialised civic, educational, medical and entertainment functions;
- the need to limit retail and commercial development outside Central Maitland and Greenhills; and
- the need to concentrate retail activities in centres and identify and strengthen industry clusters.

This Study supports the expansion of key policies in the Maitland Urban Settlement Strategy.

Maitland City Wide Development Control Plan

Maitland City Council has adopted a single comprehensive set of development principles for Maitland LGA, called the Maitland City Wide Development Plan. The Plan has been developed in accordance with the provisions of the Environmental Planning and Assessment Act 1979. This document is structured into a series of chapters containing guidelines for particular areas or topics. Some of the chapters are site specific, while other chapters are land use specific across the LGA. Some of the chapters particularly relevant to this Centres Study include:

- Industrial Development;
- Thornton Business Park; and
- Commercial and Retail Policy.

Lochinvar Structure Plan, 2007

Lochinvar has been identified in the Lower Hunter Regional Strategy as a priority area to accommodate regional population growth. The Lochinvar Structure Plan has been prepared as a strategic planning tool to ensure that a new community is well planned.

It is estimated that Lochinvar will have a population of around 12,000 people. The Plan includes details of a Civic Centre either side of the New England Highway and a commercial area to the south, in the middle of the site. Lochinvar will comprise of a mix of uses including community uses, retail, commercial, and residential uses. It is envisaged that the Civic Centre will have an area of at least 5 -10 hectares, which will cater for the provision of sufficient retail/commercial facilities within the central town precinct.

Thornton North Master Plan, 2003

The Master Plan provides a broad framework for potential development in the Thornton North area which will act as a guide for future investigations and decisions by Council and the community. Under the Master Plan, the Thornton North release area is for 12,000 people.

The Thornton North study area is located to the north-east of the Metford Railway Station. The majority of the area currently consists of farming lands, together with clay mining, bushland and rural residential land uses. The Master Plan has proposed a Local Centre in the centre of the site, consisting of a small group of local shops and possibly a community centre with a pre-school / child care centre.

Aberglasslyn Master Plan

Aberglasslyn is a proposed land release area in the LGA. The Master Plan proposes a neighbourhood centre in the southern section of the release area. This land has since been zoned accordingly.

Gillieston Heights Master Plan

A land release area is located on the eastern side of Cessnock Road in the existing suburb of Gillieston Heights. The Master Plan includes Commercial Land area in the middle of the site, near to Cessnock Road. This area has been zoned accordingly.

Maitland Section 94 Contributions Plan (Citywide), 2006

The Plan is a public document that displays Maitland City Council's Policy for the assessment, collection, spending and administration of Section 94 development contributions. The Plan estimates a population growth within Maitland LGA from 60,000 in 2006 to 77,000 by 2016. This population increase includes an expected 5,000 people within the Thornton North development area.

The Plan proposes a funding for a number of projects, some of these are included in the below table.

Table 3 - Projects to be funded by the Maitland Section 94 Contributions Plan (Citywide), 2006

Centre	Services/facilities	Location
Maitland CBD	Neighbourhood Park/Playground	Maitland #1 Sportsground
	Neighbourhood Park/Playground	Maitland Park
	Neighbourhood Sportsground & Enhancements of Fields	Maitland #1 Sportsground
	Neighbourhood Sportsground & Enhancements of Fields	Maitland Park
	Netball Courts	Maitland Park
	Cricket Nets	Maitland Park
	Cultural Precinct	Maitland CBD
	Art Gallery Loan	Maitland CBD
	Library Floor Space	Maitland CBD
East Maitland	Third River Crossing	East Maitland
	Bridge Park & Linkages	East Maitland/Ashtonfield
	Neighbourhood Park/Playground	East Maitland
	Local Playground	Ashtonfield/East Maitland
Rutherford	Local Playground	Rutherford - Weblands St
	Local Playground	West Rutherford URA
	Multipurpose Centre No.1	Rutherford
Thornton North (New)	Neighbourhood Sportsground	Thornton North URA (1)
	Neighbourhood Sportsground	Thornton North URA (2)
Morpeth	Neighbourhood Sportsground	Morpeth (River F/S)
	Multipurpose Centre No.3	Raworth Morpeth
	Neighbourhood Sportsground & Enhancements of Fields	Morpeth
	Passive Open Space	Morpeth (River F/S)
Gillieston Heights	Local Playground	Gillieston Heights URA (North)
	Local Playground	Gillieston Heights URA (South)
	Multipurpose Centre No.2	Gillieston Heights URA
	Neighbourhood Park/Playground	Gillieston Heights
	Neighbourhood Sportsground & Enhancements of Fields	Gillieston Heights
	Tennis Courts	Gillieston Heights
	Multipurpose Centre	Gillieston Heights Release Area
Aberglasslyn	Local Playground	Aberglasslyn URA (North)
	Local Playground	Aberglasslyn URA (South)
	Local Playground	Aberglasslyn (Central)
	Neighbourhood Sportsground	Aberglasslyn URA
	Neighbourhood Sportsground & Enhancements of Fields	Aberglasslyn URA
	Tennis Courts	Gillieston Heights

Source: Maitland Section 94 Contributions Plan (Citywide), 2006

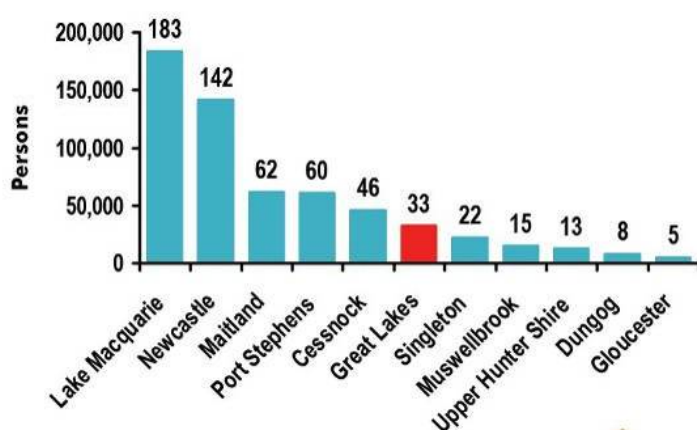
4. MAITLAND LGA IN CONTEXT

The following section profiles the characteristics of Maitland's existing population and employment opportunities. It analyses what industries Maitland's population work in, where they work and how they travel there. A comparison of the existing scenario is then provided with the projected growth in population and employment opportunities.

4.1 How big is Maitland's population - how has it changed?

As of the 2006 Census, Maitland LGA had a resident population (excluding overseas visitors) of 61,116 persons. As seen in the table below, comparative to the Hunter Region, in 2006 Maitland was the third largest LGA after Newcastle and Lake Macquarie.

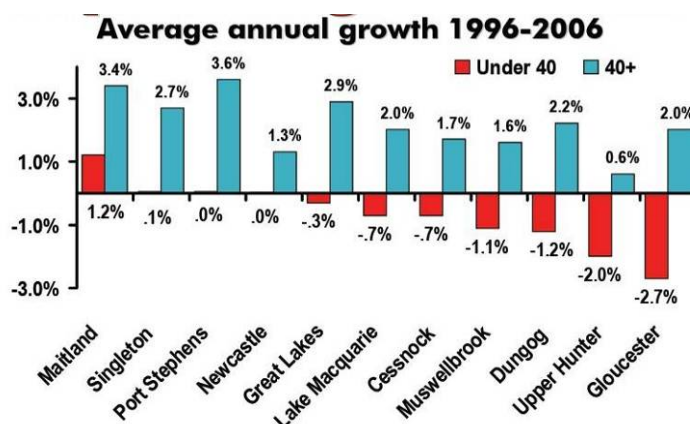
Figure 3 - Maitland's Population Compared to Hunter Region 2006



Source: Hunter Valley Research Foundation 2008

Maitland LGA experienced significant population growth over the ten year period between 1996 and 2006. Unique amongst any of the other LGAs in the Hunter Region, Maitland experienced a growth in the number of persons under the age of 40. Notwithstanding this, there was a far greater rate of growth for persons aged over 60 years. These characteristics indicate the growth in the number of families attracted to the LGA yet also the ageing of the population consistent with wider regional trends.

Figure 4 - Population Growth Rates Compared to the Hunter Region



Source: Hunter Valley Research Foundation 2008

4.2 Who are Maitland's Existing Residents?

The demographic characteristics of Maitland's population has been compared with the characteristics of the broader Hunter Region, Sydney SD, NSW and Non Metropolitan NSW to better understand its uniqueness. Some of the key characteristics of Maitland's resident population, of relevance to this Study, include:

- A relatively young age structure. Maitland has a higher proportion of its population under the age of 29 (43%) than the Hunter Region (38%). Maitland also had a higher proportion of 0 -14 year olds (23%) than the Sydney SD, NSW and Non Metro-NSW. Combined this data indicates a greater share of young families with children in the LGA;
- Maitland also has the lowest proportion (16%) of its population over the age of 60. The proportion of the resident population within middle to older age groups is, however, steadily increasing consistent with trends in the Hunter Region. Persons over the age of 60 increased by 3.4% between 1996 and 2006. Notwithstanding this, 60 - 84 year olds still represent a lower share of the population (14.8%) than the population of the broader Hunter Region (19.7%), Sydney SD, NSW and Non Metro NSW;
- A declining household size from 3.1 occupants per household in 1986 to 2.7 in 2006. This trend is consistent with trends in the broader Hunter Region and NSW where average household sizes varied between 2.5 persons per household to 2.7 in 2006;
- A higher proportion of home ownership (71%) and lower levels of household rental (25%) compared to the Hunter (70%, 26%), Sydney SD (65%, 31%) and NSW (67, 30%);
- A higher proportion of family households (77%) compared to the Hunter (72%), Sydney SD (73%) and NSW (72%);
- A higher proportion of separate dwellings (89%) compared to the Hunter (84%), Sydney SD (63%) and NSW (71%); greater levels of occupied private dwellings (94%) and a low proportion of housing in the form of units or apartments (5.9%);
- A significantly higher median weekly household income of \$1,025 compared to the Hunter Region (\$888) yet lower than the NSW median (\$1,036) and Non Metro median (\$1,082);
- Lower levels of residents employed as Manager and / or Professionals (24%) and accordingly higher comparative proportions of persons employed in Sales (10%); as Technicians and Trade Workers (17%); Machinery Operators and Drivers (8.9%) and Labourers (11%);
- Of the workforce seeking employment, Maitland had a higher rate of unemployment (6.5%) compared to Sydney (5.3%, NSW (5.9%) and Non Metropolitan NSW (5.7%) at the same time, yet slightly lower than the Hunter Region overall (6.9%); and
- Household incomes that are generally consistent with the State average, however, there is a slightly higher proportion of households in the middle income bracket and a lower percentage in the higher income bracket.

The characteristics identified above, indicate a younger, more family orientated population for Maitland LGA than the broader Hunter Region. The greater proportion of the population under the age of 40 translates into a higher workforce participation rate and significantly higher weekly household incomes than the Hunter Region.

Consistent with wider trends in NSW, household sizes are declining. Once again however, the proportion of families with children in Maitland has resulted in a difference to the Hunter Region with a higher household occupancy that is more on par with the characteristics of the Sydney SD.

Reflecting the family characteristic of the population, detached houses and high rates of dwelling ownership are indicative of Maitland's population.

Resident occupations are more orientated to the sales and service industries, manufacturing and construction than larger city areas or NSW as a whole. This reflects the traditional industrial role of the lower Hunter Region and significant local construction industry. It also reflects a population generally with higher levels of industry skills and lower levels of secondary and tertiary education, in addition to fewer opportunities for professional or managerial employment.

Table 4 - 2006 Population Characteristics

	Maitland LGA	Hunter Region	Sydney SD	NSW	Non-Metro NSW
Population and Dwellings					
Total Population	61,880	589,239	4,119,190	6,549,177	2,429,987
Total Dwellings	23,907	256,860	1,643,675	2,728,719	1,085,044
Occupied Private Dwellings	22,511	228,909	1,521,465	2,470,451	948,986
Occupied Private Dwellings (%)	94.2%	89.1%	92.6%	90.5%	87.5%
<i>Average Household Size</i>	<i>2.7</i>	<i>2.5</i>	<i>2.7</i>	<i>2.6</i>	<i>2.6</i>
Age Distribution					
0-14	22.96%	19.8%	19.5%	19.8%	19.7%
15-29	19.85%	18.6%	21.2%	19.8%	20.3%
30-44	21.12%	19.9%	23.2%	21.8%	22.3%
45-59	19.86%	20.4%	19.3%	19.9%	19.7%
60-74	10.63%	13.5%	10.6%	12.0%	11.4%
75+	5.58%	7.8%	6.1%	6.7%	6.5%
Total	100.0%	100.0%	100.0%	100.0%	100.0%
<i>Median Age</i>	<i>35</i>	<i>39</i>	<i>35</i>	<i>37</i>	<i>36</i>
Place of Birth					
Australia & Oceania	88.3%	86.1%	63.1%	71.2%	68.1%
Europe	3.8%	5.1%	8.9%	7.8%	8.2%
North Africa and Middle East	0.1%	0.1%	2.5%	1.6%	2.0%
Asia	1.0%	1.1%	10.6%	7.1%	8.4%
Americas	0.2%	0.3%	0.6%	0.5%	0.5%
Sub-Saharan Africa	0.2%	0.2%	0.7%	0.5%	0.6%
Other	6.4%	7.0%	13.7%	11.4%	12.3%
Total	100.0%	100.0%	100.0%	100.0%	100.0%

Table 5 - 2006 Dwelling and Household Types

	Maitland LGA	Hunter Region	Sydney SD	NSW	Non-Metro NSW
Home Ownership					
Owned or Being Purchased	71.3%	69.8%	65.0%	66.7%	66.1%
Rented	25.6%	26.4%	31.3%	29.5%	30.2%
Other/Not Stated	3.1%	3.8%	3.7%	3.8%	3.7%
Total	100.0%	100.0%	100.0%	100.0%	100.0%
Household Structure					
Family Households	77.3%	71.8%	72.7%	72.1%	72.3%
Lone Person Households	20.7%	25.0%	23.1%	24.2%	23.7%
Group Households	2.0%	3.2%	4.2%	3.7%	3.9%
Total	100.0%	100.0%	100.0%	100.0%	100.0%
Family Type					
Couple family w. children	47.0%	42.4%	49.3%	46.2%	47.4%
Couple family w/o children	34.4%	39.2%	33.2%	36.0%	34.9%
One parent family	17.5%	17.1%	15.6%	16.1%	15.9%
Other family	1.1%	1.3%	1.9%	1.7%	1.8%
Total	100.0%	100.0%	100.0%	100.0%	100.0%
Dwelling Type					
Separate house	89.1%	84.1%	63.6%	71.4%	68.4%
Townhouse	4.4%	7.3%	11.8%	9.7%	10.5%
Flat-Unit-Apartment	5.9%	7.2%	23.9%	17.7%	20.1%
Other dwelling	0.5%	1.3%	0.6%	1.1%	0.9%
Not stated	0.0%	0.1%	0.1%	0.1%	0.1%
Total	100.0%	100.0%	100.0%	100.0%	100.0%

Table 6 - 2006 Employment & Income

	Maitland LGA	Hunter Region	Sydney SD	NSW	Non-Metro NSW
Labour Force					
Managers	9.2%	10.0%	12.5%	12.8%	12.7%
Professionals	14.4%	16.1%	22.5%	19.9%	20.9%
Community & Personal Services Workers	8.2%	8.8%	7.6%	8.1%	7.9%
Clerical and Administrative Workers	13.5%	12.9%	15.8%	14.5%	15.0%
Sales Workers	10.3%	9.8%	9.0%	9.1%	9.1%
Technicians & Trade Workers	16.6%	15.9%	12.0%	12.8%	12.5%
Machinery Operators & Drivers	8.9%	7.7%	5.7%	6.1%	5.9%
Labourers & Related Workers	10.8%	10.5%	7.6%	9.0%	8.5%
Inadequately described or N.S.	1.5%	1.5%	2.0%	1.8%	1.9%
Unemployed	6.5%	6.9%	5.3%	5.9%	5.7%
Total	100.0%	100.0%	100.0%	100.0%	100.0%
Weekly Household Income					
\$0-\$349	14.5%	17.0%	12.8%	14.9%	14.1%
\$400-\$799	22.4%	24.6%	17.9%	21.2%	19.9%
\$800-\$1,399	22.9%	22.0%	20.8%	21.5%	21.3%
\$1,400-\$2,499	21.7%	18.2%	21.2%	19.1%	19.9%
\$2,500+	8.1%	7.3%	16.0%	12.0%	13.6%
Partial income stated	7.7%	7.8%	8.6%	8.3%	8.4%
All incomes not stated	2.8%	3.0%	2.7%	2.9%	2.8%
Total	100.0%	100.0%	100.0%	100.0%	100.0%
<i>Median Weekly Household Income</i>	<i>\$1,025</i>	<i>\$8,88</i>	<i>\$1,154</i>	<i>\$1,036</i>	<i>\$1,082</i>

Source: ABS Census Data 2006

4.3 Employee Skills & Education

The level of education attained by a population is a good indication of their level of workforce skill. Based on ABS 2006 data it was found that Maitland LGA had a low level of secondary school completion.

Table 7 - Secondary School Completion – Maitland LGA 2006

Year Completed	Maitland LGA	Hunter Region	NSW
Completed Year 10	55.8%	54%	40.4%
Completed Year 12	29.4%	30%	42.4%

Source: ABS 2006, Hill PDA

With respect to post secondary school education, Maitland LGA also had comparatively low levels of its population with tertiary degrees, a noticeably higher proportion with vocational skills and a higher proportion without qualifications.

Table 8 - Level of Post School Education Received

Level of Education	Maitland LGA	Hunter Region	NSW
Bachelor or Higher	9.3%	10.4%	16.5%
Advanced / Diploma	6.4%	6.4%	7.4%
Vocational	22.3%	21.3%	16.8%
No qualifications	50.7%	49.4%	45.5%

Source: ABS 2006, Hill PDA

The historical trend of low post school education may be shifting however, whereby 2.8% of Maitland's population are presently attending TAFE. This compares favourably with the same characteristic for the Hunter Region and NSW (both at 2.5%). This figure indicates the important role that the Maitland campus of the Hunter Institute TAFE is playing in relation to employment opportunities and training within the LGA.

The proportion of Maitland LGAs population attending University (2.3%) is lower, however, than the Hunter Region (2.8%) and NSW (3.7%), despite the higher proportion of the population under the age of 29. This may be reflective of the presence of the TAFE within Maitland and the greater distance to travel to Newcastle University.

In conclusion, Maitland LGA still has a sizeable proportion of its workforce dependant on lower skilled jobs. Examples of such jobs include retail, administrative support, labour and machinery operators / drivers. This characteristic is reflected in the fact that 69% of the LGA's population (over the age of 15 years) did not have a post school (tertiary education) qualification as of 2006 and only 5.1% were undertaking studies or training after completing secondary school.

With population growth, a growing proportion of families and changes to the nature of the global and regional economies increasing the importance of education to employment, this characteristic is likely to alter over the study period.

The emerging shift may already be indicated by the fact that close to 25% of the LGA's population were employed in highly skilled professions as either Managers and / or Professionals as of 2006. Furthermore, the proportion of LGA residents undertaking post school education grew from 30% in 1996 to 38% in 2006.

Of particular mention was the proportion of women undertaking post school education. This figure grew from 12% of the female LGA population (across all age groups) to 18% by 2006. The latter trend may be reflective of the younger population in the LGA and lifestyle changes, increasing the number of women in the workforce and therefore undertaking post school education.

Another important finding is the growth in the number of people over the age of 35 years undertaking post school qualifications increasing as a percentage of the LGA from 11% in 1996 to 18% in 2006. This may be reflective of the increasing importance of life long learning as well as the need for re-skilling owing to the changes in industries in the Hunter Region.

4.4 Existing Employment

Maitland's Workforce

Maitland has the third highest number of people employed in the Hunter Region (24,207 or 10.4%) after Newcastle (23.5%) and Lake Macquarie (26.9%). Despite this unemployment in the LGA, 6.6% remained above the NSW average of 5.9% although it had dropped significantly since the 2001 Census.

Maitland LGA has a high workforce participation rate. Workforce may be defined as the resident population of an area over the age of 15, looking for full or part time work. As of the 2006 Census, Maitland LGA had 61.2% of its population in the workforce compared to 55.8% of the Hunter and 58.9% of the NSW population.

The size of Maitland's workforce had increased by 4,559 people or 18.5% since 2001. This is in part a reflection of the growth in the population base over the census period and the growing number of people participating in second jobs or part time work in retirement.

Employment Generated within Maitland LGA

The table below shows that as of 2006, the most significant industry generating employment within Maitland LGA was retail at 24.1% or 4,697 jobs. Other major industries respectively included: Education (9.1% or 1,777 jobs); Property and Business Services (8.5% or 1,650 jobs) and Health Services (8.3% or 1,620 jobs). Employment generated within these industries represented 58% of all jobs generated within the LGA as of 2006.

The industries listed above did not have the greatest proportional increase across all industry categories between 2001 and 2006 owing to the significant scale of their starting base. They did however generate the greatest increase in actual jobs (650 retail jobs; 226 education jobs; 159 property and business related jobs and 111 health related jobs). The combined actual increase in jobs generated within these industries (1,146) represented 58% of all job growth in the LGA between 2001 and 2006.

The growth of the retail, education, health, property and business industries within Maitland LGA was a consistent trend across NSW between 2001 and 2006. It exemplifies:

- the growing affluence of communities and therefore their greater ability to purchase retail goods and personal services;
- the growing importance of education and knowledge based jobs to businesses of the New Economy;
- the ageing and increasing health awareness of communities resulting in greater demand for health related industries; and
- the increasing dominance of commercial businesses to the NSW economy.

Maitland LGA is no exception to these wider lifestyle and economic trends and accordingly experienced strong actual growth in each of these industries between 2001 and 2006.

The main industry category experiencing proportional growth between 2001 and 2006 in Maitland was Communications (30% growth since 2001). The actual number of additional jobs for the Communications industry category, however, was only 58. Other major growth industries by proportion were Accommodation, Restaurants,

Cafes and Clubs (19.4% = 163 additional jobs); Cultural and Recreational Services (19.3% = 51 additional jobs); Agriculture, Forestry and Fishing (18.6% = 75 additional jobs) and Personal and Other Services (15.9% = 106 additional jobs).

The growth of three of the five industries above is reflective of two key trends. The first being the growth of the personal services and entertainment industries coupled with higher housing discretionary spending potential. The second being the actual increase in population over the period and the increasing socioeconomic profile of households within the LGA.

Contrastingly, major employment industries within Maitland that experienced a decline between 2001 and 2006 were heavily orientated to Manufacturing and utilities including: Non Metallic Products (-26.7% = 65 fewer jobs); Textiles, Clothing and Footware Production (-22.7% = 22 fewer jobs); Wood and Paper Products (-15.4% = 14 fewer jobs); Energy, Water and Sewerage (-6.2% = 7 fewer jobs) and Machinery, Transport and Equipment (-5.3% = 18 fewer jobs).

With the exception of Energy, Water and Sewerage, the decline of the abovementioned industries are not unique to Maitland LGA. The reduction in the number of jobs in these industries are part of wider economic trends including growing efficiencies in manufacturing production and the greater use of technologies, thereby reducing the need for employees. Trends of relevance also include the growing significance of international trade and manufacturing, particularly in industries such as textiles, clothing and footwear, thereby reducing the competitiveness of these industries within Australia.

Table 9 - Employment by Industry in Maitland 2001 and 2006

Year	2001	% of 2001	2006	% of 2006	% Change
Agriculture, forestry, fishing	404	2.3%	479	2.5%	18.6%
Mining	236	1.3%	264	1.4%	11.9%
Food industries	211	1.2%	225	1.2%	6.9%
Textiles, clothing, footwear	97	0.5%	75	0.4%	-22.7%
Wood and paper products	94	0.5%	80	0.4%	-15.4%
Printing, publishing, recording	147	0.8%	157	0.8%	7.0%
Chemicals and petroleum	129	0.7%	146	0.8%	13.5%
Metal products	304	1.7%	303	1.6%	-0.3%
Non-metallic products	242	1.4%	177	0.9%	-26.7%
Machinery, transport and equipment	334	1.9%	316	1.6%	-5.3%
Other and undefined manufacturing	262	1.5%	269	1.4%	2.9%
Energy, water, sewerage	107	0.6%	100	0.5%	-6.2%
Construction	1,264	7.1%	1,273	6.5%	0.7%
Wholesaling	769	4.3%	756	3.9%	-1.7%
Retailing	4,047	22.7%	4,697	24.1%	16.1%
Transport and storage	753	4.2%	838	4.3%	11.2%
Communications	190	1.1%	248	1.3%	30.7%
Finance, insurance	452	2.5%	484	2.5%	7.1%
Property and business services	1,491	8.4%	1,650	8.5%	10.7%
Public administration and defence	510	2.9%	530	2.7%	3.9%
Education	1,551	8.7%	1,777	9.1%	14.6%
Health services	1,509	8.5%	1,620	8.3%	7.4%
Other community services	573	3.2%	574	2.9%	0.1%
Cultural and recreational services	262	1.5%	313	1.6%	19.3%
Accommodation, restaurants, cafes, clubs	839	4.7%	1,002	5.1%	19.4%
Personal and other services	663	3.7%	769	3.9%	15.9%
Unclassified	403	2.3%	336	1.7%	-16.7%
Total	17,843	100.0%	19,460	100.0%	9.1%

Source: TDC 2006

Top 5 Employment Generating Industries in 2006

Top 5 Employment Generating Industries experiencing growth between 2001 and 2006

Top 5 Employment Generating Industries experiencing decline between 2001 and 2006

4.5 Where do Maitland's Residents Work?

Sourced from the ABS 2006 Census are the results to the question *"How do you Travel to Work"*. Analysis of these results shows that the largest proportion of Maitland LGA's workforce (43%) work within Maitland LGA. An additional 24% of Maitland's residents commute to Newcastle LGA for employment. The remaining 33% work in a range of LGAs including Cessnock, Lake Macquarie, Port Stephens, Dungog, Muswellbrook and Singleton as shown in the table below. Approximately 5% of Maitland's workforce identified Sydney as their place of work.

4.6 How do Maitland's Residents Get to Work?

Although the largest portion of Maitland's workforce is employed within the LGA, 57% of all workers or 15,517 people travelled outside of the LGA to work. Whilst just under 26% of these workers travelled by train, bus, motorbike, bicycle or walked to work, the overwhelming share (74%) travelled by car. Of this number, over 90% drove themselves.

The next major category related to travel by train (2%). The vast majority of these workers were commuting to jobs in Newcastle LGA indicating the strong public transport links between Maitland Centres that are served by Railway Stations (as shown in the figure below) and Newcastle LGA.

A similar proportion of employees (2%) walked to work. The latter indicates the number of people employed close to their place of residence and the reasonable containment of residents employed within Maitland LGA.

Additional information of interest that can be drawn from the table above includes:

- there was a comparatively similar proportion of people who worked from home (4%) at the time of survey to the number who travelled as a car passenger (7%);
- there were similar actual numbers of employees who drove to work in Lake Macquarie (996) to those who drove to Singleton (963) as there were who did not go to work that day in Newcastle LGA (804); and
- there was a similar proportion of employees who walked to work within Maitland LGA (433) as the number who caught the train to work within Newcastle LGA (435).

Key Transport Infrastructure Considerations

In summary, the table below shows that the overwhelming majority of Maitland LGA's workforce journeyed to work in 2006 by less sustainable methods such as the private car. This was particularly the case for employees travelling across the Lower Hunter Region or to other Regions. This finding indicates the difficulties associated with travelling to destinations such as Cessnock LGA, Singleton LGA, Port Stephens LGA, Lake Macquarie LGA and the Sydney Statistical Area by public transport (train or bus) or walking / cycling from areas within Maitland.

These difficulties are a reflection of a number of factors including the distance of the destinations from Maitland LGA (i.e. Sydney SD); the lack of direct access by public transport to these destinations (i.e. Port Stephens) and / or the lack of public transport frequency at necessary travel times (i.e. for shift workers).

Interregional travel, as well as intra Maitland LGA journey to work travel, is also hindered by the location of public transport nodes within Maitland LGA. A review of the figure below, which shows the location of train stations within the LGA, assists in explaining this point. In essence the existing rail stations are all centre located.

This means that travel between centres can be easily accommodated and is of great benefit for residents residing within / close to a centre who work within another centre in Maitland LGA or Newcastle that is served by a rail station. It also means however that for employees residing outside of centres (the majority of the existing population), access to public transport is limited and requires the employee to first travel to the station by car or

another means of transport. In cases where residents live and work outside of centres (i.e. in industrial precincts or bulky goods centres) there may be no realistic public transport option.

Lastly it is important to note that the merits of private vehicle travel (speed, access, flexibility, reliability and convenience) for many employees travelling between work and home can also reduce the attraction of travelling to work by other modal options. This is particularly the case when the employment destination is not within walking distance and provides good parking options.

The limitations to public transport infrastructure within Maitland LGA and the competitive advantages of travelling to work by private methods will continue to influence the modal choice of Maitland's residents. Without enhanced public transport options across the LGA and with population and employment growth, the number of residents choosing to travel to / from work by private vehicle will increase. This will have a number of environmental and social implications for the LGA and its community.

Future Implications and Opportunities

With the continuing increase in petrol prices, the need to travel to work by car will place a greater burden on household disposable incomes and potentially hinder the ability for residents to access work. The growing number of residents travelling to work by car (as a result of population growth in areas inadequately served by public transport) will also result in greater road congestion, traffic and pollution. This will place greater strain on not only the existing road infrastructure but also the environment.

There are a number of mechanisms that can be adopted together to address the predominance of private transport use for journey to work. These mechanisms include:

- an increase in the number of jobs based within Maitland LGAs centres;
- an increase in the number of residents living within close proximity to existing public transport nodes (i.e. within or surrounding Maitland's Centre's);
- incentives to travel to work by public transport i.e. travel passes,
- an enhanced and extended public transport network that serves the broader LGA; and
- joint working with State Government to enhance rail and bus links between LGAs within the Lower Hunter and Hunter Regions.

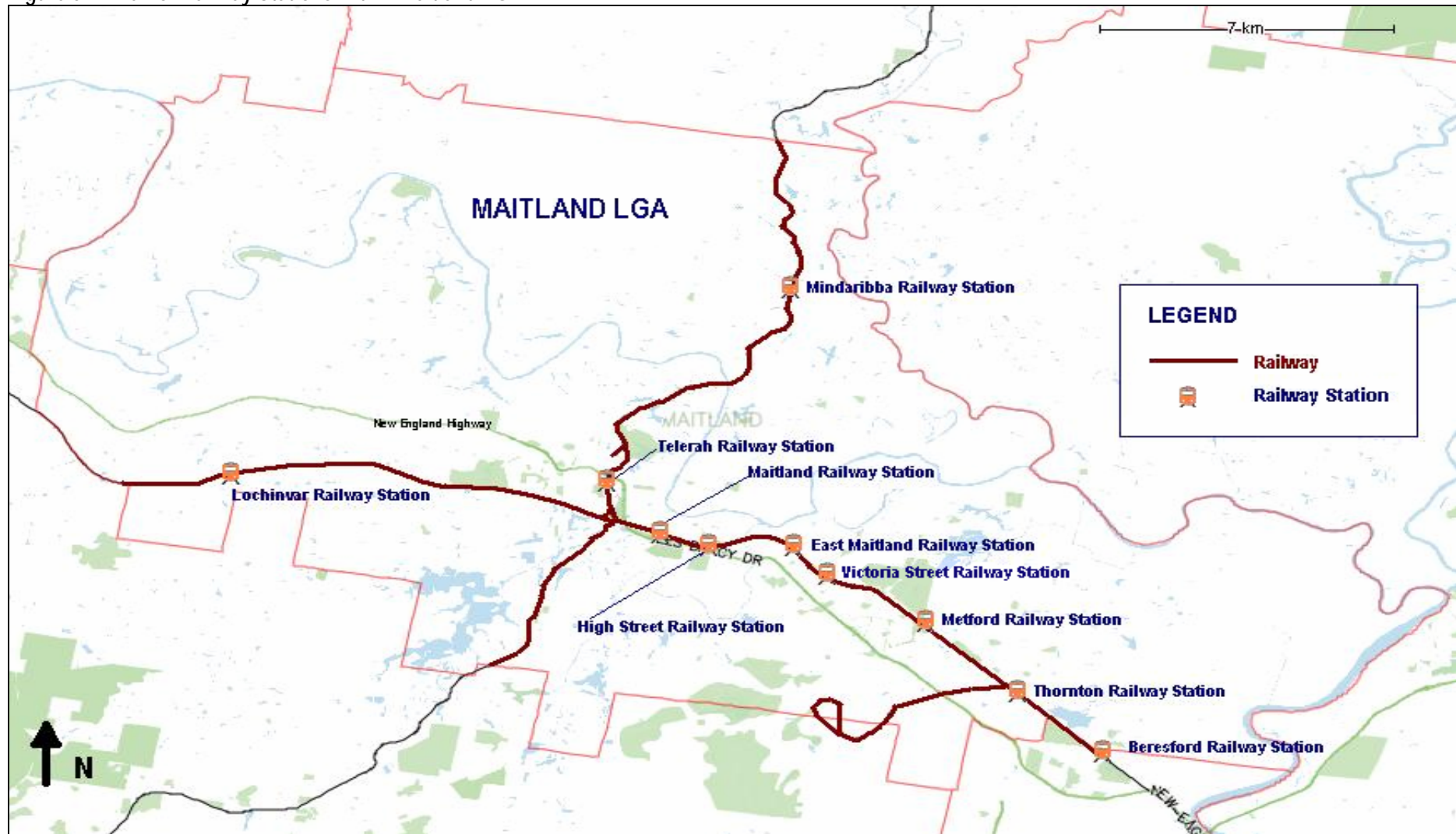
Table 10 - Work Destinations and Methods of Travel to Work for Maitland's Workforce 2006

	Train	Bus	Ferry	Tram	Taxi	Car Driver	Car Passenger	Truck	Motorbike/scooter	Bicycle	Other / Not stated	Walked	Worked at home	Did not go to work	Total	
Cessnock	6	5	0	0	0	1,097	71	11	9	3	20	7	10	203	1,442	5.3%
Lake Macquarie	16	0	0	0	0	996	48	22	5	0	16	3	6	157	1,269	4.7%
Maitland	67	71	3	3	25	7,174	837	183	57	78	166	433	877	1,749	11,723	43.1%
Newcastle	435	6	0	0	11	4,593	335	55	51	23	71	22	12	804	6,418	23.6%
Port Stephens	0	4	0	0	0	1,275	121	10	19	9	17	4	3	186	1,648	6.1%
Dungog	0	0	0	0	0	96	9	8	4	0	0	4	0	16	137	0.5%
Muswellbrook	0	0	0	0	0	149	18	0	3	0	0	0	0	38	208	0.8%
Singleton	3	0	0	0	0	963	157	7	5	0	14	0	3	175	1,327	4.9%
Sydney	20	21	0	3	0	212	24	15	0	0	3	11	6	56	371	1.4%
Other	29	7	0	0	6	806	102	33	15	6	202	38	23	194	1,461	5.4%
Not Stated / No Fixed Address	4	4	0	0	4	811	83	103	4	3	24	13	22	143	1,218	4.5%
Total	580	118	3	6	46	18,172	1,805	447	172	122	533	535	962	3,721	27,222	
	2%	0%	0%	0%	0%	67%	7%	2%	1%	0%	2%	2%	4%	14%	100%	

Source: TDC

Top two destinations for employment

Figure 5 - Plan of Railway Stations within Maitland LGA



Source: Red Square

5. ECONOMIC TRENDS AND MARKET RESEARCH

A number of local, regional and global trends effect employment generating uses. Particularly their type, location and labour skill requirements, their success and economic viability. The following section analyses these trends at a macro and in some cases a micro level, to better understand potential future influences to employment and employment generating uses in Maitland.

