



SOCIAL AND ECONOMIC IMPACT ASSESSMENT

Proposed Redevelopment of Yacht Club Site

Ada Street, Belmont

PREPARED FOR: LAKE MACQUARIE YACHT CLUB

**SOCIAL AND ECONOMIC IMPACT ASSESSMENT
LAKE MACQUARIE YACHT CLUB****ADA STREET, BELMONT**

Insite Economic & Social Planning Pty Ltd (ABN: 76 125 889 572)

Address:

Suite 1, Level 1, 104 – 106, Vincent Street, Cessnock
PO Box 93, Cessnock NSW 2325

Contact:

(ph) 4991 4793
(fax) 4990 7551
email: admin@insiteplan.com.au

QUALITY ASSURANCE

This document has been prepared, checked and released in accordance with the Quality Control Standards established by Insite Planning Engineering Economic & Social.

Issue	Date	Description	By
A	19/03/09	Draft	JM
B	23/03/09	Edit	JL
C	25/03/09	Final Proof	JM/DH
D	21/05/09	Approved	JL

Copyright © Insite Planning Engineering Economic & Social

This document has been authorised by _____

Date

**Disclaimer**

This report has been prepared based on the information supplied by the client and investigation undertaken by Insite Planning Engineering Economic & Social & other consultants. Recommendations are based on Insite Planning Engineering Economic & Social's professional judgement only and whilst every effort has been taken to provide accurate advice, Council and any other regulatory authorities may not concur with the recommendations expressed within this report. This document and the information are solely for the use of the authorised recipient and this document may not be used, copied or reproduced in whole or part for any purpose other than that for which it was supplied by Insite Planning Engineering Economic & Social. Insite Planning Engineering Economic & Social makes no representation, undertakes no duty and accepts no responsibility to any third party who may use or rely upon this document or the information.

Confidentiality Statement

All information, concepts, ideas, strategies, commercial data and all other information whatsoever contained within this document as well as any and all ideas and concepts described during the presentation are provided on a commercial in confidence basis and remain the intellectual property and Copyright of Insite Planning Services Pty Ltd and affiliated entities.



EXECUTIVE SUMMARY

Insite Economic and Social Planning (IESP) have been engaged by the Lake Macquarie Yacht Club (LMYC) to undertake a Social and Economic Impact Assessment (SEIA) in relation to the proposed redevelopment of the current yacht club site. The proposed redevelopment of the club is to:

1. Increase the wet marina berths from 83 to 141 berths. This represents an increase of 58 berths which will extend to the west of the existing marina.
2. Increase car parking from 94 spaces to 151 spaces. This represents an increase of 57 spaces which will be achieved via improved layout of the existing car park and also formalisation of the car park located on the crown reserve located at the eastern end of Alma Street, adjacent to the entry to the yacht club.
3. Demolition of the existing club and construction of a new two story building.

Consultation

Consultation with identified stakeholders has been undertaken to help assess the social and economic impacts of the redevelopment of the site. Through these consultations it has been found that there is overall support for the project. The main issues identified relate to the social impacts of the development and the specific feedback and comments have been incorporated into the report.

Strategic Context

The redevelopment of the LMYC has included a review of a range of strategic planning policies and documentation. It has been found that social and economic impacts arising from this development are not in conflict with, but rather support the strategic direction of the;

1. Lower Hunter Regional Strategy;
2. Lake Macquarie 2020 Vision Plan;
3. Lake Macquarie Community Plan 2008 – 2018;
4. City of Lake Macquarie Investment Prospectus;
5. Main Street and Town Centre Strategic Plans;
6. Tourism Profiles for Local Government Areas in Regional Australia (Tourism Research Australia);
7. NSW Maritime Boat Ownership and Storage Study (HILL PDA);
8. Trinity Point Marina Demand Study (Patterson, Britton and Partners);
9. Discussion Paper on Vessel Storage in NSW (Buttigieg, D. and Norbom, S.);
10. Review of boat registration data (NSW Maritime).

Marina Berths Supply & Demand

The demand for marina berths is met through the development of the related infrastructure across the Lake. There is an expected 11% growth in the demand for moorings over a ten year period (from 2003). The future supply of marina berths cannot be met by any one facility, meaning that the LMYC has a market share in meeting this demand. The LMYC has an established clientele and is situated in an area which is known for its sailing and general boating.

Economics

The economic benefits to the local economy are significant. Based on an estimated construction cost of \$7 million the development has the potential to create approximately 44 direct job years over the construction period and a further 70 job years throughout the wider economy. Furthermore, an estimation of running costs for various sized vessels has been undertaken and the average expenditure across all boat classifications ranges between \$4,000 and up to \$50,000 per moored boat per annum (depending on size, type, utilisation patterns etc). This represents a significant financial input into the local economy.

In addition to the marina operations, the LMYC has, and will continue to be a positive asset to the lakes infrastructure as well as playing a significant role in the promotion of the area as a destination point for visitors.

Social

With regards to specific social impacts it was identified that the likely area of affectation (ie the area where the social impacts are most likely) is within the vicinity of the development. The specific impacts identified through consultation relate to:

-  Car parking and traffic: This has been an ongoing issue and is an issue generally across the Belmont community, in particular relating to the business precinct. It should also be noted that some residents reported that the issue of traffic was 'part and parcel' of the area and brought with it some vibrancy and character to the area. The development will formalise an additional 57 car parks which will mitigate the issue. The extent of this will be addressed within the Traffic Impact Assessment.
-  Visual impact: The LMYC facility is part of the visual landscape of the area. The size and location of the club house itself did not identify any visual impacts other than some comments regarding its aesthetic design which are basically a matter of taste. There were some concerns raised regarding the visual impact arising from the extension of the marina. This issue was specifically related to properties on Andersons Hill (Bellevue Road) which face north.
-  Lake Macquarie Water Health: There were some general concerns about the health of the Lake in the Belmont Bay area. Residents expressed concerns that the past development of the car park (and subsequent infill of the Lake) has resulted in water flow issues and silting of the Belmont Bay area. General comments raised related to better maintenance of the small channel between Ada Street and the car park. The fact that there was no further infill of the lake was generally seen as a positive factor.

It is considered that the redevelopment of the LMYC has a substantial net positive impact on the local and sub-regional community and economy. The LMYC is a positive asset for the community and the current design has taken into account the issues raised and has attempted to address these where possible.

STRUCTURE OF THE REPORT

The final SEIA include a number of sections and will examine the following:

- Section 1: Introduction
 - Section 2: Outline of the Proposed Development
 - Section 3: Consultation and Engagement
 - Section 4: Strategic Context
 - Section 5: Marina Berths – Supply and Demand
 - Section 6: Economic Impacts
 - Section 7: Social Impacts
 - Section 8: Conclusions and Recommendations
-

CONTENTS

EXECUTIVE SUMMARY

1. INTRODUCTION	1
1.1 THE PROJECT	1
1.2 THE SOCIAL ECONOMIC IMPACT ASSESSMENT	1
1.2.1 Director Generals Requirements	2
1.2.2 Lake Macquarie City Council Social Impact Assessment DCP	2
1.2.3 Lake Macquarie City Council Economic Impact Assessment DCP	2
1.2.4 The Environmental Planning and Assessment Act.	3
1.2.5 Guidelines for Major Project Community Consultation: Department of Planning 2007	3
1.3 AUTHORS QUALIFICATIONS	3
1.4 RESEARCH APPROACH	4
2. THE DEVELOPMENT	5
2.1 INTRODUCTION	5
3. COMMUNITY ENGAGEMENT	9
4. STRATEGIC CONTEXT	10
4.1 INTRODUCTION	10
4.2 LOWER HUNTER REGIONAL STRATEGY	10
4.3 LAKE MACQUARIE LOCAL GOVERNMENT AREA.	12
4.4 LAKE MACQUARIE – INDUSTRY SECTORS	12
4.5 LAKE MACQUARIE LIFESTYLE 2020 AND COMMUNITY PLAN 2008 - 2018	15
4.6 BELMONT – LOCAL CONTEXT	15
4.7 BELMONT'S RESIDENTIAL CHARACTER	20
4.8 CONCLUSION – STRATEGIC AND LOCAL CONTEXT	21
5. MARINA BERTH -SUPPLY AND DEMAND ANALYSIS	22
6. ECONOMIC IMPACTS	26
6.1 MARINA	26
6.2 TOURISM	27
6.3 EMPLOYMENT	29
6.4 ECONOMIC CONCLUSIONS	29
7. SOCIAL IMPACTS	30
7.1 INTRODUCTION	30
7.2 BACKGROUND	31
7.3 POPULATION CHARACTERISTICS OF THE AREA	32
7.4 LABOUR FORCE	32
7.5 INCOME	33
7.6 IMPACTS ON POPULATION AND ITS CHARACTERISTICS	33
7.7 COST OF LIVING, INCLUDING HOUSING AFFORDABILITY	34
7.8 COMMUNITY STRUCTURE, ITS CHARACTER OR BELIEFS	37
7.9 HEALTH AND SAFETY OF THOSE LIVING AND WORKING IN THE VICINITY OF THE DEVELOPMENT	37
7.10 ASSESSMENT OF SAFETY AS IT RELATES TO CRIME, ANTI SOCIAL AND NUISANCE BEHAVIOUR	37
7.11 ACCESSIBILITY	38
7.12 SOCIAL COHESION, IN PARTICULAR THE QUALITY OF LIFE OF THOSE LIVING IN THE VICINITY OF THE DEVELOPMENT	38
7.13 SENSE OF PLACE AND COMMUNITY	40

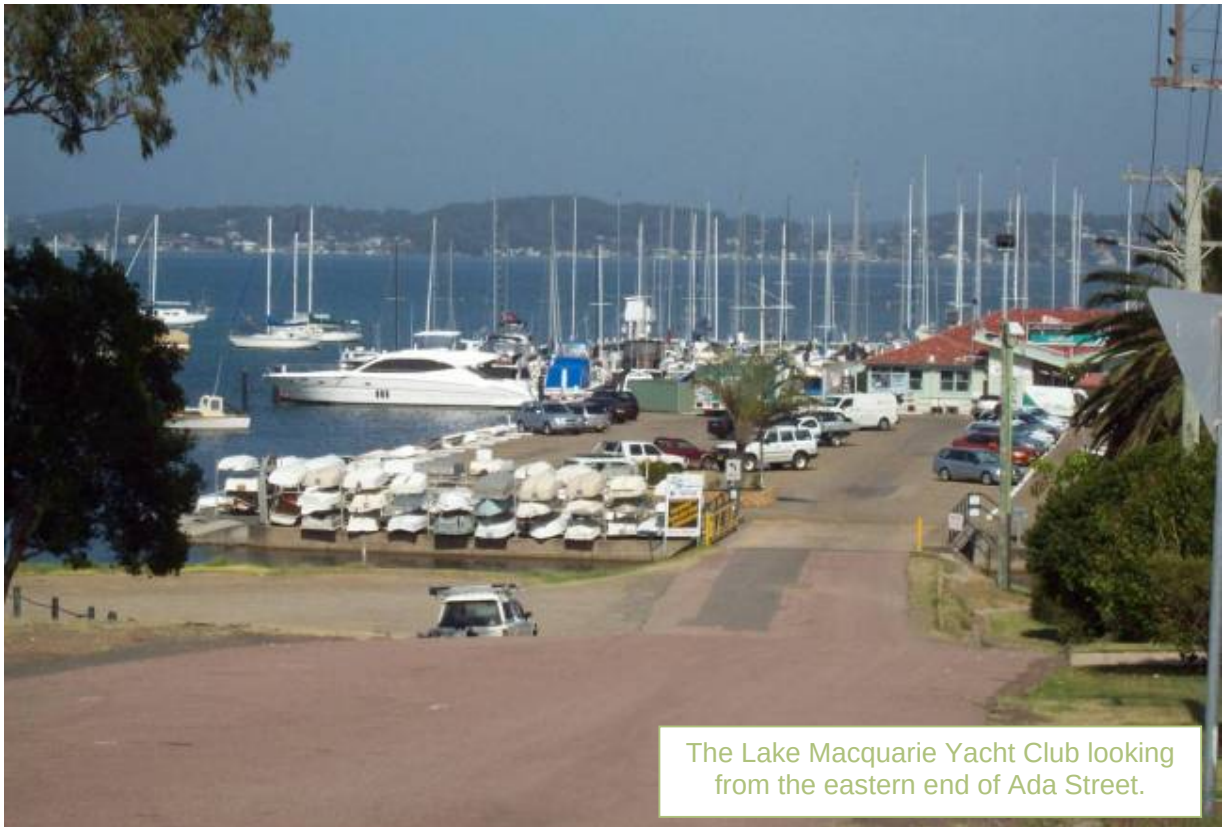
8. CONCLUSIONS ON SOCIAL AND ECONOMIC IMPACTS	43
8.1 STRATEGIC POLICIES AND DIRECTIONS	43
8.2 MARINA BERTH SUPPLY AND DEMAND	43
8.3 ECONOMIC IMPACTS	44
8.4 SOCIAL IMPACTS	44
9 REFERENCES	46

