



Yass Commercial Precinct Study

August 2010

PREPARED FOR Yass Valley Council

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1 Executive Summary

In late 2009 the Project Team, consisting of MacroPlan Australia (MacroPlan) and Lennon Salvestro Planning (LSP), were commissioned by Yass Valley Council (Council) to undertake the Yass Commercial Precinct Study (the Study). The report aims to provide Council with guidance as to the potential commercial and employment opportunities it could sustain in the future and provide policy advice and planning suggestions that will enable Yass to grow as a commercial centre to cater for the surrounding region. The study will be used to achieve these objectives and to thus inform the preparation of a new Yass Local Environmental Plan (LEP).

The key requirements of the study were as follows:

- To review the existing Yass Commercial Precinct and surrounding land in order to identify issues relating to the future supply and demand for commercial land in the Yass Township
- To recommend appropriate zones and other development controls for inclusion in a new LEP which will support the growth of Yass as a commercial centre for the surrounding region.

The key themes underlying the study are the concepts of economic sustainability and employment self sufficiency. Essentially, these themes answer the questions

- How can Yass Township improve its commercial competitiveness and improve as a self sustaining community?
- How can Yass Township create jobs to match the growth in the residential workforce and improve self containment and self sufficiency?
- How should land be zoned and what controls should be considered to accommodate growth?

Study Area

For the purposes of the study several study areas have been identified:

- The Yass LGA – (Identified in Figure 1 in Section 3.2)
- The Yass Commercial Precinct – The precinct stretches from Orion Street in the north incorporating Laidlaw Street to Petit Street in the south incorporating Comur Street. (Identified in Figures 2 and 3 in Section 3.2)
- A Retail Main Trade Area (MTA) – Generally incorporates the Yass LGA and extends slightly beyond its border. This MTA has been applied to understand the supportable retail floor space within the Yass Commercial Precinct as retail expenditure data are available at the small area level allowing a deeper delineation of areas to be defined.

Strategic Context

The Sydney-Canberra Corridor Regional Strategy is the primary State Government Strategic Planning Strategy of relevance for the Yass Valley. The regional strategy aims to identify and create 2,500 new jobs in the Yass Valley LGA and accommodate about 2,000 new dwellings and population growth of about 4,000 persons.

Yass Commercial Precinct – Planning Context

The primary statutory document of relevance to the Yass Commercial Precinct is the Yass Local Environmental Plan (LEP) 1987.

The current Yass LEP 1987 has two zones which specifically relate to the development of Commercial areas within the former Yass Shire. These are the 3 (a) (Business Zone) and 3 (b) (Highway Services Zone). These two commercial zones are also the main employment zones within the Yass Commercial Precinct, although there are many examples of employment uses on land zoned for residential purposes and vice versa. The other zones identified within the study area include Open Space, Residential, Industrial and Special Use zones.

The Project Team is of the opinion along with many stakeholders including Council that the existing zonings are somewhat redundant and are not necessarily applicable to the present day Yass economy nor appropriate for stimulating future potential commercial growth within the Yass Township. The economic analysis in this report intends to confirm this as reality (or perception) and will inform the land use mix that Yass should plan for to accommodate and attract growth within its Town Centre.

Supply Assessment

The Project Team undertook a detailed land use survey of the Yass Commercial Precinct Study Area to understand on-ground development and the relationship between current uses and the land use zonings within the Yass LEP 1987. The Study Area incorporated approximately 94ha of zoned land of which 60% was residentially zoned, 21% commercially zoned and about 18% zoned open space.

The Project Team identified that there was a total employment floor space supply of 37,000m² within the Yass Commercial Centre. This comprised approximately 21,000m² of retail floor space, 12,000m² of business floor space as well as health, government / civic uses, industrial businesses at the northern end and about 1,900m² of vacant building floor space (i.e. vacancy rate of about 5%).