To complement the analysis of economic trends, the following section also profiles the results of market research undertaken by Hill PDA. The market research was informed by discussions with Maitland property experts and research using various market sources such as RP Data, Red Square, PIMS, The Australian Property Monitor and other search engines and property databases.

5.1 Retail Trends and Key Drivers of Change

The dynamic nature of the retail industry is driven largely by the need to anticipate and effectively respond to consumer behaviour, needs and desires. Changing demographics and lifestyles demand that retailers and shopping centres constantly monitor the often subtle shifts and respond accordingly by repositioning their retail offer, presentation and mode of operation.

Some of the key drivers of change in the nature and form of retailing activity include:

- population and household growth;
- declining average household size;
- an ageing population;
- increasing part time employment;
- longer working hours; and
- increasing workforce participation rate.

The combined impacts of continued population growth and demographic change are now being reflected in a rapid increase in the quantum of retail floorspace, the introduction of new technologies, product designs, more creative retail concepts, strategies, formats and experiences.

The key trends and issues relevant to forecasting retail demands for Maitland are diverse and complex. Broadly they include a deregulation in the hours of shopping, the development of larger supermarkets to operate 24 hours and 7 days a week, the development of out of centre or stand alone retailing complexes such as Greenhills, the development of discount department stores (Big W, Kmart, Target), a diversification in the retail experience and the emergence of electronic shopping. These trends and their likely influence to retailing in Maitland are discussed further below.

Deregulation of Shopping Hours

Whilst most forms of retail activity now operate with extended hours, the most significant impact of deregulated shopping hours has been on the trading patterns of supermarkets. Late-night-trading, seven days a week and in some cases 24 hour trading, has largely been a response to the growth in food expenditure captured by convenience stores operating on a 24 hour basis such as 7 Eleven. There has also been a blurring of the hierarchical distinction in function between centres, as supermarkets, which trade with extended hours in major centres, compete more directly with more traditional local convenience stores.

The physical location of centres is therefore critical in ensuring that the higher order centres (such as Maitland CBD, Greenhills and Rutherford) do not monopolise the market and a place is maintained for easily accessible neighbourhood centres or convenience stores within town centres and local centres such as Telarah and Woodberry. The broader spread of shopping hours also appears to be significantly flattening the peaks in trading patterns and may allow for some relaxation in car parking requirements at local centres or convenience centres.

Supermarkets

Paralleling the deregulation of trading hours has been a trend towards the development of larger main line supermarkets (i.e. supermarkets between 4,000sqm and 5,000sqm). While in most cases the impacts can be seen in lower prices and increased product ranges, this trend has placed considerable pressure on the ability of smaller local centres to compete, with impacts often being reflected in a decline in their long term sustainability. Planning policies therefore need to be framed and applied to ensure that supermarkets do not adversely affect competition in local centres and neighbourhood centres and to maintain an acceptable level of access for regular food shopping.

A spin-off of the trend towards larger main line supermarkets is an increase in the number of smaller supermarket operators (i.e. supermarkets between 800sqm and 1,500sqm). It is these supermarkets which form the core or anchor for modern local centres. These supermarkets can positively enhance the economic function of a local centre by attracting additional shoppers who would otherwise travel to larger centres. The draw of these additional shoppers in turn benefits smaller retailers in a centre through spin off spending and helps to support a thriving atmosphere.

There has also been a recent trend with the introduction of discount supermarkets such as Aldi and Bi-Lo. These supermarkets have largely been established for more price conscious rather than convenience conscious consumers. These supermarkets have established themselves in all levels of the hierarchy from major regional centres to neighbourhood centres, and even outside of town centres (usually on major roads to attract passing trade as well as local trade).

Out of Centre Retailing

A prominent trend to emerge over the past two decades has been the development of out-of-town centres. These are most often characterised by activities which have a primary orientation to bulky goods retailing, activities which require larger floor areas and lower rent structures than those found in traditional centres. Although furnishings, lighting and other home related merchandise has been, and continues to be the primary focus of this form of retailing, the range of activities has become more diversified.

Increasingly they are becoming destination shopping venues, offering a substantial range of merchandise at more competitive prices than can be offered by traditional department, discount department and specialty stores, with resulting impacts on the overall sustainability of traditional centres.

There are a number of bulky goods retail concentrations within Maitland LGA including Rutherford Industrial Area, East Maitland (Chelmsford Drive), Thornton Supa Centre and Johnson Street / Bungaree Street Telarah. Each of these precincts are located outside of Maitland's urban centres although the Johnson Street / Bungaree Street Telarah precinct may be argued to have an affiliation with Maitland CBD.

Out of centre retailing has and continues to have significant impacts on the structure and dynamics of urban systems. In particular, these are being felt by traditional nodes of retail activity, which are now experiencing a loss in trade. The impacts are being seen in the way in which transport infrastructure is used, with out of town centres most often being removed from public transport infrastructure and dependent on car access. Furthermore, Bulky Goods clusters (such as Rutherford or Thornton) are often located within employment lands and therefore compete for site area with industry and manufacturing. This can be a particular concern where employment lands, suitable for industrial uses are limited.

Increased Diversification

Traditionally, retailing has followed a hierarchy from major centres through to town centres, local centres and neighbourhood centres. With the introduction of the discount department store in the mid 1960s, a wave of new centre development and expansion was spawned. Since then, ever larger indoor shopping centres have and continue to be developed. Today, centres covering in excess of 70,000sqm of floorspace are commonplace. Greenhills is an example of such a centre at close to 32,000sqm in floor area with current plans to grow to 71,000sqm, subject to planning approval.

Increasingly these newer centres are diversifying the retail experience with the incorporation of food courts, in-centre cinemas, family entertainment centres and larger supermarkets, department stores (David Jones, Myer) and other major tenants. Some are incorporating community facilities such as libraries, child care centres, 'market squares' and community meeting rooms.

These centres are significant destinations for large populations of people. An emerging retail trend for major shopping centres like Greenhills will be the extension of the shopping experience to not only include entertainment (cinema and game arcades) but also accommodation (hotel/serviced apartments) and a lifestyle focus including eat streets and street theatre (buskers and public performances).

In the case of Maitland LGA, however, this type of diversification should be limited at the Greenhills Stand Alone Centre. It is important that Greenhills does not impede on the function of Maitland CBD, as the main services, cultural and community focal point for the LGA. It is important that Maitland CBD maintains its prominence with regard to the provision of services beyond its retail function. Diversification is something which should be encouraged in Maitland CBD.

Convenience Shopping

Another more recent trend to emerge in retailing has been the development of convenience shopping facilities. These are centred on the concept of quick, convenient shopping, meeting the needs of workers travelling home by car and consumers who prefer to spend less time shopping.

One dimension of this trend is a focus on 'convenience community centres', which are usually dominated by a supermarkets (to meet daily and weekly shopping needs) and supported by a range of specialty shops such as a butcher, fruit shop, liquor shop, take-away food, video rental and petrol station. These centres are distinguished by a dependence on commuters making their way home and are hence located to enable convenient access and parking.

Another dimension has been the emergence of 'convenience service centres', often centred on petrol stations adjacent to main highways. These offer a range of groceries and fast foods which typically occupy a floor area of around 100 – 300sqm. Rather than being a primary destination for food and grocery shopping they seek to meet the needs of 'just-in-time' impulse shoppers. Often they co-locate with operators such as McDonalds, Burger King and KFC.

In some cases these outlets take the form of 'front of centre/car park' including drive through retailing. The concept is for the car parking to have strong visual exposure to the main road enabling shoppers to clearly see available parking before entering.

Electronic Retailing

Electronic retailing (also called e-tailing and Internet retailing) is a retail format in which the retailer and customer communicate with each other through an interactive electronic network. A growing proportion of Australians have access to the internet at home. The rate of access has quadrupled in recent years, from 16% of households in 1998 to 64% in 2006-07. In 2006-07, 61% of the 11.3 million people who used the internet at any site reported using it in the past 12 months to buy goods or services for private use. Among all age groups, people aged between 25-34 years were most likely to have used the internet for this purpose (71%). (Australian Social Trends - ABS 2008). If this growth continues, electronic retailing is expected to have a major impact on the retail industry, significantly decreasing retail sales in stores.

Electronic retailing is thus generally considered to have substantial growth potential. But this will be dependent on whether or not it can, and is perceived to be able to provide superior benefits over existing retail formats. The critical benefit that electronic retailers can offer is the opportunity for consumers to search across a broad range of alternatives, develop a smaller set of alternatives based on their needs, and get specific information about the alternatives they want.

The type of merchandise sold by electronic retailers depends on delivery costs, the consumers need for immediacy and the degree to which electronic retailers can provide purchase information that helps customers determine whether they will be satisfied with the purchase. It is in this respect that the influence of electronic retailing on the nature and form of retailing should be considered. Significantly, it is giving rise to increased pressure on 'bricks and mortar' retailing activity to seek and adopt new concepts, strategies, formats and experiences. It is also increasing pressure to develop new supply chain networks which enable rapid and efficient movement of goods. This is now evident in the development of large new warehouse distribution centres adjacent to major transport infrastructure.

5.2 The Implications for Retail in Maitland

The trends described above are polarising the retail hierarchy. The larger regional centres are positioning themselves for a more dominant role in the provision of entertainment and customer services matched with increased retail floor space. For Maitland LGA, this can be expected to be reflected in the continued expansion of Greenhill's Shopping Centre, Maitland CBD, as well as Westfield Kotara and Raymond Terrace. As a result, there is considerable expenditure that is not only drawn into Maitland but also expenditure that escapes to the larger Regional City of Newcastle and its strong retail offer and diversity.

The more successful smaller centres have moved towards a consolidation of their role as convenience centres with greater emphasis on food retailing, just-in-time shopping, fast foods, local services and petrol. In traditional centres, pressure is increasing, where opportunities permit, for an expansion of supermarket floor space, in order that a more competitive range of goods can be offered. An excellent example of this in Maitland LGA is Rutherford Town Centre.

Significant shifts in trade have and continue to occur. In competing for consumer patronage, some centres are succeeding, and some are losing. Regional Cities, Major Regional Centres and Bulky Goods Premises are expanding and absorbing trade from town centres and even some local centres. Convenience centres located adjacent to major roads are drawing trade from the traditional town centres and local centres that are often a focus for public transport.

An interesting trend that is beginning to emerge, however, is the return to the attraction of shopping in the outdoor environment and therefore, the attraction back to traditional retail strips. Traditional centres are becoming 'lifestyle centres' that allow for al fresco dining, boutique / unique locally owned stores and non franchise stores. This type of retail environment contrasts with the climate controlled major franchise options provided by indoor centres.

Discussions with local business owners and property experts have recognised this trend with particular respect to Maitland CBD. The attractive heritage environment of the CBD coupled with the community, education and culture facilities provided within the centre, have highlighted the attraction of not only shopping but living there.

Maitland CBD represents an ideal situation where road traffic has been removed along High Street and character of the street lends itself to the creation of a "lifestyle centre".

In addition to this, out of centre locations, such as strip retailing often, provide more affordable rental rates for lessees. For example, some tenants have relocated from centres, such as Stockland Greenhills due to the comparatively higher floorspace costs.

The emergence of the return to the attraction of shopping in the outdoor environment is a trend which could benefit Maitland CBD.

5.3 Commercial Trends

Traditionally commercial office space has been located within centres where it could cluster with a centre's retail, civic and community facilities. Maitland CBD is an example of a traditional urban centre that developed as the

main retail and commercial focus for the LGA. Maitland CBD remains the main location within the LGA for commercial and professional businesses, such as property consultants, legal advisors, financial institutions and advisors. It also provides contemporary office accommodation for Government Departments, such as the Department of Primary Industries.

With the decline of the office market in the 1970's in Australia and changes in business composition and technology, over the last decade and a half there has been a significant shift in the location of office-based activities. This shift has been towards business park developments and industrial zones.

In Sydney, these new centres (known as business parks) have grown along the new motor transport corridors such as the M5 and M7 Motorways. Business parks have become a successful alternative location for commercial and industrial businesses to traditional centres.

Business parks such as Norwest, Australia Centre and North Ryde in Sydney, are now recognised as highly successful. Consistent across these parks are the following key characteristics:

- they are predominantly office parks with a component of warehousing, and in some cases a component of research and development, and high-technology users;
- apart from providing A-grade commercial space, often with cheaper rent than Sydney CBD, business parks enable purpose designed buildings and plenty of on-site car parking;
- the provision of on-site amenities that attract large corporations, which follows in the footsteps of business park developments in Britain and the USA;
- they hold a sense of prestige, which is a further factor that attracts large corporations. Tenants sign up with a business park for its marketable image. There is a preference for a good clean suburb, which is away from polluting industries. Business parks enable large corporations to custom build their headquarters, providing them with their own stand alone identity, which cannot be achieved in a CBD building of mixed tenants;
- they have lower floorspace ratios, typically 1:1 or lower compared to 2:1, or higher in established commercial centres. This allows more cost-effective building construction; and
- they have flexible floor plates and cheaper ground rent, which allows warehousing and office space to be integrated.

5.4 Implications for Commercial Space in Maitland LGA

Maitland CBD provides a range of office floorspace, including small office units located above retail stores located on the High Street, stand alone office space focused around Church Street and a larger (5,000sqm) contemporary office building located on the corner of the High Street and Hannan Street that is occupied by the Department of Primary Industries. This position is supported by the range of office rental rates, that provide affordable accommodation and choices for businesses of varying sizes and specifications.

With the significant growth in population anticipated to occur over the study period and the growth in demand for personal and professional services, it is anticipated that demand for small, professional office suites within Maitland CBD will remain strong.

Commercial floorspace is also provided within centres such as Greenhills and East Maitland, although the quantum of space is to a far lesser degree than Maitland CBD and relative to other uses, there is a far lower proportion of commercial space. The nature of these commercial uses is also different as there is a predominance of smaller units that relate to the surrounding retail uses or provide personal services. Commercial uses are also located within Maitland's employment lands, although the vast majority are associated with industrial uses.

At present, major commercial firms requiring a few thousand square metres of 'A' grade office space are not prevalent in Maitland LGA. This is predominantly because of the close proximity of Newcastle CBD and regional objectives to attract commercial uses to high quality new commercial locations such as Honeysuckle.

Maitland LGA does not have a business park that facilitates pure commercial or predominantly commercially businesses. Rather, Maitland LGA provides employment lands zoned for industrial uses that permit ancillary commercial uses. There are some sites within Maitland that could accommodate a business park that meets the desirable characteristics for business parks listed above i.e. close proximity to highways, scope for car parking and affordable land. However, the market for these uses is not considered sufficiently developed in Maitland, nor is there considered a sufficient critical mass of major businesses to be successful. Furthermore, the creation of a successful business park could directly compete with Maitland CBD and Newcastle CBD to their detriment, contrary to adopted policy and government intentions.

5.5 Industrial Trends

The demand for industrial floorspace is being influenced by trends such as the globalisation of trade and the wider use of information technology. The global economy today consists of sophisticated linkages between businesses, which are designed to enable the efficient sharing of information and the delivery of goods now through a global supply chain. This supply chain, once thought of as the flow of goods through production to the end user, can now be seen as an alignment of firms that design, develop, market and produce goods and services, and deliver them to the customer when needed.

An example of this change can be seen in the motor industry. Once concentrated in cities, the industry has evolved into a process where design, manufacture, and assembly occur in many different locations worldwide. Owing to the ability to utilise markets around the world, costs savings may be achieved by transferring manufacturing of goods to cheaper locations such as China and Indonesia. All this has heightened time based competition and flexibility, with consequential implications for the functional characteristics and spatial disposition of industrial activity.

In response to the changing format of industrial activities and the growth of inner metropolitan land values, there has been a spatial redistribution of more traditional forms of industrial activity. Those activities with lower rent sensitivities have relocated to less expensive land, often on the urban periphery. Others have simply stopped operations either in Sydney or altogether.

Industrial floorspace used primarily for business related storage will be in secular decline, whereas space built for the transferral of goods will increase. This 'high throughput distribution' space is essentially designed to facilitate the rapid movement of goods through the supply chain. In essence, businesses with low inventory turnover are gravitating to inexpensive land and low cost buildings.

In contrast, businesses that have high inventory turnover and high value products, and typically provide value added functions (including product customisation, packaging, and customs) are more prepared to pay a premium for excellent access to a large customer base and proximity in time and space to roads, ports and airports. These industries may seek to locate in areas such as Maitland with good proximity to the F3 Freeway and its junction with the Pacific Highway, the New England Highway, Newcastle Airport and Port. Furthermore, many locations within Maitland may be desirable to such industries owing to their accessibility to the Rail Freight Lines owned and operated by the Rail Corporation of NSW.

As a result of the industrial trends described above, over the past two decades, the development of industrial land and floorspace in NSW has generally occurred at a rate slower than employment growth. This however, has varied considerably between specific sectors of activity. In manufacturing and wholesale trade, employment growth has, with only a few exceptions, either declined or remained stagnant. Contrasting this pattern has been the performance of transport and storage, which has shown strong growth.

In essence, this economic trend may be summarised by the fact that traditional manufacturing is changing and becoming more efficient in its processes as a result of the use of new technologies and equipment. These greater efficiencies in many cases have not resulted in a decline in output but rather a reduction in the number of staff required. This can be no more clearly reflected in the Hunter Region by the fact that between 1991 and 2002 *"the number of manufacturing establishments trebled, but total employment only increased by 7%. Total wages and salaries increased by a modest 7% and the value of manufacturing income rose by 18% (each valued in current dollars)".*¹

Since the decline of manufacturing in the Hunter Region in the 1990s, enhanced by the closure of the BHP steelmaking industry, the lower Hunter Region (including Maitland) has reinvigorated its manufacturing industry. At present, Maitland LGA is the third largest (15%) destination of employment for manufacturing in the Lower Hunter (after Lake Macquarie 35% and Newcastle 26%).

As of 2006, employment generating manufacturing industries in the Region were concentrated in three main categories. Metal product manufacturing is the main industry (30%), with machinery and equipment manufacturing (24%) and food, beverages and tobacco (14%) being the other two major manufacturing category in the Lower Hunter. Over the decade, from 1996 to 2006, employment in metal products and food beverages decreased by more than 20%, although employment in machinery and equipment increased by 56% over the same period.

It is recognised that machinery and equipment production is a knowledge intensive industry. With over 300 businesses in this category in the Hunter, it relates to electronic and medical, mining and food processing equipment, as well as electrical and agriculture related equipment. The industry in turn serves many other industries in the Hunter such as defence, mining, construction and transport.

¹ Hunter Valley Research Foundation – Newcastle and Hunter Region: Manufacturing 2008

Maitland may be considered well placed to facilitate businesses within this industry owing to the presence of the Maitland hospital and associated medical industries, its proximity to defence lands in Raymond Terrace, the Aluminium Smelter in Kurri Kurri, the airport and port in Newcastle and the changing socio-demographic profile of its resident base towards more knowledge workers. Furthermore, Maitland is anticipated to experience significant growth in construction related industries over the study period in order to accommodate its economic growth.

Another trend influencing industrial lands in Maitland is the growth of wholesale and retail trade, indoor recreation, distribution centres, light manufacturing and engineering businesses in large industrial areas that were once reserved for general manufacturing. It is now not uncommon to find that there is a blurring of these uses as part of an industrial estate.

This trend has emerged as a result of the lower costs associated with purchasing / renting these sites, the need for and availability of substantial land areas (including space for parking), exposure to main roads and a need to be separated from residential areas, in order to minimise any adverse impact by way of noise, smell or traffic. This trend has changed the landscape of many traditional industrial areas and provides an array of different services and businesses. It does however, place greater pressure on the availability and cost of land for traditional manufacturing industries. Furthermore, the operation of these new industries may influence the effective operation (traffic movement, smells etc) of more traditional industries forcing them to alternative locations.

5.6 The New Economy

The New Economy is a term used to describe a knowledge and idea-based economy. In the New Economy the key to higher standards of living and job creation is the incorporation of innovative ideas and technologies in services, products and manufacturing processes. It is characterised by technological innovation, e-commerce, digital transformation, higher education and skills and open trade. It differs from the previous economy where there was less of a reliance on skills and education, technology and innovation and the key driver of economic growth was the mechanisation of the production process.

Some of the key characteristics of the 'New Economy' as it emerges includes:

- higher levels of entrepreneurial dynamism and technological innovation due to increased competition. Such innovation is characterised by research and development, and is the key driver of productivity and ultimately wage growth, which benefits both consumers and the wider community;
- an increase in knowledge based employment that stems from technological innovation, highlighting the need for education and training;
- an improvement in the efficiency of the design and production process, resulting in faster times to the marketplace and to the end-user;
- an increase in diversity in the products and services provided to consumers;
- increased reliance on the internet and other forms of information technology, especially in the service sector. 'Digitisation' (using digital information technologies to produce goods and services) is also a key driver;
- globalisation of the marketplace;

- the restructuring of the hierarchical organisational structures with the emergence of the need for government to co-invest and collaborate with other organisations, so as to achieve a wide range of public policy goals; and
- an increase in the importance of understanding the changing economy.

The goal for growing metropolitan areas, such as Maitland, will be to foster innovation and adaptation, in order to secure a range of employment options and industry diversity. In many industries, education and training, creativity and adaptation have become the principal sources of competitive advantage. Efforts made by communities to foster the New Economy need to be proactive so as to ensure that the community has access to tertiary education and lifelong learning opportunities. Maitland TAFE is one such opportunity, together with enhanced links with the University of Newcastle.

An LGA's economic strategy should grow out of its unique structure, economic assets, limitations and business culture. Therefore, an LGA should develop an in-depth and ongoing understanding of its economy, including how the major economic sectors work and what the LGA's strengths and weaknesses are.

In the New Economy, the public and private sectors must work together. Metropolitan areas should form economic policy councils that bring together key leaders in business, government, labour, civic groups and education, to provide an in-depth analysis of the economy and to develop creative economic strategies, with these strategies ready for adoption.

It is increasingly important in the New Economy that an LGA is attractive to 'knowledge workers', as they are the key driver in the success / failure of implementing the New Economy's principles. There are many factors to contribute to the attractiveness of an area, the most important of which is the quality of life / lifestyle on offer. This is affected by such things as crime, amenities and transportation. Maitland has many lifestyle benefits that could attract knowledge workers; the rural environment; new high quality homes and easy access to major centres such as Sydney and Newcastle.

It will be imperative, however, that Maitland embraces the complementary lifestyle factors sought by today's knowledge workers, including good quality office space, a choice of restaurant and café destinations, a range of entertainment facilities and an attractive night time economy.

5.7 Property Market Trends in Maitland LGA

As part of the Study research process, discussions were undertaken with property market experts and business representatives from Maitland. It was found that there is currently considerable market interest in Maitland with enquiries by potential purchasers / lessees for retail and commercial sites / premises. Owing to the nature of the economic climate at present however, business and investor sentiment is cautious and therefore, these enquiries have not yet translated into significant activity.

This situation is not unique to Maitland LGA. Many investors are adopting the 'wait-and-see' approach until there is greater market certainty and incentive.

To complement the research discussed above in relation to economic and social trends affecting Maitland's Centres and employment lands, Hill PDA has undertaken property market research in relation to its key centres: Maitland CBD, Greenhills and Rutherford. The research focused on the current performance of these centres and emerging trends that will determine their economic performance or success in the future.

With respect to Maitland CBD, it was found that commercial property in the centre has been providing above-average returns for investors with yields achieving as high as 8 - 9% in some cases. Maitland CBD provides office tenants with a range of accommodation i.e. different sizes, different levels of quality suiting many uses. It also offers affordable rates in the order of \$200 - \$240/sqm for newer stand alone office stock and \$120 - \$140/sqm for small office suites located above retail shops. This is comparatively low, compared to rates achieved in Greenhills and Rutherford for retail uses and will therefore help to ensure that demand for office space in the CBD remains strong in the future.

It was considered that Maitland CBD does suffer from issues regarding transport and access owing to the pedestrian mall configuration. As stated earlier however, the emerging trend of retailers returning to traditional retail strips and outdoor centres for leisure and entertainment will provide excellent opportunities for central Maitland to improve and expand. This, coupled with affordable rental rates available to retail tenants, will help to ensure a healthy future for the retail market in central Maitland.

The Greenhills property market has improved significantly over the last 12-18 months, mainly due to the strength of Stockland Greenhills as a retail centre. Greenhills now dominates the retail market in the LGA, which has had positive and negative effects on other centres. Currently there is 32,000m² of lettable floorspace in the centre, with a further 40,000m² planned for in the future, reflecting the success of the development and its pull of trade from across the LGA and surrounding LGAs.

The commercial office market in Greenhills is limited, with only a few small commercial businesses based in the area. However, the retail potential is widely considered to be far greater. Consequently, local expert's advice is such that increasingly the change of use of commercial space to retail will be sort to build on the anchor created by Stockland Greenhills. Conversely, it is anticipated that retail space in East Maitland will increasingly be sought as office space for small local businesses.

The Rutherford property market has performed very well in the last 12-18 months. It is seen as an emerging market mainly due to the forecasted increase in population in the medium to long-term. Such increases in population will have a positive flow on effect to all classes of property in the area due to increased demand.

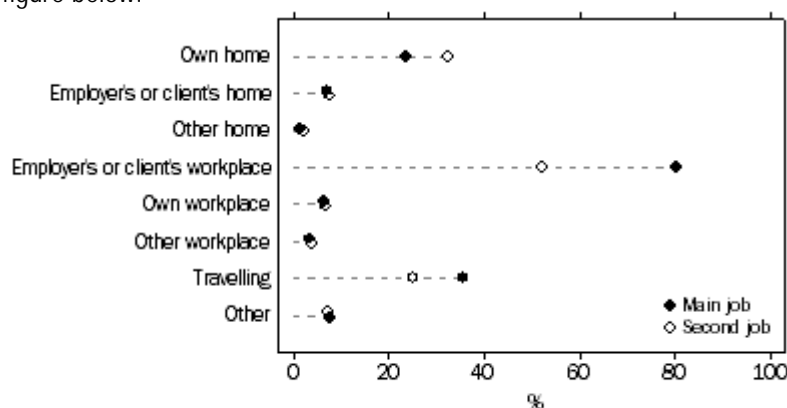
Similar to Greenhills, potential lessees in Rutherford have the option of retail space in shopping centres, such as Rutherford Marketplace for an average of \$600/sqm, or in the more established parts of the suburb for as little as \$250/sqm. There has been a recent trend in the development of bulky goods retailing and industrial properties in the area, particularly along the New England Highway. This trend is expected to continue.

5.8 Home Working

The advent of the internet in the late 1970s raised predictions that a greater number of persons would work from home rather than an employer's premises. Despite considerable research attention in the 1980s however, the

reality of work from home situations has not expanded hugely since it became a technological possibility with the widespread deployment of internet connections.

The ABS November 2005 Locations of Work Survey suggested that of the 9,401,400 persons employed across Australia, 81% worked mainly at business premises in their main job. The break up work locations is shown in the figure below:



(a) Refers to all locations of work, therefore people may appear in more than one category.

Source: ABS Census Data 2006

The ABS survey also showed that the types of work carried out at home are far more varied than those made possible as a result of the using the internet. They range across a very wide range of activities, including small scale production (especially garment manufacture) professional services, various service provisions, sales work and various forms of self employment.

While the internet makes work from home practical for many office jobs, the rate of take up of this opportunity across Australia has been tardy. Reasons for this include supervision concerns, social and organisational aspects of the office location, and the importance of physical proximity for effective performance and client contact. Despite this, there appears to be a high level of out of hours work from home using telecommuting technology. Many office workers use their home computers to complete work at home, check emails and communicate with clients in the evenings.

The ABS Method of Transport to Work survey found a smaller proportion of persons worked from home in the Sydney area. The survey suggested only 3.9% of Sydney workers, worked mainly from home. The difference may be partly methodological, but may be partly due to the relative importance of non-telecommuting work at home activities in Regions out of Sydney.

Within Maitland LGA, home working was found to be at a rate of about 4% of employed persons. This is likely a reflection of the relative attraction of telecommuting, compared to actual commuting between homes in the LGA and external business locations, such as Newcastle and Sydney.

Future growth in work from home should consider the various classes of work from home situation. Various creative industries may suit this style of employment including writers, architects and some IT activities. These could be expected to be attracted to Maitland LGA due to its lifestyle attractions and the growing affluence of its population. This may require encouragement of self-employment and may have complex relationships to property values.

The telecommuting type work at home will very likely grow as confidence and experience in working partly from home expands. This second category has the capacity to soften peak hour transport congestion, as commuters choose to organise the location of their day's work more flexibly.

6. STAKEHOLDER DISCUSSIONS

During the preparation of this background Study and analysis, Hill PDA consulted with key local and state government organisations such as Maitland City Council; the Department of Planning and the Department of State and Regional Development. In addition to these government departments, Hill PDA gained preliminary comments from selected organisations and industry players including the Maitland Chamber of Commerce; Stockland and Woolworths.

Discussions with the various organisations outlined above enabled a local snapshot and understanding of the general issues relating to centres and employment lands in Maitland LGA. Some of the general issues highlighted by Stakeholders included:

- Many residents commute to work in Newcastle;
- Maitland's appearance and image could be improved;
- Residential uses should be encouraged in Maitland CBD to create a safer, more thriving atmosphere;
- Maitland CBD is experiencing a resurgence in popularity for higher end boutique shopping, cafes and restaurants;
- There positives and negatives relating to the future rapid population growth of the LGA, being such things as an increase in services but potential impact on existing infrastructure;
- Greenhills and Maitland CBD have different roles with Maitland being a civic, commercial and cultural hub, as well as providing retail, whereas Greenhills is retail focussed;
- The Bulky Goods clusters in the LGA, particularly in Rutherford, are a big draw card for the area;
- Questions were raised as to how much Bulky Goods is needed in the LGA and where it should be located;
- Light industrial land is very well located, close to rail, road, airport and the port;
- Events such as the Summer Food Markets have been very successful in Maitland CBD with over 2,000 people visiting the centre in a night;
- Need more events in centres to bring people back i.e. Farmers Markets, International Cuisine, etc; and
- Myer at Greenhills would be a win for the whole LGA, as it would stop people leaving to shop in Newcastle and would attract residents from areas such as Mayfield. The different products offered by Myer would mean that it would not compete with Maitland CBD.

Some more specific economic and business issues highlighted by Stakeholders include:

- Interest rates effecting businesses and residents of the LGA;
- The impact of the performance of the economy is being felt by businesses across the LGA;
- The Employment Lands within Maitland LGA are important for the Region;

- Low tertiary education is an impediment to economic growth;
- Constraints to business include suitably skilled staff and heritage building constraints;
- Chamber of Commerce trying to get centres to work together;
- Demand for commercial floorspace in Maitland CBD has been healthy;
- The commercial aspect of Maitland should be strengthened and enhanced;
- Maitland CBD is constrained and it is difficult to gain large business lots; and
- A lot of trade comes from passing motorists using the New England Highway.

The reasons behind why the population of Maitland is growing so quickly may be due to:

- There are many green field sites within Maitland whereas similar sites within Newcastle have started to “dry up”;
- Maitland is more affordable than other places in the Lower Hunter, such as Port Stephens and Newcastle;
- Maitland has good service connections via the railway line and the New England Highway in comparison to places such as Cessnock;
- Maitland also has good, well, established schools;
- Proactive council facilitating development;
- Flood plains surrounding towns have the potential to maintain the open field landscape of the area;
- The LGA is visually attractive; and
- The LGA is only 30 minutes to Newcastle and the services which it offers and other things and lifestyle attracters, such as beaches.

Some of the developments in the Lower Hunter Region which may impact on Maitland LGA highlighted by Stakeholders include:

- The designated future freight hub and employment lands to the south of the LGA known as the Hunter Economic Zone;
- The possible extension of the F3 Freeway and what impact that will have on such things as passing trade;
- What will be the impact of the growth of coal production in the area on the passenger railway; and
- Rezoning and subdivision of employment lands within the surrounding LGAs from heavy industrial uses to light industrial and what impact this will have on employment lands in Maitland LGA.

7. POPULATION GROWTH

The DoP has established a dwelling projection for Maitland LGA of 26,500 by 2031. Based on an average dwelling occupancy rate of 2.4¹, this translates into an additional 62,400 people residing in Maitland by 2031.

Maitland Council has identified a number of areas within the LGA as investigation areas with the potential to accommodate these additional dwellings. Such areas include Lochinvar, Thornton North and Anambah.

Urban growth is not only targeted for greenfield areas but also within established urban areas to better facilitate the use of existing infrastructure and to provide a range of housing options. In fact, of the 26,500 additional dwellings targeted for Maitland, the DoP has established a projection of 1,300 dwellings specifically for Maitland CBD.

Infill development and urban consolidation has also been identified for centres such as East Maitland, Thornton, Rutherford and Telarah. Combined there is a projection of 5,000 dwellings for infill sites.

The table below shows the indicative areas and scale of growth within Maitland LGA between 2006 and 2031 to achieve the DoP dwelling projection.

¹ Mid point between average dwelling occupancy for Lower Hunter Region by 2031 – Lower Hunter Regional Strategy and Existing Maitland Rate of 2.7

Table 11 - Forecast Dwelling Growth within Maitland by Area 2006 - 2031

Year	2006 - 2011	2011 - 2021	2021 - 2031	TOTAL
Western Release				
Aberglasslyn	600	1,200	0	1,800
Farley		1,000	600	1,600
Anambah		1,000	3,000	4,000
West Rutherford	431	0	0	431
Rutherford Centre Consolidation		300	0	300
Rural Residential	50	27	0	77
INFILL West	120	240	240	600
Lochinvar	0	2,000	3,000	5,000
Total West	1,201	5,767	6,840	13,808
Eastern Sector				
Raworth & Morpeth	150	185	0	335
Thornton North	800	3,950	0	4,750
Louth Park	200	0	0	200
Centre Consolidation Thornton		300	0	300
Centres Consolidation – East Maitland		500	0	500
Rural Residential		150	0	150
Aged Care Accommodation	500	0	0	500
INFILL East	340	680	680	1,700
Total East	1,990	5,765	680	8,435
Central Sector				
Largs & Bolwarra	198	100	0	298
Gillieston Heights	1,003	911	0	1,914
Centres Consolidation - Maitland CBD		200	800	1,000
Thornton / Ashton - Employment	0	0	0	0
Rural Residential	67	75	0	142
INFILL Central	140	280	280	700
Total Central	1,408	1,566	1,080	4,054
TOTAL	4,599	13,098	8,600	26,297

8. EXISTING RETAIL SUPPLY AND DEMAND

8.1 Existing Retail Demand and Expenditure

Demand for retail floorspace is dependent upon household expenditure. Household expenditure is in turn dependent upon population characteristics, the number of households and the socio-demographic characteristics of those households. Most notably, there is a strong correlation between expenditure, household type and household income levels.

In the 1980s, Australian retail floor space totalled approximately 1.8sqm per person which was divided as regional, district and neighbourhood / local centres. Now, the amount of floorspace per capita is approximately 2.0sqm per person with bulky goods stores taking about 20% of the market share from the traditional centres. In general, it is estimated that:

- 0.6sqm relates to Regional Cities, Global Cities and Major Centres;
- 0.4sqm relates to Neighbourhood Centres;
- 0.4sqm to Bulky Goods Retailing / Out of Centre Retailing; and
- 0.6sqm to the balance i.e. Town Centres and Local Centres.

In order to identify more specifically the degree of retail demand generated by residents within Maitland LGA, Hill PDA prepared a Retail Expenditure Model. The model combined Maitland's population characteristics (as outlined in Section 4) with the estimated population as of 2006. This data has been assessed in order to quantify the amount of expenditure likely to be generated in Maitland LGA. This expenditure was then translated into demand for retail floorspace.

Household expenditure was sourced from the following:

- the ABS Household Expenditure Survey 2003-04 which provided household expenditure by broad commodity type by household income quintile, and the ABS Retail Survey 1998-99; and
- the Marketinfo 2006 database which is generated by combining and updating data from the 2006 Population Census and the ABS Household Expenditure Survey (HES) using "micro simulation modelling techniques".