FIGURES

Figure 1: Plan of the overall redevelopment showing the marina extension, foot print of the proposed redeveloped club house and car park area.	6
Figure 2: Plan of the car park area	7
Figure 3: The marina is to be extended to the west of the existing marina.	8
Figure 4: Commercial Hierarchy of the Lake Macquarie LGA	11
Figure 5: Lake Macquarie Town Centres Strategic Plan, November 2007: 27	19
Figure 6: Boat registrations and catchment for Lake Macquarie.	25
Figure 7: Assessment of housing affordability for the Greater Metropolitan Area (source: Department of Housing).	36

TABLES

Table 1: Retail and Commercial expenditure projected to 2020	13
Table 2: Current Supply of Marina Berths	23
Table 3: Review of Running Costs	26
Table 4: Tourism Based Businesses across Lake Macquarie	27
Table 5: Tourism Trends and Expenditure	27
Table 6: Domestic Day Visitors to the Lake Macquarie LGA	28
Table 7: Domestic Overnight Visitors to the Lake Macquarie LGA	28
Table 8: International Visitors to the Lake Macquarie LGA	28
Table 9: Projected population and selected characteristics - Lake Macquarie (C)	32
Table 10: Single Residential Dwelling – trends in sales 1998 - 2008 (Source RP data)	35
Table 11: Residential Strata Unit – trends in sales 1998 – 2008 (Source RP Data)	35



1. INTRODUCTION

1.1 The Project

Insite Economic and Social Planning (IESP) have been engaged by the Lake Macquarie Yacht Club (LMYC) to undertake a Social and Economic Impact Assessment (SEIA) relating to the proposed redevelopment of the current LMYC site. The existing facility includes a club house which is approx 70 years old, an 83 berth marina which is 20 years old and a 94 space car park. The proposed redevelopment of the club is to;

1. Increase the marina berths from 83 to 141 berths. This represents an increase of 58 berths which will extend to the west of the existing marina.
2. Increase car parking from 94 spaces to 151 spaces. This represents an increase of 57 spaces which will be achieved via improved layout of the existing car park and also formalisation and construction of the car park located on the crown reserve located at the eastern end of Ada Street, adjacent to the entry to the yacht club.
3. Demolition of the existing club and construction of a new two story building.

1.2 The Social Economic Impact Assessment

The SEIA is a requirement by the Director General as part of the 3A approval process. A SEIA is required for development matters which are identified to bring about changes to a particular locality where the development will occur. The process of SIA will be guided by Section 79C (1b) of the Environmental Planning and Assessment Act. This will enable a consistent approach to all SEIA.

A SEIA is an analysis of the extent of change, and subsequent effect, that a development will have on the social fabric of a community. The aim of the SEIA is to assist determine the scale of change, if any, within the community (it must be noted that social and economic impacts can be both positive and negative). For example:-

-  The desirable and undesirable social and economic impacts.
-  The intentional and unintentional social and economic impacts.
-  The distributional social and economic impacts (impacts experienced by different people and different parts of the community).

With this in mind the SEIA has been prepared in line with the following guidelines and requirements:

1. Director General's Requirements of the Part 3A Submission.
2. Lake Macquarie City Council Social Impact Assessment DCP.
3. Lake Macquarie City Council Economic Impact Assessment DCP.
4. Environmental Planning & Assessment Act.
5. Guidelines for Major Project Community Consultation.

1.2.1 Director Generals Requirements

The Director Generals requirements for a social and economic impact assessment states that the social impact assessment is to address social impacts arising from the proposal and measures to mitigate any negative impacts. In this regard community consultation should be undertaken and the issues/concerns raised need to be addressed. The economic impact assessment is to address the demand for additional berths including consideration of proposed developments at Marmong Point and Trinity Point; the Lake Macquarie Mooring Management Plan and potential tourism needs.

1.2.2 Lake Macquarie City Council Social Impact Assessment DCP

Lake Macquarie City Councils Development Control Plan for Social Impact Assessments. Lake Macquarie City Council requires a SIA to be undertaken in accordance with Section 2.2 (Social Impact) of the DCP (Category 2).

Lake Macquarie Council states that the SIA should generally contain the following information:

-  A community social profile.
-  The identification of the scope of the assessment (otherwise known as scoping).
-  The formulation and examination of alternatives.
-  The protection and estimation of social impacts,
-  The identification of proposed mitigation methods.
-  If negative impacts have been identified through the site analysis, the application will need to outline the amelioration measures to be undertaken.

1.2.3 Lake Macquarie City Council Economic Impact Assessment DCP

Lake Macquarie City Councils Development Control Plan for Economic Impact Assessments. Lake Macquarie City Council requires an EIA to be undertaken in accordance with Section 2.3 (Economic Impact) of the DCP.

Lake Macquarie council states that the EIA should generally contain the following information:

-  The potential economic benefits and impacts of the proposal
-  Community needs
-  The measures proposed to maximise the benefits and avoid adverse impacts.
-  Floor space, industrial/retail/ commercial mix and turnover data.
-  Sample analysis of the development within the catchment
-  Ability of the development to generate economic benefits for the City.

1.2.4 The Environmental Planning and Assessment Act.

Section 79C (1b) of the Environmental Planning and Assessment Act is used to assist the applicant consider the range of possible social impacts of the proposed development. It allows for the identification of positive and negative social impacts of the proposed development which in turn allows for any issue, which may impede the approval process, to be addressed at the earliest possible stage.

1.2.5 Guidelines for Major Project Community Consultation: Department of Planning 2007

The Departments guidelines stress the importance of community consultation to provide an opportunity to obtain the stakeholders views in the assessment and decision making process.

1.3 Authors Qualifications

This SEIA has been prepared by James Marshall, Senior Planner at Insite Economic and Social Planning (IESP). IESP is a multi disciplinary consulting firm providing specialist assistance to the development industry and public sector in the areas of community consultation, mediation, social planning, economic planning, strategic planning, recreation planning, asset management and project management. IESP's experience includes;

-  Community Consultation and Engagement
-  Social Impact Assessments
-  Economic Impact Assessments
-  Recreation Strategic Planning
-  Social & Community Strategic Planning
-  Safer By Design Reviews
-  Feasibility Studies and Needs Analysis
-  Demographic Analysis and Population Projections
-  Mediation and Conflict Resolution
-  Cemetery Strategic Plans
-  Open Space Analysis
-  Strategic Land Use Planning
-  Asset Management Planning
-  Corporate Planning
-  Management Reviews

James Marshall has over fifteen years experience in the community development and social planning sector. He has held a number of senior management roles in both the welfare sector and in local government. His focus is on social research methodologies, community consultation practices and both demographic analysis and social mapping. James holds graduate qualifications in the social sciences as well as post-graduate qualifications in business management. James has prepared a number of Social Plans, social impact assessments and provided expert advice in the Land and Environment Court.

-  Bachelor of Social Science (Community Development)
-  Advanced Diploma in Business Management



1.4 Research Approach

Research has been undertaken in accordance with the Director General's requirements and will be concerned with two main principals. Firstly, the contextual relationship of the proposal in terms of existing social and economic implications and secondly, a broad assessment of the impact arising from the proposed development assuming it is approved, including strategies to mitigate negative impacts if identified. The report presents an independent assessment of the capacity and capability of the area to support the proposal.

The assessment will be constructed using accepted modelling techniques, utilising demographic information obtained from the ABS Census and other statistical sources as well as liaison with identified stakeholders within the area of affectation. Insite will have had regard to the following, as a minimum:

1. Review of existing studies relating to the planning and growth strategies for the area and surrounds including but not limited to:
 - Lower Hunter Regional Strategy
 - Lake Macquarie 2020 Vision Plan
 - Lake Macquarie Outdoor Recreation and Open Space Plan
 - Lake Macquarie Social and Community Plan
 - Demographic review derived from the 2001 and 2006 ABS Census.
2. Liaise with identified key stakeholders and special interest groups including LMCC.
3. A statistical assessment of the area including an analysis of the demographic characteristics and population growth forecasts in the area.
4. Assessment of existing social infrastructure and services as well as opportunities in surrounding area. Particular reference will be made to the demand for moorings.
5. Assessment of similar facilities (existing and proposed) and the implications of the proposal, in particular the redevelopment of Marmong Point and proposed development of Trinity Point. With this in mind the following has been reviewed:
 - Trinity Point Marina Demand Study (Patterson, Britton and Partners)
 - NSW Maritime Boat Ownership and Storage Study (HILL PDA)
 - Review of boat registration data (NSW Maritime)
 - Discussion Paper on Vessel Storage in NSW (Buttigieg, D. and Norbom, S.);
 - Lake Macquarie Mooring Management Plan
 - Lake Macquarie Estuary Management Plan
 - Consultations with NSW Maritime
 - Consultations with LMYC
6. Information concerned with the development application for the proposed development and its context within the LMCC LGA as well as the wider sub-regional context assessing the potential impacts (both negative and positive) arising from the proposed development and subsequent management strategies.





2. THE DEVELOPMENT

2.1 Introduction

The LMYC's clubhouse was opened on 28 April 1934. Due to its age and location, and as a result of exposure to the harsh saltwater environment, the timber building is in a state of poor repair. The building is built over water on timber piles on timber joists and bearers and many of these are rotted out and propped up in a make shift way.

For some years the Board of LMYC has debated the most appropriate means to address the issue of the Clubhouse and in June 2006 a development committee was formed. It was then agreed to process with a Development Application to replace the existing clubhouse facility and extend the marina. The redevelopment of the site therefore addresses the physical state of the building and associated infrastructure and the increased demand for marina berths.

The development and financial strategy, developed by the Club's board, was finalised and agreed to in July 2006. Stage 1 of the development entails the expansion of the marina. This is based on the existing 100% occupancy rate of the marina and the extensive waiting list and perceived high demand for additional marina berths.

Stage 2 entails the redevelopment of the LMYC Clubhouse. It is expected to be completed within five (5) years.

The redevelopment is as follows:

1. Increase the wet marina berths from 83 to 141 berths. This represents an increase of 58 berths which will extend to the west of the existing marina.
2. Increase car parking from 94 spaces to 151 spaces. This represents an increase of 57 spaces which will be achieved via improved layout of the existing car park and also formalisation of the car park located on the crown reserve located at the eastern end of Alma Street, adjacent to the entry to the yacht club.
3. Demolition of the existing club and construction of a new two story building.

Plans for the proposed development are shown below.



Figure 1: Plan of the overall redevelopment showing the marina extension, foot print of the proposed redeveloped club house and car park area.



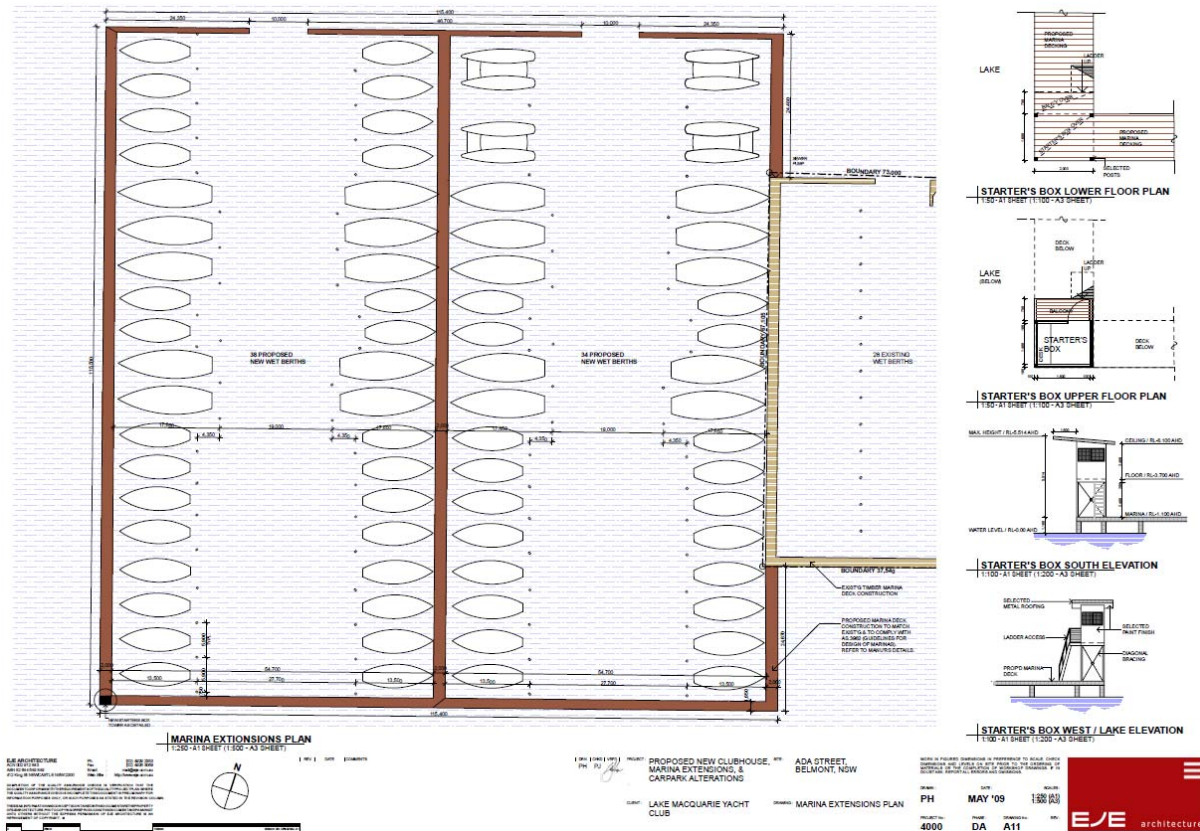


Figure 3: The marina is to be extended to the west of the existing marina.