This floor space is provided in existing building structures with internal design configurations made to accommodate tenant / business requirements with some purpose built premises such as the stand-alone Woolworths and the Council Offices for example. Each of the broader employment uses has been disaggregated into sub-components to understand the current composition of the future potential commercial growth opportunities for the Study Area. These are discussed in Section 6 of the report.

Population Growth

The Project Team has assessed a variety of sources regarding likely future population across the Yass LGA and has estimated the population across the LGA to grow at about 2.0% per annum from 2009 to 2031. The LGA population is expected to increase from 14,712 persons to about 22,785 by 2031 equating to an increase of about 8,073 persons or 2,800 to 3,200 dwellings.

This is much greater than the 2,000 extra dwellings and 4,000 extra persons estimated in the Sydney to Canberra Corridor Strategy, which relied upon population projections from 2005 using 2001 Census data.

The Project Team projections recognise the rapid recent historical growth across the LGA which has been largely driven by affordability in the housing market in comparison with the ACT. These growth projections also align with those used in other studies currently being undertaken to inform the new comprehensive Yass LEP.

Employment Demand

Of the 13,762 residents within the Yass LGA in 2006, 49% or 6,752 were employed as at the 2006 Census, with the most significant industries of employment as follows:

- Public Administration and Safety – 1,108 employees (16%)
- Agriculture, Forestry and Fishing – 720 employees (11%)
- Retail Trade – 644 employees (10%)

The most significant growth over the period 1996 to 2006 has occurred across Construction (+123%), Professional, Scientific and Technical Services (109%) and Public Administration & Safety (95%).

As at the 2006 Census there were about 3,547 local jobs within the Yass Valley LGA, which equates to an employment self sufficiency ratio of about 53% (i.e. local jobs/ employed residents). This ratio is reasonable given the size of the commercial core in the Yass Township and the proximity of the LGA to the larger employment base available within the ACT. The level of self containment within the LGA is quite high at 44%. This means that 56% of employed residents are leaving the LGA each day for work, with the majority working in the ACT.

Of the 3547 jobs, 83% are undertaken by Yass residents and about 60% of these jobs are located within the Yass Township.

The Project Team has assessed the demand for employment uses across the Yass LGA and within the Yass Commercial Study Area over the period 2009-2031 based upon likely population growth and assumptions regarding employment self sufficiency and future industry mix. This analysis has shown that the LGA employment pool is expected to grow by about 3,800 workers between 2009 and 2031. If the ratio of jobs to workers improves slightly over this time frame, then Yass could potentially support about 2,665 extra jobs of which about 1,884 extra jobs could be accommodated within or directly adjacent to the Yass Commercial Precinct Study area.

About 40% of these jobs are expected to be in retail, 22% requiring office floor space, 13% in health related fields and about 8% in education.

Retail Demand

It is possible to further understand the demand for retail floor space by assessing the available retail expenditure pool from which the Yass Commercial Precinct could potentially draw trade. Retail floor space demand is driven by population growth and growth in real retail expenditure per capita. The Project Team has determined that the overall demand growth is expected to increase by about 34,000m² over the next 20 years or about 1,700m² per annum. Not all of this will be captured within the Yass Township as there will be leakage beyond the catchment to Canberra for example, while conversely there is also the potential to capture trade from beyond the LGA.

By applying appropriate market shares it is shown that the retail demand could be expected to increase by about 21,300m² through to 2031. This demand in growth is expected to be generated as follows:

- 7,000-8,000m² – supermarket (inc. bottle shop) floor space growth
- 1,300m² – food, restaurant and café growth
- 4,000-4,500m² – non-food specialty
- 6,000-6,500m² – bulky goods
- 2,200m² – department store / discount department store (DDS)

Not all of these retail categories are in equilibrium. Some categories are undersupplied and some are oversupplied. For example there is a latent demand for 1,000 to 2,000m² of DDS floor space at present, thus the overall market gap in the future or potential floor space is closer to 4,000 to 5,000m².