Marketinfo combined the data from the Census, HES and other sources to derive total household expenditure by commodity type. This data, which was validated using taxation and national accounts figures, quantified around 14% more expenditure than the ABS HES Survey.

The table below shows the total retail expenditure generated within Maitland LGA by retail category. The table is based on Maitland's estimated population and household expenditure as of 2006.

Table 12 - Total Retail Expenditure (\$M) Generated by Maitland LGA Residents 2006

Retail Category	Total Retail Expenditure 2006 (\$M)
Supermarkets & Grocery Stores	199
Specialty Food Stores	78
Fast-Food Stores & Restaurants	110
Department Stores	57
Clothing Stores	46
Bulky Goods Stores	104
Other Personal & Household Goods Retailing	72
Selected Personal Services	23
Total Retailing	691

Source: Hill PDA BS Household Expenditure Survey 1998-99 and Marketinfo 2004.

Using the data in the table above and cross tabulating it with anticipated retail turnover rates, the table below shows the total retail floorspace demand generated within Maitland LGA as of 2006. It shows that demand for retail floorspace within Maitland on average is 2.2sqm per capita. This is above the per capita average across Australia (i.e. 2.0sqm / person), and consistent with the Sydney Statistical Division of 2.2 sqm of retail per capita.

Table 13 - Total Retail Floorspace (sqm) Demand Generated by Maitland Residents 2006

Retail Category	Total Retail Floorspace Demand
Supermarkets & Grocery Stores	22,162
Specialty Food Stores	10,344
Fast-Food Stores & Restaurants	20,054
Department Stores	16,413
Clothing Stores	10,304
Bulky Goods Stores	34,731
Other Personal & Household Goods Retailing	16,059
Selected Personal Services	6,651
Total Retailing	136,718

Source: Hill PDA BS Household Expenditure Survey 1998-99 and Marketinfo 2006

Bulky Goods

The table above shows that in 2006, bulky goods was the largest category (by floorspace) of retail demand. Bulky goods retailing may relate to electrical appliances, furniture, floor coverings, hardware, sports, and camping stores. This is attributed to the growing young population of Maitland, as well as the significant number of new residential dwellings being developed in the LGA and therefore the demand for these bulky items to furnish homes.

Supermarkets

Supermarkets (including convenience stores and small mixed business stores) were the second highest retail category required within Maitland as of 2006. There was a total of 22,162sqm of floorspace required for supermarkets and convenience stores. Dependant on size, this demand may translate into demand for between 27¹ small supermarkets and 6² large or 'Full Line' supermarkets within Maitland.

For consistency with Maitland Council's Urban Settlement Strategy, the data provided above has been broken down into the East, West and Central Sectors.

¹ Average floor Area of 800sqm

² Average floor Area of 4,000sqm

Table 14 - Expenditure Generated and Floorspace Demand in East Sector 2006

Retail Category	Expenditure (\$M)	Floorspace (sqm)
Supermarkets & Grocery Stores	115	12,856
Specialty Food Stores	45	6,000
Fast-Food Stores & Restaurants	64	11,633
Department Stores	33	9,521
Clothing Stores	27	5,977
Bulky Goods Stores	61	20,147
Other Personal & Household Goods Retailing	42	9,316
Selected Personal Services	14	3,858
Total Retailing	401	79,308

Source: Hill PDA, BS Household Expenditure Survey 1998-99 and Marketinfo 2006

The table above shows that 58% of all retail expenditure demand generated within Maitland LGA as of 2006 was generated by households located within the Eastern Sector of the LGA. This may be expected as a result of the greater number of households located within this component of the LGA.

Table 15 - Expenditure Generated and Floorspace Demand in Central Sector 2006

Retail Category	Expenditure (\$M)	Floorspace (sqm)
Supermarkets & Grocery Stores	31	3,488
Specialty Food Stores	12	1,628
Fast-Food Stores & Restaurants	18	3,156
Department Stores	9	2,583
Clothing Stores	7	1,622
Bulky Goods Stores	16	5,466
Other Personal & Household Goods Retailing	11	2,527
Selected Personal Services	4	1,047
Total Retailing	109	21,518

Source: Hill PDA, BS Household Expenditure Survey 1998-99 and Marketinfo 2006

The table above shows that 16% of all retail expenditure was generated by households located within the Central Sector of the LGA.

Table 16 - Expenditure Generated and Floorspace Demand in West Sector 2006

Retail Category	Expenditure (\$M)	Floorspace (sqm)
Supermarkets & Grocery Stores	53	5,818
Specialty Food Stores	21	2,716
Fast-Food Stores & Restaurants	29	5,265
Department Stores	15	4,309
Clothing Stores	12	2,705
Bulky Goods Stores	27	9,118
Other Personal & Household Goods Retailing	19	4,216
Selected Personal Services	6	1,746
Total Retailing	181	35,893

Source: Hill PDA, ABS Household Expenditure Survey 1998-99 and Marketinfo 2004

The remaining 25% of expenditure generated within Maitland as of 2006 was attributed to households within the West Sector of the LGA.

8.2 Existing Supply vs. Existing Demand

By comparing demand generated (as discussed above) with existing floorspace, it has been possible to identify whether there is an existing surplus or deficit of retail floorspace in Maitland LGA.

The table below provides a breakdown of existing retail floorspace by category and compares this to the demand for retail floorspace generated by all residents of the LGA. It is important to note that the table below does not account for additional expenditure being captured from surrounding LGA's (such as Dungog or Cessnock) or the expenditure lost from Maitland LGA as a result of residents shopping in Newcastle or Raymond Terrace. Assuming Maitland was a closed system, the table below shows that there is:

- an existing oversupply of supermarket and grocery floorspace in Maitland of 8,968sqm. This oversupply indicates that there is existing expenditure being pulled from surrounding LGAs to support this retail category. In other terms residents from other LGAs are travelling to Maitland to conduct a portion of their supermarket shopping. The oversupply may also be attributed (to a small degree) to the foresight of the supermarket retailers and their protection of the sizeable future market in Maitland from competitors;
- an undersupply of specialty food retail and catered food. This category relates to an undersupply of delicatessens, bakeries and green grocers in addition to restaurants and cafes;
- a supply of department store floorspace that closely meets current demand; and
- a significant oversupply of bulky goods floorspace. This oversupply indicates a significant pull of expenditure from surrounding LGAs to support this category.

Table 17 - Maitland LGA – Floorspace (sqm) Supply vs. Demand 2006

YEAR	2006 Demand	2006 Existing	Over / Under Supply
Supermarkets & Grocery Stores	31,130	22,162	8,968
Specialty Food Stores	6,810	10,344	-3,534
Fast-Food Stores & Restaurants	11,550	20,054	-8,504
Department Stores	16,030	16,413	-383
Clothing Stores	12,070	10,304	1,766
Bulky Goods Stores	71,710	34,731	36,979
Other Personal & Household Goods Retailing	24,610	16,059	8,551
Selected Personal Services	7,810	6,651	1,159
Total Retailing	181,720	136,718	45,002

Source: Hill PDA, ABS Household Expenditure Survey 1998-99 and Marketinfo 2006

* Note blue colour represents oversupply, red represents undersupply

Once again assessing Maitland LGA in isolation of the surrounding LGAs and centres, the following tables show existing floorspace for each sector in Maitland (East, West and Central Sectors) compared to the demand for retail floorspace generated within each.

East Sector

The East sector presently generates 58% of all retail demand within the LGA. This is a result of the greater number of dwellings / density of development within the sector at present compared to the Central and West Sectors. Whilst the East generates 58% of demand however, it provides 36% of retail floorspace in the LGA or 65,840sqm. 31,800sqm or 48% of total retail floorspace in the East Sector is however specific to the Stockland Stand Alone Centre in Greenhills.

The main areas of undersupply in the sector (shown in red) are fast food establishments and restaurants and bulky goods stores. The undersupply in these two categories (particularly the Bulky Goods category) is catered for

however within alternative locations in Maitland LGA. For example, Maitland CBD has a greater focus on restaurants and cafes and a significant amount of Bulky Goods floorspace is provided in areas such as Rutherford in the West and Maitland in the Central Sector. In fact the extent of bulky goods floorspace provided within other areas in the LGA results in a significant oversupply of such floorspace.

Table 18 - East Sector – Floorspace (sqm) Supply vs. Demand 2006

YEAR	2006 Existing	2006 Demand	Over / Under Supply
Supermarkets & Grocery Stores	12,010	12,856	-846
Specialty Food Stores	4,210	6,000	-1,790
Fast-Food Stores & Restaurants	6,470	11,633	-5,163
Department Stores	8,020	9,521	-1,501
Clothing Stores	6,190	5,977	213
Bulky Goods Stores	13,930	20,147	-6,217
Other Personal & Household Goods Retailing	11,100	9,316	1,784
Selected Personal Services	3,910	3,858	52
Total Retailing	65,840	79,308	-13,468
Proportion of Floorspace Existing / Demand	36%	58%	

Source: Hill PDA, ABS Household Expenditure Survey 1998-99 and Marketinfo 2006

Central Sector

The Central Sector generates 16% of all retail demand within the LGA yet provides 29% of all floorspace. This means that the Central Sector provides 52,710sqm of retail floorspace which exceeds the level of floorspace demand by 31,192sqm. This dichotomy is a result of the small geographic footprint of the Central Sector yet the location of the LGAs CBD within it.

The CBD has a noticeable proportion of supermarket and grocery stores, bulky goods retailing and household and personal goods. It meets the level of demand generated for specialty foods, fast food premises, cafes and restaurants generated within the Central Sector. As the main cultural and community focal point for the LGA however it could be expected that there would be a significant oversupply in the catered food category (i.e. in the provision of cafés and restaurants) in order to meet the level of demand generated by the wider LGA.

Table 19 - Central Sector – Floorspace (sqm) Supply vs. Demand 2006

YEAR	2006 Existing	2006 Demand	Over / Under Supply
Supermarkets & Grocery Stores	8,310	3,488	4,822
Specialty Food Stores	1,300	1,628	-328
Fast-Food Stores & Restaurants	3,180	3,156	24
Department Stores	8,010	2,583	5,427
Clothing Stores	5,580	1,622	3,958
Bulky Goods Stores	12,330	5,466	6,864
Other Personal & Household Goods Retailing	10,800	2,527	8,273
Selected Personal Services	3,200	1,047	2,153
Total Retailing	52,710	21,518	31,192
Proportion of Floorspace Existing / Demand	29%	16%	

Source: Hill PDA, ABS Household Expenditure Survey 1998-99 and Marketinfo 2006

West Sector

The West Sector is the least developed of the three sectors yet owing to its sizeable scale, it still generates 26% of all retail demand in the LGA. The sector provides 35% of existing retail floorspace or 63,170sqm. It has a significant oversupply of supermarket floorspace compared to demand generated, as a likely a result of

supermarket provision in centres such as Rutherford. It also provides a significant oversupply of Bulky Goods Premises owing to the scale of centres such as the Hunter Supa Centre located within the Rutherford Industrial Park.

Owing primarily to the latter two categories, the West sector has an existing oversupply (compared to Maitland resident demand) of 27,277sqm of retail floorspace. Caution must be highlighted here however as uses such as Bulky Goods retailing (that makes up a large portion of the oversupply) have large catchment areas that not only extend the entire LGA but also across LGA borders.

Notwithstanding the existing oversupply in the two categories discussed above, the West has a noticeable undersupply of retail floorspace in all other categories (highlighted in red). Consequently residents of this sector would presently need to travel across the LGA to centres such as Maitland CBD and Greenhills to meet their retail needs.

Table 20 - West Sector – Floorspace (sqm) Supply vs. Demand 2006

YEAR	2006 Existing	2006 Demand	Over / Under Supply
Supermarkets & Grocery Stores	10,810	5,818	4,992
Specialty Food Stores	1,300	2,716	-1,416
Fast-Food Stores & Restaurants	1,900	5,265	-3,365
Department Stores	0	4,309	-4,309
Clothing Stores	300	2,705	-2,405
Bulky Goods Stores	45,450	9,118	36,332
Other Personal & Household Goods Retailing	2,710	4,216	-1,506
Selected Personal Services	700	1,746	-1,046
Total Retailing	63,170	35,893	27,277
Proportion of Floorspace Existing / Demand	35%	26%	

Source: Hill PDA, ABS Household Expenditure Survey 1998-99 and Marketinfo 2006

9. FORECAST RETAIL DEMAND

The following section assesses and reviews existing and forecasted retail demand generated within Maitland LGA based on detailed expenditure modelling conducted by Hill PDA. The modelling forecasts household growth and income. This analysis includes our knowledge of market capture and forecast growth in spending patterns.

Based on the quantum of forecast demand for retail expenditure, this section provides recommendations as to the quantum of additional retail floorspace required in Maitland over the study period, its type and where it should be located.

9.1 Forecasted Retail Demand

The main influence on the demand for retail floorspace in Maitland LGA over the study period will be the level of future population growth in Maitland. The growing affluence of households, and therefore their increasing ability to purchase goods and services, will be another significant factor. This means that the substantial population growth and socioeconomic changes forecasted to occur in Maitland over the study period will translate into a significant growth in demand for retail floorspace.

In order to project the growth in demand for retail floorspace to 2031, the socio-economic characteristics of the population (as outlined in Section 4), together with the estimated household growth rates provided by Council (as outlined in Section 7), were applied in Hill PDA's Retail Expenditure Model. The level of expenditure anticipated to be generated in 2031 was then translated into demand for retail floorspace.

The Hill PDA expenditure model calculates not only what the cumulative household expenditure in Maitland will be¹ but also what type of store this expenditure might be spent in. This is particularly relevant for planning as stores types like supermarkets, personal services and speciality food, predominantly need to be locally based, while store types like bulky goods and department stores can be regionally based.

The following table provides a breakdown of forecast net growth in retail expenditure by retail category for 2011, 2021 and 2031.

¹ Based on the data sources described in section 8.1 including the ABS retail survey 1998-1999, Marketinfo database 2006 and the ABS Household Expenditure Survey 1998 – 1999.

Table 21 - Retail Expenditure Forecast for 2006 - 2031 (\$m2006)

YEAR	2006	2011	2021	2031
Supermarkets & Grocery Stores	199.45	239.29	389.06	528.73
Specialty Food Stores	77.58	93.08	151.33	205.66
Fast-Food Stores & Restaurants	110.30	132.33	215.15	292.39
Department Stores	57.44	68.92	112.05	152.28
Clothing Stores	46.37	55.63	90.44	122.91
Bulky Goods Stores	104.19	125.00	203.24	276.20
Other Personal & Household Goods Retailing	72.27	86.70	140.96	191.56
Selected Personal Services	23.28	27.93	45.41	61.71
Total Retailing	690.89	828.88	1347.64	1831.44

Source: Hill PDA ABS Household Expenditure Survey 1998-99 and Marketinfo 2006

Using industry benchmark target turnover rates, the table above may be converted into floorspace demand for the study period.

Table 22 - Retail Floorspace Demand (sqm) for Maitland LGA 2011 - 2031

YEAR	2006	2011	2021	2031	Net Change 2006 – 2031
Supermarkets & Grocery Stores	22,162	25,933	40,112	51,861	29,699
Specialty Food Stores	10,344	12,105	18,723	24,207	13,862
Fast-Food Stores & Restaurants	20,054	23,468	36,298	46,930	26,875
Department Stores	16,413	19,206	29,707	38,408	21,995
Clothing Stores	10,304	12,058	18,650	24,112	13,808
Bulky Goods Stores	34,731	40,642	62,862	81,274	46,543
Other Personal & Household Goods Retailing	16,059	18,792	29,066	37,580	21,521
Selected Personal Services	6,651	7,783	12,038	15,564	8,913
Total Retailing	136,718	159,986	247,458	319,935	183,217

Source: Hill PDA ABS Household Expenditure Survey 1998-99 and Marketinfo 2006

Hill PDA expenditure modelling demonstrates that over the next 25 years, there will be demand generated in Maitland for an additional 183,217sqm of retail floorspace. This translates into an average retail provision of 2.6sqm¹ per capita by 2031 and equates to the anticipated Sydney per capita average of 2.6sqm per capita for the Sydney GMA in 2031.

It is important to note however that the floorspace projections shown above relate to the growth of the resident population only. As Maitland is a Major Regional Centre it attracts expenditure from other areas such as the surrounding LGAs and tourism. In light of Maitland's proximity to Newcastle Regional City however, and the strength of its retail provision, some expenditure is also lost from the LGA.

This analysis can also be broken down into the Eastern, Central and Western Sectors.

The table below shows the demand generated for retail floorspace in Maitland's East Sector owing to dwelling growth. It shows that demand for an additional 64,359sqm of retail floorspace will be generated between 2006 and 2031 resulting in demand for 143,666sqm of retail in total by 2031.

Notwithstanding the significant forecast growth in demand, as the Eastern Sector of Maitland LGA is more established in terms of dwelling numbers and retail supply than the Western Sector, the growth in demand for retail floorspace, over the study period is proportionally lower at 35% compared to 53% for the West.

¹ 2001 population plus estimated population growth from additional 26,500 household at an occupancy of 2.4 persons / dwelling

Table 23 - Growth in Demand for Retail Floorspace (sqm) 2006 - 2031 East Sector

YEAR	2006	2011	2021	2031	Net Change 06– 31
Supermarkets & Grocery Stores	12,856	14,762	21,310	23,288	10,432
Specialty Food Stores	6,000	6,891	9,947	10,870	4,870
Fast-Food Stores & Restaurants	11,633	13,359	19,284	21,074	9,441
Department Stores	9,521	10,933	15,782	17,247	7,726
Clothing Stores	5,977	6,864	9,908	10,827	4,850
Bulky Goods Stores	20,147	23,136	33,397	36,496	16,349
Other Personal & Household Goods Retailing	9,316	10,697	15,442	16,875	7,560
Selected Personal Services	3,858	4,430	6,395	6,989	3,131
Total Retailing	79,308	91,072	131,467	143,666	64,359
Proportion of Floorspace Demand in Maitland	58%	57%	53%	45%	35%

Source: Hill PDA, BS Household Expenditure Survey 1998-99 and Marketinfo 2006

Demand for retail floorspace generated by households in the Central Sector will increase by 21,852sqm between 2006 and 2031. This represents 12% of all growth in demand for retail floorspace anticipated for the LGA.

Table 24 - Growth in Demand for Retail Floorspace (sqm) 2006 - 2031 in Cental Sector

YEAR	2006	2011	2021	2031	Net Change 2006 – 2031
Supermarkets & Grocery Stores	3,488	4,190	5,689	7,030	3,542
Specialty Food Stores	1,628	1,956	2,656	3,281	1,653
Fast-Food Stores & Restaurants	3,156	3,791	5,148	6,362	3,205
Department Stores	2,583	3,103	4,214	5,206	2,623
Clothing Stores	1,622	1,948	2,645	3,269	1,647
Bulky Goods Stores	5,466	6,566	8,916	11,017	5,551
Other Personal & Household Goods Retailing	2,527	3,036	4,123	5,094	2,567
Selected Personal Services	1,047	1,257	1,707	2,110	1,063
Total Retailing	21,518	25,846	35,099	43,370	21,852
Proportion of Floorspace Demand in Maitland	16%	16%	14%	14%	12%

Source: Hill PDA, BS Household Expenditure Survey 1998-99 and Marketinfo 2006

Demand for retail floorspace generated by the significant growth in households forecast for the West Sector will increase by a substantial 97,015sqm between 2006 and 2031. As a result, households in the West Sector will generate demand for 132,908sqm by 2031 in total. This represents 53% of all floorspace growth demand anticipated for the LGA. This is a significant proportion owing to the relatively lower starting base.

Table 25 - Growth in Demand for Retail Floorspace (sqm) 2006 - 2031 in West Sector

YEAR	2006	2011	2021	2031	Net Change 2006 – 2031
Supermarkets & Grocery Stores	5,818	5,966	13,113	21,544	15,726
Specialty Food Stores	2,716	2,785	6,121	10,056	7,340
Fast-Food Stores & Restaurants	5,265	5,398	11,866	19,496	14,231
Department Stores	4,309	4,418	9,711	15,955	11,647
Clothing Stores	2,705	2,774	6,097	10,017	7,311
Bulky Goods Stores	9,118	9,349	20,550	33,763	24,645
Other Personal & Household Goods Retailing	4,216	4,323	9,502	15,611	11,396
Selected Personal Services	1,746	1,790	3,935	6,466	4,720
Total Retailing	35,893	36,804	80,896	132,908	97,015
Proportion of Floorspace Demand in Maitland	26%	27%	33%	42%	53%

Source: Hill PDA, BS Household Expenditure Survey 1998-99 and Marketinfo 2006

In order to reiterate, the tables above assume that Maitland LGA is a closed economy. That is, all retail demand generated by residents within the LGA is captured by the LGA. Retail demand and expenditure is however a complex matter dependant on the type of retail provided in an area, the area's relationship and accessibility to an

alternative retail destination, additional expenditure generated by industries such as tourism, the accessibility of a retail destination and the quality or pull of retail offer in other centres. Consequently whilst the tables above give an excellent indication of need generated within Maitland over the study period, they do not factor in the existing relationship of Maitland LGA to centres surrounding the LGA.

To account for these relationships, the following section outlines how Hill PDA has addressed the matter of trade capture and loss for Maitland LGA.

9.2 Tourism Expenditure

Tourism can be a sizeable contributor to demand for retail floorspace within a region such as the Hunter. In fact the Hunter Region is ranked eleventh in the top 20 domestic tourist destinations in Australia. It is ranked one place lower than the NSW North and South Coast but higher than Canberra and the Northern Rivers. Maitland's historical character and proximity to the Hunter wine region supports a \$45m tourism industry per annum¹. This figure relates to expenditure generated by the 151,000 domestic and international tourists visiting Maitland LGA each year².

Tourists increase demand in particular for retail floorspace and services such as restaurants, cafes, accommodation and entertainment. Based on Tourism Australia research, derived from the 2003 National Visitors Survey, approximately 28% of expenditure within the Hunter Region may be attributed to the drink and food category; 24% to accommodation and 13% to shopping.

In light of the above, tourism within Maitland, on a per annum basis accounts for an additional:

- \$12.6m of drink and food related expenditure;
- \$11.7m of accommodation expenditure; and
- 10.8m of shopping expenditure.

Based on the estimated Tourism expenditure captured by Maitland per annum, we have calculated that there is a corresponding increase in demand for 4,200sqm³ of retail floorspace. It is important to also consider however the degree of household expenditure that is also lost from the LGA annually as a result of Maitland residents visiting other destinations for tourism. On balance it is considered unlikely that Maitland LGA benefits from a net gain of tourism expenditure and therefore these two factors have been cancelled out for the sake of the net expenditure modelling.

¹ Tourism Profiles for LGAs in Regional Australia NSW, Day and Overnight Tourists - Tourism Research Australia 2007

² Tourism Profiles for LGAs in Regional Australia NSW, Tourism Research Australia 2007

³ Applying Target Turnover rates of \$5,500

9.3 Expenditure Capture and Trade Areas

Owing to the type of retail floorspace provided within Maitland LGA and the nature of centres surrounding it, additional household expenditure may be captured by Maitland retailers from households in surrounding LGAs. Alternatively expenditure generated by Maitland LGA residents may leak or 'escape' to other regions / LGAs owing to the strength of their retail offer or because Maitland residents work in other LGAs such as Newcastle.

To account for these variations, Hill PDA has reviewed the type of floorspace provided within Maitland and the surrounding LGAs. Based on these characteristics Hill PDA has applied 'capture rates' to the various retail categories and their expenditure generation. These capture rates have been applied for Maitland LGA households as well as households located within the LGA's defined trade area. As a result the retail expenditure calculations discussed in this section have been based on trade areas defined both within and beyond the LGA's boundary.

A trade area refers to a geographical area whereby the majority of expenditure within that area is captured by the subject retail centre or centres. Alternatively it refers to a major proportion of expenditure where trade areas overlap. There may be different trade areas for different types of retail stores or commodities.

For example for food and grocery shopping shoppers generally choose a retail centre closer to where they live provided that the retail offer is good.

'Top up' shopping is often referred to as shopping for a few items of food and groceries when needed quickly. This type of shopping is often conducted in a range of possible locations such as petrol stations and convenience stores.

The choice of retail centres for clothing shopping is more limited. In this case shopping for clothes can become quasi-entertainment rather than a chore. Often it's a case of comparing items in different stores and so shoppers will travel further to centres with a greater retail offer. In this case the major destinations for clothes shopping are the larger centres such as Greenhills, Maitland CBD, Kotara Westfield, Myer and David Jones Newcastle and Raymond Terrace.

We have used value judgement taking into account travel distances, accessibility and the strength of retail offer to apportion trade generated within Maitland and areas surrounding Maitland. These value judgements have been based on our industry expertise of retail, knowledge of existing and forecast retail demand and access between centres.

For example, owing to the strength of retailing within Newcastle with centres such as Kotara and department stores such as Myer and David Jones it has been assumed that a portion of expenditure is lost from the LGA in the bulky goods and department store categories. Conversely expenditure from neighbouring LGAs such as Dungog, Singleton and Cessnock will be gained in some categories such as bulky goods, clothing and discount department stores. For the purposes of this assessment, it has also been assumed that the Myer department store, proposed as part of the Stockland Greenhills expansion, has been approved and is operational as of 2011. This will act as a magnet for expenditure within the department store category.

Owing to the nature of supermarket and specialty food shopping, the vast majority of expenditure within this category has been retained within the respective LGAs. In fact over 90% of supermarket, grocery, specialty food, fast food,

restaurant and personal service related expenditure has been assumed for retention by retailers within the Maitland LGA.

Based on this refined analysis, it was found that as of 2006 there was demand for 135,063sqm of retail floorspace in Maitland. By 2031, as a result of population growth in Maitland and demographic changes in surrounding LGAs, there will be demand for 302,010sqm or a net increase of 166,947sqm. This represents a 123% increase on existing floorspace.

Table 26 - Growth in Demand for Retail Floorspace (sqm) by Category in Maitland 2006 - 2031

YEAR	2006	2011	2021	2031	Net Change
Supermarkets & Grocery Stores	23,453	27,466	41,879	54,153	30,701
Specialty Food Stores	10,762	12,602	19,264	24,894	14,132
Fast-Food Stores & Restaurants	18,445	21,585	33,178	42,837	24,393
Department Stores	17,467	20,326	30,066	38,490	21,024
Clothing Stores	11,173	12,937	18,706	23,800	12,627
Bulky Goods Stores	30,332	35,191	51,338	65,463	35,131
Other Personal & Household Goods Retailing	16,813	19,587	29,053	37,216	20,403
Selected Personal Services	6,619	7,737	11,776	15,156	8,537
Total Retailing	135,063	157,432	235,260	302,010	166,947

Source: Hill PDA, BS Household Expenditure Survey 1998-99 and Marketinfo 2006

9.4 Existing Supply vs. Future Demand

By comparing the forecast growth in demand that will be generated within the LGA over the study period, with actual floorspace, it has been possible to identify whether there is an existing surplus or deficit of retail floorspace in Maitland LGA.

Taking the Table 26, and the column referring to the net growth in demand for retail floorspace, it has also been possible to identify the net increase in floorspace that will be required in the LGA over the study period, by retail category minus existing floorspace.¹

Table 27 - Growth in Floorspace Demand (sqm) Factoring in Existing Supply 2006 - 2031

YEAR	2006 Demand	Surplus	2011 Demand	Additional Required	2021	Additional Required	2031	Additional Required
Supermarkets & Grocery Stores	23,453	7,677	27,466	3,664	41,879	- 10,749	54,153	- 23,023
Specialty Food Stores	10,762	-3,952	12,602	- 5,792	19,264	- 12,454	24,894	- 18,084
Fast-Food Stores & Restaurants	18,445	-6,895	21,585	- 10,035	33,178	- 21,628	42,837	- 31,287
Department Stores	17,467	-1,437	20,326	- 4,296	30,066	- 14,036	38,490	- 22,460
Clothing Stores	11,173	897	12,937	- 867	18,706	- 6,636	23,800	- 11,730
Bulky Goods Stores	30,332	41,378	35,191	36,519	51,338	20,372	65,463	6,247
Other Personal & Household Goods	16,813	7,797	19,587	5,023	29,053	- 4,443	37,216	- 12,606
Selected Personal Services	6,619	1,191	7,737	73	11,776	- 3,966	15,156	- 7,346
Total Retailing	135,063	46,657	157,432	24,288	235,260	- 53,540	302,010	- 120,290

Source: Hill PDA, BS Household Expenditure Survey 1998-99 and Marketinfo 2006

¹ Based on Supply calculated by Hill PDA Floorspace Surveys 2008

Table 29 above shows that taking into account existing supply and assuming no additional retail supply by 2031 there will be demand (in red) for an additional 120,290sqm of retail floorspace in Maitland LGA. This demand will be across all categories except bulky goods retailing (blue colour).

The growth in demand for floorspace has also been distributed to the East, West and Central Sectors. This demand was apportioned using the contribution of each sector to demand (as a result of household numbers and size). As shown in the table below the share of demand generated within each sector changes as housing is forecast to increase in the East and West, at various stages over the study period, and generate a greater proportion of retail demand within the LGA as a whole.

Table 28 - Changing Contribution of Maitland Sectors to Household Expenditure Generation 2006 - 2031

Sector	2006	2011	2021	2031
East	58%	57%	53%	45%
Central	16%	16%	14%	14%
West	26%	27%	33%	42%
	100%	100%	100%	100%

Source: Hill PDA

Short Term 2006 – 2011

The table below shows the net growth in demand for retail floorspace, within each sector, based on household expenditure generation. The table accounts for trade lost from the LGA and trade captured. It does not however factor in the spatial distribution of existing floorspace. The table assumes no additional retail supply to the existing supply.

Table 29 shows that by 2011 there will be no net additional demand for retail floorspace across the LGA. This however is a result of the existing oversupply of supermarket and grocery floorspace, personal and household goods and bulky good premises in particular. The oversupply in these categories masks the fact that by 2011, there will be an undersupply (figures in red) of specialty food retail (5,792sqm), fast food premises and restaurants (10,035sqm) and department stores (4,296sqm).

Within the **Eastern Sector**, as of 2011 we forecast an undersupply of floorspace of 25,484sqm. This figure does not however factor in the proposed 37,700sqm of retail floorspace proposed as part of the Stockland Geenhills Shopping Centre expansion.

Within the **Central Sector**, supply will exceed demand generated in 2011 by 27,932sqm. There will however be an modest undersupply of specialty food (683sqm) and fast food and restaurant floorspace (217sqm).

Within the **Western Sector**, supply will exceed demand generated by 21,839sqm. There will be an undersupply of specialty food (2,008sqm), fast food and restaurant floorspace (3,767sqm), department store space (5,336sqm), clothing (3,097sqm), other personal household goods (2,432sqm) and selected personal services (1,331). The undersupply in these categories is masked by the existing oversupply (36,211sqm) of bulky goods floorspace provided in the West Sector.

At present it is anticipated that the undersupply in department store and clothing floorspace is being met by higher order centres such as Newcastle, which has major department stores and a wider retail offer. A major portion of

this demand would be captured back to the LGA, should the proposed 12,000sqm Myer Department Store and the 7,000sqm discount department store be permitted as part of the Stockland Stand Alone Shopping Centre.

Specialty foods and restaurants are however a more localised retail market that by all accounts is insufficiently developed across all sectors of Maitland LGA. There is an opportunity for Maitland CBD to capitalise on this existing latent demand as part of a revitalisation programme.

Table 29 - Net Growth in Demand for Retail Floorspace (sqm) by Sector – Short Term (2011)

Category	East	Central	West
Supermarkets & Grocery Stores	-3,923	3,987	3,599
Specialty Food Stores	-3,100	-683	-2,008
Fast-Food Stores & Restaurants	-6,051	-217	-3,767
Department Stores	-3,771	4,811	-5,336
Clothing Stores	-1,315	3,544	-3,097
Bulky Goods Stores	-6,484	6,791	36,211
Other Personal & Household Goods Retailing	-262	7,717	-2,432
Selected Personal Services	-578	1,982	-1,331
Total Retailing	- 25,484	27,932	21,839
Proportion of Total Retailing Demand	58%	16%	26%

Source: Hill PDA, BS Household Expenditure Survey 1998-99 and Marketinfo 2006

Note: Table assumes no additional retail supply to existing

Note: Red Figures show undersupply, blue oversupply

Medium Term 2011 – 2021

Table 30 shows that by 2021 there will be sufficient demand generated for an additional 53,540sqm of retail floorspace. Whilst there will still be an oversupply of bulky goods floorspace (20,372sqm) across the LGA, there will be an undersupply (figures in red) in all other categories assuming there is no additional supply from 2006. Of particular note will be the demand generated for an additional 14,000sqm of department store floorspace and an additional 10,700sqm of supermarket floorspace. The latter would translate into two additional main line supermarkets and two small supermarkets.

Within the **Eastern Sector**, demand for an additional 68,258sqm of retail floorspace will be generated. This figure would reduce should the additional 37,000sqm of proposed retail floorspace be approved as part of the Stockland Greenhills extension.

This additional demand is a result of the 7,955 dwellings anticipated for development within the East Sector between 2006 and 2021. With respect to supermarket provision, the growth in demand could support an additional three main line supermarkets or seven smaller supermarkets within the East Sector.

Within the **Central Sector**, there will still be an oversupply of retail floorspace (15,068sqm) compared to demand generated within this small sector. By 2021 there will be demand however for an additional 1,782sqm of specialty food retail within the Central Sector and 2,129sqm of fast food and restaurant floorspace.

Within the **Western Sector**, overall demand will closely equate to supply however once again this high level analysis is masked by the oversupply of bulky goods floorspace. Excluding this floorspace from the equation there will be demand for retail across all retail categories. This additional demand will be a result of the 6,968 dwellings anticipated for development within the West Sector between 2006 and 2021. The main focus of development

during this period will be within Aberglasslyn (1,800 dwellings), Lochinvar (2,000 dwellings), Anambah (1,000 dwellings) and Farley (1,000 dwellings).

Table 30 - Net Growth in Demand for Retail Floorspace (sqm) by Sector – Medium Term (2021)

Category	East	Central	West
Supermarkets & Grocery Stores	-11,861	1,609	-497
Specialty Food Stores	-6,770	-1,782	-3,901
Fast-Food Stores & Restaurants	-12,442	-2,129	-7,058
Department Stores	-9,117	3,199	-8,118
Clothing Stores	-4,472	2,587	-4,751
Bulky Goods Stores	-15,333	4,116	31,589
Other Personal & Household Goods Retailing	-5,460	6,152	-5,134
Selected Personal Services	-2,802	1,316	-2,480
Total Retailing	-68,258	15,068	-350
Proportion of Total Retailing Demand	57%	16%	27%

Source: Hill PDA, BS Household Expenditure Survey 1998-99 and Marketinfo 2006

Note: Table assumes no additional retail supply to existing

Note: Red Figures show undersupply, blue oversupply

Long Term 2021 – 2031

By 2031 there will be demand for an additional 120,290sqm of retail floorspace across the LGA. This assumes that there is no additional supply from 2006. Should the Stockland proposal be approved, this additional net demand would however reduce to 82,500sqm.

Within the **Eastern Sector**, demand for an additional 69,777sqm of retail floorspace will be generated. This additional demand is a result of the 8,635 dwellings anticipated for development within the East sector between 2006 and 2031 and the growth in expenditure of the existing resident population.

Within the **Central Sector**, existing supply will continue to outweigh demand. This may be expected however given the small geographic scale of the Central Sector (only 14% of demand generated within the LGA) yet the location of the CBD within it.

Within the **Western Sector**, demand will be generated for an additional 62,291sqm of retail floorspace. This will translate into demand for a centre with twice the amount of retail floorspace as the existing Greenhills Centre or a centre that provides four times as much retail as the existing Rutherford Town Centre. This additional demand is a result of the 14,008 dwellings anticipated for the West sector between 2006 and 2031 (with particular reference to the additional 7,000 dwellings between 2021 and 2031).