3. COMMUNITY ENGAGEMENT

Community engagement has been undertaken in accordance with the Guidelines for Major Project Community Consultation (October 2007) issued by the NSW Department of Planning.

The purpose of the consultation has been to:

- Provide information about the development.
- To allow the community and stakeholders have their say in the proposed development.
- Allow opportunities for new ideas.
- Allow for an opportunity to negotiate acceptable outcomes.
- To develop, maintain and enhance relationships with the community and stakeholders.
- To ensure that the reputation of the LMYC is enhanced.

The LMYC held initial information sessions regarding the proposed redevelopment for the purpose of awareness raising and obtaining initial feedback regarding the concept and design features. The community has been further engaged through the development of the SEIA. This has primarily involved those living in the immediate vicinity of the development. Consultations were undertaken via door knocks during the evening and weekends in the residential areas of Ada Street, Walter Street (to the north of the LMYC), the Pacific Highway (to the south of the development and those with foreshore access) and residents living in Bellevue Road, Andersons Hill.

This consultation has been undertaken to identify social impacts arising from the development. It was found that there was overall support for the proposed redevelopment. The main issues identified related to car parking and traffic, visual impacts and the general health of the lake in and around Belmont Bay. These are discussed in more detail in the body of the report.

Consultations with local businesses have been undertaken to assess the economic impacts of the development. These include the nearby Gunya Hotel, local boating and chandlery suppliers and the nearby Marks Point Marina. The economic impacts were found to be positive.

Lake Macquarie City Council and the Belmont Main Street Coordinator were also consulted with to establish the general economic characteristics of the area and to identify if the redevelopment was consistent with the overall strategic direction of the Lower Hunter and that of the LGA. It was found that the redevelopment of the LMYC was not in conflict with the overall strategic direction of the LGA and was found to strengthen the area as a tourist destination point. Again these points are discussed in more detail throughout the report.



4. STRATEGIC CONTEXT

4.1 Introduction

To place the development into context, a review of key regional and local strategic documents has been undertaken. The purpose of this analysis is to;

- Establish if the proposal is consistent, or in conflict, with the strategic direction of the area
- Assess its broader social and economic impacts.
- Provide an overarching context of the development before exploring the development in further detail at a local level.

4.2 Lower Hunter Regional Strategy

The Lower Hunter Regional Strategy 2006 (LHRS) forms the overarching planning strategy for the region, identifying how the expected growth in the region will be managed. The document identifies areas for population growth and aims to ensure that associated support activities are in place in a coordinated manner, rather than an ad-hoc approach.

The LHRS establishes a clear hierarchy of urban centres for the Lower Hunter and targets for employment, economic development, transport, housing and other required infrastructure. The LHRS identifies Newcastle as the city centre for the region and Charlestown (within the Lake Macquarie Local Government Area) is identified as one of the regions 6 major regional centres.

Within the strategy, Belmont is identified as a town centre which plays a support role to Charlestown. The LHRS, in part, identifies that the role of local council's is to ensure that local environmental plans and other statutory planning controls *"contain appropriate provisions that reflect the nominated role of particular centres"*.

The commercial centre of Belmont has, over time, grown to cater for a catchment population of over 23,000 people who live in the 2280 postcode and the surrounding areas south to Catherine Hill Bay and Swansea, north to Redhead and Charlestown and west to Eleebana (Belmont Business Prospectus). The commercial hierarchy of the Lake Macquarie LGA is graphically presented below.



Figure 4: Commercial Hierarchy of the Lake Macquarie LGA

The ranking of the town centres are (smallest to largest)

1. Morisset
2. Swansea
3. Cardiff
4. Warners Bay
5. Belmont
6. Toronto
7. Charlestown

The commercial and retail hierarchy of the Lake Macquarie LGA is consistent with that of the Lower Hunter Regional Strategy. Due to its location, Belmont plays an important role in supporting the commercial centre of Charlestown.



4.3 Lake Macquarie Local Government Area.

The Lake Macquarie LGA is one of the fastest growing cities in the Hunter, and one of the largest cities in New South Wales. In summary;

-  Lake Macquarie's population is approaching 200,000 people.
-  Lake Macquarie is the Hunter's largest city, accounting for 37% of the Lower Hunter population.
-  Lake Macquarie is the fourth most populous city in NSW, and the eighth most populous city in Australia.
-  The population of Lake Macquarie is expected to grow by 60,000 – 70,000 people over the next 25 years, which will create a demand for 36,500 new dwellings.
-  The percentage of our population aged 55+ will increase from 29% to 39% of our total population over the next 20 years.

The Lake has 174 kilometres of foreshore and is approximately twice the area and volume of Sydney Harbour. It is one of the largest coastal saltwater lakes in Australia and is a major feature of the City. The area is promoted to offer a range of lifestyle opportunities such a diverse range of employment and business opportunities as well as social, recreational and leisure options.

4.4 Lake Macquarie – Industry Sectors

The Lake Macquarie LGA has numerous industry sectors with the key sectors being retail trade, manufacturing and health and community services.

It is identified that the economic strength of the areas has been built from its diversity of landscape and natural resource base. This has allowed Lake Macquarie to develop into a major hub for small to medium size business with knowledge and technology-based industries exhibiting particular growth.

The Hunter Valley Research Foundation report (Manufacturing – Newcastle and Hunter Region 2008 – 2009) has identified that supermarkets and grocery stores are the main employers of Lake Macquarie residents. The three leading industries as a proportion of employment in Lake Macquarie are:

-  Retail Trade 17.7%
-  Manufacturing 12.3%
-  Health and Community Services 12%

Together these key industries employ over 30,000 people in Lake Macquarie. The Lake Macquarie LGA has a strong economy and services both its own residents as well as the broader Lower Hunter subregion.

The key industry sectors have been analysed in detail to gain an understanding of the economic base of the LGA (Hunter Valley Research Foundation report Manufacturing – Newcastle and Hunter Region 2008 – 2009). These sectors include:

-  Retail trade,
-  Manufacturing,
-  Small business,
-  Construction,
-  Mining,
-  Retirement and Aged care
-  Property and Business Services
-  Health and Education, and
-  Home Business.

Retail Trade

At 17.7%, retail trade has the highest proportion of employment in Lake Macquarie relative to other industries. The supermarket and grocery store sector employs the most residents making up 3.04% of total employment.

Lake Macquarie boasts some of the Hunter's busiest centres, along with a variety of shopping strips in each town centre. Belmont is identified as a town centre offering comprehensive shopping facilities, featuring both national retail outlets and specialty stores.

The major retail areas/centres in Lake Macquarie are Charlestown Square, Stockland Glendale, Lake Macquarie Fair at Mount Hutton, and Morisset Mega Markets.

Charlestown Square is one of the most productive regional centres for retail in Australia. General Property Trust (GPT) Retail released its June 2005 figures with annual sales turnover per square metre at \$10,638 for specialties and \$6,841 for the total centre, exceeding figures of the recently refurbished Erina Fair (Hunter Valley Research Foundation report: Manufacturing – Newcastle and Hunter Region 2008 – 2009).

Manufacturing

Manufacturing has the second highest proportion of employment in Lake Macquarie at 12.3% relative to other industries.

Lake Macquarie has witnessed a transformation in its business environment with a host of new 'smart' businesses entering the region. The city is also strongly represented in the food-manufacturing sector with Sanitarium Health Food Company, Tip Top Bakeries, and Ingham Enterprises Pty Ltd operating within the city (Hunter Valley Research Foundation report: Manufacturing – Newcastle and Hunter Region 2008 – 2009).

The total retail 'spend' generated by Newcastle and Lake Macquarie LGA's is listed below. As seen in this table, expenditure is expected to grow along with the forecasted population increase across all retail categories. The development of areas such as Charlestown, Glendale and town centres, such as Belmont, will also need to consider their role in meeting the expected demand.

Table 1: Retail and Commercial expenditure projected to 2020

	2006	2010	2015	2020
Supermarket and grocery stores	1229.2	1314.1	1424.3	1542.1
Specialty Food Stores	421.6	450.7	488.5	529.0
Fast Food Stores and restaurants	608.1	650.1	704.7	763.0
Department stores	321.8	344.0	372.9	403.7
Clothing stores	252.7	270.2	292.8	317.1
Bulky Goods stores	600.6	642.1	696.0	753.6
Other personal and household goods retailing	361.1	386.0	418.4	453.0
Selected personal services	133.9	143.2	155.2	168.0
TOTAL	3,929.2	4,200.4	4,552.7	4,929.6

Source: Charlestown Masterplan Economic Assessment April 2007

Smart Businesses

Smart businesses provide innovative approaches towards design, manufacturing and product or service delivery.

Such businesses have helped ensure Lake Macquarie's future as a city conducive to technology-based and innovative businesses.

Examples of smart businesses in Lake Macquarie include Airborne Australia, Cowan Manufacturing, Hydramatic, EDI Rail Division, Incitec Ltd, Banlaw Pipeline, and Amdel (Hunter Valley Research Foundation report: Manufacturing – Newcastle and Hunter Region 2008 – 2009).

Construction

Construction represents 8.5% of employment in Lake Macquarie relative to other industries. Residential developments are increasing due to the area's natural beauty and lifestyle opportunities.

Commercial and industrial developments have also shown steady growth as more businesses relocate to Lake Macquarie to take advantage of the comparatively low commercial and industrial rates, and cost effectiveness from market access and distribution capabilities.

Apart from construction-related activity, the sector engages the services of engineers, builder's labourers, trade suppliers, surveyors, and building product manufacturers (Hunter Valley Research Foundation report: Manufacturing – Newcastle and Hunter Region 2008 – 2009).

Mining

Mining accounts for 2% of employment in Lake Macquarie relative to other industries. Mining was one of the predominant industries on which the City of Lake Macquarie was built.

Centennial Coal is the largest underground coal producer in NSW with its largest mine located near Toronto. Mine producing companies such as Centennial, benefit from the good physical mining conditions found in Lake Macquarie and the proximity of the Port of Newcastle (Hunter Valley Research Foundation report: Manufacturing – Newcastle and Hunter Region 2008 – 2009).

Retirement and Aged Care

Projections indicate the percentage of the population aged 55+ will increase from 29% to 39% of the total population in Lake Macquarie from 2005 to 2022.

The local retirement and aged care industry in Lake Macquarie is growing to meet this demand. The LGA is known as a destination point for retirees and is highly regarded for its quality facilities and services. Due to its good transport links and a range of recreational activities, Lake Macquarie is a preferred retirement destination.

The retired population presents major opportunities for business. Accounting for 25% of all disposable income, this growing sector presents openings for entrepreneurs looking to develop new products and services (Hunter Valley Research Foundation report: Manufacturing – Newcastle and Hunter Region 2008 – 2009).



Property and Business Services

Property and business services accounts for 9% of employment in Lake Macquarie relative to other industries.

This sector is the knowledge-based service industry, the fastest growing industry group over five years. Financial, engineering, and information technology services maintain a strong presence in Lake Macquarie, drawn to the area by optimal lifestyle offerings and the business environment (Hunter Valley Research Foundation report: Manufacturing – Newcastle and Hunter Region 2008 – 2009).

Health and Education

Health and community services are the third largest sector for employment in Lake Macquarie at 12%.

Education accounts for 8.1% of employment in Lake Macquarie. Primary and secondary education are recognised as two of the top ten industries in Lake Macquarie.

Statistics show that 2.3% of Lake Macquarie residents are employed in primary education and 2.21% in secondary education (Hunter Valley Research Foundation report: Manufacturing – Newcastle and Hunter Region 2008 – 2009).

Home Business

Lake Macquarie's home business sector has shown considerable growth over recent years, with no indication of slowing down. There are approximately 7,000 home businesses in Lake Macquarie, employing 13% of the city's workforce.

The home business sector generates \$1.5 billion per annum for the City of Lake Macquarie. Operators in Lake Macquarie have successfully launched their products both nationally and internationally (Hunter Valley Research Foundation report: Manufacturing – Newcastle and Hunter Region 2008 – 2009).

It is evident that the Lake Macquarie LGA has a strong economic base across a range of industry sectors. The development of the LMYC does not negatively impact on any of the identified sectors in any way.