SWOT Assessment

The Project Team undertook a SWOT assessment of the Yass Commercial Precinct, addressing key factors relevant to potential future development and the provision of retail and commercial floor space across the Study Area. In the case of a strength or opportunity – the potential to further capitalise is discussed, while in the case of a weakness or threat – the potential to mitigate or eliminate is discussed. A summary table of factors is provided below and these are discussed further in Section 7 of this study.

Strengths	Weaknesses	Opportunities	Threats
Council Landholdings	Existing premises (non compliant / non-conforming)	National / Regional tenants / Business (agricultural strength)	Heritage (issues re: development costs / potential)
House price differential (Yass v ACT) & Strong Population Growth	Zonings are not representative of present requirements / length of commercial core	83% of jobs in Yass are undertaken by Yass residents (work, shop and live opp.)	Canberra / Gungahlin Building Market Share
Business Rents differential	Lack of suitable commercial floor space (e.g. buildings above 1000m ² rare and offices about 100m ² rare)	Barton Highway Duplication / Or no duplication (both present an opportunity)	Out of centre development
Major National Tenants	Population Threshold in Yass c. 12,000 persons	Consolidation of the northern anchor into a neighbourhood centre and the southern anchor as the primary commercial core	Land fragmentation, contamination and commercial viability

Market Gaps and Opportunities

As with many regional townships, the retail sector is a key employer in Yass and has significant economic multipliers across other sectors of the economy including wholesale trade, transport and distribution. It is important to ensure enough retail floor space is provided in the study area so that economic development and employment in this and other sectors is maximised.

Apart from a diversity of retail, other supporting and complementary uses need to be accommodated within Yass for it to achieve its full-potential as a Commercial Activity Centre and maximise sustainability potential. Quite a strong diversity already exists within the Commercial Core, however further business activities requiring office floor space as well as entertainment, Government, education or health type employment should also be pursued where possible.

These principles are designed to encourage sustainable economic development and maximise the wealth of residents in Yass by reducing the cost of shopping, undertaking other household business activities and commuting to work.

The Project Team identified expected demand growth for a further 21,300m² of retail floor space (supported by the residential and worker catchment) by 2031. At present the provision of supermarkets within the Study Area appears to be appropriate and with the imminent development of the Aldi Supermarket on Comur Street, there does not appear to be significant potential for another major supermarket chain to locate with the centre until beyond 2020. The Aldi store will also provide goods across a broader product range than traditional supermarkets – essentially operating as a quasi department store or bulky goods outlet, selling TV's, cameras, sporting goods and homewares.

Most other retail categories are generally in equilibrium, with a slight market gap at present for bulky goods floor space and an immediate gap for a discount department store (DDS). Including existing market gaps, the overall future retail demand requirement will be about 24-25,000m² by 2031 or about 1,200m² per year. Importantly, retail development should generally be provided ahead of market demand so that the community benefits from appropriate diversity and competition between retailers.

Applying an FSR of 0.5, this equates to about 50,000m² of site area or about 5 ha of land. The Aldi will absorb some of the supermarket growth across the catchment and future supermarket retail (between 2020 and 2031) should be delivered within either the southern Comur Street commercial core or within Irvine Square in the northern node to encourage competition, multi-purpose trips and contain activity within the Yass Town Centre.

The future requirements for food and drink premises and other non-food specialties translates to a land demand of about 1.5ha, while bulky goods demand translates to about 1.5ha and DDS demand about 1ha.

There are Council sites in the southern area along Comur Street which could accommodate a future major tenant DDS and its ideal location would be adjacent to an existing supermarket to ensure the cross-over shopping opportunities are present to make it viable and to achieve net community benefits.