Table 31 - Net Growth in Demand for Retail Floorspace (sqm) by Sector – Long Term (2031)

Category	East	Central	West
Supermarkets & Grocery Stores	- 12,307	969	- 11,686
Specialty Food Stores	- 6,969	- 2,075	- 9,041
Fast-Food Stores & Restaurants	- 12,766	- 2,627	- 15,896
Department Stores	- 9,264	2,792	- 15,990
Clothing Stores	- 4,497	2,354	- 9,587
Bulky Goods Stores	- 15,466	3,456	18,255
Other Personal & Household Goods Retailing	- 5,612	5,755	- 12,750
Selected Personal Services	- 2,896	1,145	- 5,596
Total Retailing	- 69,777	11,770	- 62,291
Proportion of Total Retailing Demand	45%	14%	42%

Source: Hill PDA, BS Household Expenditure Survey 1998-99 and Marketinfo 2006

Note: Table assumes no additional retail supply to existing

Note: Red Figures show undersupply, blue oversupply

Non Retail Floorspace within Centres

Not all shopfront floorspace within a retail strip relates to retail uses. Uses such as real estate agents, banks, travel agents, dentists and Australia Post are classified by the ANZIC code as commercial.

With respect to shop front commercial floorspace it is possible to estimate its growth in demand on a pro-rata basis with the growth in retail space. In high trading indoor centres commercial space occupies around 5% to 7% of specialties. In older indoor strip shopping centres the proportion may be as high as 40%, although 20% is more common.

9.5 Jobs by Store Type

Assuming the growth in demand for retail in Maitland LGA can translate into businesses and supply within the LGA, the approximate number of jobs that will be created in Maitland LGA over the study period can be estimated.

Industry surveys of retail floor space suggest that there is 1 employee per 21sqm to 60sqm of retail floor space. The higher employee density (1 per 21-30sqm) generally relates to supermarket and grocery stores, small shops and personal services while the lower employee density (1 per 45 - 60sqm) relates to department stores and bulky goods stores.

Table 32 - Potential New Retail Jobs in Maitland 2006 – 2031

Category	Yield	Floorspace Demand 2031	Jobs 2031	Net Additional Floorspace 2031	Additional Jobs by 2031
Supermarkets & Grocery Stores	21	54,153	2,579	23,023	1,096
Specialty Food Stores	30	24,894	830	18,084	603
Fast-Food Stores & Restaurants	30	42,837	1,428	31,287	1,043
Department Stores	45	38,490	855	22,460	499
Clothing Stores	40	23,800	595	11,730	293
Bulky Goods Stores	60	65,463	1,091	-6,247	-104
Other Personal & Household Goods Retailing	40	37,216	930	12,606	315
Selected Personal Services	30	15,156	505	7,346	245
Total Retailing		302,009	8,813	120,290	3,990

Source: Hill PDA Research ABS Retail Survey 1998/99

This estimated net growth in retail jobs is significantly higher than the TDC forecast of 3,101 for retailing jobs between 2006 and 2031 (at 3,990 jobs) that is discussed in the proceeding section of this Study. Based on industry trends of retailing becoming more “suburbanised” and the likely shift in higher average household incomes entering Maitland, it is not surprising to see a more detailed approach to household expenditure and floor space demand deriving a higher job growth forecast.

Even assuming a State average population growth rate of 1% per annum coupled with a household expenditure growth of 1% per annum, one can assume an area’s demand for retail floorspace will increase by 50% over 30 years. In the case of Maitland, with a medium population growth rate of 2%, it is understandable that floorspace will more than double over the next 30 years.

10. EMPLOYMENT GROWTH

The following section investigates the changing demand for employment generating floorspace other than retail and shopfront related space. These other forms of employment generating uses can be located in town centres (i.e. culture, government, and accommodation and education floorspace) or employment lands (industrial and manufacturing). Accordingly the growth or decline of these industries in Maitland LGA will have an impact on the extent of land required and the appropriate form of planning controls.

10.1 Methodology and Assumptions

The Lower Hunter Regional Strategy establishes an employment projection of 4,700 additional jobs for Maitland LGA by 2031. The following section compares the employment forecasts generated by the NSW Government, namely the Transport Data Centre's (TDC) employment forecasts (November 2006) with the DoP projection.

The TDC forecasts for 2006 are based on the detailed analysis of employment growth across the Sydney Greater Metropolitan Region by industry category. This data is in turn distributed by LGA and Journey to Work nodes (job nodes). It is important to note that the TDC employment forecasts are made on particular assumptions regarding the global economy, increased productivity and the national growth of Gross Domestic Product. Their assumptions include data relating to land releases, local area population growth rates, industry trends about office space and storage, government policy on education and health and so on.

Whilst the TDC employment forecasts are widely used for planning purposes, as with any means of forecasting long term trends there are limitations with their accuracy. Of particular relevance to this Study is the potential for changes to the rate of population growth within the Lower Hunter Region since the preparation of the TDC forecasts and how this may affect the quantum of employment growth.

As retail is an industry that correlates closely with population growth, in the interests of accuracy, this Study has utilised the results of the detailed retail expenditure modelling (discussed in the preceding section) to determine how demand for retail floorspace may translate into retail jobs for Maitland LGA. The results of this detailed analysis has been compared with the TDC forecasts and discussed further below. Categories relating to mining and agriculture have however been excluded from detailed analysis as they are beyond the scope of this Study.

10.2 Forecasted Job Growth

Based on TDC forecasts, Maitland will experience a net increase of just over 6,000 jobs by 2031. Accordingly it is forecasted that the employment growth projection of 4,700 jobs for the LGA, established by the Lower Hunter Regional Strategy will be exceeded by 1,300 jobs. The top five industries for growth are anticipated to be:

1. Retail: +3,101 jobs or over 50% of all new jobs (Hill PDAs refined figure has found that the number of jobs in this industry is likely to be closer to 3,900);
2. Education: +789 jobs or 14% of all new jobs;

3. Health Services: + 776 jobs or 13% of all new jobs;
4. Accommodation, restaurants and clubs: + 665 jobs or 11% of new jobs; and
5. Property and business services: + 579 jobs or 10% of all new jobs.

In fact the top five growth industries above represent 98% of all new jobs anticipated for the LGA in the next 25 years.

The growth of the top five industries will be largely related to the anticipated growth in population over the next 25 years. For example, the growth in retail, accommodation, restaurant and club related jobs will stem from the growing demand for these services owing to a greater number of residents.

These jobs will also relate to wider lifestyle trends discussed in Section 5 regarding the growing popularity of retail and restaurant facilities as destinations for entertainment, the growing level of household discretionary spending as a result of a strong economy and the growing affluence of households in Maitland.

The growth in education and medical service related jobs are a likely result of both the anticipated growth in family households in the LGA and the ageing of the population. The trends are consistent with wider regional and state demographic trends.

The five main job growth categories outlined above are all well suited to centre locations. The importance of Maitland's centres to employment growth can not therefore be underestimated. Furthermore the importance of ensuring Maitland's centres are well placed to facilitate this growth and development will be paramount.

10.3 Forecasted Job Decline

Consistent with the employment trends experienced in Maitland between 2001 and 2006 and wider NSW trends, the number of jobs within manufacturing industries are forecasted to continue to decline. Of particular note are jobs in food industries; textiles, clothing and footwear; wood and paper products and metal products. It is important to note however, that these industries only equate to a net loss of 117 jobs.

A major single industry anticipated to experience a significant job loss is however government administration and defence. The loss of 232 jobs is the greatest in any one category. Combined with the loss of 132 jobs in the 'other community services' category, concern is raised as to why these jobs are relocating out of Maitland LGA despite the growing size of the LGA's population and therefore demand for these services.

The TDC figures also show an anticipated net decline of 108 construction jobs from 2006 to 2031. This trend is at odds however with the significant forecasted growth in dwelling construction over the same period to accommodate population growth. For this reasons the TDC distribution of construction jobs within the Lower Hunter Region is questioned and not considered reflective of likely trends.

The table below depicts the key industries anticipated by the TDC for employment growth or decline in Maitland between 2006 and 2031.

Table 33 - Forecasted Employment Change by Industry in Maitland 2006 – 2031

Year	2006	2011	2016	2021	2026	2031	Net Change
Agriculture, forestry, fishing	479	551	614	672	722	763	284
Mining	264	268	267	258	245	229	-35
Food industries	225	231	230	225	216	204	-21
Textiles, clothing, footwear	75	52	32	20	12	7	-68
Wood and paper products	80	72	66	61	56	52	-28
Printing, publishing, recording	157	165	168	168	167	165	7
Chemicals and petroleum	146	154	179	202	225	245	98
Metal products	303	290	278	265	250	232	-71
Non-metallic products	177	171	176	181	187	193	16
Machinery, transport and equipment	316	304	336	377	430	493	177
Other and undefined manufacturing	269	255	275	292	307	315	46
Energy, water, sewerage	100	87	77	68	61	54	-47
Construction	1,273	1,267	1,261	1,239	1,206	1,166	-108
Wholesaling	756	814	879	909	923	932	176
Retailing	4,697	5,179	5,793	6,428	7,091	7,798	3,101
Transport and storage	838	859	866	843	796	733	-105
Communications	248	270	282	289	292	292	43
Finance, insurance	484	470	455	435	410	382	-102
Property and business services	1,650	1,813	1,960	2,073	2,160	2,228	579
Public administration and defence	530	444	405	368	333	300	-230
Education	1,777	1,935	2,110	2,273	2,423	2,566	789
Health services	1,620	1,760	1,937	2,108	2,261	2,396	776
Other community services	574	521	504	484	463	441	-132
Cultural and recreational services	313	355	377	395	409	421	108
Accommodation, restaurants, cafes, clubs	1,002	1,122	1,267	1,405	1,538	1,667	665
Personal and other services	769	825	873	913	946	975	206
Unclassified	336	292	275	266	260	256	-79
Total	19,460	20,528	21,942	23,217	24,384	25,504	6,045

Source: Transport Data Centre, Hill PDA

* Top five growth industries highlighted in yellow

Table 34 - Forecasted Employment Change by Industry in Maitland 2011 – 2031 as a Percentage

Year	2011	2016	2021	2026	2031
Agriculture, forestry, fishing	15%	28%	40%	51%	59%
Mining	2%	1%	-2%	-7%	-13%
Food industries	2%	2%	0%	-4%	-9%
Textiles, clothing, footwear	-30%	-57%	-73%	-84%	-90%
Wood and paper products	-9%	-16%	-23%	-29%	-35%
Printing, publishing, recording	5%	7%	7%	6%	5%
Chemicals and petroleum	5%	22%	38%	54%	67%
Metal products	-4%	-8%	-13%	-18%	-23%
Non-metallic products	-3%	-1%	2%	5%	9%
Machinery, transport and equipment	-4%	6%	19%	36%	56%
Other and undefined manufacturing	-5%	2%	8%	14%	17%
Energy, water, sewerage	-13%	-24%	-32%	-40%	-46%
Construction	-1%	-1%	-3%	-5%	-8%
Wholesaling	8%	16%	20%	22%	23%
Retailing	10%	23%	37%	51%	66%
Transport and storage	3%	3%	1%	-5%	-13%
Communications	9%	14%	16%	18%	17%
Finance, insurance	-3%	-6%	-10%	-15%	-21%
Property and business services	10%	19%	26%	31%	35%
Public administration and defence	-16%	-24%	-31%	-37%	-43%
Education	9%	19%	28%	36%	44%
Health services	9%	20%	30%	40%	48%
Other community services	-9%	-12%	-16%	-19%	-23%
Cultural and recreational services	14%	21%	26%	31%	35%
Accommodation, restaurants, cafes, clubs	12%	26%	40%	53%	66%
Personal and other services	7%	14%	19%	23%	27%
Unclassified	-13%	-18%	-21%	-23%	-24%

Source: Transport Data Centre, Hill PDA

10.4 Regional Job Distribution

Notwithstanding the fact that based on TDC forecasts, Maitland will exceed its employment projection of 4,700 jobs by 2031 by 1,345 jobs; the share of jobs it is forecast to gain within the Lower Hunter Region is disproportionate. For example Maitland currently accommodates 11.5% of all employment in the Lower Hunter Region.

Maintaining this share based on employment growth projections, Maitland should be seeking an additional 7,589 jobs. Consequently, Maitland is actually anticipated to experience a decline in the share of jobs within the Lower Hunter Region, despite the fact that it is gaining the overwhelming single share of population growth.

This disproportionate job distribution can be exemplified in another way based on forecasted population growth. Applying dwelling targets and existing labour participation rates, it is estimated that demand will be generated for an additional 28,000 jobs within Maitland LGA over the study period. However, to retain the existing job containment rate for the LGA of 43%, an additional 12,074 jobs will need to be provided within Maitland by 2031.

Based on Transport Data Centre employment forecasts, Maitland is anticipated to gain an additional 6,000 jobs by 2031. This will exceed the DoP job projection by 1,300 jobs; however it will fall short, by 6,074, of the necessary number of jobs to maintain the existing employment containment levels.

A reduced rate of job containment within Maitland LGA will have significant social and economic impacts. This will be particularly the case if the significant growth in population growth (and in turn resident labour force) is realised.

From a social perspective, a lack of job opportunities within the LGA for the resident work force will compel residents to commute to other LGAs for employment. This will result in an increase in the amount of time an employee spends travelling (to the detriment of their physical health and stress levels) as well as time spent away from leisure and family activities. It also places greater strain on the ability to find work owing to the need to travel further to find opportunities and the need to compete with a wider labour force market.

A greater need to travel for work also increases living costs for family and single households. This is becoming a more prominent issue in a softening Australian economic market and with the growth of petrol prices. From a wider economic perspective, the containment of the resident labour force also results in benefits for the LGA's economy through a reduction of escaped retail expenditure and the support of local businesses.

From an environmental point of view, more people travelling longer distances to work also creates significant impacts. This is particularly the case when commuting is to / from areas that are not located on a major transport corridor with frequent services. In this scenario, more employees choose (or are required) to drive to work. This increases levels of pollution and traffic generation to the detriment of road infrastructure and air quality. This may be a particular issue of concern for Maitland given the poor intra regional transport links (particularly between LGAs other than Newcastle in the Hunter) and the distances required to travel, given the geographic scale of the Hunter.

For the above reasons, it is recommended that a level of job growth for Maitland is encouraged that creates a sustainable community and as a minimum maintains the existing level of job containment. Consequently it is recommended that a more aspirational job growth target for Maitland LGA would be closer to 12,000.

It is important to reiterate that the 12,000 job figure is based on the Council's estimated rate of population growth. A reduction or increase in the forecast population growth, as well as the existing level of labour force participation, could alter this target. It is also important to note that even with the maintenance of the existing level of job containment, owing to population growth, there will still be a greater number of people required to commute from the LGA for employment.

Finally, as the TDC forecasts that job growth will fall short (or close to half) of the 12,000 job figure recommended by this Study, it will be necessary for the Council to work with the State Government and other relevant parties to increase the potential for job growth. This means that the Council will need to implement measures to actively attract new businesses and industries to the LGA. A host of mechanisms will need to be employed to achieve this objective including the economic promotion of the LGA to businesses, the generation and promotion of economic strategies to support business growth within Maitland in addition to fiscal and development incentives for business to relocate to Maitland or for existing businesses to expand and employee locally.

10.5 Floorspace Implications

In order to examine the implications of job growth and decline to centres and employment lands, Hill PDA has translated the TDC tables above into floorspace and site area. It is important to note that the floorspace estimates

outlined below are based entirely on TDC forecasts as opposed to the alternative means of projecting employment growth discussed in this report i.e. employment demand as a result of population growth or employment demand to maintain existing employment containment levels.

The TDC forecasts have been translated into floorspace using standard industry employee yields (as shown in the third column of the table) and appropriate FSRs for industries in Maitland¹.

The table shows the overall increase in demand for commercial floorspace over the study period. In particular it shows an increase in demand for floorspace relating to property and business services (17,000sqm). This type of floorspace is well suited to centre locations such as Maitland CBD. The growth of this industry is a common trend across the state and is in part a reflection of the growth in the New Economy. In Maitland's case it is also a reflection of the population growth and associated property development / real estate industry.

The table also shows the significant growth in demand for retail floorspace. Whilst this positive trend is consistent with Hill PDA's findings, the quantum of additional floorspace required is considered an underestimate. Hill PDA's expenditure modelling (as outlined above) applies more detailed survey analysis to estimate demand generated within an area for retail. Hill PDA's methods for retail analysis are therefore more refined than the estimate provided below. Based on Hill PDA's analysis, demand will be generated in Maitland for an additional 3,900 jobs compared to the TDC figure of 3,100.

The decline of jobs within the construction industry is also considered at odds with expectations for significant dwelling development in Maitland over the next 25 years.

The TDC does estimate however a small net growth in manufacturing jobs in the LGA and wholesale trade. The growth of jobs in wholesale trade is consistent across the Sydney GMA. The implication of the increase in demand for manufacturing floorspace of 11,060sqm or 22,120sqm of site area is discussed in greater detail below.

As highlighted in Section 13.1 above, as with any type of forecasting, the TDC methodology has limitations. In Maitland LGA's case, one such limitation may relate to changes to the size and rate of forecast population growth over the study period. Accordingly, we recommend that the employment forecasts discussed and utilised in this Study (and their effect to floorspace demand) are reviewed at reasonable intervals (say every 5 years) over the study period and refined accordingly.

¹ An FSR of 1:1 was used for Commercial and Retail ; 0.5:1 was used for Construction and Industry and Special Uses

Table 35 - Floorspace Demand in Maitland 2006 - 2031 by Broad Industry Category

Use Category		Yield*	2006	2031	Change	Site Area
Commercial	Communication Services	60	14,880	17,520	2,640	2,640
	Finance and Insurance	30	14,520	11,460	- 3,060	- 3,060
	Govt. Administration & Defence	30	15,900	9,000	- 6,900	- 6,900
	Property & Business Services	30	49,500	66,840	17,340	17,340
					10,020	10,020
Retail	Accommodation, Cafes & Rest.	40	40,080	66,680	26,600	26,600
	Personal and Other Services	30	23,070	29,250	6,180	6,180
	Retail Trade	40	187,880	311,920	124,040	124,040
					156,820	156,820
Construction & Industry	Construction	70	89,110	81,620	- 7,490	- 14,980
	Electricity, Gas and Water Supply	70	7,000	3,780	- 3,220	- 6,440
	Manufacturing	70	122,360	133,420	11,060	22,120
	Transport and Storage	100	83,800	73,300	- 10,500	- 21,000
	Wholesale Trade	50	37,800	46,600	8,800	17,600
					- 1,350	- 2,700
Special Uses	Cultural & Recreational Services	50	15,650	21,050	5,400	10,800
	Education	80	142,160	205,280	63,120	126,240
	Health and Community Services	40	87,760	113,480	25,720	51,440
					94,240	188,480
				Total	259,730	352,620

Source: TDC Employment Forecasts 2006, Hill PDA

*Sqm / Employee

Table 35 is based on TDC employment forecasts for 2031 (+ 6045 jobs). As discussed in Section 10.4 of this Study however, in order to maintain existing employment containment levels for the LGA, it will be necessary for the LGA to generate over 12,000 new jobs by 2031. This scenario would require additional floorspace to be developed in the LGA to accommodate these jobs.

The quantum of additional floorspace and site area to accommodate the increase in jobs will vary dependant on the type of employment generated. For indicative purposes however, it has been calculated that the additional demand for floorspace would range between 180,000sqm (assuming all of the additional 6,029 jobs were commercial office jobs) to 420,000 (assuming all additional jobs were traditional industrial jobs).

Applying the same FSR's by floorspace type as the table above, the commercial jobs would translate into the need for 180,000sqm¹ of additional site area (or 18ha) and the industrial jobs an additional 840,000sqm² of site area (or 84ha).

10.6 Implications for Employment Lands

The following section explains and discusses potential future implications to Maitland's Industrial areas based on forecasted changes. The TDC employment growth estimates for various industrial sectors have been used as a

¹ Based on an FSR of 1:1

² Based on an FSR of 0.5:1

basis for these forecasts. The forecasts have been used down to the level of travel zone, which is the most detailed level of information available.

Forecasted job growth has been translated into demand for floorspace using benchmark employment yields. In turn using an FSR of 0.5:1 these floorspace estimates have been translated into site area. This section discusses how growth or decline in demand for industrial floorspace can be addressed to ensure that a range of employment opportunities are provided to existing and future local residents.

Rutherford Travel Zone

As shown in the table below, based on TDC employment estimates net, demand will be generated within the Rutherford Travel Zone for 8,286sqm of floorspace. Based on an FSR of 0.5:1 this translates into demand for an additional 16,572sqm of site area.

The TDC forecasts that the greatest share of the growth in demand will occur in the machinery, transport and equipment industry (13,091sqm of site area). Growth will also occur in the manufacture of chemicals and petroleum (9,450sqm), non-metallic products (3,788sqm) and in other undefined sectors (3,250sqm).

The approved Anambah Business Park (Stages 1 – 6) provides an additional 516,000sqm of site area zoned for employment uses. The estimated 16,572sqm of additional floorspace required for the Rutherford area only represents 3.3% of this area. In addition to the area recently zoned for industrial uses in the Anambah Business Park, industrial land was also approved for subdivision into 57 lots at 91 Gardiner's Street Rutherford in 2007.

Whilst it is apparent that there is a significant surplus of land zoned and available for industrial uses than forecasted, the forecasts could be an underestimate of floorspace developed in the area over the study period and therefore business growth / job generation. This is because the forecasts reflect the current knowledge of trends and issues affecting the LGA and the availability of existing land.

With the approved release of significant amounts of attractive industrial land in Rutherford (as discussed above) a greater number of businesses may be attracted to the LGA, this will be particularly the case if strong marketing, targeting new or expanding businesses to relocate to Rutherford, is implemented. It is understood that this approach is being used for the Anambah Business Park. Council should support this approach for the LGA as a whole and the net positive flow on benefits it could generate for Maitland LGA by highlighting to a wider audience the benefits of operating your business in Maitland and the availability of good quality land.

Table 36 - Rutherford Travel Zone: Job and Floorspace Demand 2006 - 2031

Year	Jobs 2006	Floorspace 2006	Jobs 2021	Floorspace 2021	Jobs 2031	Floorspace 2031	Net Change Jobs	Net Change Floorspace	Net Change Site Area
Food industries	37	2,609	40	2,814	38	2,663	1	54	1072
Textiles, clothing, footwear	56	3,951	15	1,052	5	383	- 51	- 3,568	- 7,135
Wood and paper products	38	2,677	35	2,445	32	2,237	- 6	- 440	- 880
Printing, publishing, recording	11	779	14	966	14	1,015	3	236	47
Chemicals and petroleum	100	6,994	138	9,683	167	11,719	67	4,725	9,445
Metal products	174	12,146	152	10,629	134	9,361	- 40	- 2,785	- 5,569
Non-metallic products	66	4,591	82	5,732	93	6,485	27	1,894	3,788
Machinery, transport and equipment	118	8,285	154	10,745	212	14,830	94	6,545	13,091
Other and undefined manufacturing	127	8,920	139	9,741	151	10,545	23	1,625	3,249
Total	728	50,951	769	53,807	846	59,237	118	8,286	16,572

Source TDC Employment Estimates 2006, Hill PDA

Thornton Travel Zone

As shown in the table below, based on TDC employment estimates, there will be net increase in demand for 4,935sqm of industrial floorspace. Based on an FSR of 0.5:1 this translates into demand for an additional 9,870sqm of site area.

The TDC forecasts the main portion of growth (5,291sqm of site area) will occur in the machinery, transport and equipment industry. Growth will also occur in the manufacture of non-metallic products (3,438sqm) and chemicals and petroleum sectors (2,242sqm) to a degree.

Table 37 - Thornton Travel Zone: Job and Floorspace Demand 2006 - 2031

Year	Jobs 2006	Floorspace 2006	Jobs 2021	Floorspace 2021	Jobs 2031	Floorspace 2031	Net Change Jobs	Net Change Floorspace	Net Change Site Area
Food industries	21	1,450	22	1,564	21	1,482	0	32	65
Textiles, clothing, footwear	-	-	-	-	-	-	-	-	-
Wood and paper products	6	392	5	357	5	325	- 1	- 66	- 133
Printing, publishing, recording	-	-	-	-	-	-	-	-	-
Chemicals and petroleum	24	1,669	33	2,307	40	2,790	16	1,121	2,242
Metal products	66	4,607	58	4,030	51	3,548	- 15	- 1,059	- 2,117
Non-metallic products	59	4,160	74	5,196	84	5,879	25	1,719	3,438
Machinery, transport and equipment	49	3,415	63	4,428	87	6,111	39	2,696	5,391
Other and undefined manufacturing	39	2,705	42	2,954	46	3,197	7	492	983
Total	263	18,398	298	20,836	333	23,333	71	4,935	9,870

Source: TDC Estimates 2006, Hill PDA

Metford Travel Zone

As shown in the table below, based on TDC employment estimates, there will be a net loss in demand for industrial floorspace of 2,837sqm in the Metford travel zone over the study period.. In turn this will result in demand for 5,674sqm less site area as of 2031.

The TDC forecasts that some industries will experience growth and therefore an increase in demand for space taking up some of this capacity created in the area. These industries, in order of growth, include the machinery, transport and equipment industry (an increase in demand for 2,223sqm of site area¹), the chemicals and petroleum sector (1,427sqm) and in other undefined sectors (786sqm).

Table 38 - Metford Travel Zone Groth in Job and Floorspace Demand 2006 - 2031

Year	Jobs 2006	Floorspace 2006	Jobs 2021	Floorspace 2021	Jobs 2031	Floorspace 2031	Net Change Jobs	Net Change Floorspace	Net Change Site Area
Food industries	85	5,950	81	5,660	71	4,988	- 14	- 962	- 1,925
Textiles, clothing, footwear	6	433	2	113	1	39	- 6	- 394	- 788
Wood and paper products	20	1,396	10	672	6	403	- 14	- 993	- 1,986
Printing, publishing, recording	27	1,905	28	1,971	27	1,897	- 0	- 7	- 14
Chemicals and petroleum	16	1,113	22	1,521	26	1,826	10	713	1,427
Metal products	24	1,675	21	1,450	18	1,255	- 6	- 420	- 840
Non-metallic products	42	2,937	17	1,214	9	658	- 33	- 2,278	- 4,557
Machinery, transport and equipment	97	6,799	98	6,889	113	7,911	16	1,112	2,223
Other and undefined manufacturing	41	2,893	44	3,077	47	3,286	6	393	786
Total	359	25,100	322	22,567	318	22,263	- 41	- 2,837	- 5,674.17

Source TDC Employment Estimates 2006, Hill PDA

Maitland Travel Zone

As shown in the table below, based on TDC employment estimates, there will be less demand for industrial land over the study period within the Maitland Travel Zone. In fact demand will decline by 2,900sqm of site area². Consistent with wider trends in the LGA, there will be a modest growth in demand for floorspace in some industrial sectors including the 'other' sector (497sqm) and the machinery, transport and equipment sector (287sqm).

Unique however to the Maitland travel zone is the growth in demand (albeit minor) for space relating to the printing, publishing and recording industry (96sqm of site area). The growth in demand for services and equipment in this sector is likely to be generated by the commercial businesses based in the CBD.

The eastern end of Maitland CBD presently has a concentration of light industrial and urban support services. Whilst the retention of these uses should be encouraged in order to continue to provide support for local residents

¹ Based on an FSR of 0.5:1

² Based on an FSR of 0.5:1

and businesses, this area may in time become an attractive quarter for alternative uses such as creative industries.

Potential uses could be live / work apartments (one unit where the occupier resides and runs a small commercial or light industrial business) and artist studios. Basing uses on former industrial sites could make good use of existing buildings and would also be able to take advantage of the lower costs of land in these areas compared to more prominent locations within the centre.

For the centre, this approach is positive as it creates an attractive environment for younger creative persons and small businesses. These people would enhance the cultural character and creative concept identified for Maitland CBD. It would also help to activate the eastern end of the CBD and make good use of heritage protected buildings.

Table 39 - Maitland Travel Zone Industrial Job and Floorspace Demand 2006 -2031

Year	Jobs 2006	Floorspace 2006	Jobs 2021	Floorspace 2021	Jobs 2031	Floorspace 2031	Net Change Jobs	Net Change Floorspace	Net Change Site Area
Food industries	56	3,891	53	3,693	46	3,245	- 9	- 646	- 1,292
Textiles, clothing, footwear	2	162	1	41	0	12	- 2	- 150	- 300
Wood and paper products	6	449	3	213	2	123	- 5	- 326	- 651
Printing, publishing, recording	108	7,545	112	7,850	108	7,594	1	48	96
Chemicals and petroleum	-	-	-	-	-	-	-	-	-
Metal products	23	1,605	20	1,388	17	1,200	- 6	- 406	- 811
Non-metallic products	6	447	3	182	1	92	- 5	- 354	- 709
Machinery, transport and equipment	18	1,230	17	1,217	20	1,373	2	143	287
Other and undefined manufacturing	27	1,860	28	1,977	30	2,108	4	248	497
Total	246	17,189	237	16,561	225	15,747	- 21	- 1,442	- 2,883

Source TDC Employment Estimates 2006, Hill PDA

Tenambit Travel Zone

As shown in the table below, based on TDC employment estimates, demand will be generated within the Tenambit Travel Zone for an additional 650sqm of floorspace. This build area translates into approximately 1,300sqm of site area.

The TDC forecasts the main portion of growth will occur in the machinery, transport and equipment industry (1,390sqm of site area). Growth will also occur in the 'other and undefined manufacturing category (371sqm); printing, publishing and recording industry (161sqm) and non-metallic products (116sqm).

The retention of these industries in the Tenambit travel zone is important as it provides a diversity of employment options. Employment clusters or precincts in a range of locations can also assist in reducing the need for employees to travel greater distances to work each day.

Table 40 - Tenambit Travel Zone Industrial Job and Floorspace Demand 2006 -2031

Year	Jobs 2006	Floorspace 2006	Jobs 2021	Floorspace 2021	Jobs 2031	Floorspace 2031	Net Change Jobs	Net Change Floorspace	Net Change Site Area
Food industries	10	725	11	782	11	742	0	17	34
Textiles, clothing, footwear	2	162	1	43	0	15	- 2	- 147	- 294
Wood and paper products	7	457	6	417	5	382	- 1	- 75	- 151
Printing, publishing, recording	4	260	5	323	5	340	1	81	161
Chemicals and petroleum	-	-	-	-	-	-	-	-	-
Metal products	10	698	9	609	8	534	- 2	- 164	- 328
Non-metallic products	2	143	3	179	3	202	1	58	116
Machinery, transport and equipment	13	885	16	1,146	23	1,580	10	695	1,390
Other and undefined manufacturing	15	1,024	16	1,118	17	1,209	3	186	371
Total	62	4,355	66	4,618	71	5,004	9	650	1,299.13

Source TDC Employment Estimates 2006, Hill PDA

Bolwarra Travel Zone

As shown in the table below, based on TDC employment estimates, demand will be generated within the Bolwarra Travel Zone for an additional 536sqm of floorspace. This build area translates into approximately 1,071sqm of site area.

The TDC forecasts the main portion of growth will occur in the 'other and undefined manufacturing category (345sqm of site area) as well as the chemicals and petroleum sector (313sqm); the printing, publishing and recording industry (162sqm) and a very small increase (34sqm) in food industries.

The retention of these industries in the Bolwarra travel zone is important as it provides a diversity of employment options. Employment clusters or precincts in a range of locations can also assist in reducing the need for employees to travel greater distances to work each day.

Table 41 - Bolwarra Travel Zone Industrial Job and Floorspace Demand 2006 - 2031

Year	Jobs 2006	Floorspace 2006	Jobs 2021	Floorspace 2021	Jobs 2031	Floorspace 2031	Net Change e Jobs	Net Change Floorspace	Net Change Site Area
Food industries	10	725	11	783	11	742	0	17	34
Textiles, clothing, footwear	-	-	-	-	-	-	-	-	-
Wood and paper products	3	196	3	179	2	163	- 0	- 33	- 66
Printing, publishing, recording	4	260	5	323	5	341	1	81	162
Chemicals and petroleum	3	238	5	328	6	395	2	156	313
Metal products	-	-	-	-	-	-	-	-	-
Non-metallic products	-	-	-	-	-	-	-	-	-
Machinery, transport and equipment	3	190	3	242	5	332	2	142	284
Other and undefined manufacturing	14	950	15	1,038	16	1,123	2	172	345
Total	37	2,559	41	2,892	44	3,095	8	536	1,071

Source TDC Employment Estimates 2006, Hill PDA

11. CENTRES IN MAITLAND'S HIERARCHY

To inform the Study, a retail survey was undertaken of the centres and key employment lands within Maitland LGA. This survey calculated the number and type of retail, commercial and industrial premises within the LGA, together with an approximation of the floorspace within each centre.

The types of retail premises were organised into different groups including the following retail groups:

- Supermarket & Grocery Store (Woolworths, Coles, etc);
- Specialty Food (Butcher, Baker, etc);
- Catered Food (restaurants, cafes, take-a-way shops, etc);
- Department Store (Big W, K-mart, etc);
- Apparel (Best & Less, clothing stores, shoes, etc);
- Bulky Goods (furniture stores, Harvey Norman, Sleep City, etc);
- Other Non-Food Retail (Newsagent, Pharmacy, etc); and
- Personal Services (Hairdressers, Chiropractor, Video Hire, etc).

Other types of premises (not including industrial) were organised into the following groups:

- Vacant Shopfront (premises on the ground floor which area vacant);
- Other Commercial (Real Estate Agents, Accountants, Doctors, etc);
- Auto Related Businesses (Car Sales, Auto Repair, Petrol Station, etc); and
- Other Pubs/Clubs etc.

11.1 Existing Supply in Maitland's Centres

There are 18 existing retail / employment centres within the Maitland Local Government Area. The map and tables below show the location of theses centres, the number of retail and commercial establishments by broad store type and anchor tenants located in each.

As show in the tables below, Maitland LGA presently provides in the order of 181,720sqm of retail floorspace. The tables below also show that at the time of survey Maitland provided:

- 114,150sqm of retail floorspace within centres;
- 50,310sqm of other non retail floorspace within centres;
- 8,890sqm of bulky goods floorspace within centres;
- 62,820sqm of bulky goods floorspace outside of centres; and
- 31,040sqm of commercial floorspace within centres.

The calculations for Maitland LGA are shown in the below table.

Table 42 - Breakdown of Floorspace and Type of Premises for Maitland LGA

Category	Floor Area (sqm)	Number of Premises
Supermarket & Grocery Store	31,130	18
Specialty Food	6,810	55
Catered Food	11,550	111
Department Store	16,030	3
Apparel	12,070	93
Bulky Goods	71,710	64
Other Non-Food Retail	24,610	171
Personal Services	7,810	78
Total Retail	181,720	593
Vacant Shopfront	10,660	89
Other Commercial	34,130	278
Auto Related Businesses	9,110	70
Other Pubs/Clubs etc	4,700	20
Total	240,320	1,050

11.2 Existing Supply by Sector

The Maitland Urban Settlement Strategy divides Maitland LGA into three geographic sectors being the East Sector, Central Sector and West Sector. To accord with this approach, this Centres Study has split the LGA into the same three sectors. The suburbs that are included within each of the three sectors are shown in the table below and the map in Section 2 of this Study.

Table 43 - East Central and West Sectors of Maitland LGA

Sector	East Sector	Central Sector	West Sector
	Greenhills	Maitland Town Centre	Rutherford
	East Maitland	Lorn	Lochinvar
	Thornton	Largs	Telarah
	Woodberry		Johnson Street Bulky Goods Cluster
	Metford		
	Tenambit		
	Morpeth		

Source: Maitland City Council

Existing floor area for each sector is shown in the following table. The total floor area is relatively evenly distributed across all three sectors, however, the composition differs considerably. Over half of the floor area within the West Sector is bulky goods. The West Sector provides almost two thirds of the bulky goods floorspace within the LGA.

The Central Sector has a relatively even distribution of uses and provides over half of the LGA's commercial floorspace. The East Sector comprises of more retail floor space than the other two sectors and comprises of a large portion of auto-related businesses. The East Sector also provides the greatest share of floorspace within the LGA (36.4%).