4.5 Lake Macquarie Lifestyle 2020 and Community Plan 2008 - 2018

The City's Lifestyle 2020 and Community Plan 2008 – 2018 are both strategic documents that provide information as to priority focus areas for the city's future. In the context of this development, the area's tourist potential is to be further developed as is general commercial and employment growth.

The City's business prospectus, as well as Belmont's own prospectus, promotes the areas location and diverse opportunities available for business. Of particular focus is the areas tourist potential due to the proximity to the lake, accessibility to major transport routes and location to larger regional centres such as Charlestown and Newcastle. The Lake is promoted as a major tourist driver for the area.

4.6 Belmont – local context

Belmont is situated on the Pacific Highway and is the only through fare from the south eastern part of the Lake to Charlestown and Newcastle. The CBD area appears to be a busy, thriving area with a reported 260 Businesses operating within the Belmont business precinct (LMCC Town Centres Strategic Plan 2008). The commercial / retail floor space available in Belmont was 47,000 sq meters (LMCC Town Centres Strategic Plan 2008) increasing by a further 11,000 sq meters with the completion of the 'Belmont Citi Centre'.

The Belmont area includes the following features;

- Two major sailing clubs – Lake Macquarie Yacht Club and Belmont 16 Footers
- Belmont hospital (public).
- The Hunter Institute of TAFE.
- It is accessible by road and is also accessible by bus.



Belmont TaFE Campus – Pacific Highway

Major businesses for the area include;

- Coles
- BiLo
- Katies
- Lowes
- Retravision
- Bunnings Warehouse.
- ALDI Store



Belmont Hospital



Pacific Highway Belmont

Development

- Belmont Hospital recently completed a \$31 million upgrade and expansion
- The Belmont Bowling Club site is being redeveloped to include new bowling greens, shops, and a Woolworths supermarket
- Two new apartment buildings being constructed in Belmont



Supporting Belmont's tourist potential is the areas description found on the town centre website, hosted by Lake Macquarie Council. Belmont is described as;

... a unique coastal lakeside community located on the eastern shores of Lake Macquarie, New South Wales; a short 1.5 hours drive north of Sydney on the Pacific Highway.

Belmont boasts a thriving commercial centre that offers a wide diversity of businesses that cater for approximately 23,000 residents from the local 2280 postcode and the surrounding areas South to Catherine Hill Bay and Swansea, North to Redhead and Charlestown and West to Eleebana.

Visitors and tourist are well catered for in Belmont with a wide selection of accommodation, dining, entertainment, recreation and shopping.

Belmont is known as the "Home of Sailing on Lake Macquarie"; this is visibly evident with the flotilla of boats that occupy the bay along with the two major sailing clubs that attract both local and visiting sailors.

Belmont is envied for its unique position on Lake Macquarie; on one side is the lake and the many facilities and attractions it has to offer and on the other side, there are endless stretches of pristine safe surf beaches.

The area also offers residents and visitors; walking /cycling paths, lagoon and bush reserves to explore native flora and fauna. Belmont is a popular picnic area with large open areas of parkland that provide BBQ's and public amenities.

Recent workshops undertaken to support the areas retail and commercial growth have been undertaken. This process was undertaken to support the Towns Centres Program via the development of a three year strategic plan for the area. The identified strengths, constraints, opportunities, risks and expectations for the Belmont town centre are listed below.

Strengths	Constraints
- Location - Lake - Public Transport - People - Belmont Hospital - Loyalty to residents - Championship Golf course	- Busy Highway - Traffic congestion - Minimal infrastructure - Lack of physical connectivity - Parking

Opportunities	Risks
- Tourism - Makeover of buildings - Become a lifestyle destination - Introduce more high density residential development to the area - Green the central area	- Poor planning (traffic flow/signage) - Security and safety at night - Overcrowding of the roads - Poor infrastructure/inadequate growth - Not addressing parking and traffic - Over development



The identified expectations for Belmont over the next three years include the following:

- Commercial growth.
- Integrated strategic planning.
- Utilise assets to bring more people to the town.
- Improve the waterfront.
- Cater to the population's medical needs.
- Maintain village atmosphere.

With this in mind, to ensure that Belmont continues to play an important role in the retail and commercial activities for the area, which continues to meet the needs of its residents, the following broad priorities have been identified:

- Building appearance.
- Customer knowledge.
- Feel.
- Customer experience.
- Look.
- Communication.
- Place image.
- Business appearance.
- Accessibility.

The priorities as identified in the community based workshops are graphically presented below.

Belmont SCORE Community Strategic Planning Workshop 2008

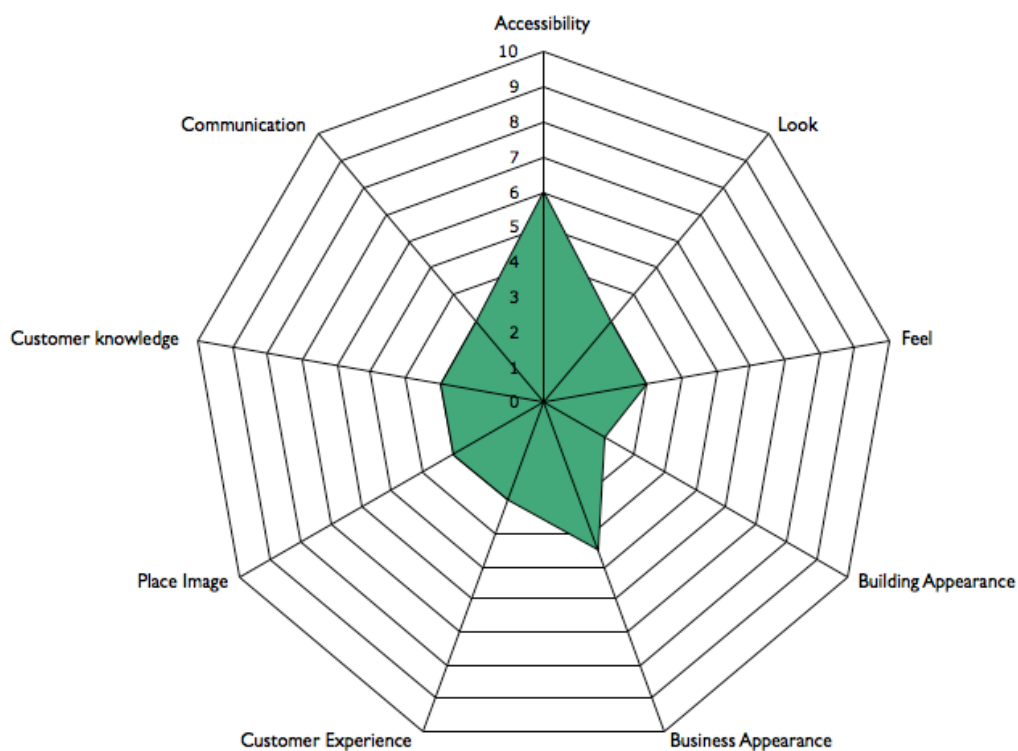


Figure 5: Lake Macquarie Town Centres Strategic Plan, November 2007: 27

4.7 Belmont's Residential Character

The residential character of this area has changed considerably over a number of years. The old characteristic 'seaside town' is still evident, but is giving way to what appears to be a more exclusive lifestyle. Housing is changing from the original single story fibro style cottages to multi-story architect style developments which are now features of the landscape, particularly along the waters edge. In saying this however management of the Lake has seen development remain at a scale which retains its landscape and has not become over developed with high rise buildings along the foreshore.



Waterfront housing character Belmont. In this photo there is a mix of older and new housing types.



Newer type of housing design located on the water front north of the development, overlooking the Belmont Bay.



Residential character – Belmont waterfront.



The characteristics of the area and the population changes have been brought about by factors other than the yacht club. These include the proximity of the area to the sub-regional centre of Charlestown and Regional City of Newcastle as well as the Central Coast. The area is well serviced by major infrastructure such as education, medical, transport etc and has a strong and diverse employment base.

4.8 Conclusion – Strategic and Local Context

On review of a range of key strategic documents, the redevelopment of the Lake Macquarie Yacht Club is not in conflict with the future direction of the Lower Hunter or the City of Lake Macquarie. The redevelopment does not negatively impact on any of the industry sectors of the LGA, nor is it in conflict with the proposed town centre strategy for Belmont.

It is found is that the redevelopment of the LMYC meets the aims and objectives of the Lake Macquarie Lifestyle 2020 and its Community Plan as well as supporting the growth and development of the Belmont residential, business and commercial precincts.



5. MARINA BERTH - SUPPLY AND DEMAND ANALYSIS

The supply and demand for marina berths has been undertaken referencing data contained in the following reports and via consultations with NSW Maritime.

- Trinity Point Marina Demand Study (Patterson, Britton and Partners)
- NSW Maritime Boat Ownership and Storage Study (HILL PDA);
- Discussion Paper on Vessel Storage in NSW (Buttigieg, D. and Norbom, S.);
- Review of boat registration data (NSW Maritime);
- Lake Macquarie Mooring Management Plan; and
- Lake Macquarie Estuary Management Plan.

The LMYC is one of six (6) marina facilities currently located in Lake Macquarie. Additional to the existing marina facilities there are proposals to extend the number of marina berths at Lake Macquarie Yacht Club and Marmong Point Marina. In addition, there is also a proposal to develop a new marina facility at the southern part of Lake Macquarie in Trinity Point.

Between 2006 and 2008, there has been a trend towards increased boat ownership. The largest proportion of boat ownership is for boats less than 6 m in length however there has also been an increase in boats greater than 6m.

The general increase in boat ownership has resulted in the need to explore options for boat storage. With this in mind, boats with a length greater than 6 m are most likely to require wet (marina) berthing (NSW Maritime Boat Ownership and Storage Study; Hill PDA: Buttigieg, D. and Norbom, S.; 2006).

Across NSW the annual rate of boat registration growth (2006 – 2008) is 2.78%. Of this, 2.60% of overall the annual growth in registrations are for boats less than 5 meters in length and those greater than 5 meters in length are growing at a rate of 3.12% - 4% per annum.

The current NSW registrations for boats that are greater than 6 meters in length is 35,741. The forecast registration at June 2031 is expected to be 71,649 registrations and the demand for storage facilities at June 2031 is expected to be 50,384 storage places.

For the Hunter Inland the current registrations of boats that are greater than 6 meters in length is 6,628. The forecast of registrations to 2031 is expected to be 14,461 and the demand for storage is expected to be 10,338 storage places (NSW Maritime Boat Ownership and Storage Study).

The increasing boating population has also resulted in an increase in demand for swing moorings. As at January 2007 there were 2357 swing moorings in Lake Macquarie (NSW Maritime). There is an expected 11% growth in the demand for swing moorings over a ten years period (from 2003) (Lake Macquarie Mooring Management Plan). This equates to a growth of 292 swing moorings to an approximate total of 2950 swing moorings.

However the growth in the demand for swing moorings has generally exceeded 2.5% per annum since 2003 and is expected to increase. Some moorings are subject to priority waiting lists and some are closed with applications only received from residents with absolute water frontage. It is therefore fair to say that saturation point is very close (Trinity Point Marina Demand Study: 11).

Given the forecasted growth, it is generally agreed that the supply of boat storage is limited and a range of storage options are to be considered which include wet berthing, dry and stacked storage. The current supply of dry storage is limited in the lake and really only caters for dinghies and small sailing vessels.

The Trinity Point Marina Demand Study states that in areas where modern berthing facilities have been introduced there is an immediate and progressive demand for the marina berths suggesting a latent demand (Trinity Point Marina Demand Study: 27). The study goes on to say that based on the projected population scenarios for Lake Macquarie LGA; both Lake Macquarie and Wyong; and for the Hunter Region (including Wyong), the future berth demand on Lake Macquarie for 2011 is between 166 and 398 marina berths. At 2016 the demand is projected to be between 221 and 537 marina berths (Trinity Point Marina Demand Study: 32).

The current supply of marina berths (and proposed increases) in Lake Macquarie is outlined in the table below.

Table 2: Current Supply of Marina Berths

Location	Wet Berths		Swing Moorings		Dry Storage	
	Current	Proposed	Current	Proposed	Current	Proposed
Royal Motor Yacht Club – Toronto	51		10			
Marmong Point Marina – Marmong Point	160	80	13		50	60
Wyee Point Marina, Wyee Point	36		4		10	
Pelican Marina, Pelican	17					
Lake Macquarie Yacht Club	83	58	12	8	19	
Marks Point Marina Marks Point	62		26			
Trinity Point		308				
TOTAL	Actual	Proposed	Actual	Proposed	Actual	Proposed
	409	446	65	61	79	60

The current available marina berths in Lake Macquarie are 409. The proposal submitted for assessment at Trinity Point is understood to be for 308 marina berths. The proposed redevelopment of Marmong Point is expected to provide an additional 80 berths and LMYC is 58 marina berths. This is a net increase of 446 marina berths.

If, according to the Trinity Point Marina Demand Study, the upper end of the supply and demand analysis is correct at 398 marina berths, there is a potential oversupply of 48 berths at 2011. However given the projected supply at 2016, the trend towards increased demand and utilisation of marina berths when they are available and the demand for visiting/short duration berthing

requirements, the proposed cumulative supply of marina berths across Lake Macquarie is reasonable.