The existing commercial spine, should be sufficient to accommodate the future demand for non-food specialties such as newsagents, hobbies, retail services, clothing stores, while the demand for bulky goods floor space of about 1.5 to 2ha could be accommodated within the existing precinct if site opportunities arise or as part of the lands to the north of the Study Area identified in the Yass Industrial Lands Study as a B5 Business Development zoning.

The project team also identified a need for a further 30,000m² of non-retail employment floor space to be accommodated across the Yass Commercial Precinct. The demand is broken down as follows:

- 10,000m² of office type floor space
- 6,000m² of education floor space
- 14,000m² of health floor space

This estimate does not include industrial floor space demand, which is expected to be significant requiring 130ha in accordance with the Yass Industrial Lands Study. Health sector employment has been one of the fastest growing sectors in the Yass LGA and with an ageing population the requirements for health care in the longer term will become more significant.

The employment growth in education could be similarly provided as extensions to existing school facilities, through new schools or new tertiary education facilities. These could be accommodated across the existing boundaries of the Study Area.

Employment in health related fields has been one of the fastest growing sectors in the Yass LGA and with an ageing population the requirements for health care in the longer term will become more significant. There is potential for Yass to deliver a multi-purpose health clinic and rejuvenated hospital facility. This would most easily be accommodated through a staged medical 'precinct' style development within the existing boundaries of the current Hospital and Community Health Centre site. The site area is 2.1 ha and therefore would be able to satisfy the majority of the projected 3 ha future land requirement to 2031.

Office floor space would require up to 2ha of land given that most of this could only be delivered as one or two storey developments due to the commercial realities involved in development. If suitable sites are available then this type of development would be ideally located in the southern precinct, along Comur Street. The B2 – Local Centre zoning will enable this type of floor space to be accommodated but finding vacant sites for redevelopment or buildings to accommodate this type of floor space may be difficult. Some of this development could be delivered within the Business zones to the north and south as per tenant requirements (i.e. not as reliant on town centre traffic or may have storage requirements etc)

The projected employment and retail demand requirements do not warrant expansions to the north or the south of the Yass Commercial Precinct, except for further floor space to accommodate potential bulky goods tenants. Ideally these could be located in close proximity to Irvine Square, thus strengthening the node and increasing its competitiveness or they could be accommodated within the B5 – Business Development zone identified in the Industrial Lands Strategy, although these lands may take longer to be completely developed.

Planning Controls and Zoning Recommendations

The demand for employment floor space could be accommodated within the existing Commercial Study Area with some of the demand for bulky goods floor space able to be accommodated within designated areas to the north and south, where cheaper and more appropriate lands will make these types of tenancies a more commercially sound option. The industrial lands study identified the lands to the north (Northern Business Precinct) and south (Southern Business Precinct) to be zoned as B5 Business Development. This allows light industrial type uses and bulky goods retailing to be developed.

Therefore the Project Team recommends that the Commercial Study Area is consolidated to the north and south with limited east-west expansion of commercial zonings.

The demand for traditional retail, office, education, health floor space can all be accommodated within the lands comprising the Commercial Study Area. With appropriate zonings, permitted land uses and a DCP to be developed after the LEP - this can be effectively managed. The following summary of zoning recommendations is outlined below:

Northern Precinct

- The Irvine Square Shopping Centre should be zoned B1 – Neighbourhood Centre, and the abutting northern lots with frontage to Orion Street should be zoned B5 – Business Development consistent with the recommendations of the Industrial Lands Study.
- Other land with frontage to the Laidlaw Street ‘spine’ is recommended to be included within a B6 – Enterprise Corridor zoning
- Yass Public School, Yass High School and the Baptist Church should be zoned SP2 Infrastructure zone, consistent with their existing use.
- Victoria Park and land adjacent to the Yass River should be zoned RE1 – Public Recreation
- The remainder of the land within the Study Area should be transferred to R1 - General Residential.