Table 44 - Existing Floorspace (sqm) by Type within each Maitland Sector

Category	Total West Sector	Total Central Sector	Total East Sector	Total Maitland LGA
Supermarket & Grocery Store	10,810	8,310	12,010	31,130
Specialty Food	1,300	1,300	4,210	6,810
Catered Food	1,900	3,180	6,470	11,550
Department Store	0	8,010	8,020	16,030
Apparel	300	5,580	6,190	12,070
Bulky Goods	45,450	12,330	13,930	71,710
Other Non-Food Retail	2,710	10,800	11,100	24,610
Personal Services	700	3,200	3,910	7,810
Total Retail	63,170	52,710	65,840	181,720
Vacant Shopfront	4,090	2,770	3,800	10,660
Other Commercial	3,690	19,430	11,010	34,130
Auto Related Businesses	1,000	2,790	5,320	9,110
Other Pubs/Clubs etc	800	2,300	1,600	4,700
Total	72,750	80,000	87,570	240,320

Source: Hill PDA Survey

The differences across the three sectors are relative to what type of centres are located within their boundaries. A break down of these centres can be seen in the following sections.

Maitland Centres Study

Table 45 - Floorspace by Category by Centre

Centre	Supermarket & Grocery Store	Specialty Food	Catered Food	Department Store	Apparel	Bulky Goods	Other Non-Food Retail	Personal Services	Total Retail	Vacant Shopfront	Other Commercial	Auto Related Businesses	Other Pubs/Clubs etc	Total
TOTAL MAITLAND	7,710	800	2,580	8,010	5,480	3,850	10,200	2,800	41,430	2,500	18,430	1,850	2,000	66,210
TOTAL GREENHILLS	8,770	1,970	2,030	8,020	4,600	3,940	5,130	1,420	35,880	1,110	4,620	2,870	300	44,780
TOTAL EAST MAITLAND	370	600	900	0	400	100	800	1,400	4,570	1,000	3,300	200	0	9,070
TOTAL RUTHERFORD	10,030	800	900	0	300	0	1,360	600	13,990	1,500	1,500	0	0	16,990
Thornton	2,300	540	290	0	190	0	720	290	4,330	390	290	0	0	5,010
Lochinvar	0	0	300	0	0	0	0	0	300	0	0	0	300	600
Woodberry	0	0	100	0	0	0	400	100	600	200	200	0	300	1,300
Metford	100	100	100	0	0	0	100	100	500	0	100	0	0	600
Tenambit	200	400	200	0	0	0	200	200	1,200	300	200	0	0	1,700
Morpeth	270	400	1,300	0	1,000	0	1,750	100	4,820	300	600	0	400	6,120
East Maitland – Melbourne Street / New England Highway	0	200	400	0	0	1,000	800	200	2,600	400	800	1,750	600	6,150
Lorn	600	400	500	0	100	0	500	300	2,100	100	500	0	0	2,700
Telarah	630	200	200	0	0	0	200	100	1,330	0	100	100	0	1,530
Largs	0	100	0	0	0	0	100	100	300	0	0	0	300	600
Glenroy St / Railway Avenue, Thornton	0	0	0	0	0	0	200	0	200	0	400	0	0	600
TOTAL FOR CENTRES	30,980	6,510	9,800	16,030	12,070	8,890	22,460	7,710	114,150	7,800	31,040	6,770	4,200	163,960
Other Development along the New England Highway	150	300	700	0	0	0	300	100	1,550	100	500	1,400	500	4,050
Total Bulky Goods Area	0	0	950	0	0	62,820	1,850	0	65,620	2,760	2,090	940	0	71,410
TOTAL FOR MAITLAND LGA	31,130	6,810	11,550	16,030	12,070	71,710	24,610	7,810	181,720	10,660	34,130	9,110	4,700	240,320

Source: Hill PDA Survey 2008 / Stockland

Table 46 - Number of Premises by Category by Centre

Centre	Supermarket & Grocery Store	Specialty Food	Catered Food	Department Store	Apparel	Bulky Goods	Other Non-Food Retail	Personal Services	Total Retail	Vacant Shopfront	Other Commercial	Auto Related Businesses	Other Pubs/Clubs etc	Total
TOTAL MAITLAND	2	8	27	1	43	9	62	28	180	25	125	15	8	353
TOTAL GREENHILLS	3	8	18	1	30	9	37	13	119	11	48	12	1	191
TOTAL EAST MAITLAND	1	6	9	0	4	1	8	14	43	10	33	2	1	89
TOTAL RUTHERFORD	4	8	9	0	3	0	10	6	40	15	15	0	0	70
Thornton	1	4	3	0	2	0	4	3	17	4	3	0	0	24
Lochinvar	0	0	2	0	0	0	0	0	2	0	0	0	1	3
Woodberry	0	0	1	0	0	0	4	1	6	2	2	0	1	11
Metford	1	1	1	0	0	0	1	1	5	0	1	0	0	6
Tenambit	1	4	2	0	0	0	2	2	11	3	2	0	0	16
Morpeth	2	4	12	0	10	0	17	1	46	3	6	0	2	57
East Maitland – Melbourne Street / New England Highway	0	2	4	0	0	10	8	2	26	4	8	18	2	58
Lorn	1	4	6	0	1	0	5	3	20	1	10	0	0	31
Telarah	1	2	2	0	0	0	2	1	8	0	1	1	0	10
Largs	0	1	0	0	0	0	1	1	3	0	0	0	1	4
Glenroy St / Railway Avenue, Thornton	0	0	0	0	0	0	2	0	2	0	4	0	0	6
TOTAL FOR CENTRES	17	52	96	2	93	29	163	76	528	78	258	48	17	929
Other Development along the New England Highway	1	3	7	1	0	0	3	1	16	1	5	14	3	39
Total Bulky Goods Area	0	0	8	0	0	35	5	1	49	10	15	8	0	82
TOTAL FOR MAITLAND LGA	18	55	111	3	93	64	171	78	593	89	278	70	20	1,050

Source: Hill PDA Survey 2008

11.3 Centre Hierarchy

The Lower Hunter Regional Strategy identifies the role of Maitland's larger centres (Major Regional Centre's, Town Centres and Stand Alone Centres) within a regional hierarchy. The role and scale of the remaining smaller centres (Local Centres and Neighbourhood Centres) have not however been included. Accordingly, this Study establishes a centre hierarchy for Maitland LGA that is inclusive of all existing and potential centres.

The hierarchy was informed by the research undertaken by this Study and a review of:

1. the retail mix and area of commercial floorspace of a centre;
2. the mix in diversity of retail and commercial uses within a centre;
3. the magnitude of primary anchors; and
4. the trade / catchment area of each centre.

To assist in defining Maitland's existing centre hierarchy, we have identified a typology for the varying categories of centres within Maitland's hierarchy. The typology of larger centres (Major Regional Centres, Stand Alone Centres, Specialised Centres, Renewal Corridors and Town Centres) used by this Study have been based on the definitions provided within the Lower Hunter Regional Strategy.

As the Lower Hunter Regional Strategy does not define characteristics for centres that are lower in order than Town Centres, in order to complete Maitland's centre hierarchy Hill PDA has created a tailored typology for Maitland's Local Centres and Neighbourhood Centres as follows:

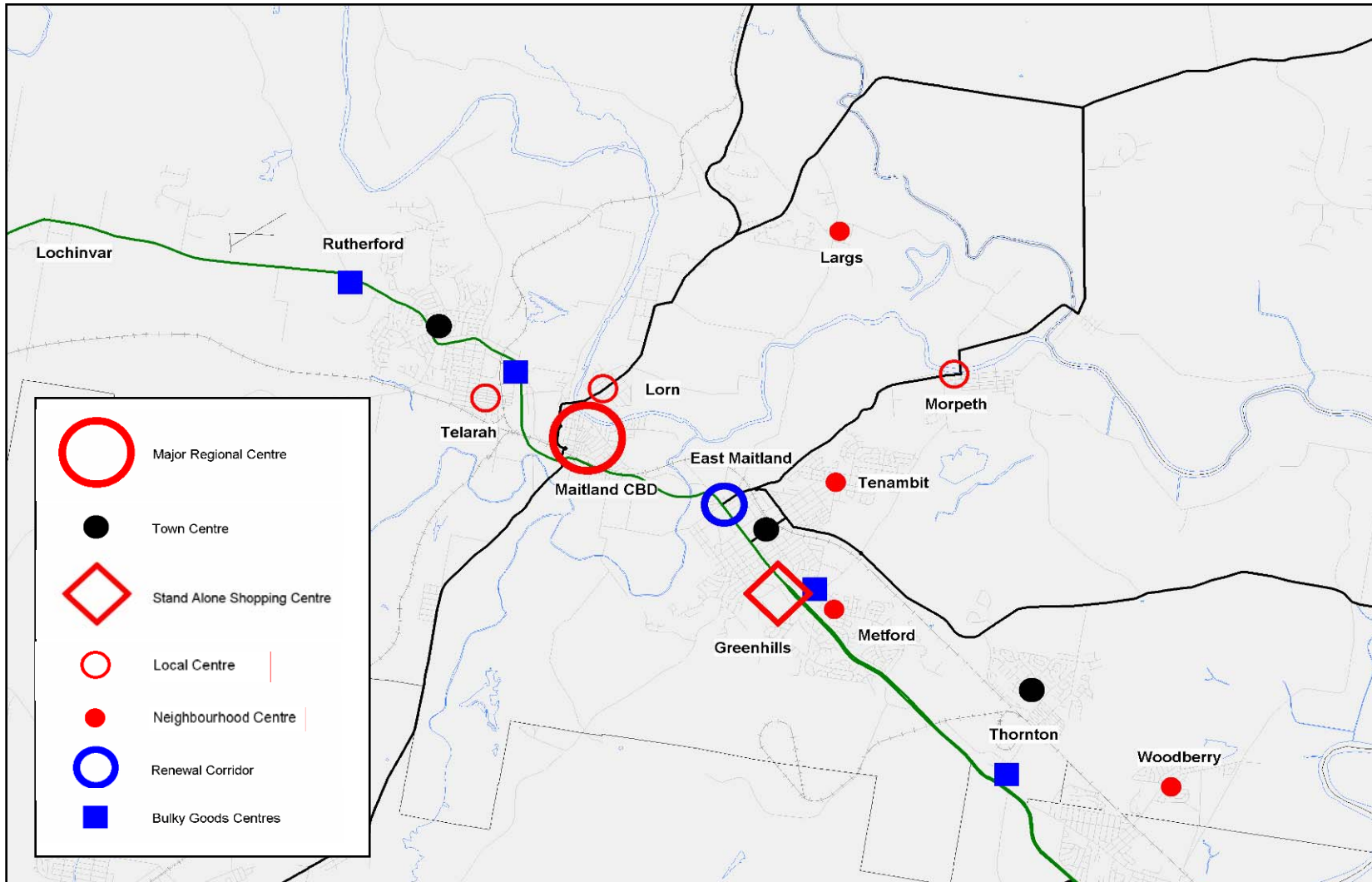
Local Centre: *A strip of shops and surrounding residential area within a 5 to 10 minute walk.. Generally contains a small supermarket (300 – 1,500sqm), personal services, post office and take-away food shops. Local centres can range between 1,500sqm and 7,000sqm and generally have between 16 and 60 establishments.*

Neighbourhood Centre: *A strip of shops and surrounding residential area within a 5 to 10 minute walk. They generally do not provide a supermarket however they may provide a small grocery store up to 200sqm and a combined total of between 300sqm and 1500sqm of retail and commercial floorspace and generally have between 4 and 12 establishments.*

Using the centre characteristic above, it has been possible to nominate an appropriate place within the hierarchy for each centre. Further rationale for this analysis is provided on a centre by centre basis below.

The following figures and table show the existing centres within the LGA and their place within the existing centre hierarchy.

Figure 6 - Plan of Existing Centre Hierarchy



Source: MapInfo

Table 47 - Existing Maitland Centre Hierarchy

Centre Category	Maitland Centre / Cluster
Major Regional Centre	Maitland Central Business District
Specialised Centre	None
Town Centre	East Maitland
	Rutherford
	Thornton
Stand-Alone Shopping Centre	Greenhills
Local Centre	Telarah
	Lorn
	Morpeth
Neighbourhood Centre	Woodberry
	Metford
	Tenambit
	Largs
	Lochinvar
Renewal Corridor	East Maitland New England Highway / Melbourne Street
Bulky Goods Clusters	Rutherford – Industrial Precinct
	East Maitland (Chelmsford Drive)
	Thornton Supa Centre
	Johnson Street / Bungaree Street Telarah

Source: Hill PDA

11.4 Major Regional Centres

Major Regional Centres are described as focal points for a range of business, government, retail, cultural, entertainment and recreational activities. They are also focal points for employment and transport and serve a number of LGA's within a subregion.

In planning terms, the Major Regional Centre classification replaces the Sub-Regional Centre. The characteristics are similar, however, whereby typically have between 40,000 – 80,000sqm of retail floorspace and serve a population of 70,000 to 150,000 people.

Major Regional Centres are typically anchored by a department store or two discount department stores (DDS), and have one or more major supermarkets. They also provide a range of other shops, at least 150 or more, mainly with a focus on lower order specialty merchandise, clothing, personal and household goods and retail services. These centres are often the location of a range of non-retail activities, including offices, medical, civic and community services.

The proliferation of bulky goods retailers in an industrial zoned area adjacent to these centres has been quite common. Whether or not these bulky goods retailers should be regarded as part of the commercial centre or form a separate centre is open to debate, dependant on aspects such as the geographic proximity and connectivity of the premises to the centre.

It is Hill PDAs recommendation that wherever possible, bulky goods premises are considered part of a major regional centre such as Maitland. Design elements and pedestrian / vehicle accessibility between the retailers and centre should be enhanced to promote a perceived linkage between the elements. Bulky goods buildings should be orientated to visually 'speak to' and connect with centres to reinforce their dominant role in the centre hierarchy and their economic viability.

Maitland CBD

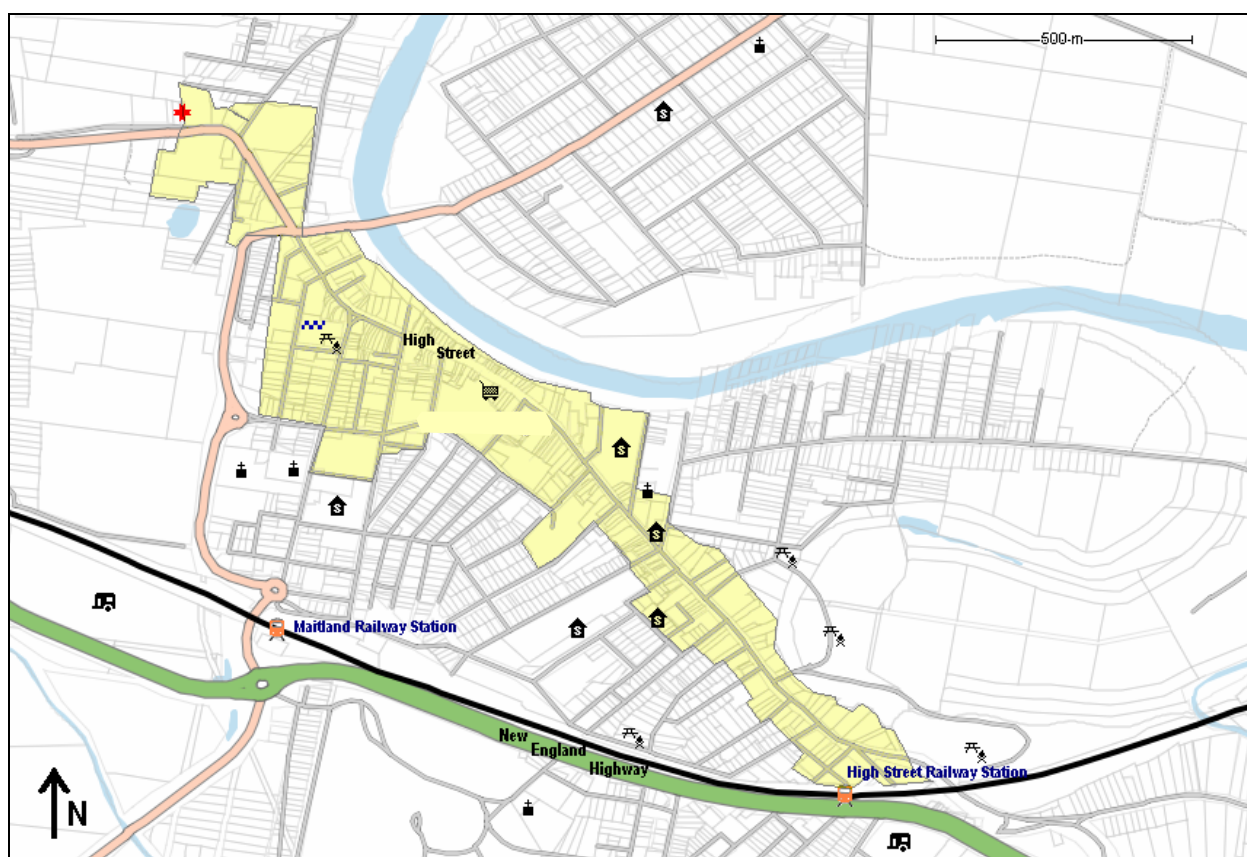
Location

Maitland CBD is located approximately 33km to the north-west of Newcastle. The Centre is bounded by the Hunter River to the north and the New England Highway and railway line to the south. A large proportion of the commercial / retail premises within the Centre front High Street, which stretches over 2km.

Branching off from High Street, predominantly to the south, are a number of individual shopping centres and additional commercial developments. This pattern of development to the south of High Street has occurred due to the restrictions created by the Hunter River to the north.

The CBD is located in close proximity to two railway stations in the south being the Maitland Railway Station and the High Street Railway Station.

Figure 7 - Maitland Town Centre



Source: Red Square

Role and Function

Maitland is classified as a Major Regional Centre by the NSW Government's Lower Hunter Regional Strategy. This centre is therefore the highest order centre in Maitland LGA. It provides retail and commercial facilities, services and employment for not only Maitland residents but those in surrounding LGAs within close proximity and accessibility to the centre.

The Centre functions as the main civic centre for Maitland LGA, accommodating such government buildings as the Maitland City Council Chambers Building, community facilities including Maitland City Library, the PCYC, the Maitland Regional Art Gallery (currently closed for redevelopment), the Masonic Hall and four schools including St John the Baptist and Maitland Public School.

Away from the main retail / commercial precinct of the centre, a number of other essential services for the Maitland LGA are provided. The main service being the Maitland Hospital, located to the north-west of the retail / commercial centre. The Hospital not only serves the population of the Maitland LGA but also the population of a number of other surrounding LGAs such as Singleton, Muswellbrook and Dungog.

Maitland is also rich in history, with many of the buildings within the CBD being over 170 years old. The historic nature of the High Street gives the centre a lot of its unique character and is a good example of period architecture.

Commercial and Retail Mix

The Centre comprises of 354 premises, totalling over 66,000sqm in floorspace. The majority of retail/commercial premises and floorspace in Maitland Regional Centre is shop front, with the bulk of that fronting High Street (282 premises providing +41,000sqm of floorspace). A large section High Street has been converted to a pedestrian arcade to enhance the quality of the pedestrian shopping experience. Almost half of the premises that front the street are retail and another 22 are vacant. There are no major supermarkets or department stores fronting the street in Maitland, these are located within the shopping centres of the town centre. There are, however, a lot of commercial premises within the centre. 100 of these front the street. One of the concentrations of commercial buildings is around Caroline Street, Church Street and Ken Tubman Drive.

Shopping centres and plazas in Maitland include the Maitland Hunter Mall, Maitland Marketplace, Maitland Plaza, Pender Place Shopping Centre and the Colonial Arcade.

Maitland Hunter Mall is located on the southern side of High Street and comprises of 22 premises, 17 of these are retail, including a K-mart (8,012sqm) and a Bi-Lo (4,437sqm).

Pender Place Shopping Centre is located to the south of High Street on Ken Tubman Drive and comprises of 17 premises, 16 of these are retail, including a Woolworths (3,270sqm).

Colonial Arcade is located on the northern side of High Street and comprises of 18 premises, 16 of these are commercial.

A bulky goods cluster is located to the north of the CBD, opposite the junction of the High Street and Hannan Street. The precinct includes a mix of homeware retailing, commercial offices, child care and a large gymnasium/health centre.

Table 48 - Commercial and retail establishments in Maitland CBD

Category	Street Front	Hunter Mall	Maitland Marketplace	Maitland Plaza	Pender Place	Colonial Arcade	TOTAL
Supermarket & Grocery Store	0	1	0	0	1	0	2
Specialty Food	4	0	0	0	4	0	8
Catered Food	20	4	1	0	1	1	27
Department Store	0	1	0	0	0	0	1
Apparel	34	5	0	0	4	0	43
Bulky Goods	9	0	0	0	0	0	9
Other Non-Food Retail	49	4	4	1	4	0	62
Personal Services	22	2	1	0	2	1	28
Total Retail	138	17	6	1	16	2	180
Vacant Shopfront	22	0	2	1	0	0	25
Other Commercial	100	3	1	4	1	16	125
Auto Related Businesses	13	2	0	0	0	0	15
Other Pubs/Clubs etc	8	0	0	0	0	0	8
Total	281	22	9	6	17	18	353

Source: Hill PDA Survey 2008

Table 49 - Commercial and retail floorspace in Maitland CBD

	Street Front	Hunter Mall	Maitland Marketplace	Maitland Plaza	Pender Place	Colonial Arcade	TOTAL
Supermarket & Grocery Store	0	4,440	0	0	3,270	0	7,710
Specialty Food	400	0	0	0	400	0	800
Catered Food	2,000	280	100	0	100	100	2,580
Department Store	0	8,010	0	0	0	0	8,010
Apparel	4,580	500	0	0	400	0	5,480
Bulky Goods	3,850	0	0	0	0	0	3,850
Other Non-Food Retail	6,700	400	2,600	100	400	0	10,200
Personal Services	2,200	200	100	0	200	100	2,800
Total Retail	19,730	13,830	2,800	100	4,770	200	41,430
Vacant Shopfront	2,200	0	200	100	0	0	2,500
Other Commercial	15,830	300	100	400	100	1,700	18,430
Auto Related Businesses	1,300	550	0	0	0	0	1,850
Other Pubs/Clubs etc	2,000	0	0	0	0	0	2,000
Total	41,060	14,680	3,100	600	4,870	1,900	66,210

Source: Hill PDA Survey 2008

Table 50 - Premises and floorspace by category in Maitland CBD

	Supermarket & Grocery Store	Specialty Food	Catered Food	Department Store	Apparel	Bulky Goods	Other Non- Food Retail
No. of Premises	2	8	27	1	43	9	62
Floorspace (sqm)	7,710	800	2,580	8,010	5,480	3,850	10,200
	Personal Services	Total Retail	Vacant Shopfront	Other Commercial	Auto Related Businesses	Other Pubs/ Clubs etc	Total
No. of Premises	28	180	25	125	15	8	353
Floorspace (sqm)	2,800	41,430	2,500	18,430	1,850	2,000	66,210

Source: Hill PDA Survey 2008

Planning Controls

Under the current Maitland Local Environmental Plan 1993, the land within the central area of Maitland is zoned 3(a) General Business, this is focused around High Street. The 3(a) General Business zoning allows for a maximum FSR of 2:1. To the north-west and the south-east of the 3(a) zone along High Street, the land is zoned 3(b) Support Business. The 3(b) Support Business zoning allows for a maximum FSR of 1:1.

Performance

The proportion of vacant shop front premises within a centre has been used in this study as an indicator of centre performance as it shows the desirability of businesses to tenant the centre and therefore its appeal to customers. Vacancy rates have been assessed on a premises basis as opposed to a floorspace basis as it is considered a more indicative estimate of performance. This is because an assessment on a floorspace basis has the potential

to be skewed if one (or more) large premises are vacant. The potential for this distortion of analysis becomes more apparent in smaller centres.

There are currently 25 vacant shopfront premises in Maitland CBD, representing a vacancy rate of 7.1%. This calculation shows that the CBD is trading at an acceptable rate. The majority of vacancies front the street (22 premises).

It is estimated that the retail trade area for Maitland Major Regional Centre generally covers most of the area located within the Central Sector (detailed under Section 2) with much of the supermarket and other retail demand to the west being captured by Rutherford Town Centre and to the east, by Greenhills Stand Alone Centre.

Issues and Challenges

As a result of the close proximity of the river to the north, a large section of Maitland CBD is flood liable. Levees line the edge of the river as part of the flood mitigation for the centre, however, this has not removed the flood liable status which applies to much of the land. Flooding is a constant threat for businesses in the centre, together with the town's residents.

As a result of possible flooding, a large portion of the residential land surrounding the business zones is zoned 2(b) Flood Liable Residential. This zoning is very restrictive on development and as a result, the surrounding residential has experienced relatively little renewal or growth and this has impacted the town centre. As a result of elements such as the lack of renewal, the centre has experienced some difficulties. Other areas within the LGA have instead grown in size. Centres such as Greenhills and Rutherford have captured this growth in retail expenditure, undergoing expansion and gentrification works accordingly.

The length of the High Street is another challenge within the Town Centre. Currently the business zones stretch approximately 2kms along the High Street, which is a considerable distance when undertaking shopping by foot. It is also a difficult layout to maintain in economic and physical terms. Elements such as the bulky goods clusters to the north of the centre do not relate well to other parts of the centre. Opportunities exist, however, to strengthen different nodes along the High Street. Focusing on these different areas has the potential to overcome the challenge of distance.

The Centre is represented by a significant number of different land owners. One of the main bodies who represent the many different businesses and owners within the centre is the "Maitland Business Chamber", with approximately 160 members. In comparison to shopping centres where there is only one sole owner of the site, multiple owners can make the organisation of projects (such as advertising and marketing) for the area difficult. It is important that when undertaking improvements to the area, they should be done in close consultation with these organisations, so as to improve the overall outcome and efficiency.

The majority of retail competition experienced by Maitland comes from the neighbouring centres of Rutherford and Greenhills. With the recent growth of Rutherford and particularly the planned future growth of Greenhills, Maitland CBD may experience a loss in trade as a result of their growth. This growth of neighbouring centres is an issue Maitland CBD must deal with in the future.

Since the 1820's, central Maitland has been home to industry, trade and commerce. As a result, there are a number of heritage listed buildings located throughout the town centre. These heritage buildings give the centre a

lot of its character but often present some challenges in relation to redevelopment. Any redevelopment of the town centre must be mindful of the historic streetscape for which the town centre possesses.

Overall, there are a number of challenges that exist for Maitland Town Centre. One of the main issues being that a large portion of the land is flood liable. The growth of neighbouring centres, particularly Greenhills and the potential loss of trade is another big issue. If these challenges can be addressed, whilst protecting the CBD's unique streetscape and character and meeting the needs of the growing Maitland population, the Centre has great potential. The Council has commissioned a plan to be prepared for Maitland CBD that will aim to unlock this potential without adversely affecting the unique strengths of the centre.

Future Opportunities

The DoP has projected a job growth of 3,200 new jobs for Maitland CBD by 2031. The 3,200 jobs represent close to 70% of the DoP's job growth projection for Maitland LGA (4,700 jobs in total) highlighting the primary role of the CBD for employment.

In order to maintain Maitland CBD's primary position in terms of retail offer and job generation in the community mindset, it will be necessary to actively promote Maitland CBD as a desirable location for business investment and working. This may be achieved through the creation of an attractive development environment that facilitates viable development through planning incentives such as floor space bonuses for desirable business uses, reduced car parking requirements in locations with good public transport / located close to the rail station and heritage concessions / heritage grants to encourage the active re-use of heritage buildings for commercial purposes. It may also be supported by fiscal incentives such as business support grants, payroll tax exemptions and economic development programs.

Our research analysis supports the retention of, Maitland CBD as the largest centre (in terms of floorspace) within the LGA. At 66,000sqm, should the CBD capture the greatest share of retail demand generated within the central sector by 2031 (and maintain the existing ratio of retail to commercial uses (0.53:0.37)) it could reasonably increase to 80,000 - 90,000sqm by 2031.

Maitland CBD has the opportunity to create a point of difference to all other centres within the LGA. It is recommended that Maitland's point of difference relates to its focus on not only retail provision but also professional services, personal services, lifestyle services, creative services, and leisure. In this way Maitland CBD could become the community, culture and entertainment hub of the LGA and maintain a point of difference from surrounding major centres such as Rutherford and Greenhills. Furthermore owing to the nature of the CBD's services and focus, the trade catchment area would draw beyond the Central sector into the East and West sectors and potentially surrounding LGA's.

Maitland CBD has the opportunity to be developed as the leisure and entertainment centre for the LGA. It would grow as an evening or weekend destination for residents seeking cafes, restaurants, wine bars, cinemas and evening entertainment. These uses could build on the amenity of the centre including its historic buildings, rural and river vistas. They could also enhance security in the centre through passive surveillance and create an exciting atmosphere that encourages residents/ visitors to stay longer and shop.

The provision of catered foods (restaurants, cafes, take away foods) is one of the few categories in the LGA that is undersupplied at present. By 2031 it is estimated that there will be an undersupply of 34,000sqm of floorspace in this category. Maitland LGA could take great advantage of this situation and create an 'eat street' or 'foodies paradise' that would draw significant trade and spin off benefits for other businesses within the centre.

In summary, Maitland CBD has a host of future opportunities to grow as the main centre within the LGA. It could have an emphasis not only on retail provision but also a point of difference from other centres. The CBD could achieve this by creating a diversity of employment and entertainment opportunities that differ from the other centres. Maitland CBD could develop as the education, culture and café destination for the LGA as well as the focus for commercial services and public administration.

11.5 Stand - Alone Shopping Centres

Stand - alone shopping centres are those that are privately owned and operated. They are located away from centres yet may provide a mix of higher order retail, bulky goods premises, convenience retail outlets and other employment opportunities.

Stand alone centres such as Greenhills in Maitland LGA often play an important role in providing scope for large retail floor-plates, at grade retail and extensive car parking. This is often important given their focus on large supermarket and household good retailers requiring excellent accessibility by car. Their role and place within the retail hierarchy should be carefully monitored, however, to ensure that they do not conflict with the success or vitality of traditional centres such as Maitland CBD or East Maitland.

It is acknowledged that in some cases the DoP identifies that Stand – Alone Shopping Centres have the potential to become a traditional town centre in their own right²³. In the case of Greenhills however this is a long term prospect (i.e. beyond the study period) and should only be considered acceptable subject to having no adverse impact on the existing centres.

Greenhills

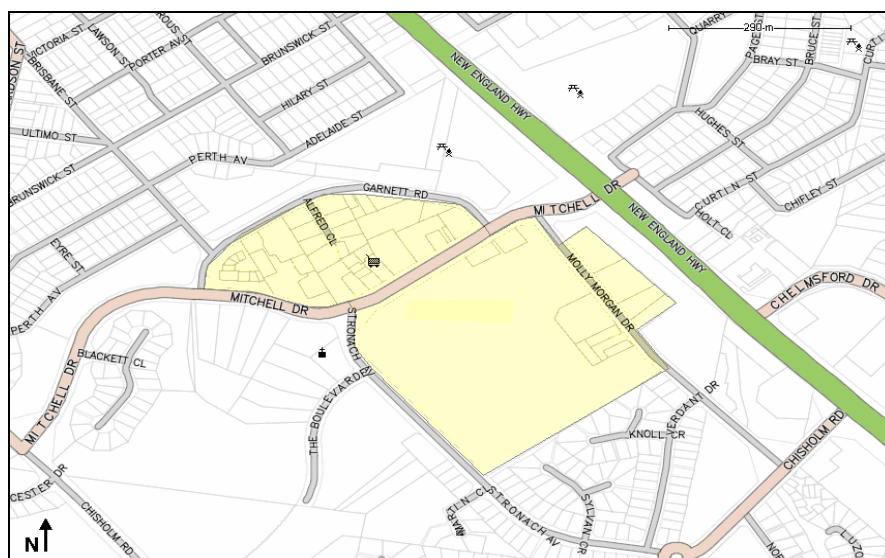
Location

The centre is located in East Maitland, situated approximately 1.5km south of East Maitland Town Centre by road and 200m south-west of the New England Highway. The Greenhills Shopping Centre is bounded by Molly Morgan Drive to the east, Stronach Avenue to the west and Mitchell Drive to the north.

On the northern side of Mitchell Drive is another large retail / commercial area and this area is bounded by Garnet Road to the north. Some additional retail / commercial premises are located on the eastern side of Molly Morgan Drive.

²³ Draft West Central Subregional Strategy – Department of Planning

Figure 8 - Greenhills Stand Alone Shopping Centre



Source: Red Square, Maitland LEP

Role and Function

Greenhills is the only centre within Maitland to be classified as a Stand Alone Shopping Centre by the NSW Government's Lower Hunter Regional Strategy. Furthermore, it is one of only two Stand Alone Shopping Centres identified by the DoP within the Lower Hunter Region. The centre is predominantly focused towards providing for the communities retail need, however, there are a number of community services located within or close to the centre. These include the East Maitland Library, the Maitland Church of Christ, Greenhills Retirement Home, Hunter Valley Grammar School and East Maitland Private Hospital.

Commercial and Retail Mix

The Greenhills Centre comprises of a large Stockland owned Shopping Centre, surrounded to the north-west and the east by a mix of bulky goods, retail and commercial development. The Greenhills Shopping Centre comprises of 95 premises, 81 of these are retail, including a Woolworths (4,871sqm), a Coles (3,702sqm) and a Big W (8,024sqm).

A development application has been submitted to Maitland City Council for the expansion of the existing shopping centre. The proposed development includes a 12,000sqm Myers department store, a 7,000sqm discount department store, 4 additional mini majors, an additional 4,595sqm of specialty retail floorspace and 1,865sqm of new office floor space. The proposed expansion would increase the size of the shopping centre by 39,236sqm to a total of 71,106sqm.

Surrounding the Greenhills Shopping Centre are an additional 95 premises. Of these premises, 76 are located to the north of the shopping centre in the Garnet Road Precinct. A large portion of the premises in the precinct are commercial (31), together with a mix of retail premises more skewed to the bulky goods style, in comparison to the Greenhills Shopping Centre, which caters more towards the specialty retail category.

Table 51 - Premises and floorspace by category in Greenhills

	Supermarket & Grocery Store	Specialty Food	Catered Food	Department Store	Apparel	Bulky Goods	Other Non- Food Retail
No. of Premises	3	8	18	1	30	9	37
Floorspace (sqm)	8,770	1,970	2,030	8,020	4,600	3,940	5,130
	Personal Services	Total Retail	Vacant Shopfront	Other Commercial	Auto Related Businesses	Other Pubs/ Clubs etc	Total
No. of Premises	13	119	11	48	12	1	191
Floorspace (sqm)	1,420	35,880	1,110	4,620	2,870	300	44,780

Source: Hill PDA Survey 2008

Planning Controls

Under the current Maitland Local Environmental Plan 1993, the land where the Greenhills Shopping Centre is located is zoned 3(a) General Business. This zone stipulates a floor space ratio (FSR) of 2:1, except where a different floor space ratio is specified in a development control plan. To the north of the shopping centre across Mitchell Drive the land is zoned 3(b) Support Business. To the east of the shopping centre across Molly Morgan Drive the land is zoned 3(c) Special Business. A maximum floor space of 1:1 applies in zone 3(b) and 3(c).

Performance

Currently there are a total of 11 vacancies within the entire centre, representing a 5.8% vacancy rate.

There is currently only 1 vacancy within the Stockland shopping centre. Discussions with Stockland report that the centre is one of the highest trading centres within NSW. It draws trade from Maitland LGA in addition to surrounding LGAs such as Dungog, Cessnock and Singleton.

Currently there are 10 vacancies within the business land surrounding the shopping centre. This breaks down to a 7.9% vacancy rate for the Garnet Road Precinct and a 20% vacancy rate for the land to the east of the shopping centre, this is the poorest performing component in Greenhills. This may indicate that currently the shopping centre relates poorly to the surrounding retail and as a result, the good trade experienced shopping centre does not flow onto the neighbouring retail stores.