Furthermore, as identified within the Trinity Point Marina Demand Study, the Sydney market has not been quantifiably accounted for which could possibly increase this demand scenario. The study identifies that marina berths and moorings in Sydney are becoming increasingly difficult to obtain and are expensive. This has been supported in the NSW Boat Ownership and Storage Study (Hill PDA).

While storage options need to be considered given the residential growth in the Sydney basin, and relative accessibility of Lake Macquarie, additional demand, over and above the projected 398 berths in 2011 is more likely.

The location of Trinity Point at the southern end of the lake may be more accessible to the Sydney market and those living in the Wyong LGA. However the northern part of the lake currently has a large population mass and therefore demand for marina berths in this area is likely to be maintained.

This was also supported through the study undertaken by Buttigieg and Norboms (Discussion Paper on Vessel Storage in NSW, 2006: 41) who state that “... the anticipated strong population growth for the region may create a need for additional vessel storage infrastructure in the future”. The same report also goes on to say that “... the most practical means of meeting the natural demand increases for additional storage capacity appears to be through the expansion / enhancement of existing marinas and through the judicious allocation of swing moorings”.

The expansion of the LMYC therefore meets the current demand for mooring facilities as well as the ongoing demand that will be created by the increasing population. Furthermore, the LMYC is located centrally to the identified catchment as illustrated in **Figure 6** below. Identified benefits relating to the expansion of the LMYC include;

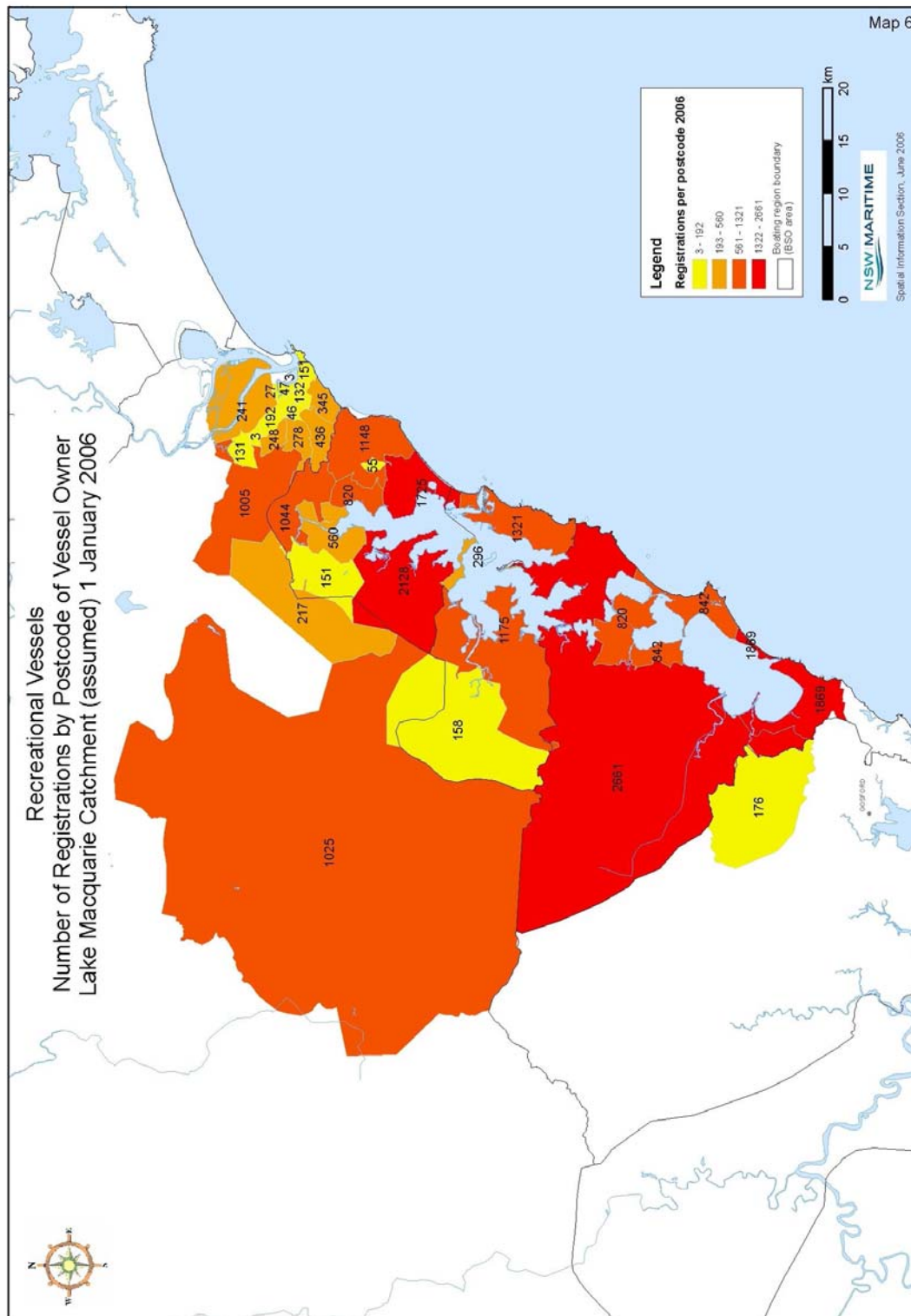
-  It is located in an area where there is an established and growing population;
-  It is an established facility;
-  It is accessible to the sub-regional centre of Charlestown and the Regional City of Newcastle;
-  It is on a major transport route; and
-  It is located in an area identified with sailing.

The LMYC has available 83 wet marina berths with an occupancy rate of 100%. The marina berths are distributed 90% sail and 10% powercraft (which will be maintained). LMYC currently have a waiting list for marina berths for 35 boats including powercraft from 25 – 45ft, catamaran sailing vessels up to 53 ft and yachts from 25 – 45ft. Waiting lists are indicative of demand, however are not a determining factor. This is because some people may be included on more than one waiting list and others may not be included on any waiting list at this time.

The supply and demand analysis has also considered the impact on water users. This has been undertaken via consultations with NSW Maritime and boat owners. The extension of the marina was not identified as interfering with general boating traffic. This is because Belmont Bay is primarily an area for mooring boats (both at the marina and also swing moorings) and not a throughfare for water based traffic. NSW Maritime states that the location of markers and navigation lights can be determined once the final design is completed. Therefore the extension of the marina does not pose a negative impact from a physical sense.

The LMYC marina, the club is in a financial position to undertake the required works to redevelop the marina immediately on approval.

The redevelopment of the LMYC, along with the redevelopment of Marmong Point and Trinity Point is considered to be a reasonable supply of marina berths. This assessment is made taking into account the latent demand for marina berths, the current demand in mooring facilities, the growth in boat ownership and the identified undersupply of boat storage facilities.



Source: Discussion Paper on Vessel Storage requirements for NSW. Buttegieg and Norbom 2006: 36.

Figure 6: Boat registrations and catchment for Lake Macquarie.

6. ECONOMIC IMPACTS

In considering the economic impacts of the development, three (3) areas have been analysed:

1. Marina
2. Tourism
3. Employment

6.1 Marina

The LMYC plays an important role in the economy both at a local and regional perspective. In the development of the report a number of consultations have been undertaken to assess the economic impact on the clubs redevelopment. It was found that there was very little negative impact identified by other restaurant and function establishments. For example the nearby Gunya Hotel identified that the clientele between the two facilities were very different and the impact on trade was not perceived as being an issue. In fact, the competition was seen to be positive.

The redevelopment of the club house is hoped to bring about an increase in trade which would be of benefit to its local suppliers who have had a long association with the club. This again is a positive economic benefit to the local community.

The main economic benefit associated with the LMYC relates to the income generated by marina. The marina facility provides an important source of business to local boating suppliers, chandlery etc. While it is difficult to estimate what is generated in this sector, some estimates have been made regarding the annual running costs of a boat. The difficulty lies in the fact that boat utilisation varies significantly from say frequent (more than once per week) to rarely (less than once per month).

A review of running costs has been estimated through consultations with boat owners and boating equipment suppliers. The estimation is based on a wet moored boat and is as follows:

Table 3: Review of Running Costs

Vessel Type	Estimated cost per annum (inc. marina costs)
Powercraft to 30ft	\$5000 pa.
Yachts to 30ft	\$4000 pa.
Yachts to 35ft	\$7 - \$15,000 pa
Powercraft to 30ft	\$13,500 - \$18,500 pa.
Yachts to 40ft	\$10 - \$50,000 pa
Powercraft to 40ft	\$15 - \$50,000 pa

(Source: This is an estimated cost based on anecdotal information and consultations).

Across all boat classifications, as listed above, annual costs range between \$4,000 and up to \$50,000 per boat per annum. This is inclusive of the mooring costs. It is recognised that these costs could vary significantly due to the size, type, utilisation, age of the vessel, construction material etc. Therefore a concentration of boat ownership, in particular larger boats, generate a significant amount of revenue into the local economy.

Marine suppliers in the local area (including fuel, sail repairs and other general equipment supplies) have identified that a large proportion of income comes from boats located in local marinas. This is because a 'critical mass' of boats are within the one location and are therefore more accessible for the supplier. Suppliers also usually have some sponsorship/business arrangement with the local yacht clubs. On that basis local suppliers have identified that the increase in the availability of marina berths will have a positive impact on their business.

Furthermore, local suppliers are receiving benefits during regattas where visiting clubs attend the area and require equipment. Those in the local area of the LMYC have been identified as being the main beneficiary. For example the nearby BIAS Boating Supplies has found that general trade relates mainly to trailer boat owners however there is a large demand for equipment during regattas. Again this is a positive benefit to the local economy.

It has been found that the overall financial benefit of the marina development will have a positive benefit to the local economy.

6.2 Tourism

Tourism is a main economic focus for the Hunter Region and in particular the Lake Macquarie area. The Belmont area is marketed as a great place to visit and is known as the 'home for sailing'. When exploring the role of tourism in a local area, it is not the specific LGA that is considered by tourists but rather the destination. Tourists identify the holiday they want to experience and identify where the experience can be obtained.

With regards to boating tourism, or any type of tourism, it depends on availability of infrastructure or resources. If there is available infrastructure, and it is included within a network of destinations, then there is usually a positive effect on tourism expenditure. This is certainly the case in the Hunter.

With regards to Lake Macquarie, and in particular the eastern side of the lake, beaches, accommodation and boating are all promoted as destination features. The eastern side of the lake plays host to a number of identified boating destinations, particularly the LMYC, Marks Point Marina, Belmont 16 Footers and Pelican Marina.

With regards to the economic benefits from tourism, boating infrastructure needs to be in place to support the area as a destination point. The benefits of expenditure for Lake Macquarie will have a primary impact (ie increase the economic development of the area), rather than the region or across NSW. With this in mind however, the benefits of tourism on the economy are positive.

There are a range of tourism based businesses across Lake Macquarie. As at 30 June 2007 the business types are as follows;

Table 4: Tourism Based Businesses across Lake Macquarie

Business Type	Number	Percentage of total businesses
Non Employers	1728	48%
Micro Business (1-4 employees)	1080	29%
Small Business (5-19 employees)	681	18%
Medium to large Business (20 + employees)	282	7%

Source: Tourism Research Australia, March 2008.

With regards to Lake Macquarie the 3 to 4 year average to June 2007 (Tourism Research Australia) has found that the tourism trends and expenditure generated by tourism are as follows;

Table 5: Tourism Trends and Expenditure

	International	Domestic Overnight Visitors	Domestic day Visitors
Visitors (000's)	9	220	434
Visitor Nights (000's)	102	679	Na
Spend (\$Million)	5	67	43
Average stay (nights)	11	3.1	Na
Spend per trip	577	304	100
Spend per night	53	99	Na

Source: Tourism Research Australia, March 2008.

The average input into Lake Macquarie's economy over this 3-4 year average is \$115 Million or approximately \$28.75 to \$38.33 Million dollars per year. The main source of income is generated by domestic overnight and day visitors. LMYC hosts five regattas per year which attract between 100 – 200 people to each event (includes families). People attending regattas are regarded as domestic overnight and domestic day visitors and they usually stay in local accommodation (close to the LMYC) and attend other activities during their stay. Based on the above spend people attending regattas alone could contribute up to \$300,000 per annum into the local economy. This represents an important contribution to the total tourism numbers attending Lake Macquarie.

The purpose and activities of visitors in Lake Macquarie are as follows;

Table 6: Domestic Day Visitors to the Lake Macquarie LGA

Domestic Day – Purpose	
Holidays	44%
Visit friends and/or relatives	46%
Domestic Day – Activities	
Visit	52%
Eat out / restaurants	33%
Beach	N/A
Drive / walk around	14%

Table 7: Domestic Overnight Visitors to the Lake Macquarie LGA

Domestic Overnight – Purpose	
Holidays	42%
Visit friends and/ or relatives	49%
Domestic Overnight – Activities	
Visit	55%
Eat out / restaurants	41%
Beach	28%
Shopping	24%
Walk / drive around	20%

Table 8: International Visitors to the Lake Macquarie LGA

International – Purpose	
Holidays	29%
Visit friends / relatives	62%
International – Activities	
Shopping	75%
Eat out	73%
Beach	66%
Visit pubs, clubs, discos	58%

With this in mind, the redevelopment of the LMYC has the capacity to cater to the desired activities for a range of visitors to the area via its restaurant facilities, capacity for functions and specific boating activities. The redevelopment of the LMYC improves existing infrastructure and therefore reinforces the role of the LGA and Belmont as a tourist destination. Given the demand for tourism, desired visitor activities and expenditure generated by visitors to the area, the impact of the redevelopment of the LMYC can only be positive.

The restaurant facility and capacity for functions has not been identified as having negative trade impacts. As mentioned previously, consultations with the nearby Gunya Hotel identified the two facilities as targeting separate patrons. With regards to the capacity for functions, the LMYC currently holds a range of functions within its existing facility which primarily include weddings, parties and events associated with specific activities of the yacht club such as Board meetings, regatta functions etc. Its market share in this area is not expected to grow significantly.

While Lake Macquarie is a destination point for many activities, it is not a destination point for functions and conferences for people from out of the area. The Newcastle Conference Bureau identifies the Hunter Valley Vineyards and Port Stephens as the main destination point for these type of activities with Newcastle CBD playing a role in hosting major meetings. There is no negative impact on the trade area identified with this aspect of the development.

6.3 *Employment*

The LMYC employs 20 people in 8 FTE positions. Catering at the facility is undertaken by contractors who have recently entered into a new three year lease. It is expected that once the marina has been finalised there will be an additional position created (Marina Manager) making a total of approximately 9 FTE positions. Due to the hospitality nature of the LMYC, additional staff requirements for functions or at peak times are filled via their casual pool. Once the redevelopment is completed, the staff establishment will be reviewed to assess if additional FTE positions are required.

With regard to the number of jobs created from the development, it is estimated that one direct job year is created in the construction industry per \$160,000 of construction investment (based on Australian National Accounts Input-Output tables ABS Cat. No. 5209.0). Based on an estimated overall capital cost of approximately \$7 million, the development has the potential to create approximately 44 direct job years over the construction period. In addition to direct employment, ABS National Accounts Data indicates that a multiplier of 2.6 applies to the direct construction employment. Therefore the creation of 44 direct job years during construction would result in approximately 70 job years created in the wider economy.

The redevelopment of the LMYC therefore provides significant employment across the construction sector.

6.4 *Economic Conclusions*

The economic impacts arising from the redevelopment of the LMYC are positive. The LMYC redevelopment provides a positive economic contribution via the availability of the marina facility to local boating and chandlery suppliers. The estimated cost generated per boat is estimated to be anywhere between \$4,500 and \$19,000 per boat per annum.

Furthermore facilities such as the LMYC play an important role in promoting the area as a tourist destination. To be successful, facilities and infrastructure need to be available and of high quality. Given that tourism generates an estimated \$28.75 to \$38.33 Million dollars per year the redevelopment of the LMYC needs to be regarded an important asset this the area's economy.

The cost of the LMYC's redevelopment is estimated at \$7 million dollars. This will generate approximately 44 direct job years over the construction period and approximately 70 job years created in the wider economy.

The assessment of the redevelopment of the LMYC is found to bring an important and positive benefit to Lake Macquarie as well as the local area of Belmont.





7. SOCIAL IMPACTS

7.1 Introduction

The LMYC is located in Ada Street Belmont. The area represents a mix of residential, commercial/retail with a small scattering of light industry/ manufacturing throughout the area. The area is located on the eastern side of the lake and bounded by Belmont Lagoon and the Pacific Ocean on the east.

The LMYC has been a part of the community since 1934 and given this history, it has become part of the community's character. The buildings are now out dated and it has been decided that it requires more than a simple refurbishment.

Given the popularity of boating on the lake and the increased demand for boating facilities, if the club does not redevelop its current site its share in the market place could be very much lost. It is considered that the redevelopment of the club is within keeping with the character of the area and also meets demands for additional infrastructure, in particular the need for marinas.

In a commercial sense, it is also considered that the redevelopment of the club will have a positive impact on existing patrons and also suppliers who at the same locality have the opportunity to increase their market share (for example, industries affected would be catering, boat manufacturing, boat equipment, fuel supplies etc).

In order to fully assess the social impact of the development, analysis is undertaken against a range of criteria. The criteria is used to assist identify the impacts (both positive and negative) that will, or are likely to arise from the proposed development.

The areas explored will specifically relate to;

1. Changes to the population and characteristics of the area.
2. Economic costs and benefits.
3. The community structure, its character or beliefs.
4. The health and safety of those living and working in the vicinity of the development.
5. An assessment of safety as it relates to crime, anti social and nuisance behaviour.
6. Social cohesion, in particular the quality of life of those living in the vicinity of the development.
7. Cost of living, including housing affordability.
8. Accessibility.
9. Sense of Place and community.

7.2 Background

With regards to the social impact, the local community within the vicinity of the LMYC has been identified as the primary area of affectation for the SIA. This is because they will be the community most likely to be affected by the development due to day to day operations, the size, scale and visual impacts etc.

Residents consulted with include those living on Ada Street, Walter Street, the Pacific Highway (to the south of the yacht club and backing onto the lakes foreshore), Bellevue Road (with an outlook towards the LMYC).

The area of affectation is visually represented in the following aerial photograph. The photograph shows the position of LMYC to the neighbouring residents to the north and south. Areas to the north of the LMYC look directly over the lake towards the eastern shoreline. It was found that the visual impacts from the development are thought to be less likely in this area. However, residents who access properties from Ada Street and Walter Street are impacted upon by traffic and also parking. It would be difficult to determine the exact impact because there is a popular hotel and restaurant (The Gunya) located on the corner of the Pacific Highway and Ada Street. Cumulative impacts would need to be considered in the Traffic Impact Assessment.

The areas to the south of the LMYC will not be impacted upon by traffic as there is no vehicular thoroughfare to this area.

Residences to the south of the development are more likely to experience visual impacts because their line of sight includes the area of the LMYC. Residences located in the northern side of Andersons Hill (Bellevue Road) are also likely to be impacted upon due to visual impacts.

The nearby park may attract some attention due to its location to the Gunya Hotel and the construction and formalisation of the pedestrian access along the foreshore to the south of the development may also impact on the residents by increased pedestrian traffic and the potential for increased opportunistic crime.



7.3 Population characteristics of the area

The immediate population of the identified residential catchment is 6,467 people. Belmont represents 3.5% of the LGA's population (183,138 people). Of Belmont's population, 1.6% (104 people) are identified as being Indigenous. The LGA has a total Indigenous population of 2.3%. The service catchment of Belmont is approximately 22,000 people which represents 12% of the LGA's population.

The median age of the population is 43 years which is higher than the LGA which has a median age of 40 years overall. In the Belmont area over 22% of the population are aged 65 years and over which is much higher than the LGA which has 16.8% of its overall population aged 65 years and over.

Across the LGA, data from DoP indicates that there will be an increase in the proportion of the population aged 65 years and over to 28% by 2031. Given the current characteristics of the Belmont area, the percentage of those aged 65 years and above will be expected to be higher than the LGA average. This will have implications on a range of factors such as the provision of services (eg health), housing design (adaptable design), social and recreational activities and the like. Facilities such as the LMYC will need to take into account these changing characteristics and be designed in an accessible manner.

Table 9: Projected population and selected characteristics - Lake Macquarie (C)

Year	Population:				% aged 0-14	% aged 65+	Median Age
	Males	Females	Persons	Sex ratio			
2001	92,810	95,000	187,800	98	21%	15%	38
2006	94,370	96,680	191,050	98	19%	17%	40
2011	97,430	99,960	197,380	97	18%	18%	41
2016	100,650	103,360	204,000	97	17%	21%	43
2021	103,780	106,630	210,410	97	16%	24%	45
2026	106,660	109,710	216,360	97	15%	26%	46
2031	109,120	112,400	221,530	97	15%	28%	47

Population projections for the Lake Macquarie LGA (Source Department of Planning)

The re-development of the LMYC will not result in any net changes to Belmont's total population or its characteristics. The most likely changes to the community's population and its characteristics will be a result of lifestyle choices for retirees and the in-migration of older professional people.

7.4 Labour Force

Information about the labour force helps understand the socio economic status of the area and how the development will impact on these characteristics.

In Belmont, there are 2731 people in the labour force and of these 55.5% are employed full-time, compared with 56.2% for the LGA. In Belmont, 30.6% employed part-time compared with 30.8% for the LGA and 7.6% of Belmont's population are unemployed which is higher than the LGA which has recorded an unemployment rate of 6.7%.

The most common occupation for the catchment are;

- Technicians and Trades Workers 18.2%. Compared with 17.3% for the LGA;
- Professionals 16.6% compared with 18.1% for the LGA;
- Clerical and Administration 16.1% compared with 15.3% for the LGA;
- Sales 11.0% compared with 11.2% for the LGA;
- Labourers 10.5% compared with 10.4% for the LGA;
- Managers 10.4% compared with 10% for the LGA;
- Community and Personal services 8.5% compared with 9% for the LGA.

The most common industry of employment are;

- ☞ School education 4.6% compared with 5.1% for the LGA;
- ☞ Hospitals 4.5% compared with 4.2% for the LGA;
- ☞ Café/restaurants 3.3% compared with 3.4% for the LGA.

Other common industries of employment for Belmont included; Building Completion 3.2% and Building Installations 3.2%.

Given the characteristics of the area it was surprising to find that there were no industries of employment in the marine area. This however may be indicative that boating is a leisure pursuit and the associated industries are specialised and do not represent a large market share. It would be fair to say however that the emergence of both tourism and boating in the area could lead to the development of a specialist economy in these areas.

As stated above the LMYC plays an important role in the local economy and supports many businesses. The re-development of LMYC will not negatively impact on the areas labour force but its re-development could in fact bring about a more robust marine based industry.

The LMYC employs about 20 staff (8FTE). Catering is undertaken by contractors who are about to have their lease renewed. It is anticipated that the staff establishment will increase by 1 FTE as the role of marina manager will be created.

Due to its hospitality component additional staff requirements are met via casual engagement. After the clubs redevelopment is completed, the minimum required staff establishment in this area will be reviewed.

7.5 Income

Income provides an indication of the socio economic status of a community. It is found that generally Belmont has lower income levels than that of the LGA. This is characteristic of the older population who have lived in Belmont for some time. It is expected to change as more affluent people move into the area. These new residents are expected to be older, professional people who will buy properties within the vicinity of the lake for reasonable prices when compared to other areas.

- ☞ The medium weekly individual income is \$373 compared with \$394 for the LGA
- ☞ Median household weekly income is \$733 compared with \$922 for the LGA
- ☞ Median family income \$1085 compared with \$1102 for the LGA

7.6 Impacts on population and its characteristics

Population characteristics are important to identify to assess if and how the proposed development will impact on the community. Developments such as residential subdivisions, or aged care facilities are more likely to bring about changes to communities and the impacts (demand for services etc) therefore need to be identified.

The development of the LMYC will not alter the composition of the population (ie in total numbers) or the characteristics of this area. The redevelopment will not result in the need to relocate any of the existing population.

The age distribution of this area is changing (ageing), but not as a result of the development of the LMYC. Given the past characteristics, the share of the aged population is expected to be higher in areas such as Belmont. There is no adverse social impact resulting from the re-development of the LMYC.



7.7 Cost of living, including housing affordability

The impact on cost of living explores if the development will bring about changes to the locality which is being developed. For example, will housing and land prices increase as a result of the development, will the cost of living be affected (ie an increase in say supermarket groceries), will there be impacts on employment etc.

The redevelopment of the LMYC is not expected to bring about changes to the level of income across the community, nor will it impact on the cost of day to day living. Many services (retail and commercial) are not affected by the operation of the LMYC and its redevelopment will not impact in this area.

There will be some increase in demand for retail and commercial activities relating to boating as the local market share will increase.

With reference to housing, the development may have a positive impact on housing/land prices in the immediate area. However waterfront land is usually more expensive and more popular to buy so changes to this characteristic would most likely be driven by factors other than the redevelopment of the LMYC. The area's residential characteristic is diverse and the waterfront properties are becoming very exclusive with older style cottages are being demolished to make way for more modern style housing.

Residential dwelling and unit prices have increased steadily since 1998. The highest capital growth for residential dwellings was to the end of 2004 with the highest growth period during 2002. Capital growth has declined since 2006 but overall the market in this area (in particular for water front properties that can be redeveloped) is strong.

Single residential dwellings represents 71.4% of all housing stock with semi detached residences representing 7.4% of stock. Flats and units represent 13.7% of all stock.