Issues and Challenges

There are concerns that the growth of the Greenhills Shopping Centre may have an adverse impact to the economic viability of the Maitland CBD. The centre is currently retail focused, whereas Maitland CBD not only has a large amount of retail but is also a civic and commercial hub with a different streetscape and character. It is important that there is a point of difference between the two so as to maintain the viability of the two centres.

Preliminary market research shows, that owing to higher rents and trends away from enclosed shopping centres, some businesses are starting to move away from the shopping centre environment. Attracting an anchor tenant to the shopping centre will help to improve the centres attraction and future success.

The shopping centre is owned and operated by Stockland who lease units within the centre to individual retailers. As a result the coordination of strategies, (such as marketing and branding) for the Centre is made easier as retailers are bound by their lease agreements.

Future Opportunities

Future opportunities for the Greenhills Shopping Centre relate to its ability to continue to grow as a strong and thriving Stand-Alone Centre that provides a range of retail services to Maitland LGA (and a broader catchment area) yet does not compete with the economic viability, character or diversity of uses provided by Maitland CBD.

The centre is proposed for expansion to include a 12,000sqm department store (Myer) and 7,000sqm of discount department store floorspace. The strength of this retail offer will draw greater trade from the wider Lower Hunter Region, particularly LGAs north of Maitland whose residents need to travel through Maitland LGA in order to access higher order centres in Newcastle LGA that provide this strength of offer. A department store within Greenhills Stand Alone Centre could also significantly reduce the loss of existing trade from the LGA to department stores and higher order centres in Newcastle. This would result in a net gain of expenditure for Maitland LGA and generate a significant number of retail jobs.

Whilst it could be argued that the 12,000sqm department store should be located within Maitland CBD, to reinforce its role in the centre hierarchy, the practicalities of site amalgamation and site suitability limit this possibility. Greenhills Stand Alone Centre provides a workable and attractive location for retailers with options for large retail floorplates and at grade car parking. The attraction of retailers to the centre benefits the LGA as a whole through the generation of employment and the provision of services.

Whilst retail provision in Greenhills should be supported, the extent of commercial, community, culture and restaurant floorspace should be carefully planned to ensure that the centre does not conflict with the role of Maitland CBD. Our retail analysis suggests that the centre could accommodate the growth of floorspace over the study period between 75,000sqm and 85,000sqm.

11.6 Specialised Centres

The Centres and Corridors Strategy for Sydney defines Specialised Centres as those containing *“major airports, ports, hospitals, universities, research and business activities that perform vital economic and employment roles across the metropolitan area.”*

Examples of specialised centres within the Lower Hunter Region, as identified by the DoP include: the Port of Newcastle, the Newcastle Airport Precinct, John Hunter Hospital, the University of Newcastle, the Nelson Bay Tourism Precinct and the Pokolbin Vineyard and Tourism Precinct.

There are numerous benefits of Specialised Centres to an LGA / Region's economy, level of employment and service provision. Specialised Centres are clusters of like industries that are able to benefit from an economic point of view through economies of scale. These efficiencies are potentially gained through shared building use, on site servicing (i.e. retail, dining halls, a post office), transport and road infrastructure that may otherwise not be viable on an individual scale.

Benefits of Specialised Centres also include shared knowledge and enhanced knowledge transfer. In the New Economy, the efficient gain of information and knowledge is critical to success and innovation. Clusters of like industries will therefore benefit from close proximity and association, drawing other symbiotic industries to an area. This in turn enhances the potential for Specialised Centres to succeed and generate more jobs within a given area.

Specialised Centres play a regionally significant role and have a sensitive, yet important, relationship with major centres. There are no Specialised Centres identified for Maitland. Notwithstanding this, there is magnet infrastructure (such as Maitland Hospital) that could in time form the centre of an economic cluster or specialised centre.

Future Opportunities

Maitland Hospital is a major employer within the LGA and is a form of magnet infrastructure that has attracted medical services such as doctors, radiologists and osteopaths to Maitland CBD.

The existing cluster has potential to expand, particularly given the significant growth in population forecast for the LGA and the ageing of the population within the Hunter Region over the timeframe of the Study. These characteristics will result in greater demand for health and medical services.

Maitland hospital is already planning expansion to cater to the growth in demand for medical services. A development application has recently been submitted for a reported capital value of \$7.3m to extend the emergency services and car parking facilities to increase patient capacity.

The expansion of the hospital and associated services will generate additional employment opportunities. Based on TDC estimates, the net growth in health related jobs in Maitland LGA will be in the order of 776 jobs (13% of all job growth in the LGA.) Based on industry benchmarks²⁴, this could translate into demand for an additional 31,000sqm of health related floorspace (i.e. consulting rooms, osteopaths, physiotherapists, chiropractors etc).

Issues and Challenges

The growth of demand for health, medical and associated commercial services will assist in reinforcing the commercial role of Maitland CBD. To support the successful relationship between the hospital and Maitland CBD as a Specialised Centre for health it will be necessary to create a greater perceived link between the two elements. This may be achieved through streetscape design, pathways and enhanced transport services.

Jobs in the health industry are also considered of benefit for Maitland LGA and CBD as they create additional diversity in job opportunities. They provide a range of highly skilled and non skilled jobs that can meet the growing diversity of residents and skills in the LGA.

²⁴ 1 employee per 40sqm

The development of the Maitland CBD and Hospital Specialised Centre should be staged over the Study period commensurate with population growth. This is because the growth in population within the LGA and broader Hunter Region will underpin demand for services and jobs within the centre.

Much of the impetus towards this concept has been put in place with existing medical related businesses in the CBD and the hospital planning to expand. Support for the success of this centre will be dependant however on the adoption of the concept and its advocacy at a local and state government level.

11.7 Renewal Corridors

Renewal Corridors are located along major transport routes such as highways. They can link major centres and may provide highway related enterprise opportunities including retail and employment. They may also provide opportunities for housing.

The DoP identifies that Renewal Corridors should be focused around major transport routes. Whilst the Regional Strategy does not define Renewal Corridors in terms of scale or capacity, a comparative example may be enterprise corridors that are defined as:

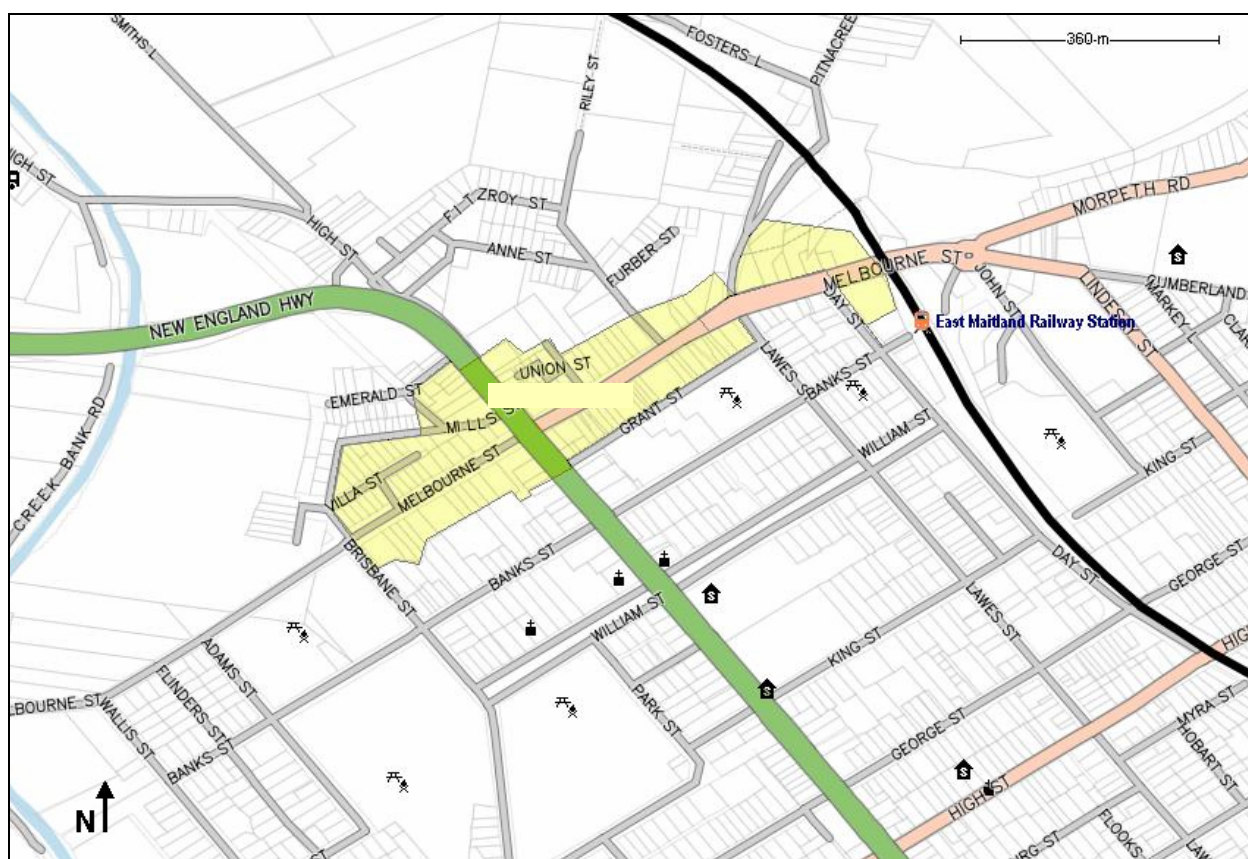
“Areas which provide low cost accommodation for a range of local and regional services, including start-up offices, light industrial, showrooms, building supplies and retail which benefit from high levels of passing traffic (over 50,000 vehicles per day). They provide a valuable buffer between residential development and the road.”

East Maitland - Melbourne Street / New England Highway

Location

The East Maitland – Melbourne Street / New England Highway Corridor is located within East Maitland on Melbourne Street, at the New England Highway intersection, approximately 2.8km to the south-east of Maitland Town Centre. The majority of the premises within the corridor front Melbourne Street, from Brisbane Street to Lawes Street, with some fronting Villa Street, Mill Street and the New England Highway. Melbourne Street runs north - east to south – west across the New England Highway.

Figure 9 - East Maitland - Melbourne Street / New England Highway



Source: Red Square

Role and Function

This centre is not classified by the NSW Government's Lower Hunter Regional Strategy. It is however identified by the Maitland Council Urban Settlement Strategy as a Local Renewal Corridor.

Currently the corridor provides an area for essential urban support businesses for the LGA which are not always accommodated in a lot of the other centres within the LGA.

Commercial and Retail Mix

The corridor focusing on the junction of the New England Highway and Melbourne Street comprises of 58 generally small and independent businesses. These businesses provide local urban support services car sales and trade related goods and services. There are no major retailers within the corridor such as a supermarket.

Approximately half of the centre comprises of bulky goods and auto related premises. The centre also contains an additional 6 light industrial premises.

Table 52 - Premises and Floorspace by Category in East Maitland - Melbourne Street / New England Highway

	Supermarket & Grocery Store	Specialty Food	Catered Food	Department Store	Apparel	Bulky Goods	Other Non- Food Retail
No. of Premises	0	2	4	0	0	10	8
Floorspace (sqm)	0	200	400	0	0	1,000	800
	Personal Services	Total Retail	Vacant Shopfront	Other Commercial	Auto Related Businesses	Other Pubs/ Clubs etc	Total
No. of Premises	2	26	4	8	18	2	58
Floorspace (sqm)	200	2,600	400	800	1,750	600	6,150

Source: Hill PDA Survey 2008

Planning Controls

Under the current Maitland Local Environmental Plan 1993, the land is zoned 3(b) Support Business. 3(b) Support Business allows for a maximum FSR of 1:1.

Performance

Currently the area is performing at a reasonable level. There are 4 vacancies within the corridor, representing a vacancy rate of 6.9%.

Future Opportunities

The corridor is located between the East Maitland Regional Centre and the Greenhills area and therefore should be promoted as a complementary corridor for uses that are not suited to centre locations and that depend on passing trade. Given the lack of similar centres in the LGA to the East Maitland New England Highway Corridor, it is considered well placed to provide some variety to employment and enterprise opportunities.

Our retail analysis has found that the core of the corridor could grow to provide in the order of 8,000sqm of commercial and retail floorspace.

11.8 Town Centres

Town Centres are defined as shopping and business centres for a Subregion. They include health and professional services, community facilities and housing. They may include one or two supermarkets, a range of specialty shops and non retail services (generally between 80 and 150 establishments) such as banks, community services and offices. They are usually more of a residential origin than an employment centre.

East Maitland

Location

East Maitland is located approximately 4km to the south-east of Maitland Town Centre. Most of the retail / commercial premises front Lawes Street, High Street and George Street.

Figure 10 - East Maitland Town Centre



Source: Red Square

Role and Function

East Maitland is classified as a Town Centre by the NSW Government's Lower Hunter Regional Strategy and Maitland Council's Urban Settlement Strategy.

The reasonable proportion of commercial premises and the presence of the supermarket within the East Maitland Town Centre are reflective of the differences with the Melbourne Street Centre. East Maitland Town Centre is a retail / commercial hub of the locality that provides day to day food and grocery shopping needs for local residents.

Commercial and Retail Mix

The Town Centre comprises of 89 premises, most of which front Lawes Street, High Street and George Street. A small commercial development known as the "Village Walk" is located on the corner of High Street and Lawes Street. 6 of the 11 premises within the "Village Walk" are commercial. This is similar to the mix of uses in the remaining portion of the centre where over a third of the premises are commercial. Commercial premises include a number of local services such as real estate agents, tutors and doctors. The centre has one supermarket, a small IGA (370sqm).

Table 53 - Premises and floorspace by category in East Maitland Town Centre

	Supermarket & Grocery Store	Specialty Food	Catered Food	Department Store	Apparel	Bulky Goods	Other Non- Food Retail
No. of Premises	1	6	9	0	4	1	8
Floorspace (sqm)	370	600	900	0	400	100	800
	Personal Services	Total Retail	Vacant Shopfront	Other Commercial	Auto Related Businesses	Other Pubs/ Clubs etc	Total
No. of Premises	14	43	10	33	2	1	89
Floorspace (sqm)	1,400	4,570	1,000	3,300	200	0	9,070

Source: Hill PDA Survey 2008

Planning Controls

Under the current Maitland Local Environmental Plan 1993, the Centre is zoned 3(a) General Business. The 3(a) General Business zoning allows for a maximum FSR of 2:1.

Performance

There are currently 10 vacancies within East Maitland Town Centre, representing a comparatively high vacancy rate of 11.2%. The higher vacancy rate could be a result of the retail strength and trade draw of Stocklands Greenhills. To clarify this and assess the degree of any potential impact, a survey of tenants and landlords is recommended.

Issues and Challenges

East Maitland Town Centre is the retail / commercial hub of the locality that provides day to day food and grocery shopping needs for local residents. The Melbourne Street Centre however provides urban support type premises and businesses, which provide a wider function than the East Maitland Town Centre. The two centres do not compete with each other, rather they provide different types of complementary services. This relationship should be encouraged within any future planning policy.

Future Opportunities

Future opportunities for the East Maitland Town Centre relates to the strengthening of the scope of retail offer and services to cater to the growth in demand for retail floorspace within the West sector over the study period. An increase in specialty food retailers, personal services and the potential expansion of the supermarket should be encouraged to provide local (and therefore environmentally sustainable and convenient) shopping options. In the short term this growth in retail provision could be accommodated by existing shop vacancies.

The Town Centre has the opportunity in the future to strengthen its position as a centre providing a broad range of employment opportunities as well as retail, community and personal services. It also has the prospect of becoming a Town Centre that minimises the need for the community to travel to higher order centres or alternative places of employment.

Our retail analysis suggests that the centre could accommodate growth to between 9,000sqm and 15,000sqm of floorspace.

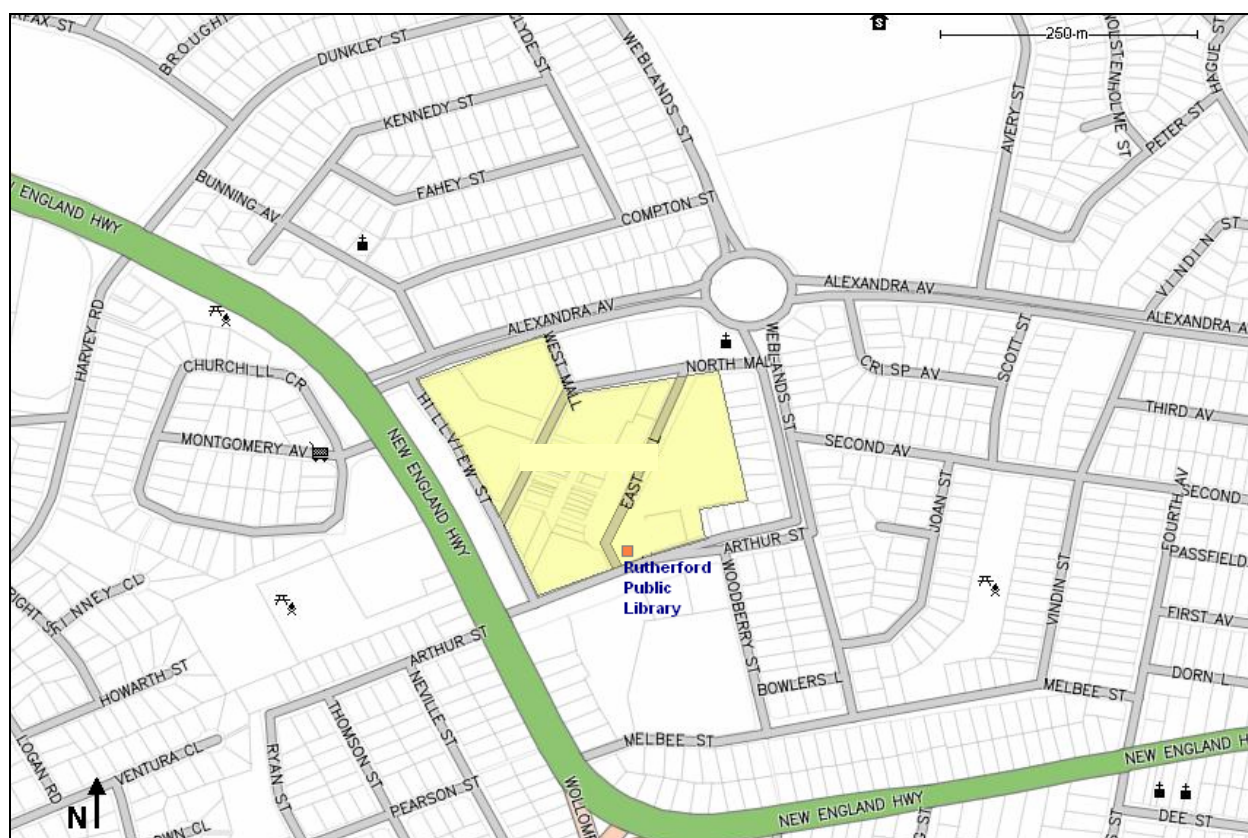
Rutherford Town Centre

Location

Rutherford Town Centre is located approximately 7.4km to the north-west of Maitland CBD. The retail centre comprises of the North Mall, East Mall and West Mall and is bounded by Alexandra Avenue to the north, Webland Street to the east, Hillview Street to the west and Arthur Street to the south.

The centre comprises of three major elements, being the two shopping centres to the east and west of the centre and the mix of retail and commercial in between, together with the large amount of car parking interspersed.

Figure 11 - Rutherford Town Centre



Source: Red Square

Role and Function

Rutherford is classified as a Town Centre by the NSW Government's Lower Hunter Regional Strategy and Maitland Council's Urban Settlement Strategy. The centre is predominantly retail based with some commercial floorspace such as doctor's surgeries. There are, however, a number of community services located within, or close to the centre, including the Maitland City Corps Salvation Army Church, a library and a community centre.

Commercial and Retail Mix

The centre comprises of the recently extended retail shopping centre, which includes a Woolworths (located to the north-west) a second self contained shopping centre (which includes a Coles) to the east and an open air arcade (which is made up of many shop front premises, an IGA and a small enclosed arcade) in between the two shopping centres. In total the Town Centre has 70 premises.

Rutherford Market Place, located to the north-west of the Rutherford Town Centre, comprises of 17 premises, including a Woolworths which has a floor area of 3,800sqm and 9 other specialty shops. The shopping centre was opened at the beginning of 2008 and currently contains 3 vacant premises. Of the existing shops within Rutherford Town Centre, it is the Market Place which is most visually appealing.

The second self contained shopping centre located within the east of Rutherford Town Centre comprises of 7 premises including a Coles with a floor area of 2,880sqm.

The two self contained shopping centres are separated by a lot of car parking, a number of shop front premises, an open air arcade and a small enclosed arcade. The area comprises of 46 premises, including a Super IGA (2,150sqm), an ALDI (1,200sqm) and an Amcal Chemist (459sqm).

Table 54 - Premises and floorspace by category in Rutherford Town Centre

	Supermarket & Grocery Store	Specialty Food	Catered Food	Department Store	Apparel	Bulky Goods	Other Non- Food Retail
No. of Premises	4	8	9	0	3	0	10
Floorspace (sqm)	10,030	800	900	0	300	0	1,360
	Personal Services	Total Retail	Vacant Shopfront	Other Commercial	Auto Related Businesses	Other Pubs/ Clubs etc	Total
No. of Premises	6	40	15	15	0	0	70
Floorspace (sqm)	600	13,990	1,500	1,500	0	0	16,990

Source: Hill PDA Survey 2008

Planning Controls

Under the current Maitland Local Environmental Plan 1993, the land is zoned 3(a) General Business. The 3(a) General Business zoning allows for a maximum FSR of 2:1.

Performance

There are currently 15 vacancies within Rutherford Town Centre, representing a vacancy rate of 21.4%.

The Rutherford Market Place currently has three vacancies; however, this is most likely the case due to the recent opening of the shopping centre.

The majority of the vacant premises are located within the area between the shopping centres (11 representing a vacancy rate of 23.9%). This has most likely occurred due to the lower quality of many of the premises in comparison to the two self contained shopping centres and the additional floorspace provided by the new

Rutherford Market Place, that has meant there is an over-supply of floorspace in the area. With the growing population of the centre's catchment, it is likely that the supply will be met over time.

Issues and Challenges

Currently the two shopping centres are performing well with relatively low vacancy rates in comparison to the central mall section of the centre, which has a high vacancy rate and a poorer quality of building stock. This section will need to undergo some refurbishment and promotion, so as to better compete with the shopping centres on either side. The new shopping centre will however act as a strong anchor that will support the growth and viability of the mall area over time.

The Rutherford Bulky Goods cluster is located 1.5km to the west of the Town Centre. It is important that the type of premises allowed in the bulky goods cluster do not adversely impact on the future viability of Rutherford Town Centre.

Future Opportunities

As the main centre located within the Western Sector of the LGA, Rutherford Town Centre has significant opportunities to grow as demand for retail grows commensurate with the proposed release of areas for urban development.

The growth of the shop front commercial component of the centre (travel agents, real estate agents, banks etc) and range of personal services (beauticians, shoe repairs, dry cleaners) should be supported in order to provide a broader range of services and to reduce the need for residents to travel to larger centres.

Rutherford centre could also benefit from the creation of a community focal point, play area and amenity space (including café space) to enhance its entertainment and leisure value.

In summary, Rutherford Town Centre has the opportunity to grow into a Town Centre that provides a broad range of employment opportunities as well as retail, community and personal services. It has the prospect of becoming a Town Centre that minimises the need for the community to travel to higher order centres or alternative places of employment.

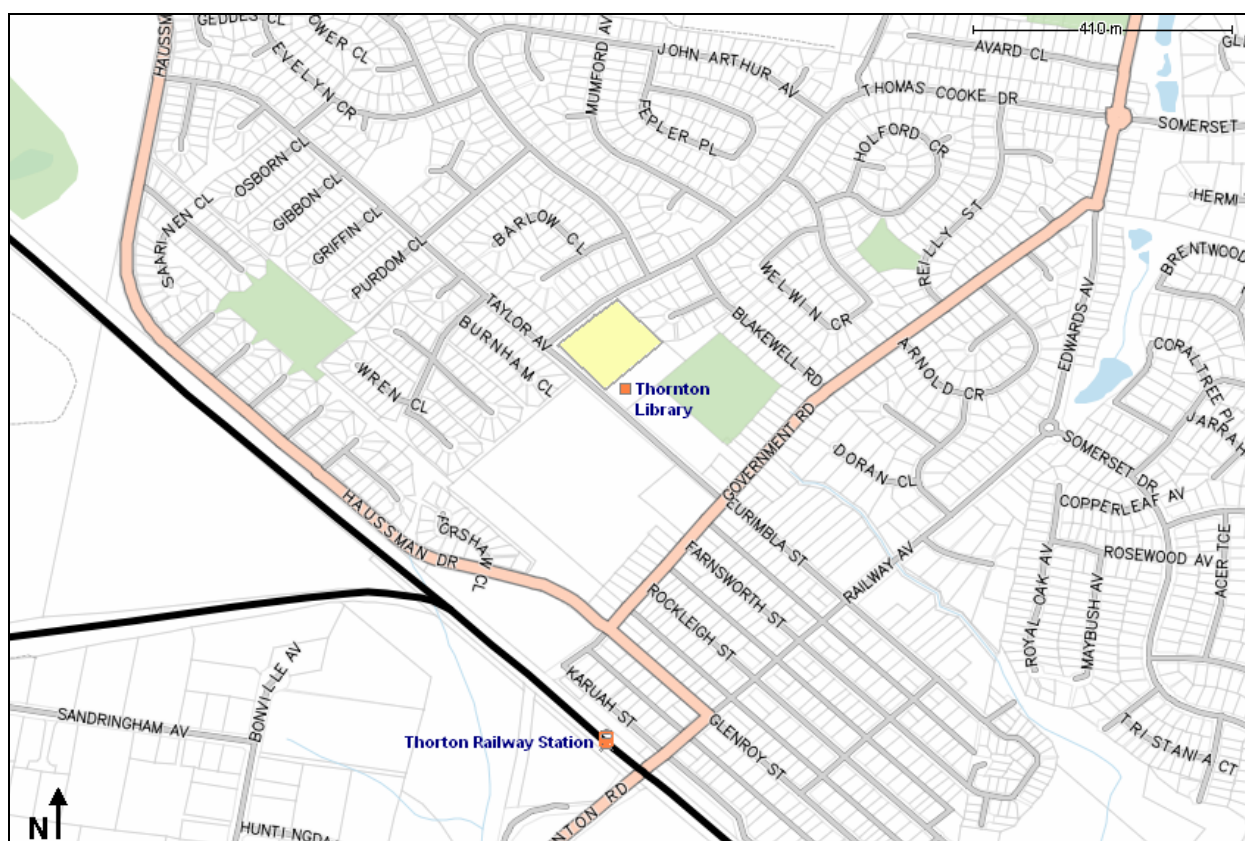
Our retail analysis suggests that the centre could accommodate growth to between 16,000sqm and 20,000sqm of floorspace.

Thornton Town Centre

Location

Thornton Town Centre is located approximately 10km to the south-east of Maitland CBD. The centre comprises of the Thornton Shopping Centre on the corner of Taylor Avenue and Thomas Cooke Drive.

Figure 12 - Thornton Town Centre



Source: Red Square

Role and Function

Thornton is classified as a Town Centre by the NSW Government's Lower Hunter Regional Strategy and Maitland Council's Urban Settlement Strategy. The main component of the town centre is the Thornton Shopping Centre, servicing the needs of the local population. In close proximity to the shopping centre is Thornton Library and the Thornton Public School.

Commercial and Retail Mix

The shopping centre comprises of 24 premises, totalling approximately 5,000sqm. The centre includes a Bi-Lo (2,300sqm), a Pricemart (431sqm) and an Ice Box Liquor (254sqm).

Table 55 - Establishments by Category in Thornton Town Centre

	Supermarket & Grocery Store	Specialty Food	Catered Food	Department Store	Apparel	Bulky Goods	Other Non- Food Retail
No. of Premises	1	4	3	0	2	0	4
Floorspace (sqm)	2,300	540	290	0	190	0	720
	Personal Services	Total Retail	Vacant Shopfront	Other Commercial	Auto Related Businesses	Other Pubs/ Clubs etc	Total
No. of Premises	3	17	4	3	0	0	24
Floorspace (sqm)	290	4,330	390	290	0	0	5,010

Source: Hill PDA Survey 2008

Planning Controls

Under the current Maitland Local Environmental Plan 1993, the land is zoned 3(a) General Business. The 3(a) General Business zoning allows for a maximum FSR of 2:1.

Performance

There are currently 4 vacancies within the Thornton Town Centre, representing a vacancy rate of 16.7%. This is relatively high vacancy rate provides scope for greater retail provisions.

Issues and Challenges

Currently the Centre is relatively small, and any expansion would be restricted by the surrounding residential. An expansion of the Centre would require some residential lots to be purchased for redevelopment to meet the growing local demand for retail services to accommodate any additional retail required by the increase in dwelling numbers in the area. In the short term, however, the existing vacant shops provide capacity for greater retail provisions and the strengthening of the centre without the immediate need for expansion.

Future Opportunities

Opportunities for Thornton Town Centre relate to the anticipated development of additional residential dwellings (approximately 4,750) in the Thornton North area over the Study period.

The Town Centre therefore has the prospect of strong future trade, filling existing vacancies, providing a broad range of employment opportunities as well as retail, community and personal services.

Our retail analysis suggests that the centre could accommodate growth to between 5,000sqm and 6,000sqm of floorspace.

11.9 Local Centres

The Lower Hunter Regional Strategy does not define centres within Maitland that are smaller in scale than Town Centres. For the purposes of this Centres Study, we have based a terminology for centres within Maitland LGA on the terminology used for centres by the DoP in its subregional strategies for the Sydney Metropolitan Area.

Local Centres are defined as centres within a hierarchy that are below Town Centres.

For the purposes of defining centres within Maitland LGA, we have refined this definition for Local Centres as follows:

A strip of shops and surrounding residential area within a 5 to 10 minute walk. Contains a small supermarket (200 – 1,500sqm), personal services, post office and take-away food shops. Local centres can range between 1,500sqm and 7,000sqm and generally have between 16 and 60 establishments.

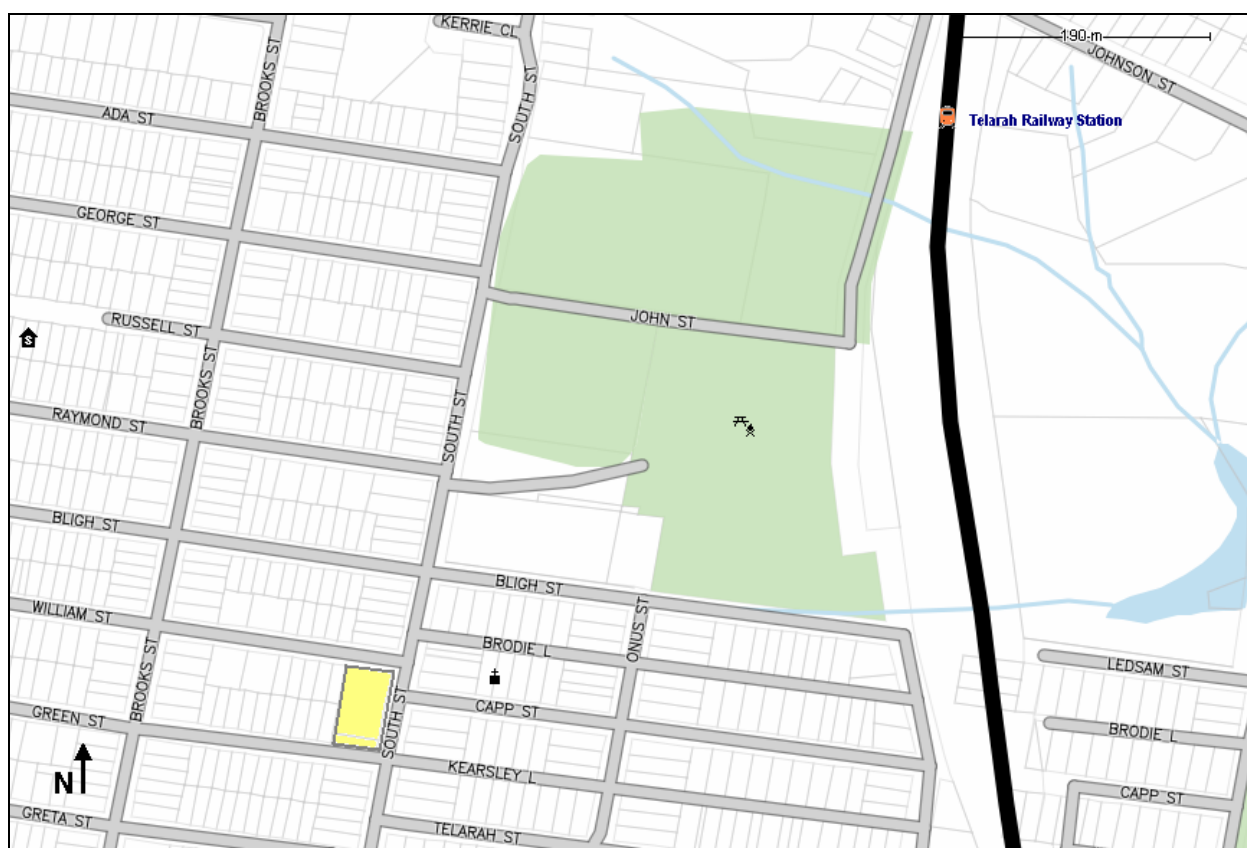
These centres generally have an emphasis on providing mostly convenience goods and services for day to day shopping, and serve a weekly grocery role, although successful Local Centres may also have non-food and retail service outlets as part of their retail mix (i.e. medical surgery's, accountants, physiotherapists). The latter commercial uses are important to serving the needs of local communities in order to reduce their need to travel.

Telarah Local Centre

Location

Telarah is located approximately 3.6km by road to the west of Maitland Town Centre. Telarah comprises of a small cluster of shop front premises, with associated car parking. The centre is located on the south-western corner of South Street and William Street.

Figure 13 - Telarah Local Centre



Source: Red Square

Role and Function

Telarah is not classified by the NSW Government's Lower Hunter Regional Strategy. As the centre provides a range of retail premises and includes a 630sqm supermarket we have categorised the centre as a Local Centre.

Commercial and Retail Mix

The cluster contains 10 premises, including an IGA supermarket (630sqm), a doctor surgery and a newsagent.

Planning Controls

Under the current Maitland Local Environmental Plan 1993, the land is zoned 3(a) General Business. The 3(a) General Business zoning allows for a maximum FSR of 2:1.

Table 56 - Premises and Floorspace by Category in Telarah

	Supermarket & Grocery Store	Specialty Food	Catered Food	Department Store	Apparel	Bulky Goods	Other Non- Food Retail
No. of Premises	1	2	2	0	0	0	2
Floorspace (sqm)	630	200	200	0	0	0	200
	Personal Services	Total Retail	Vacant Shopfront	Other Commercial	Auto Related Businesses	Other Pubs/ Clubs etc	Total
No. of Premises	1	8	0	1	1	0	10
Floorspace (sqm)	100	1,330	0	100	100	0	1,530

Source: Hill PDA Survey 2008

Performance

The Local Centre is performing well. There are currently no vacancies indicating the strong demand for retail in this area.

Issues and Challenges

The catchment of the Local Centre is small, generally covering the population of Telarah. At the time of the survey there were no vacancies, suggesting that the centre is performing well. With ever expanding larger centres providing a greater variety of retail and commercial opportunities, the centre is reliant on the local residents of the area supporting local businesses and capitalising on the convenience of the centre's location.

One retail development, located on a single lot, contains the majority of retail premises. The building stock within the local centre is of a good quality. The quality of the centre's environment is likely to support the ongoing performance of the centre.