Table 10: Single Residential Dwelling – trends in sales 1998 - 2008 (Source RP data)

Year	Number of Sales	Mean Sale Price	Capital Growth in Mean Prices
1998	198	\$110,000	
1999	251	\$123,000	11.8%
2000	203	\$143,500	16.7%
2001	182	\$181,000	26.1%
2002	151	\$249,950	38.1%
2003	152	\$302,500	21.0%
2004	134	\$371,750	22.9%
2005	105	\$387,500	4.2%
2006	104	\$367,475	-5.2%
2007	133	\$357,000	-2.9%
2008	74	\$355,500	-0.4%

For Lake Macquarie LGA the median house price was \$335,000 in 2008

Table 11: Residential Strata Unit – trends in sales 1998 – 2008 (Source RP Data)

Year	Number of Sales	Mean Sale Price	Capital Growth in Mean Prices
1998	39	\$151,318	
1999	19	\$160,000	5.7%
2000	47	\$154,000	-3.8%
2001	22	\$168,000	9.1%
2002	29	\$218,500	30.1%
2003	27	\$310,000	41.9%
2004	14	\$323,500	4.4%
2005	20	\$303,975	-6.0%
2006	27	\$345,000	13.5%
2007	30	\$387,500	12.3%
2008	15	\$365,000	-5.8%

For Lake Macquarie the median unit price was \$304,700

Residential strata units have shown strong capital growth to 2003. The marked increase in 2002 and 2003 coincided with new stock being available for purchase. Residential strata units have shown the strongest growth in this area. This is because of new stock becoming available and their relative affordability. Belmont is currently seeing an increase in this type of development.

Rental properties in the area and across the LGA are generally considered affordable. There is a high proportion of rental properties in this area (27.9%).

Of this, 14.6% are from a state housing authority (note there is 22.3% state housing authority properties in the LGA).

Median rent is \$165 per week compared with \$185 for the LGA and median housing loan is \$1517 per month compared with \$1300 for the LGA. The area for rent is considered to be affordable as per the Department of Housing analysis on affordable housing (see **Figure 7**).

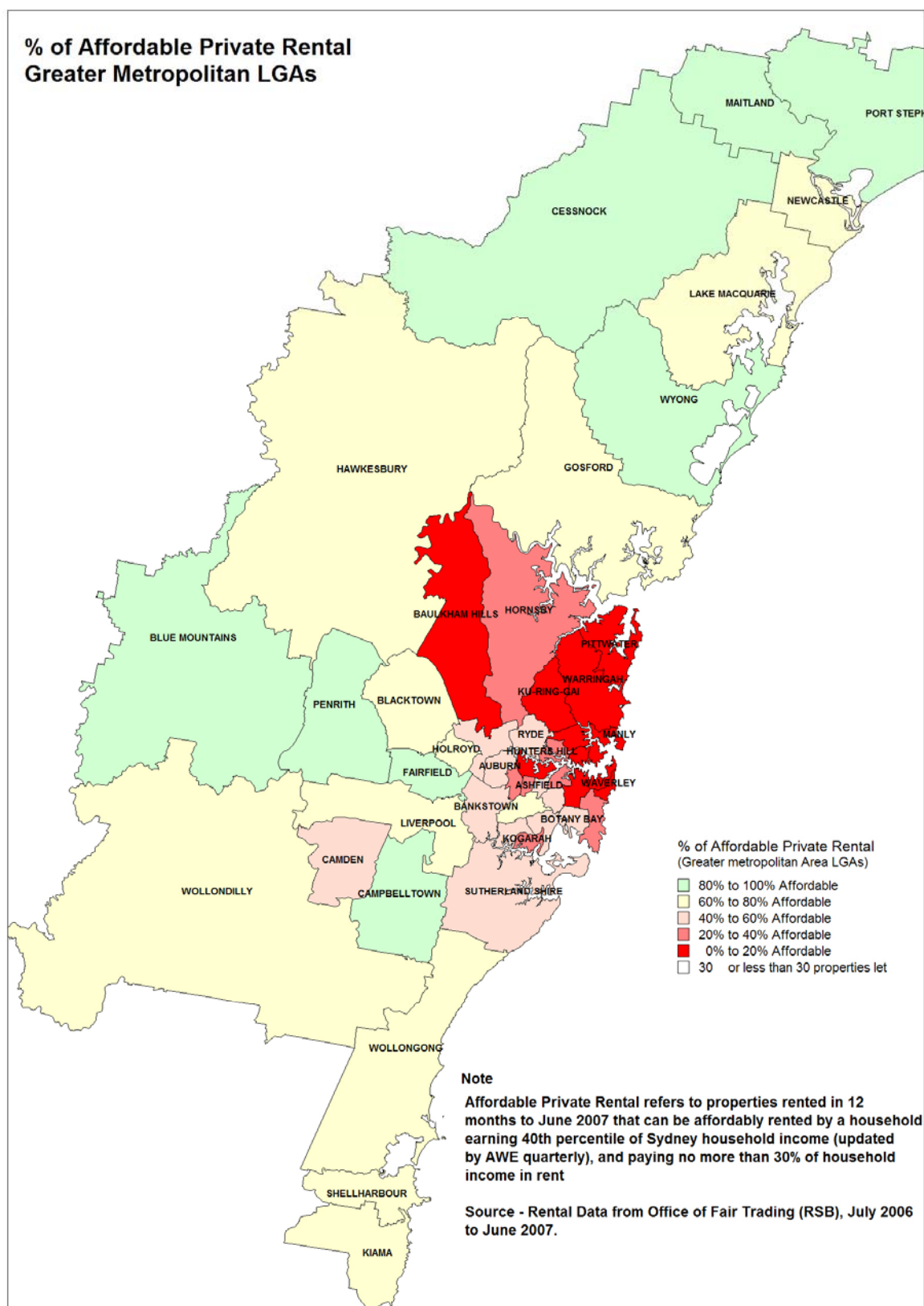


Figure 7: Assessment of housing affordability for the Greater Metropolitan Area (source: Department of Housing).

7.8 Community structure, its character or beliefs

The community structure, character and beliefs relate to the impacts that may arise regarding relationships between people due to their customs, beliefs, attitudes and even religious beliefs. The 2006 ABS Census identified a population of being primarily Australian born (86% and 92.2% of the total population being Australian citizens. The religious affiliation was predominantly Anglican (29.6%, catholic (23.6%) or no religion (13.1%). The redevelopment of the LMYC will have no impact on any factors relating to these characteristics identified in the ABS.

There may be some impact relating to the Indigenous community. There is a nearby area of land dedicated to the Awabakal peoples of the area. Research into this is being undertaken and subject to an independent report. It is understood that the cultural significance is within the place itself rather than the particular yacht club building.

With this in mind, and notwithstanding the finding of the specialist Aboriginal Heritage Study, the LMYC is an existing facility and no impacts relating to the community's structure, character or beliefs has been identified to arise from its redevelopment.

7.9 Health and safety of those living and working in the vicinity of the development

Health and safety relates to the impacts arising from the development which may necessitate the need for additional health services, dental, childcare etc. The development will not require the addition of any health services. The development is not identified to impact on the health of any residents and may in fact promote healthy lifestyles / fitness by those participating in boating activities.

There may be additional noise and pollution during construction however the management of these impacts are identified in separate reports.

Public safety could possibly be an impact arising from the development given its proximity to the water. However in identifying this it needs to be recognised that the LMYC is an existing facility and it is located on the shore of a large lake, of which its foreshore is very accessible across the entire lake. In that sense the development will not increase any risk that is not already identified and managed.

7.10 Assessment of safety as it relates to crime, anti social and nuisance behaviour

It is reported that there have been no significant or systematic incidences of crime and anti-social behaviour arising from the operations of the LMYC. The LMYC have reported one incidence of attempted break enter and steal from a boat moored at the marina. There have also been a small number of incidences where patrons have been requested to leave the premises. These incidences have been sporadic.

It was found that the vicinity of the LMYC generally is not a hot spot for any crime and does not come under any attention from the Police. The proposed redevelopment of the LMYC, including the pedestrian pathway proposed for the southern foreshore did not raise any concerns regarding the increased risk of crime and antisocial behaviour. A Crime Risk Assessment has been undertaken and is contained within a separate report.

7.11 Accessibility

Accessibility refers specifically if the development will prevent access to certain groups within the community. As a yacht club, it specifically caters for people with specific interests. Access into the general club is allowable but criteria such as memberships, age restrictions etc apply. In that sense the LMYC is not generally accessible however does not specifically restrict certain groups from the general facilities or grounds.

As the LMYC is an existing facility, it does not generate any further impacts in this regards nor does the facility impact on the general access to other services within the community.

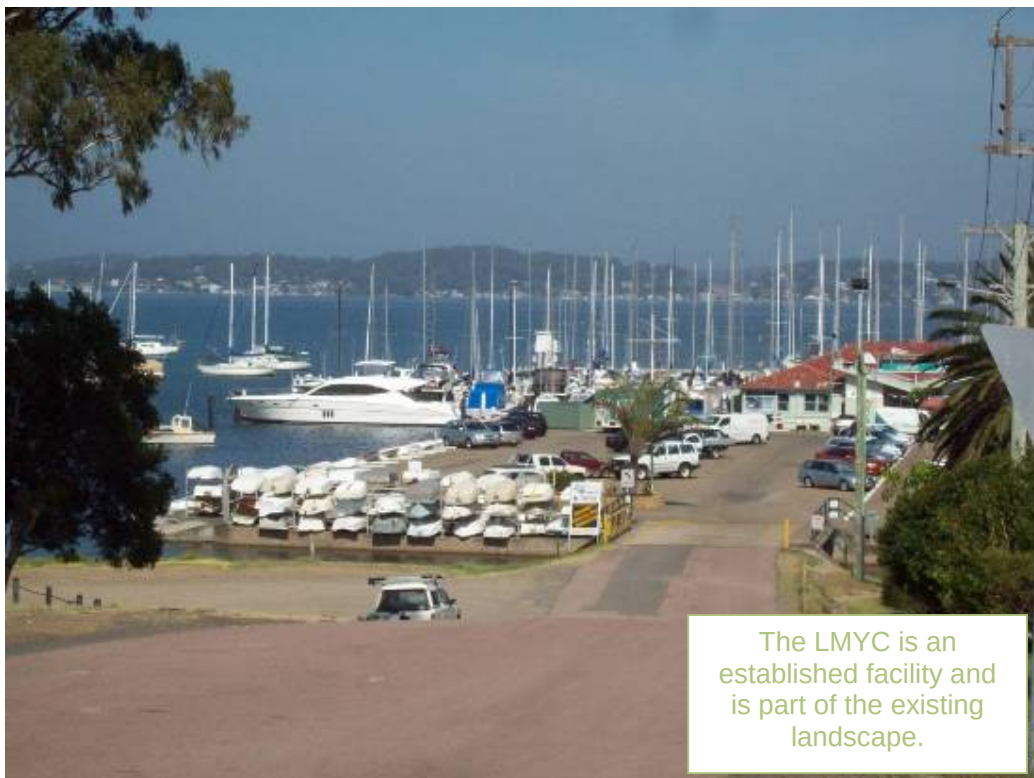
7.12 Social cohesion, in particular the quality of life of those living in the vicinity of the development

Social cohesion and the impact on the quality of life of residents relates to the impact on the day to day lifestyle of those who live and work in the vicinity of the development. It is an assessment of land use conflict that may arise from the development.

The LMYC has been in existence since 1934. Its growth and development over this time has been limited and the proposed redevelopment represents the largest change to the site for many years. The LMYC is well known in the area and is one of a number of yacht clubs, boating clubs, marinas etc on the Lake.

As previously identified, lake Macquarie is identified as the “... the “Home of Sailing on Lake Macquarie”;

With this in mind, the redevelopment of the LMYC is not in conflict with what the areas is known for. Further to this the Belmont Bay area (which LMYC lies within) also hosts a number of moored yachts outside of the marina. Therefore the visual aspect of the Bay is very much featured by boats, in particular yachts. The previous aerial photo illustrates this point as do the photographs below.



Boats on swing moorings in Belmont Bay, to the south of the LMYC.



The existing LMYC and marina from the nearby Andersons Hill.

The view across Belmont Bay looking south from Brooks Parade Belmont.



Further to this, the redevelopment of the existing site will not change the lifestyles of the existing residents. Many residents would have relocated to the area when the LMYC was in existence and may possibly be attracted to the character and appeal that the LMYC provides.

The adverse reactions to the development proposal relate to the ongoing impact of car parking and traffic on the local residents who live in the Ada and Walter Street areas. Race days in particular have caused problems to some residents.

There has also been an issue with the health of the lake, in particular the area of Belmont Bay north of the LMYC as a result of the past construction of the car park. The filling of the lake and small channel (covered by the bridge leading to the car park from Ada Street) are said to be a cause of this issue. These issues have been ongoing for some time.

The increase in marina berths will not so much increase traffic flows because not all boats at the marina will be used on a regular basis. The main impact from traffic flow and car parking would be from race days, regattas and on weekends (reported to be Saturday afternoons in particular). It is not envisaged that the impact would be significantly increased. Some residents reported this to be part and parcel of the LMYC.

7.13 Sense of place and community

Sense of place and community relates primarily with the aesthetics of the surrounding neighbourhood/residential character. For example; does the development complement the existing character, is the design in keeping with the character of the area etc.

Generally, there is no issue with the concept of the redevelopment of the LMYC. Residents agree that the yacht club is in need of redevelopment due to its age and condition. Yachting and boating are characteristic of the area and the LMYC has been a part of the community for many years. Therefore the redevelopment generally is not in conflict with the surrounding area.

There were some comments regarding the design but these related to taste rather than size, scale and bulk. There was no visual impact identified from the redevelopment of the club house its self.

The extension of the marina to the west raised some concerns with residents who had limited (ie not expansive) views of the lake. Of particular note were houses on Bellevue Road (Andersons Hill) who face towards the north. After the re-development the little open water views would be lost to the marina extension by some residences.

Options discussed included expanding the marina laterally to minimise this impact. However this would have a negative impact (visually) on the residents living to the south and immediate north of the LMYC. It appears that the extension of the marina to the west impacts on fewer residents than if it was extended laterally. Further to this, the lateral extension would impact significantly on the location of the swing moorings in Belmont Bay. Numerous options for the layout of the marina have been explored and the current design has the least overall negative impact. The visual impacts are considered in further detail within the Visual Impact Assessment.





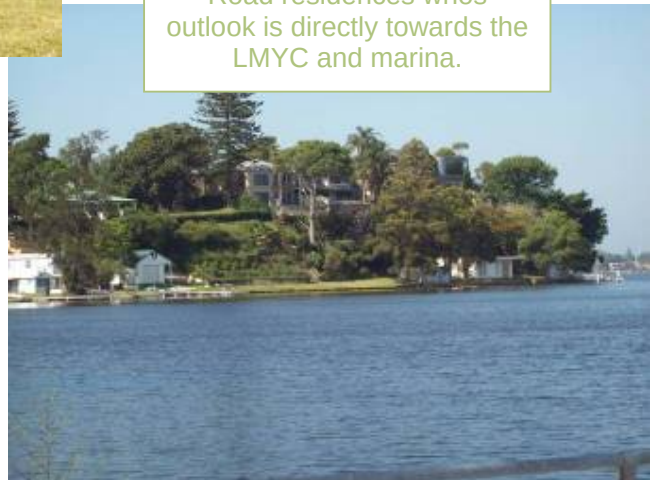
The LMYC taken from the corner of Ada Street and the Pacific Highway (The Gunya Hotel site).



The LMYC taken from Cullan Park



Looking towards the Bellevue Road residences whose outlook is directly towards the LMYC and marina.



Looking north from the LMYC carpark. The aspect of these residences is generally directly over the lake (to the west).



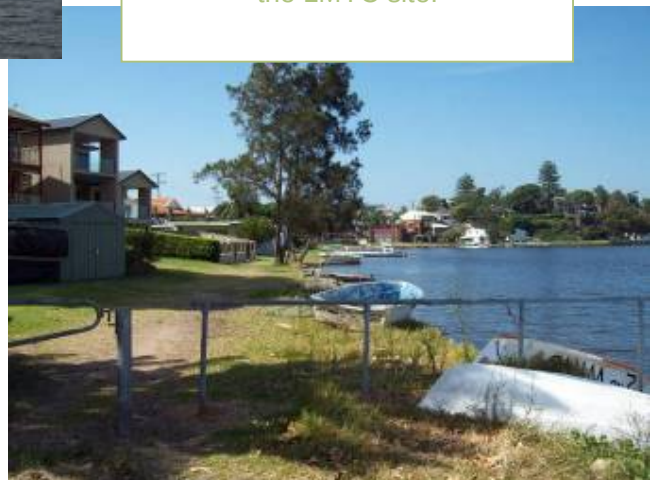
Residences further north of the development site do not look across the LMYC site.



Towards the LMYC from the vicinity of the Belmont 16 Footers.



Residences directly south of the LMYC. The first nine (9) properties look directly towards the LMYC site.





8. CONCLUSIONS ON SOCIAL AND ECONOMIC IMPACTS

The social and economic impact assessment of the redevelopment of the LMYC has made an assessment across a number of areas. These have included a review of strategic policies and directions, supply and demand of marina berths, economic impacts and social impacts. A summary of each area is provided below.

8.1 *Strategic Policies and Directions*

The redevelopment of the LMYC has included numerous consultations and review of a range of strategic planning policies and documentation. It has been found that social and economic impacts arising from this development are not in conflict with, but rather support the strategic direction of the;

1. Lower Hunter Regional Strategy,
2. Lake Macquarie Lifestyle 2020 Report,
3. Lake Macquarie Community Plan 2008 – 2018,
4. Lake Macquarie Outdoor Recreation Open Space Plan,
5. City of Lake Macquarie Investment Prospectus,
6. Main Street and town Centre Strategic Plans,
7. Tourism Profiles for Local Government Areas in Regional Australia (Tourism Research Australia);

8.2 *Marina Berth Supply and Demand*

An assessment of the economic impacts as they relate to demand as well as input into the local economy has been undertaken. A review of recent studies has included those listed below.

- Trinity Point Marina Demand Study (Patterson, Britton and Partners)
- NSW Maritime Boat Ownership and Storage Study (HILL PDA);
- Discussion Paper on Vessel Storage in NSW (Buttigieg, D. and Norbom, S.);
- Review of boat registration data (NSW Maritime);
- Lake Macquarie Mooring Management Plan;
- Lake Macquarie Estuary Management Plan;

What has been found is that there is an expected 11% growth in the demand for moorings over a ten year period (from 2003) (Lake Macquarie Mooring Management Plan).

The growth in the demand for swing moorings has exceeded 2.5% per annum since 2003 and is expected to increase. When taking into account the latent demand for marina berths, increasing boat ownership and the lack of boat storage facilities, the cumulative demand (taking into account LMYC, Marmong Point and Trinity Point) does not exceed the current projected demand for marina berths in Lake Macquarie. This has led to the conclusion that the extension of the LMYC marina and the proposed supply of 58 additional berths is within the demand targets for these facilities.

8.3 *Economic Impacts*

The economic benefits to the local economy are significant. Based on the construction cost being \$7 million, the development has the potential to create approximately 44 direct job years over the construction period with an estimated multiplier of approximately 70 job years created in the wider economy. Also considered, is the running costs for various sized vessels which is estimated at between \$4,000 and up to \$50,000 per boat per annum. This represents a significant ongoing financial input into the local economy.

Furthermore facilities such as the LMYC play an important role in promoting the area as a tourist destination. To be successful, facilities and infrastructure need to be available and of high quality. Given that tourism generates an estimated \$28.75 to \$38.33 Million dollars per year, the redevelopment of the LMYC needs to be regarded an important asset to the area's economy.

The cost of the LMYC's redevelopment is estimated as \$7 million dollars. This will generate approximately 44 direct job years over the construction period and approximately 70 jobs created in the wider economy.

8.4 *Social Impacts*

With regards to specific social impacts it was identified that the likely area of affectation (ie the area where the social impacts are most likely) is determined to be within the vicinity of the development. The specific impacts identified through consultation relate to;

 Car parking and traffic: This has been an ongoing issue and is an issue generally across the Belmont community, in particular relating to the business precinct. With specific reference to the LMYC, the redevelopment of the car park and formalisation of the small car park in Ada Street will increase car parking by 73 spaces. This will address some of the impact experienced by residents however it should be noted that there are additional impacts from the nearby Gunya Hotel. It is thought that car parking and traffic issues are most likely on Saturday afternoons and also on race days and regatta events (rather than the increase in marina berths). Due to the attendance at these events (including clubs from other areas) the traffic generated impacts will continue. The extent of this will be addressed in the TIA.

It should also be noted that some residents reported that the issue of traffic was 'part and parcel' of the area and brought with it some vibrancy and character to the area.



- Visual impact: The LMYC is part of the visual landscape of the area. The main issues relate to the properties on Andersons Hill (Bellevue Road) who had limited panoramic views of the lake. Some properties, due to their location and mature landscaping, have a 'framed' view of the lake and basically overlooked the LMYC. The extension of the marina would mean that the LMYC would become their full view. Suggestions to extend the marina laterally were discussed however this would result in visual impacts to residents living to the south and immediate north. In summary there is less visual impact in the current design, than if the marina was extended laterally.

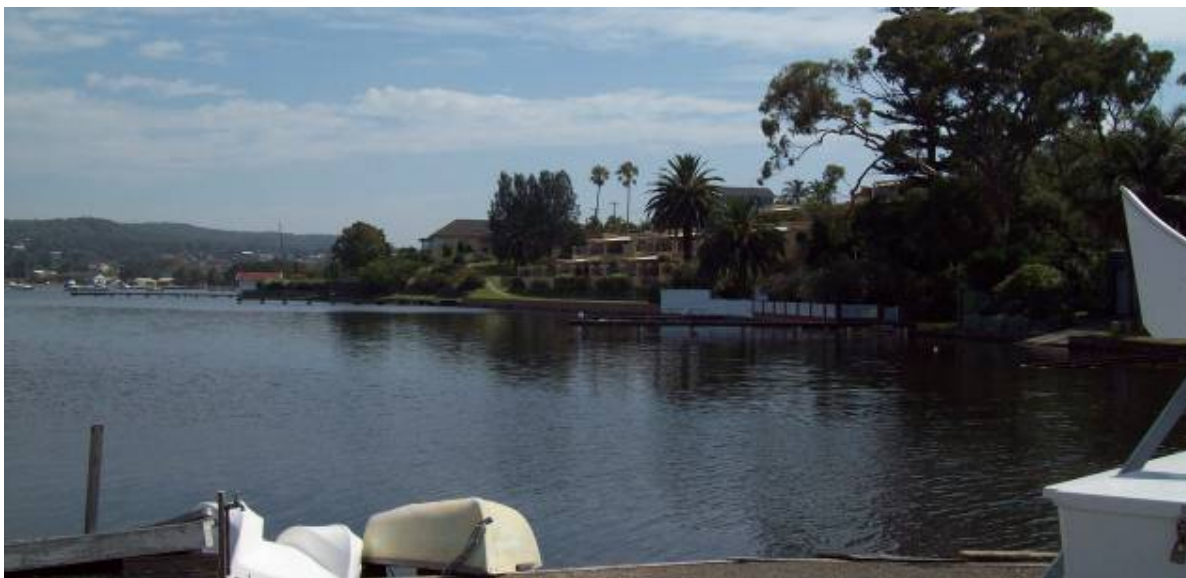
The size of the clubhouse did not identify any visual impacts other than some comments regarding its aesthetic design which are basically a matter of taste.

The landscaping along the foreshore was noted and it has been requested that this does not impact on the view of any residents living along the southern foreshore or residents located along Ada Street. Therefore the height of the canopy of trees and shrubs needs to be considered.

- Potential promotion of access to the rear of the properties south of the development with the formed footpath was not identified as an issue. However residents will need to ensure vigilance of their property and possessions and keep them secure to minimise opportunistic crime.
- There were some general concerns about the health of the lake in the Belmont Bay area. Residents expressed concerns about the past development of the car park and subsequent infill of the Lake has resulted in water flow issues, silting etc of the Belmont Bay area, in particular impacting on residents living to the immediate north. General comments raised related to better maintenance of the small channel between Ada Street and the car park. The fact that there was no further infill of the lake was generally seen as a positive factor.

The LMYC has been a part of this community for many years and is aware of the issues that have been presented in this report. The LMYC has developed a design which has taken into account the majority of concerns identified in this report. There have been numerous redesigns of the layout of the LMYC and the current design is indicative of measures that have been undertaken.

Overall the redevelopment of the LMYC has been found to have an overall positive economic and social impact on the broader LGA as well as the local community of Belmont. The redevelopment of the LMYC will supply much needed marina berths into the area.



9. REFERENCES

-  ABS Census Data 2001 and 2006 Population Statistics
-  Charlestown Masterplan Economic Assessment April 2007 HILL PDA
-  Discussion Paper on Vessel Storage in NSW (Buttigieg, D. and Norbom, S.);
-  Guidelines for Major Project Community Consultation. Department of Planning 2007
-  Lake Macquarie 2020 Vision Plan
-  Lake Macquarie Outdoor Recreation and Open Space Plan
-  Lake Macquarie Social and Community Plan
-  Lake Macquarie Mooring Management Plan
-  Lake Macquarie Estuary Management Plan
-  Lake Macquarie City Council Social Impact Assessment DCP.
-  Lake Macquarie City Council Economic Impact Assessment DCP.
-  Trinity Point Marina Demand Study
-  Lower Hunter Regional Strategy
-  Population projections for the Lake Macquarie LGA (Source Department of Planning)
-  Residential and strata unit property sales 1998 – 2008 RP Data
-  Review of Boat Registration data (NSW Maritime Lake Macquarie City Council Town Centres Strategic Plan 2008)
-  The Hunter Valley Research Foundation report (Manufacturing – Newcastle and NSW
-  Maritime Boat Ownership and Storage Study (HILL PDA Hunter Region 2008 – 2009)