Future Opportunities

Telarah Local Centre has the prospect of expanding to meet the growing demand for retail services owing to forecast local population growth. The centre has opportunities to grow through the expansion of the existing supermarket, the greater provision of specialty food stores, personal services and shopfront commercial space to a minor degree. A greater density of residential development could also be encouraged around the centre to increase its accessibility to a wider number of people.

Our retail analysis suggests that the centre could accommodate growth to between 1,500sqm and 3,000sqm of floorspace.

Lorn Local Centre

Location

Lorn is located on the northern side of the Hunter River, approximately 500m north of Maitland Town Centre. The Local Centre comprises of a cluster of shop front premises. The majority of premises front Belmore Road which runs north to south.

Figure 14 - Lorn Local Centre



Source: Red Square 2008

Role and Function

Lorn is not classified by the NSW Government's Lower Hunter Regional Strategy. As the centre provides over 3,600sqm of floorspace, over 30 premises and a small supermarket to meet the convenience needs of the local community, we have categorised the centre as a Local Centre.

Commercial and Retail Mix

The cluster contains a total of 22 premises including a Dick Foodwork's Grocery Store (600sqm). Other premises include a Chiropractor, a butcher and the Lorn Gallery.

Table 57 - Premises and Floorspace by Category in Lorn

	Supermarket & Grocery Store	Specialty Food	Catered Food	Department Store	Apparel	Bulky Goods	Other Non- Food Retail
No. of Premises	1	4	6	0	1	0	5
Floorspace (sqm)	600	400	600	0	100	0	500
	Personal Services	Total Retail	Vacant Shopfront	Other Commercial	Auto Related Businesses	Other Pubs/ Clubs etc	Total
No. of Premises	3	20	1	10	0	0	31
Floorspace (sqm)	300	2,500	100	1,000	0	0	3,600

Source: Hill PDA Survey 2008

Planning Controls

Under the current Maitland Local Environmental Plan 1993, the land is located is zoned 3(a) General Business. The 3(a) General Business zoning allows for a maximum FSR of 2:1.

Performance

The local centre is performing strongly. At the time of survey there was only 1 vacancy, representing a vacancy rate of 3.2%.

Issues and Challenges

The catchment of the Local Centre is modest, covering the residents of Lorn and some passing trade which crosses the Belmore Bridge to the south west and travel north. It appears (based on the number of vacancies) that the centre is currently performing well.

With the close proximity of Maitland CBD to the south, the centre is heavily reliant on the residents of the local area and residents to the north, supporting local businesses and capitalising on the convenience of the centre's location for daily retail needs.

The retail premises of Lorn are relatively spread out along Belmore Road, with there being no continuous frontage of buildings. Lorn shops are not well connected for pedestrians and the urban design of the streetscape is mixed. This may be of some inconvenience to shoppers.

The centre is also located within close proximity to the Hunter River and as a result may experience flooding in the future.

It is unlikely that the centre will undergo any major extensions due to the proximity of Maitland CBD.

Future Opportunities

The centre has the prospect of developing its village atmosphere as a marketing strength in addition to the modest expansion of some retail services to meet the needs of the local community. The expansion of the centre is likely to be minimal however in light of its close proximity to Maitland CBD. Accordingly the centre has the prospect of continuing its role providing a range of retail, business and community uses that serve the retail convenience needs of the local community.

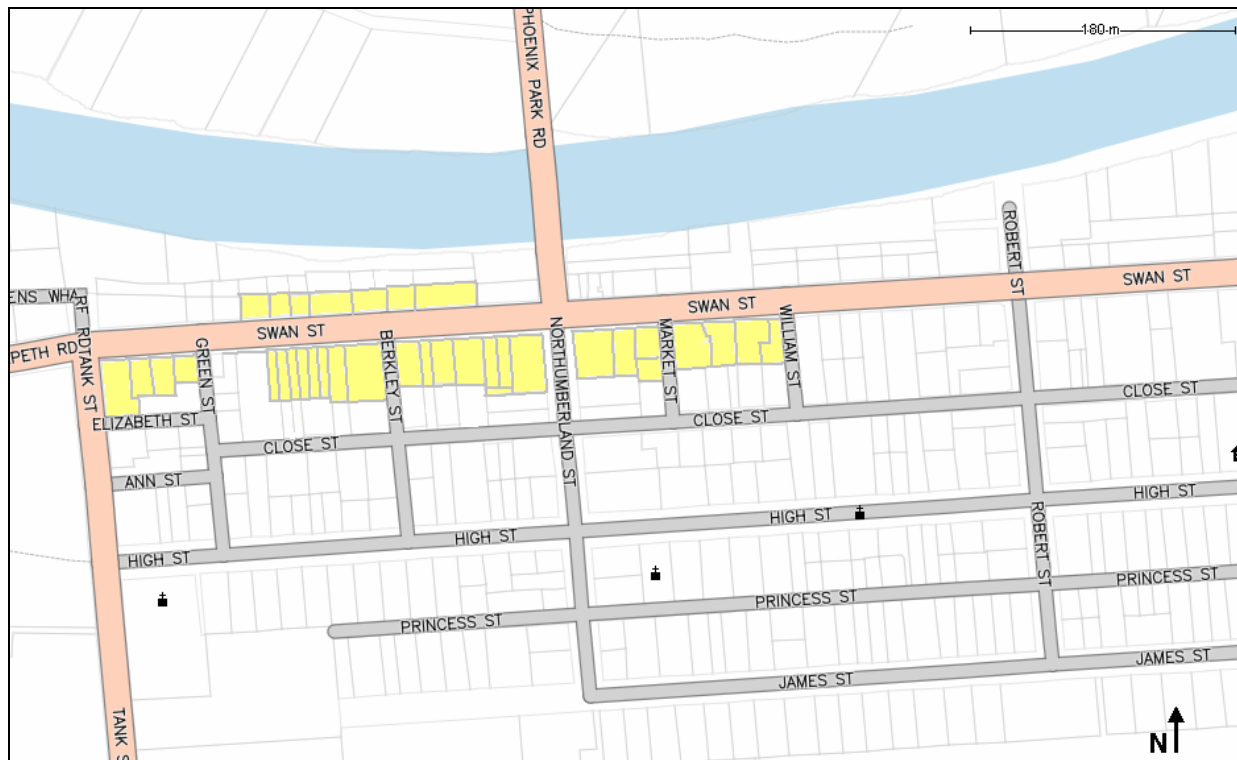
Our retail analysis suggests that the centre could accommodate growth to between 3,600sqm and 4,500sqm of floorspace.

Morpeth Local Centre

Location

Morpeth is located approximately 8km to the east of Maitland CBD. Most premises front Swan Street, which runs east – west and is located south of the Hunter River. The main road intersection in Morpeth occurs between Swan Street, Phoenix Park Road and Northumberland Street. Phoenix Park Road crosses the Hunter River on Morpeth Bridge. The nearest bridge to Morpeth Bridge is located 8.5km to the West by road. The majority of retail / commercial premises are located near to the main intersection, with a small separate industrial site located 300m to the east.

Figure 15 - Morpeth Tourist Local Centre



Source: Red Square

Role and Function

Morpeth is not classified by the NSW Government's Lower Hunter Regional Strategy. Morpeth comprises of a mix of retail and commercial premises which provide for both the day to day needs of the local community of Morpeth and accommodate the needs of the visitors to the area. A number of the retail premises are primarily focused on tourist trade. The centre includes a small supermarket and accordingly has been classified as a Local Centre as opposed to a Neighbourhood centre.

Morpeth's tourist focus differentiates it from other local centre centres that have the majority of their trade meeting the convenience shopping needs of the local surrounding population. Tourist centres such as Morpeth often have a wide trade area dependant on the origin of their tourists. There are two types of tourist trades – destination (where the retail centre is a tourist destination) and passing trade (where tourists stop on the highway). Morpeth is considered a destination tourist centre.

Commercial and Retail Mix

Morpeth contains 57 premises, totalling over 6,000sqm of floorspace. The Local Centre provides two small supermarkets which serve the community but are not main line supermarkets. The majority of premises within the centre are retail (46), with 17 of these being non-food retail, reflecting the type of goods sought by the tourist market attracted to the Centre.

Table 58 - Premises and Floorspace by Category in Morpeth

	Supermarket & Grocery Store	Specialty Food	Catered Food	Department Store	Apparel	Bulky Goods	Other Non- Food Retail
No. of Premises	2	4	12	0	10	0	17
Floorspace (sqm)	270	400	1,300	0	1,000	0	1,750

	Personal Services	Total Retail	Vacant Shopfront	Other Commercial	Auto Related Businesses	Other Pubs/ Clubs etc	Total
No. of Premises	1	46	3	6	0	2	57
Floorspace (sqm)	100	4,820	300	600	0	400	6,120

Source: Hill PDA Survey 2008

Planning Controls

Under the current Maitland Local Environmental Plan 1993, the land is zoned 3(a) General Business. The 3(a) General Business zoning allows for a maximum FSR of 2:1.

Performance

The Local Centre appears to be performing well. At the time of survey there were 3 shop front vacancies within the Local Centre, representing a vacancy rate of 5.3%.

Issues and Challenges

The majority of the tourist trade which Morpeth attracts is destination trade as the Local Centre is not situated on the New England Highway. Some passing trade would, however, be gained as a result of the local centre providing the only bridge crossing the river for over 8.5km.

The Local Centre is located on the southern bank of the Hunter River. Although the majority of premises within Morpeth are located outside of the area designated as subject to a 1 in 100 year flood, it is possible that the roads to the centre could be cut off in the advent of a flood, impacting on the centre for that period.

Various elements affecting the domestic and international economy can impact on the spending habits of tourists. One such element is the price of oil. As Morpeth is heavily reliant on the tourist dollar, adverse impacts to the economy may influence the performance of the Local Centre more than for other centres that are less dependant on the tourist dollar.

Future Opportunities

One of the most prominent and defining features of the Local Centre is its historic character. The character of the town is one of the main attracters for tourists. For these reasons it is important that the character of the Local Centre is preserved. Any future developments within the Local Centre should be sympathetic in design and density to the existing streetscape. It is important that the character and other qualities which make the Local Centre popular with tourists are not only retained but enhanced.

A modest increase in retail floorspace could be supported to meet the increase in demand for goods and services by locals and to enhance the visitor experience. We estimate that the centre could grow to between 6,000sqm and 7,000sqm whilst maintaining its village atmosphere and character.

11.10 Neighbourhood Centres

For the purposes of this Study, we have defined the characteristics of Neighbourhood Centres within Maitland LGA and identified the centres that fall within this category. The defining characteristics of Neighbourhood Centres in Maitland have primarily been based on the terminology used for Small Village Centre by the DoP in its subregional strategies for the Sydney Statistical Division.

For the purposes of defining centres within Maitland LGA, we have refined this definition as follows:

A strip of shops and surrounding residential area within a 5 to 10 minute walk.. They do provide a supermarket however they may provide a small grocery store up to 200sqm and a combined total of between 300sqm and 1500sqm of retail and commercial floorspace and generally have between 4 and 12 establishments.

These centres generally have an emphasis on providing convenience goods and services for day to day shopping and small goods. The latter uses are important to serving the needs of local communities in order to reduce their need to travel.

Woodberry Neighbourhood Centre

Location

Woodberry is located approximately 14km to the south-east of Maitland CBD and comprises of a small cluster of shop front premises. The retail and commercial premises within the local centre face towards Kingfisher Lane to the north-west and Kookaburra Parade to the south-east.

Role and Function

Woodberry is not classified by the NSW Government's Lower Hunter Regional Strategy. The local centre currently serves the adjacent residential area (which is surrounded by rural land and wetlands), providing for the day to day needs of the community. It does not however provide a supermarket and is 1,300sqm in floor area. It therefore has been classified as a Neighbourhood Centre.

In close proximity to the cluster of shops is the Woodberry Family Centre and Noel Unicomb Community Hall.

Commercial and Retail Mix

Woodberry comprises of a small cluster of shop front premises (10) and the detached "Hotel Tudor", located in between Kingfisher Lane, Kookaburra Parade and Lark Street.

Table 59 - Premises and Floorspace by category in Woodberry

	Supermarket & Grocery Store	Specialty Food	Catered Food	Department Store	Apparel	Bulky Goods	Other Non- Food Retail
No. of Premises	0	0	1	0	0	0	4
Floorspace (sqm)	0	0	100	0	0	0	400
	Personal Services	Total Retail	Vacant Shopfront	Other Commercial	Auto Related Businesses	Other Pubs/ Clubs etc	Total
No. of Premises	1	6	2	2	0	1	11
Floorspace (sqm)	100	600	200	200	0	300	1,300

Source: Hill PDA Survey 2008

Planning Controls

Under the current Maitland Local Environmental Plan 1993, the land is zoned 3(a) General Business. The 3(a) General Business zoning allows for a maximum FSR of 2:1.

Performance

There are currently 2 vacancies within Woodberry Local Centre, representing a comparatively high vacancy rate of 18.2%.

Issues and Challenges

The Neighbourhood Centre had a proportionally high vacancy rate at the time of the retail survey, suggesting that the centre may be experiencing some trading difficulties. The catchment of the centre is small. With ever expanding larger centres providing a greater variety of retail and commercial opportunities, the centre is heavily reliant on the local residents of the area supporting local businesses and capitalising on the convenience of the centre's location.

The quality of the building stock is relatively aged and of a mixed standard. The streetscape surrounding the centre does not comprise of many landscaping features. An improvement to the appearance of the streetscape and building façades could help improve the performance of the centre. The multiple owners of the buildings within the Neighbourhood Centre may make future improvements difficult. Stimulating this gentrification may prove a challenge and Council would need to play a role in improving the appearance of the centre.

Woodberry would benefit from some intervention in the form of landscaping and general urban renewal works to improve the appeal of the Neighbourhood Centre.

Future Opportunities

The centre has the potential to strengthen and grow to provide a greater range of retail (including a grocery store) and community services to meet the growing needs of the local community and to minimise the need for residents to travel to larger centres for groceries and other needs.

Our retail analysis suggests that the centre could accommodate growth to between 1,300sqm and 1,500sqm of floorspace.

Metford Neighbourhood Centre

Location

Metford Neighbourhood Centre is located approximately 6.6km to the south-east of Maitland CBD. The Neighbourhood Centre comprises of a small cluster of shopfront premises. The centre is located on the eastern corner of Chelmsford Drive and Tennyson Street.

Approximately 1km to the south west of the cluster of shops along Chelmsford Drive is a Church, two Childcare Centres and a Petrol Station. These are not included in the Metford Centre but serve the same community.

Role and Function

Metford is not classified by the NSW Government's Lower Hunter Regional Strategy. The centre is relatively small, but serves the convenience needs of the local community, providing a good range of retail, from a small grocery store, to a hair and beauty salon.

The Centre does not provide a supermarket and is only 600sqm in floor area. It therefore has been classified as a Neighbourhood Centre.

Commercial and Retail Mix

Metford comprises of a small neighbourhood cluster of shop front premises (6), with associated car parking.

Table 60 - Premises and Floorspace by Category in Metford

	Supermarket & Grocery Store	Specialty Food	Catered Food	Department Store	Apparel	Bulky Goods	Other Non- Food Retail
No. of Premises	1	1	1	0	0	0	1
Floorspace (sqm)	100	100	100	0	0	0	100
	Personal Services	Total Retail	Vacant Shopfront	Other Commercial	Auto Related Businesses	Other Pubs/ Clubs etc	Total
No. of Premises	1	5	0	1	0	0	6
Floorspace (sqm)	100	500	0	100	0	0	600

Source: Hill PDA Survey 2008

Planning Controls

Under the current Maitland Local Environmental Plan 1993, the land is located is zoned 3(a) General Business. The 3(a) General Business zoning allows for a maximum FSR of 2:1.

Performance

There are no vacant shops indicating a strong demand for retail in the centre.

Issues and Challenges

The Neighbourhood Centre appears to be performing well, even though the catchment of the centre is small. With ever expanding larger centres providing a greater variety of retail and commercial opportunities, the centre is heavily reliant on the local residents of the area supporting local businesses and capitalising on the convenience of the centre's location.

The retail premises within the Neighbourhood Centre are contained within the one complex and as a result, are uniform in their design. The complex may require some gentrification in the future, however, the current performance suggests that the centre is being sufficiently utilised by local residents.

Future Opportunities

Owing to the forecast growth in retail demand and the centres suburban location, the centre is considered to have strong opportunities for increasing its range of grocery, specialty and personal services. This growth would not only meet the growing needs of the local community but also minimise the need for residents to travel to longer centres for groceries and other needs.

Our retail analysis suggests that the centre could accommodate growth to between 600sqm and 1,500sqm of floorspace.

Tenambit Neighbourhood Centre

Location

Tenambit is located approximately 5.2km to the east of Maitland Town Centre. The Neighbourhood Centre comprises of a cluster of shop front premises, with associated car parking. It is surrounded by an established residential area. The development is located on the southern side of Maize Street, to the west of Tyrell Street and to the east of Sinclair Street. The development is arranged in a linear fashion fronting Maize Street with the associated car parking in between.

Role and Function

The Neighbourhood Centre provides for the day to day needs of the local community of Tenambit. A number of community facilities are also located within Tenambit including the Tenambit Community Hall, the Tenambit Public School and the Kindy Patch Early Education Centre. As the centre provides retail, commercial and community services, is just over 1,500sqm in floor area and provides a Foodworks grocery store, we have categorised the centre as a Neighbourhood Centre.

Commercial and Retail Mix

Tenambit has 16 premises, 11 of these being retail. The centre has a Foodworks grocery store and other retail services ranging from 4 catered food establishments to a medical centre.

Table 61 - Premises and floorspace by category in Tenambit

	Supermarket & Grocery Store	Specialty Food	Catered Food	Department Store	Apparel	Bulky Goods	Other Non- Food Retail
No. of Premises	1	4	2	0	0	0	2
Floorspace (sqm)	200	400	200	0	0	0	200
	Personal Services	Total Retail	Vacant Shopfront	Other Commercial	Auto Related Businesses	Other Pubs/ Clubs etc	Total
No. of Premises	2	11	3	2	0	0	16
Floorspace (sqm)	200	1,200	300	200	0	0	1,700

Source: Hill PDA Survey 2008

Planning Controls

Under the current Maitland Local Environmental Plan 1993, the land is zoned 3(a) General Business. The 3(a) General Business zoning allows for a maximum FSR of 2:1.

Performance

There are currently 3 vacancies within the Tenambit Neighbourhood Centre, representing a comparatively high vacancy rate of 18.8%.

Issues and Challenges

The relatively high vacancy rate of the centre suggests that it is experiencing difficulties. The catchment of the Neighbourhood Centre is small, generally covering the residents of Tenambit and Raworth. East Maitland Town Centre is located approximately 1.5km to the south-west and Greenhills Stand Alone Centre less than 3km to the south. With ever expanding larger centres providing a greater variety of retail and commercial opportunities, the centre is heavily reliant on the local residents of the area supporting local businesses and capitalising on the convenience of the centre's location.

The existing building stock and landscaping of the neighbourhood centre is relatively aged. The Neighbourhood Centre has multiple owners, making it difficult to coordinate any gentrification projects in an attempt to improve the appeal of the Neighbourhood Centre. Any works to the gentrification of the centre may require some input from Maitland City Council.

Future Opportunities

The centre has the prospect of strengthening its position as neighbourhood centre providing a range of retail, business and community uses that serve the retail convenience needs of the local community. Tenambit would benefit from some intervention in the form of landscaping and general urban renewal works to improve the appeal of the Neighbourhood Centre.

Based on our retail growth analysis, we believe the centre could grow to between 600sqm and 1500sqm in scale.

Largs Neighbourhood Centre

Location

Largs is located approximately 8.5km north-east of Maitland Town Centre. The premises fronts High Street which runs north – south.

Role and Function

Largs is not classified by the NSW Government's Lower Hunter Regional Strategy. The development is relatively small, but serves the convenience needs of the local community. A Soldiers Memorial Hall is also located within the Centre. The Centre does not provide a supermarket and is only 600sqm in floor area. It therefore has been classified as a Neighbourhood Centre.

Commercial and Retail Mix

Largs comprises of a small number of shop front premises including a newsagent, a hairdressers and the Bushranger Bar and Brasserie.

Table 62 - Premises and Floorspace by Category in Largs

	Supermarket & Grocery Store	Specialty Food	Catered Food	Department Store	Apparel	Bulky Goods	Other Non- Food Retail
No. of Premises	0	1	0	0	0	0	1
Floorspace (sqm)	0	100	0	0	0	0	100
	Personal Services	Total Retail	Vacant Shopfront	Other Commercial	Auto Related Businesses	Other Pubs/ Clubs etc	Total
No. of Premises	1	3	0	0	0	1	4
Floorspace (sqm)	100	300	0	0	0	300	600

Source: Hill PDA Survey 2008

Planning Controls

Under the current Maitland Local Environmental Plan 1993, the land is located is zoned 2(a) Residential. Some of the land uses within the Neighbourhood Centre are not permitted within this zone. These land uses, however, were developed under past planning control and now survive under existing use rights.

Performance

There are no vacant shops in the centre. However, as the centre has not been zoned business, the performance is problematic to determine.

Issues and Challenges

The catchment of the centre is small and there has been no rezoning to allow for further commercial use. With ever expanding larger centres providing a greater variety of retail and commercial opportunities, the centre is heavily reliant on the local residents of the area supporting local businesses and capitalising on the convenience of the centre's location.

The shops within the centre are spread out, reducing its convenience. The lack of connection could also reduce the centres success in the future. If changes to zoning were to occur so as to allow for more retail development, it should occur between the existing businesses in an attempt to bridge the physical gap.

Future Opportunities

Future opportunities for Largs relates to its recognition in future planning strategies and regulations as a retail centre. The centre could also benefit from the development of a range of grocery, specialty and personal services in the centre to not only meet the growing needs of the local community but to also minimise the need for residents to travel to larger centres for groceries and other local services. To this effect, the centre would also benefit from an anchor tenant such as a small supermarket and the provision of additional personal (i.e. shoe repairs, dry cleaners). The centre could also benefit from an increase in the range of specialty food stores (i.e. delicatessen, green grocers, butcher, bakery etc.)

Based on our retail growth analysis, we believe the centre could grow to between 600sqm and 1500sqm in scale.

Lochinvar Neighbourhood Centre

Location

Lochinvar is located approximately 11.6km to the north – west of Maitland CBD. The existing centre has only a few retail premises which front the New England Highway. Two schools are located in close proximity to the centre, the Lochinvar Public School and the St Patrick's Primary School.

Role and Function

Lochinvar is classified as an emerging Town Centre by the NSW Government's Lower Hunter Regional Strategy. It presently comprises of a cluster of two retail premises and one hotel. It is therefore categorised as a Neighbourhood Centre in accordance with the centre typology described above.

The centre is considered to be emerging as a result of the significant residential development expected in the area due to future land releases.

Commercial and Retail Mix

Presently the centre comprises of only a few premises fronting the New England Highway, including the Outpost (Post Office, deli, café, ATM, newsagent, grocer), a hot food takeaway shop and the Lochinvar Hotel / Motel.

Table 63 - Premises and floorspace by Category in Lochinvar

	Supermarket & Grocery Store	Specialty Food	Catered Food	Department Store	Apparel	Bulky Goods	Other Non- Food Retail
No. of Premises	0	0	2	0	0	0	0
Floorspace (sqm)	0	0	300	0	0	0	0
	Personal Services	Total Retail	Vacant Shopfront	Other Commercial	Auto Related Businesses	Other Pubs/ Clubs etc	Total
No. of Premises	0	2	0	0	0	1	3
Floorspace (sqm)	0	300	0	0	0	300	600

Source: Hill PDA Survey 2008

Planning Controls

Under the current Maitland Local Environmental Plan 1993, the land is zoned 2(a) Residential. The premises have been developed in the past and survive under existing use rights.

Performance

There are no vacant shops in the centre, however, as the centre has not been zoned as business, the performance is difficult to determine.

Issues and Challenges

The centre is considered to be emerging with a vast amount of residential development expected in the locality in the near future due to recent land releases. An appropriate amount of land will need to be rezoned business so as to accommodate the retail and commercial demands generated by the growth in population in the area.

Future Opportunities

In light of the anticipated growth in the Lochinvar area, owing to the release of land for urban development, Lochinvar Neighbourhood Centre has significant growth potential. The existing 600sqm centre could be increased to a small centre in the order of 1,500sqm to meet a range of local convenience needs.

The existing centre also has the potential to be developed further on one side of the Highway (i.e. focus around the existing 'Out Post' Convenience and Grocery store) to create a pedestrian safe, Neighbourhood Centre that caters to the existing and future residents of Lochinvar. The expanded centre would support the effective operation of the school and community services already located within Lochinvar.

Residential density should be increased around the existing centre (without constraining opportunities for expansion) to maximise the number of households within walking distance of the centre. The centre could create a physical amenity buffer between the highway and potential higher density residential area.

It is recommended that the centre is planned as part of the wider structure planning for the Lochinvar Release Area.

11.11 Dispersed Retail Activity

In addition to the centres described above, there some individual retailers and dispersed activity outside of Maitland's centres. Examples of this type of activity include corner shops in residential areas, stand alone hardware stores or patisseries along Highway corridors. In some areas they can add up to 5% to 10% of all retailers.

These retailers can often provide another level of convenience to the residents of the LGA. The trends affecting this style of development have been discussed under Section 5.

Although a retailer located outside of a centre may not be appropriately zoned, the business may have been located on the land for a long period of time and be subject to existing use rights.

In addition, some expenditure is captured from non-retailers including tourist attractions (which often have souvenirs / gifts and fast food shops), automotive service centres, wholesalers and home delivery businesses.

11.12 Emerging Centres

A number of centres have been identified within Maitland LGA for growth and development over the Study period. Of particular note is Lochinvar Town Centre that is recognised and discussed as an emerging Town Centre by the

Lower Hunter Regional Strategy. Additional potential emerging centres include Gillieston Heights and Thornton North.

The following section provides a general discussion regarding each of these emerging centres, their opportunities and constraints. The following section also identifies opportunities for new centres in Anambah and Farley

Lochinvar – Town Centre

In light of the proposed population growth in the Lochinvar Release Area, the need for a new town centre has been identified by the Lower Hunter Region Strategy to provide a broad range of employment opportunities as well as retail, community and personal services. It is anticipated that there will be sufficient demand for a Town Centre in Lochinvar in addition to the existing highway focused Neighbourhood Centre.

Future Opportunities

The town centre could provide significant local employment opportunities that would minimise the need for the community to travel to higher order centres or alternative places of employment. In addition the centre would help to meet the significant growth in retail demand generated by the development of the release area.

To enhance the success of the town centre, it should be planned as part of the wider structure planning for the Lochinvar Release Area. It is also advisable that the proposed town centre has good connectivity with the existing rail station via public transport. This would enable future residents of the Lochinvar area, and visitors to the centre, to travel to / from higher order centres such as Maitland CBD and Newcastle. Our retail analysis supports the growth of the centre to around 7,000 Sqm of floorspace.

Gillieston Heights Village

A Masterplan has been adopted by Council for Gillieston Heights. The Masterplan covers an area on the eastern side of Cessnock Road, opposite the existing residential community of Gillieston Heights. As part of the Masterplan, a commercial area has been planned. This commercial area fronts Cessnock Road and is centrally located on the eastern side of Cessnock Road.

Future Opportunities

A Local Centre in this location would provide a range of retail, business and community uses that serve the retail convenience needs of the local community. It would also provide a diversity of choice and local sustainable shopping options that reduce the need to travel to larger centres for top up or convenience shopping. Our retail analysis supports the growth of the centre to between 2,000 sqm and 4,000 sqm of floorspace.

Thornton North - Village

The Thornton North Release Area is flagged for the development of an additional 4,750 dwellings over the study period. The existing Thornton Town Centre has some retail capacity owing to existing shop vacancies that will be able to meet some of the increase in demand for retail and local services as a result of this development. It is understood however, that Thornton Town Centre is constrained from substantial expansion owing to surrounding residential uses.

Future Opportunities

In light of constraints in Thornton Town Centre, it is recommended that a new village centre is planned for development commensurate with residential development in the Thornton North Release Area. If planned appropriately, a new village centre in Thornton North could support (rather than compete) with the existing Thornton Town Centre.

A centre in this location would provide a range of retail, business and community uses that serve the retail convenience needs of the local community. It would also provide a diversity of choice and local sustainable shopping options that reduce the need to travel to larger centres for top up or convenience shopping. Our retail analysis suggest that a centre in the order of 2,00 sqm to 4,000 sqm would be appropriate.

Anambah and Farley

In keeping with the rationale for the provision of a new centre within the Thornton North Release Area, our analysis identifies that there may also be opportunities for the development of a modest new centre as part of the potential development of the Anambah and Farley Investigation Areas.

Future Opportunities

Balancing the level of expenditure generated within the LGA with the need to provide convenient and accessible retail options to the existing and future community, there are opportunities to provide new centres that are small in scale for both Anambah and Farley. Our analysis indicates that Neighbourhood Centres in the order of 1,500sqm may be appropriate in these locations.

It is important to note that this recommendation has been based on the forecast rate of population growth and expenditure over the study period. In the case that population growth exceeds the forecast rate there may be opportunity to increase the scale of future centres. Should this be proposed, however, a full Retail Impact Analysis and Assessment should be undertaken. The analysis must clearly show (to the satisfaction of Council) any potential impact to surrounding centres or centres that may be influenced. It follows that if population growth fails to meet the forecast levels, or is delayed in a given location, this will alter the scale of new centres required and possibly eliminate the need for a new centre at all.

11.13 Bulky Goods Clusters

Bulky Goods Clusters have emerged as a new form of retailing that has noticeably different characteristics and site requirements than traditional retail clusters. They generally involve large-scale formats that are located outside of traditional retail areas due to the lower rents that may be negotiated in addition to other factors. It is not uncommon for many of these stores to be established within industrial areas where land is available and rents cheap. This has proven to be the case in Maitland as the present industrial zones permit bulky goods premises. Site requirements include high exposure, good accessibility, large site area to accommodate the store footprint and plentiful parking.

Examples of these clusters in Maitland LGA include:

- Rutherford Industrial Area;
- East Maitland (Chelmsford Drive);
- Thornton Supa Centre; and
- Johnson Street/ Bungaree Street Telarah.

There are some other small bulky goods clusters in the LGA (especially close to Maitland CBD). These small clusters have been included in the Other Bulky Good Centres category.

The floorspace and composition of each of these bulky goods clusters and others is shown in the below tables.

Table 64 - Floorspace by Category within the Bulky Goods Clusters of Maitland LGA

	Rutherford - Hunter Supacentre	Harvey Norman Bulky Goods Rutherford	Thornton Supa Centre	Chelmsford Drive Bulky Goods	Johnson Street Bulky Goods	Other Bulky Goods Centres	Total Bulky Goods Areas
Supermarket & Grocery Store	0	0	0	0	0	0	0
Specialty Food	0	0	0	0	0	0	0
Catered Food	0	0	190	760	0	0	950
Department Store	0	0	0	0	0	0	0
Apparel	0	0	0	0	0	0	0
Bulky Goods	14,280	21,820	6,100	2,790	9,350	8,480	62,820
Other Non-Food Retail	950	0	0	900	0	0	1,850
Personal Services	0	0	0	0	0	0	0
Total Retail	15,230	21,820	6,290	4,450	9,350	8,480	65,620
Vacant Shopfront	2,540	50	0	0	0	170	2,760
Other Commercial	2,090	0	0	0	0	0	2,090
Auto Related Businesses	0	0	0	0	0	940	940
Other Pubs/Clubs etc	0	0	0	0	0	0	0
Total	19,860	21,870	6,290	4,450	9,350	9,590	71,410

Source: Hill PDA Survey

Table 65 - Premises by Category within the Bulky Goods Clusters of Maitland LGA

	Rutherford - Hunter Supacentre	Harvey Norman Bulky Goods Rutherford	Thornton Supa Centre	Chelmsford Drive Bulky Goods	Johnson Street Bulky Goods	Other Bulky Goods Centres	Total Bulky Goods Areas
Supermarket & Grocery Store	0	0	0	0	0	0	0
Specialty Food	0	0	0	0	0	0	0
Catered Food	0	0	3	2	1	2	8
Department Store	0	0	0	0	0	0	0
Apparel	0	0	0	0	0	0	0
Bulky Goods	13	9	6	3	2	2	35
Other Non-Food Retail	1	0	0	2	1	1	5
Personal Services	0	0	0	0	0	1	1
Total Retail	14	9	9	7	4	6	49
Vacant Shopfront	2	1	0	0	0	7	10
Other Commercial	2	0	0	1	3	9	15
Auto Related Businesses	0	0	0	0	5	3	8
Other Pubs/Clubs etc	0	0	0	0	0	0	0
Total	18	10	9	8	12	25	82

Source: Hill PDA Survey

The following describes the existing role and make up of these clusters.

Rutherford Industrial Area

Rutherford Industrial Area (Racecourse Business Park) is located on the southern side of the New England Highway in Rutherford, approximately 1.2km north-west of Rutherford Town Centre and 5.6km of Maitland CBD. The main road serving the area is Racecourse Drive / Kyle Street loop which connects to the New England Highway at both ends, approximately 1.8kms apart. The majority of the land is zoned 4(a) General Industrial, while a smaller section in the east is zoned 4(b) Light Industrial. "Bulky goods retailing" is permitted in both zones.

The area has two major bulky goods developments fronting the New England Highway, with direct access. These are the Hunter Supa Centre and the second development at 366 New England Highway (Harvey Norman Bulky Goods Area). The two developments are less than 500m apart along the New England Highway

The Hunter Supa Centre comprises of 19 premises, totalling approximately 20,600sqm. Some of the larger bulky goods retailers are Fantastic Furniture (3,430sqm), Beta Electrical (1,440sqm), Beach House Health and Fitness (1,640sqm) and Bubs Baby Shop (1,520sqm).

The second bulky goods development contains 10 bulky goods retailers, totalling approximately 21,860sqm. The major tenant in the development is Harvey Norman which has a floor area of 7,240sqm. Other tenants in the development include Joyce Mayne (4090sqm), Spotlight (3770sqm) and Batavia Furniture (1640sqm).

Vacant floorspace was measured both developments and it was found that there was only a small amount of floor area vacant at 366 New England Highway, whereas over 12% of the Hunter Supa Centre's floorspace was vacant

(2,540sqm) at the time of survey. Both developments are relatively new and are still in the process of being taken up by new tenants for the first time.

East Maitland (Chelmsford Drive)

The Chelmsford Centre is a bulky goods cluster located within East Maitland on the northern corner of the intersection of the New England Highway and Chelmsford Drive. The cluster is located approximately 500m east, (by road), of the Greenhills Shopping Centre. Vehicular access is provided from Chelmsford Drive. The area is currently zoned 3(c) Special Business. "Bulky goods sales rooms or showrooms" are permitted within the zone.

The cluster contains 7 premises, totalling in 4,450sqm in floorspace. The major tenant existing is The Good Guys (1,920sqm). Other existing tenants include Pet Barn (655sqm), Kangaroo Tent City & BBQ (630sqm) and the Hogs Breath Café (445sqm). The cluster is performing well and there are currently no vacant premises. The East Maitland Fire Station is located on the opposite side of Chelmsford Drive.

Thornton Supa Centre

The Thornton Supa Centre is located on the eastern corner of the intersection of the New England Highway and Thornton Road. The cluster is located approximately 1.2km south-west of Thornton Railway Station. Vehicular access is provided from Thornton Road. The cluster is currently zoned 3(c) Special Business. "Bulky goods sales rooms or showrooms" are permitted within the zone.

The cluster contains 6 premises, totalling 6,105sqm in floorspace. The existing bulky goods tenants include Knotts Pine Furniture (1,025sqm), Horton's Furniture One / Sleep Lab (2,185sqm) and Bing Lee (1,430sqm). The cluster also includes 3 catered food establishments, being a McDonalds Restaurant, a Subway and Darby's Freshbake. The cluster is performing well and there are currently no vacant premises.

Johnson Street / Bungaree Street Telarah

A large bulky goods retailing cluster is located to the north-west of Maitland CBD, circling the roundabout at the intersection of the Johnson Street, Bungaree Street, New England Highway and High Street. Telarah Railway Station is located further to the west. The area is currently zoned as 4(b) Light Industrial in the west and 3(c) Special Business for the remaining area. Both zones allow for bulky goods retailing, however, a large portion of the area is occupied by other land uses.

The largest bulky goods retailer in the area is Bunnings Warehouse with an approximate floor area of 9,350sqm. Other bulky good retailers in the area include Horseland and Wardrobe World. There are a number of other land uses in the area which are not bulky goods which fall under the light industrial, trade and auto related business categories. These uses include Holden, Tubular Steel, Mitsubishi, Motor Repairs, Electrical and Data Supplies, Jenny Craig, and a Performing Arts Studio.

12. OTHER CENTRES OF INFLUENCE OUTSIDE OF MAITLAND LGA

There are a number of centres outside Maitland LGA that influence retail and service demand and provision within Maitland. The Centres which have the greatest impact Maitland's centres are those that are in close proximity to the LGA and/or have a large number of retail and commercial premises and some large anchor tenants. This variety can improve their appeal and draw trade from wider catchment areas. These centres include Raymond Terrace, Cessnock, Singleton, Charlestown Square, Newcastle and Muswellbrook.

The growth of centres outside of the LGA has the potential to impact on the performance of centres within Maitland LGA. It is unlikely developments outside of the LGA will have major impacts on Local Centres and Neighbourhood centres, as their catchments are small and do not generally rely on trade from outside of the LGA. The centres most likely to be impacted on are Greenhills and Maitland CBD as their trade areas are the largest of the centres within the LGA. The potential expansion of Greenhills, particularly the addition of a department store, may offset the impact to that centre. Together with the Maitland is the main services, cultural and community focal point for the LGA. This should be promoted to offset the impact of any developments outside of the LGA.

The growth of other centres outside of Maitland LGA, has been taken into consideration throughout the preparation of this Study.

Raymond Terrace

Raymond Terrace is located approximately 22kms to the east of Maitland CBD via road. The centre includes Raymond Terrace Marketplace and Centro Raymond Terrace, as well as the William Street retail strip.

The Marketplace is anchored by Big W and Woolworths, and includes a broad range of specialty traders. This centre is centrally located within the Town Centre, with strong connections through to William Street.

Centro Raymond Terrace is anchored by a Woolworths that is conveniently located for supermarket shopping with good car parking and accessibility.

There are a range of non-food retailers provided along William Street, as well as non-retail services such as banks, real estate agents and the like. A small Bi-Lo supermarket is located on Sturgeon Street, immediately north of William Street.

Currently, land is zoned within Raymond Terrace for a sub-regional shopping centre. The site has the potential to be anchored by more than one anchor tenant. Currently, however, Port Stephens Council has not received any development applications relating to the site.

Retail facilities within Raymond Terrace currently total around 34,933sqm according to the Port Stephens Community Settlement and Infrastructure Strategy, 2008. The development of the zoned land for a sub-regional shopping centre has the potential to increase this to over 43,000 – 45,000sqm. Raymond Terrace could then be anchored by two discount department stores and an extensive range of supermarket and specialty shopping.

In addition to the proposed sub-regional centre development, an Aldi supermarket has recently been opened in the town centre.

Cessnock

Cessnock is located approximately 27kms to the south-west of Maitland CBD via road. The centre includes three shopping centres, being Cessnock City Centre, Cessnock Plaza and Cessnock Marketplace. There are also free-standing Big W, Aldi and The Warehouse stores, as well as the main retail strip along Vincent Street. These facilities are located in close proximity to one another at the north-western edge of the Centre.

Cessnock City Centre is the largest shopping centre in Cessnock at around 8,500sqm including a small Target and a Coles supermarket. Cessnock Plaza is anchored by a Woolworths supermarket.

Singleton

Singleton is located approximately 47kms to the north-west of Maitland CBD via road. The centre has a retail provision in the order of 35,000sqm. The main shopping centres in Singleton include Gowrie Street Mall (Big W and Woolworths), Singleton Plaza (Franklins) and Singleton Town Square (IGA).

Gowrie Street Mall has been approved for an expansion which will see the addition of a Coles supermarket as well as a range of mini major and specialty floorspace. The redeveloped centre will double in size, and on completion will total some 22,000 sqm of retail floorspace. An Aldi supermarket has also been approved within Singleton.

Muswellbrook

Muswellbrook is located approximately 92kms to the north-west of Maitland CBD via road. The major facility serving this township is Muswellbrook Marketplace, anchored by a Big W discount department store and Woolworths supermarket. Other facilities within the township include Muswellbrook Fair (Coles) and a Franklins supermarket located in South Muswellbrook. An Aldi is also currently proposed within the township.

Newcastle

Newcastle CBD is located approximately 33kms to the south-east of Maitland CBD via road. Newcastle is the main commercial and administration centre within Newcastle Council and is the headquarters for the regional location for a number of state government agencies and private businesses. The retail and commercial space stretches around 2km along Hunter and King Streets and fills three distinctive areas – the East End and Mall, Civic and West End.

Newcastle CBD has around 100,000sqm of retail space, of which around 30,000sqm is in the West end. Newcastle CBD is anchored by a 14,000sqm David Jones store, 5,000sqm Spotlight (west end) and a 3,000sqm Coles supermarket in Marketown (west end).

Newcastle is trading at average levels, if not below average levels, particularly for Newcastle West, which has a vacancy rate of 20% to 25%. The exception to this is Marketown, which is trading well, due to its high level of convenience and its strong anchor tenant.

Charlestown currently provides a similar level of floor space as central Newcastle, however trades at levels well in excess of Newcastle.

Newcastle is designated as a regional centre given its historic role and as a result of the large range of government and other commercial offices located within the CBD.

Newcastle has lost trade to the suburban centres over recent decades largely due to its position at the end of the peninsula. Other centres such as Kotara, Charlestown and Glendale are better located in the middle of the population base.

Charlestown Square

Charlestown is located approximately 39kms to the south-east of Maitland CBD via road. Charlestown is a major centre comprising of two indoor centres including Charlestown Square and Hilltop Plaza and strip retail along the Pacific Highway.

Charlestown Square is the largest indoor retail centre in the Hunter and is located in a prominent location in Charlestown Town Centre with a primary frontage to Pearson Street. The centre is anchored with 5 major tenants Myer, Big W, Target, Coles and Woolworths provide over a total of 30,295sqm of floorspace. The remaining 16,261sqm is occupied by specialty retail stores on three levels. In addition the centre contains 1,400sqm of office space and a 500sqm service station. An expansion of the centre is currently underway that will increase the total size of the centre to approximately 89,000sqm, including a retail component of 75,000sqm. Upon completion, the centre will be the largest enclosed retail centre in the Hunter Region.

The other indoor centre in Charlestown is the Hilltop Plaza with 6,000sqm of space including a large Rebel Sport store, a Go-Lo discount variety store and 28 specialties.

Outside the two indoor centres there are 100 shop-front premises totalling some 15,000sqm of floor space. Around one third of this space (31 premises) is occupied by non-retail commercial users such as banks, real estate agents and medical centres.

Charlestown has a number of non-retail attractors including a library, a large range of medical services and a six screen cinema.

Westfield Kotara

Westfield Kotara is located approximately 33kms to the south-east of Maitland CBD via road. The shopping centre was recently expanded to 64,000sqm and is anchored by David Jones, Kmart, Target, Woolworths and Coles. In addition, this centre provides some 250 specialty shops and eight mini-major tenants. A development application has recently been lodged for further retail space, with the possibility of adding a cinema.

Kotara has around 50,000sqm of bulky goods retailing in the industrial zone area just north of Westfield which includes a Bunnings, Domain, The Good Guys, Nick Scali Furniture, Go-Lo and Barbeques Galore.

Stockland Glendale

Stockland Glendale is located approximately 30kms to the south of Maitland CBD via road. The Regional Strategy classifies this centre as an emerging major regional centre. Major tenants in the centre include Target, Kmart, Coles, Woolworths, Aldi Supermarket, A-Mart All Sports, World Wide Appliances, Best & Less and Greater Union Cinemas. The Centre has another 65 specialty stores and a total floor area of 55,238sqm.

Trading for the centre was around 20% lower than average levels in 2005 and considerably lower than many similar size centres in the Newcastle area including Kotara and Charlestown. However there is considerable residential development planned in the western area of Newcastle and Glendale is in a strong position to exploit this growth.

Currently Stockland Glendale is the largest stand alone managed retail centre within the Hunter Region with 53,000sqm of lettable retail space. Since the recent additions, turnover has improved substantially.

13. EXISTING EMPLOYMENT LANDS IN MAITLAND

Maitland provides a range of industrial precincts across the LGA. Industrial land in the area has proven popular and therefore experienced quick take up due to the LGA's close proximity to many mines and their raw materials, a growing population and good transport links via road and rail.

The demand for industrial land will increase to a degree with the growing population. In anticipation there has been a large amount of industrial land (53ha) recently released on the northern side of the New England Highway in Rutherford, opposite the Industrial Park. Over 24ha of this land have been approved for subdivision into 60 lots.

The main existing industrial areas within the Maitland LGA are:

- Racecourse Business Park (Rutherford Industrial Area);
- Thornton Industrial Estate; and
- the Metford Industrial Area.

Further to the abovementioned areas, there are a number of other smaller areas of industrial land interspersed throughout the LGA.

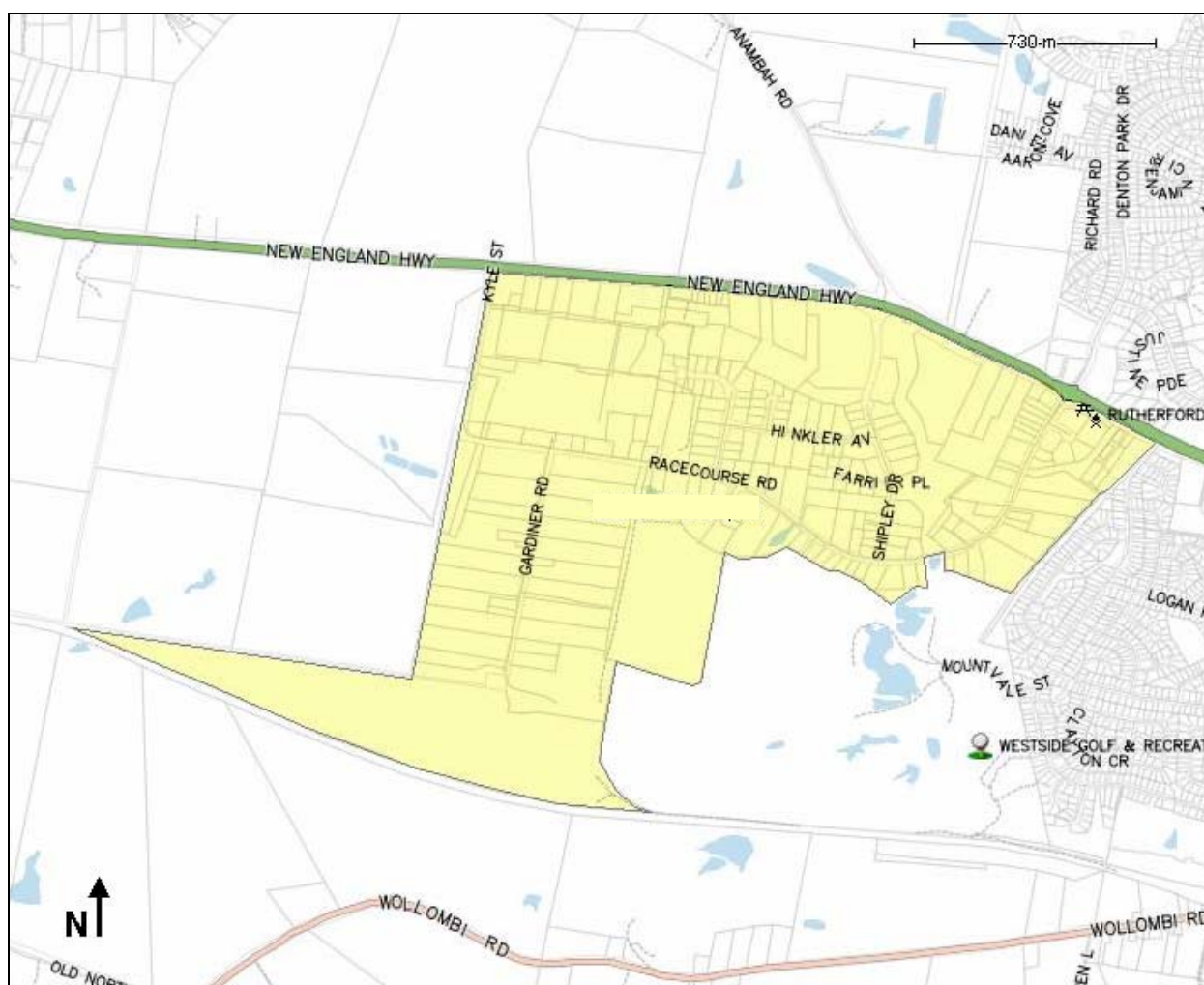
Maps of the 2001 Travel Zones for the LGA, used to calculate the employment figure have been added under Appendix 1

A description of existing industrial areas is detailed below.

Racecourse Business Park (Rutherford Industrial Area)

The Racecourse Business Park (Rutherford Industrial Area) is one of the Hunter's major Industrial land release sites, located on the southern side of the New England Highway in Rutherford, approximately 1.2kms north-west of Rutherford Town Centre. The main road serving the area is the Racecourse Drive / Kyle Street loop which connects to the New England Highway at both ends, approximately 1.8kms apart.

Figure 16 - Map of the Rutherford Industrial Area



Source: Red Square, 2005

The majority of the land is zoned 4(a) General Industrial, while a smaller section in the east is zoned 4(b) Light Industrial. The Park has an approximate area of 258ha based on the existing Maitland Zoning Map. The majority of the Park is used for industrial purposes of varying intensities, with some lots occupied by bulky goods.

The land was released in the early 1990's as part of the Council's economic development strategy for the City and in conjunction with the Lower Hunter Gateway Plan. The Park is fully prepared and cleared, and serviced for immediate building. All relevant environmental issues have been taken into consideration in the development of the Racecourse Business Park, including the provision of flooding and drainage control systems, landscaping and nature corridors.

The take up of lots has been positive and there is relatively few vacant blocks of land.

Currently the Park is host to a number of industrial companies including Eagles - Bathroom & Kitchen Centres; Garden Master - Hunter, Atlantic Batteries; Quality Sheet Metal; Saddingtons - Building and Landscape Supplies; Racecourse Automotive; Select Timbers; Hunter Valley Earthmoving; Terex, Emeco - Tractors; Hunter Valley Granite and Marble; Goldsprings Earthmoving; Heavy Haulage and Granite Hire; Hunter Valley Workwear; Wax Converters Textiles; and Pirtek - Fluid Transfer Solutions.

The Rutherford Travel Zone is the biggest generator of industrial jobs within the LGA (42% of industrial jobs in Maitland). Based on 2006 Journey to Work Data, and utilising standard industry employment yields, the zone has approximately 50,651sqm of industrial floorspace and generates 728 jobs. There are some other industrial areas which are included within this zone, however, Rutherford is by far the biggest generator of jobs within the zone. The other areas which generate industrial jobs include:

- A 4(b) Light Industrial site to the south-east of the Rutherford Industrial Park. The area is bounded by Green Street to the north and the railway to the south. The site is approximately 12.5ha in area;
- A 4(b) Light Industrial site located to the north-west of Maitland, west of the roundabout at the intersection of the Johnson Street, Bungaree Street, the New England Highway and High Street. The majority of industrial premises front Johnson Street. Telarah Railway Station is located further to the west. The area of land zoned industrial is approximately 11.6ha in area;
- A 4(b) Light Industrial site is located on the western side of John Street, Telarah. The site is approximately 2.7ha in area; and
- A 4(b) Light Industrial site to the north-east of the Rutherford Industrial Park. The area is located on the eastern side of Aberglasslyn Road. The area of land zoned industrial is approximately 10.4ha in area.

A sizable portion of the land consulting at these smaller sites in the Rutherford Travel Zone have not been totally developed or are occupied by other non-industrial uses such as bulky goods retailing.

Table 66 - Employment and Estimated Floorspace – Rutherford Travel Zone 2006

Year	Jobs	Floorspace (sqm)
Food industries	37	2,609
Textiles, clothing, footwear	56	3,951
Wood and paper products	38	2,677
Printing, publishing, recording	11	779
Chemicals and petroleum	100	6,994
Metal products	174	12,146
Non-metallic products	66	4,591
Machinery, transport and equipment	118	8,285
Other and undefined manufacturing	127	8,920
Total	728	50,951

Source: JTW 2006, Hill PDA

Thornton Industrial Estate

The Thornton Industrial Area is located on the north-eastern side of the New England Highway in Thornton, approximately 0.8kms south-west of the Thornton Railway Station. The main roads serving the area are Glenwood Drive, Huntingdale Road and Thornton Road. The latter crosses the Estate and connects to the New England Highway in the south.

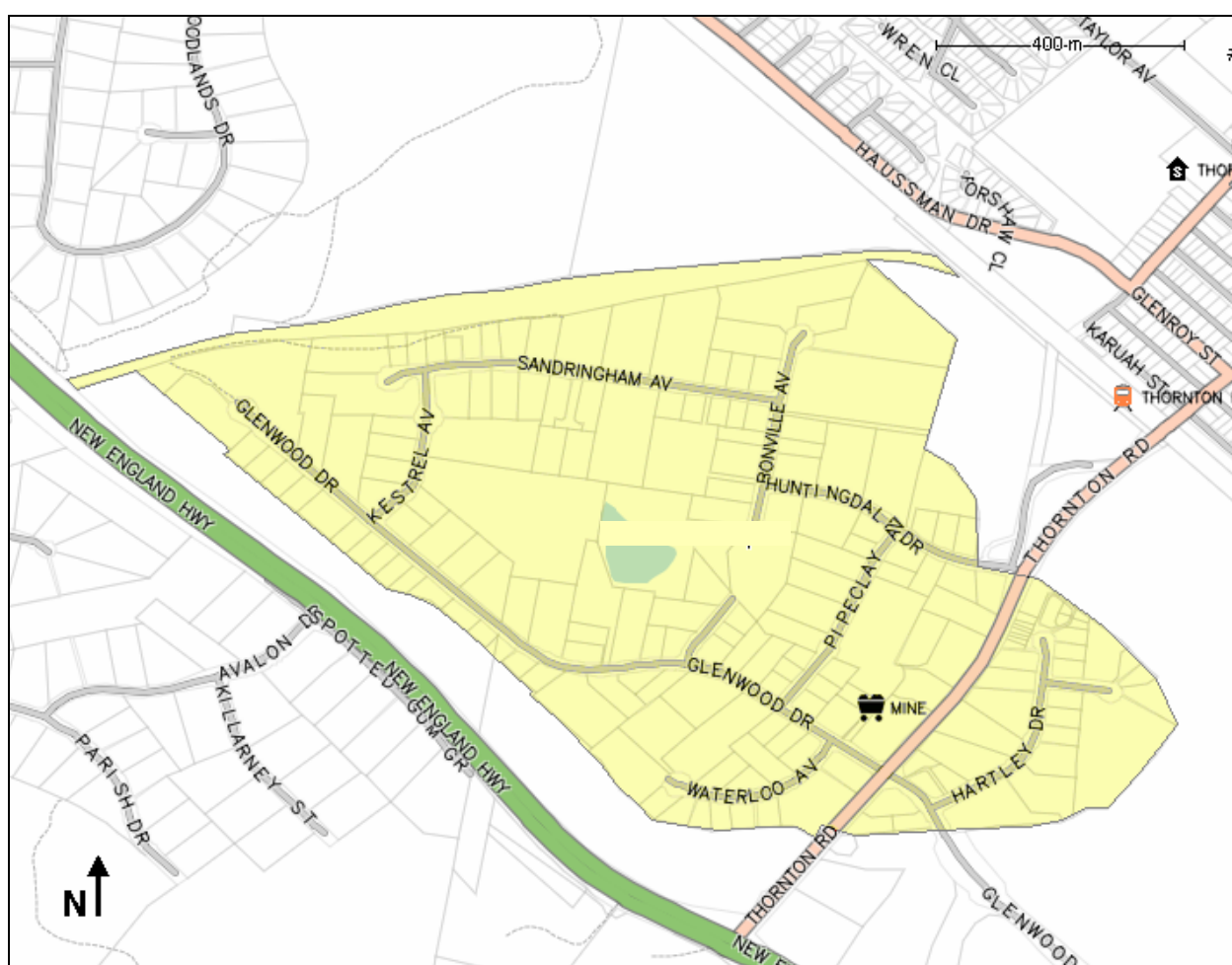
The area is zoned 4(b) Light Industrial, with the majority of the Estate located on the western side of Thornton Road. Based on the existing Maitland Zoning Map, the Estate has an approximate area of 110ha, however Maitland Council's Website advertises the Estate as having 90ha of usable employment land. The majority of the Park is used for light industrial purposes of varying intensities, with some lots occupied by bulky goods. A section

of the industrial area (along Sandringham Avenue and Hartley Drive) also provides commercial office uses and floorspace.

The take up of lots in the Industrial Estate has been strong. Lots which are available for design and development range from 2,400sqm to over 30,000sqm in size.

Currently the Estate is host to a number of industrial companies including Morris Powerlec Material Handling; Theiss Services; Minstor Thornton; Mastor Craft Interior Linings; Strategic Mining; Sigma; Westra CAT; Concrete Technologies; Hunter Pod Supplies; J.W. Express; Tyco - Flow Control; Flick Pest Control; Andre Skin Technology; Razer; National Plant and Equipment; M & S Fabrications; Southern First for Steel; Alco Batteries; Hunter Valley Buses and Hunter Buildings.

Figure 17 - Thornton Industrial Estate



Source: Red Square, 2005

Based on 2006 Journey to Work Data, and industry benchmark employment yields, the Thornton Travel Zone generates 15% of all industrial jobs within the Maitland LGA. The zone has approximately 18,398sqm of industrial floorspace and generates 263 jobs.

On visiting the Thornton area, it has become clear that there are no major industrial areas located within the 2001 Thornton Travel Zone boundary (No. 3847), which have the capability of generating over 200 jobs. It is for that

reason that it has been assumed some of, if not all of the Thornton Industrial Estate has been included within the results for the zone. The Estate is however actually located within the Metford Travel Zone boundary (No. 3848). This error may have occurred due to the name of the Thornton Industrial Estate but none-the-less it is assumed that the majority of the 263 industrial jobs from the Thornton Travel Zone are from the Estate.

As it has not been possible to determine the exact distribution of jobs between the Metford and Thornton Travel Zones, the two have been added in the below table under the heading "Metford and Thornton Area". The job and floorspace figures therefore comprise of industrial lands from both travel zones.

Metford Industrial Area

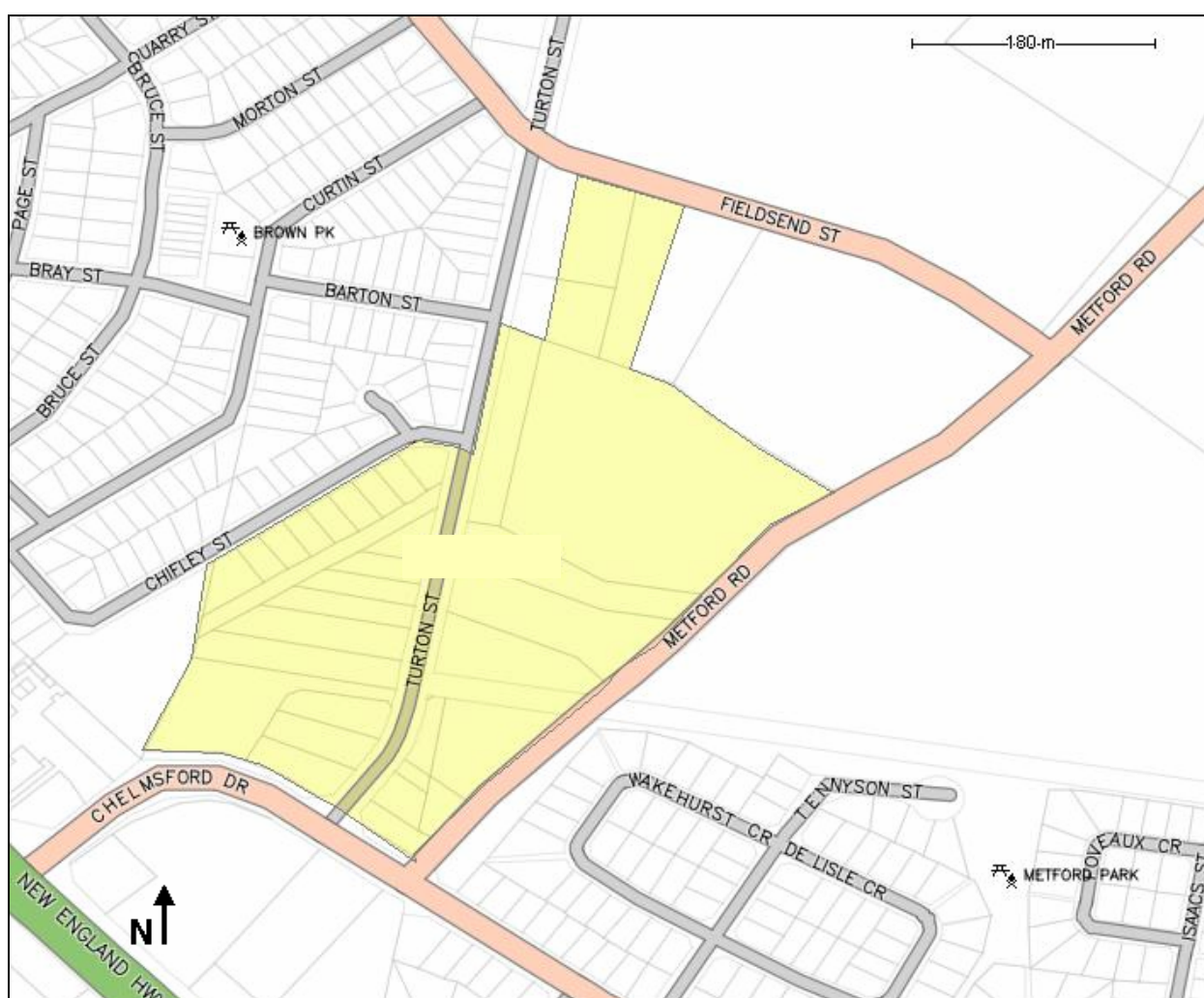
The Metford Industrial Area is located on the northern side of Chelmsford Drive in Metford, approximately 0.75kms west of Greenhills Shopping Centre, via road. The main roads serving the area are Turton Street and Metford Road, which both connect to Chelmsford Drive in the south.

Half of the area in the south-west is zoned 4(b) Light Industrial, the other half is zoned 4(a) General Industrial. The site has an approximate area of 12.7 ha based on the existing Maitland Zoning Map. The majority of the Park is used for industrial purposes of varying intensities, with some lots occupied by bulky goods and auto-related businesses.

Currently the site is host to a number of industrial companies including Watty Paints; Trade Link Plumbing; Australian Sweets; Hanson Concrete; Doctor Mat - Engines Repair; Knox Joinery; Penbroke Business Supplies; Penman Electrics; Maitland City Council Works Depot; Telstra Depot; Ultra Tune and Paint Place.

Based on 2006 Journey to Work Data and using standard industry employment yields, the Metford Travel Zone (No. 3848) generates 20% of all industrial jobs within the Maitland LGA and has approximately 25,100sqm of industrial floorspace, generating 359 jobs. However, as has been discussed under the above heading "Thornton Industrial Estate", the figures for the neighbouring travel zone do not match what is actually located on the ground and it appears the categorisation by the TDL is an error.

Figure 18 - Map of Metford Industrial Area



Source: Red Square, 2005

Metford and Thornton Areas

Due to inconsistencies with the Journey to Work Data, the Thornton (No.3847) and the Metford (No. 3848) Travel Zones have been added together.

These two areas collectively include the Metford Industrial Estate and the Thornton Industrial Estate, together with the following smaller areas of industrial land:

- a 4(b) Light Industrial site located on the southern side of the railway line, approximately 500m to the east of Victoria Street Railway station, fronting Young Street, East Maitland. The site is approximately 2ha in area; and
- a number of industrial businesses scattered around the Melbourne Street Precinct in East Maitland.

The two travel zones generated in the LGA a large proportion of industrial jobs within the LGA (36% of industrial jobs in Maitland). Based on 2006 Journey to Work Data, the two zones have approximately 43,498sqm of industrial floorspace and generate 621 jobs.

Table 67 - Employment and Estimated Floorspace – Thornton and Metford 2006

Type	Jobs	Floorspace (sqm)
Food industries	106	7,400
Textiles, clothing, footwear	6	433
Wood and paper products	26	1,788
Printing, publishing, recording	27	1,905
Chemicals and petroleum	40	2,782
Metal products	90	6,282
Non-metallic products	101	7,097
Machinery, transport and equipment	146	10,214
Other and undefined manufacturing	80	5,598
Total	621	43,498

Source: JTW 2006, Hill PDA

Other Industrial Areas

The remaining 23% of industrial jobs generated in the LGA are located throughout the other travel zones of the Maitland LGA.

The travel zone that comprises of the most industrial jobs outside of the abovementioned zones is the Maitland Travel Zone (No. 3851). Based on 2006 Journey to Work Data, the Maitland Travel Zone generates 14% of all industrial jobs within the Maitland LGA and has approximately 17,189sqm of industrial floorspace, generating 246 jobs. A large percentage of the Maitland jobs are classified as "Printing, publishing, recording", an industry which would support the commercial and civic nature of the centre.

Table 68 - Employment and Estimated Floorspace – Maitland 2006

Type	Jobs	Floorspace (sqm)
Food industries	56	3,891
Textiles, clothing, footwear	2	162
Wood and paper products	6	449
Printing, publishing, recording	108	7,545
Chemicals and petroleum	-	-
Metal products	23	1,605
Non-metallic products	6	447
Machinery, transport and equipment	18	1,230
Other and undefined manufacturing	27	1,860
Total	246	17,189

Source: JTW 2006, Hill PDA

Other smaller industrial areas in Maitland include Tenambit which contains 3.5% of the industrial jobs generated in Maitland LGA. The Tenambit Travel Zone includes the industrial land in Morpeth and some of the scattered industrial businesses located within the Melbourne Street Precinct in East Maitland.

Table 69 - Employment and Estimated Floorspace – Tenambit 2006

Year	Jobs	Floorspace (sqm)
Food industries	10	725
Textiles, clothing, footwear	2	162
Wood and paper products	7	457
Printing, publishing, recording	4	260
Chemicals and petroleum	-	-
Metal products	10	698
Non-metallic products	2	143
Machinery, transport and equipment	13	885
Other and undefined manufacturing	15	1,024
Total	62	4,355

Source: JTW 2006, Hill PDA

The Bolwarra Travel Zone includes the towns of Lorn, Largs and Bolwarra. The area does not have any specific land which is zoned industrial, however, the zone does contain 2% of the industrial jobs generated within Maitland LGA.

Table 70 - Employment and Estimated Floorspace – Bolwarra 2006

Year	Jobs	Floorspace (sqm)
Food industries	10	725
Textiles, clothing, footwear	-	-
Wood and paper products	3	196
Printing, publishing, recording	4	260
Chemicals and petroleum	3	238
Metal products	-	-
Non-metallic products	-	-
Machinery, transport and equipment	3	190
Other and undefined manufacturing	14	950
Total	37	2,559

Source: JTW 2006, Hill PDA

Other Pockets of Industrial Jobs

Further to the abovementioned industrial areas, the remaining 3.5% of industrial jobs generated in the LGA (as of 2006) were distributed across Maitland.

The Anambah Business Park is one of these pockets located at the junction of the New England Highway and Anambah Road. The approved Anambah Business Park (Stages 1 – 6) provides an additional 516,000sqm of site area zoned for employment uses. As of 2006 the Business Park generated 3 jobs in food related industries. The TDC forecasts that with respect to industrial jobs, the business park will experience modest employment growth in industries such as Machinery and Transport (14 jobs) by 2031. The Business Park is presently being widely marketed to prospective tenants and accordingly has the prospect of growing as a far larger cluster of employment generating businesses in the future than indicated by the TDC 2006 forecasts.

Other small pockets of industry, that may be relate to one or a modest cluster of businesses include:

- Gillieston Heights – 3 jobs were generated in 2006 in Chemicals and Petroleum. This is anticipated to increase to 6 by 2031;
- Oswald – 16 jobs were generated in food industries, textiles and clothing and non metallic products. This is anticipated to reduce to 9 by 2031; and

- Woodberry – 7 jobs were generated in the metal products category. It is anticipated that this will reduce to 5 in 2031. 7 jobs in Machinery and Transport increasing to 11 by 2031.

14. CONCLUSION

This Background Study has found that Maitland LGA is forecast to experience significant population growth and residential development by 2031. Owing to this growth, there will be a substantial increase in demand for local employment opportunities and service provision.

Given the scale of growth in demand for retail floorspace, we do not anticipate that any one centre is at risk of decline. Notwithstanding this, centres such as Maitland CBD require detailed structure planning to ensure that they can successfully compete for businesses and sustainable growth in light of potential competing centres in Maitland LGA and the Lower Hunter Region. Potential new or emerging centres within Maitland LGA will also require structure planning to ensure they create attractive and sustainable retail options for the communities they serve, without adversely affecting other centres in Maitland's Centre Hierarchy.

Based on the research and modelling conducted within this Study, we forecast demand for over 12,000 additional jobs within the LGA by 2031. This job target will maintain the existing level of job containment. Maintaining the existing level of job containment (as a minimum) is considered desirable for a range of important social, economic and environmental reasons.

The challenge for Maitland LGA relates to the significant difference between the 12,000 jobs required to maintain existing levels of employment containment, and the DoP projection for job growth of 4,700 over the study period. The TDC job growth estimate for the LGA is slightly higher at 6,000 jobs, however it still falls at close to half the target recommended by this Study.

Maitland LGA's employment challenge will be compounded by the projected decline in industrial jobs across the LGA and the modest increase in commercial jobs by 2031. Retail will be the main industry of employment generation in the LGA by 2031 highlighting the important role of Maitland's centres to not only service provision by local jobs.

For Maitland LGA to achieve a significantly greater share of employment growth over the Study period, it will be important for the LGA to proactively target industries to move to the Maitland LGA or existing industries to expand. To achieve this, Maitland Council will need to proactively work with State Government and other government / non government organisations to support sustainable business and employment growth commensurate with the skills of Maitland's existing and emerging resident labour force. These objectives will need to be achieved in light of this studies recommendation to protect and enhance the viability and functionality of Maitland's Centre Hierarchy.

DISCLAIMER

This Study is for the confidential use only of the party to whom it is addressed (the client) for the specific purposes to which it refers. We disclaim any responsibility to any third party acting upon or using the whole or part of its contents or reference thereto that may be published in any document, statement or circular or in any communication with third parties without prior written approval of the form and content in which it will appear.

This Study and its attached appendices are based on estimates, assumptions and information sourced and referenced by Hill PDA and its sub consultants. We present these estimates and assumptions as a basis for the reader's interpretation and analysis. With respect to forecasts we do not present them as results that will actually be achieved. We rely upon the interpretation of the reader to judge for themselves the likelihood of whether these projections can be achieved or not.

As is customary, in a Study of this nature, while all possible care has been taken by the authors to prepare the attached financial models from the best information available at the time of writing, no responsibility can be undertaken for errors or inaccuracies that may have occurred both with the programming or the financial projections and their assumptions.

This Study does not constitute a valuation of any property or interest in property. In preparing this Study we have relied upon information concerning the subject property and/or proposed development provided by the client and we have not independently verified this information excepted where noted in this Study.

APPENDIX 1 - TRAVEL ZONE MAPS FOR MAITLAND LGA FOR 2001 AND 2006