Southern Precinct

- The existing commercial core along Comur Street should be zoned B2 – Local Centre consistent with its existing use

- The B2 - Local Centre zoning should be extended to the south west of Comur Street to take in areas adjacent to Rossi/Dutton Street, Crago/Adele Street, Browne and Petit Streets, and the former Yass Tramway Station.
- The B2 - Local Centre zoning should also be extended over YECCA, the CWA and the adjacent car park, as well as the Atherfield car park, rear of the Australian Hotel and adjacent premises.
- An R3 – Medium Density Residential zone is recommended over the Fifield Lane Tennis Courts, and sites on Dutton and Meehan Streets.
- An RE1- Public Recreation is recommended over Riverbank Park, Coronation Park, Miles Franklin Park and Banjo Patterson Park.
- An SP1 – Special Activities zone is recommended over the former Gasworks site.
- An SP2 – Infrastructure zone is recommended to cover Mt Carmel, St Augustine's Church, St Andrew's, St Clements, TAFE, Yass Hospital and Community Centre and Berinba Public School.
- The remainder of the land within the Study Area should be transferred to R1 - General Residential.

One of the key issues is that vacant lands within the Yass Commercial Precinct are fragmented in their distribution. Not many sites are located along Comur/Laidlaw Street and bringing these sites together for future development including site amalgamation will be an issue and a 'reason' why larger national tenants or regional businesses will be unable to locate within the Commercial Core. This will cause some businesses to consider alternative land parcels beyond the main commercial area.

Essentially, for commercial growth to work there will need to be a collective approach in conjunction with Council to amalgamate and redevelop land parcels to achieve suitable outcomes for the town centre. Council could enter into joint venture arrangements, activate target tenants to encourage development or provide car-parking concessions or relax some of the controls to induce developments by allowing projects to cross specific feasibility hurdles and meet tenant requirements.

If there are too many constraints within the Town Centre, then the only avenues for growth will be beyond the defined Commercial Study area. The LEP Heritage Schedule which is still in draft form will provide further certainty regarding particular opportunities and constraints across the Town Centre. The proposed zonings and permitted uses within the study area, as well as the Council and Community being proactive will encourage Yass to realise its growth potential and attract significant business investment in the short, medium and long term.

2 Introduction

2.1 Purpose of the Report

In late 2009, MacroPlan Australia (MacroPlan) and Lennon Salvestro Planning (LSP) were commissioned by Yass Valley Council (Council) to undertake the Yass Commercial Precinct Study (the Study). The report aims to provide Council with guidance as to the potential commercial and employment opportunities it could sustain in the future and provide policy advice and planning suggestions that will enable Yass to grow as a commercial centre to cater for the surrounding region. The study will be used to achieve these objectives and to thus inform the preparation of a new Yass Local Environmental Plan (LEP).

The key requirements of the study were as follows:

- To review the existing Yass Commercial Precinct and surrounding land in order to identify issues relating to the future supply and demand for commercial land in the Yass Township
- To recommend appropriate zones and other development controls for inclusion in a new LEP which will support the growth of Yass as a commercial centre for the surrounding region.

It should be noted that this is the first major review of the commercial zoning within Yass Town since the 1987 LEP. The function of the town has changed dramatically since then and the LEP zonings have not adjusted to reflect this change. Re-zonings resulting from this study, combined with those from the Industrial Lands Study will boost business and employment opportunities and provide avenues through which Yass Town can evolve and grow.

2.2 Report Scope and Structure

The report is comprised of ten (10) primary sections:

1. **Themes and Study Areas** – This section presents the key underlying themes adhered to in the undertaking of this study and outlines the three key study areas.
2. **Strategic Context and Literature Review** – This section of the report reviews the key NSW Government Strategic Policy of relevance to the Yass Commercial Precinct and reviews other relevant documents.
3. **Planning Context and Land Uses** – This section of the report reviews the existing land use zonings and planning controls and discusses their appropriateness for the Yass Commercial Precinct.
4. **Supply Assessment** – This section of the report presents a summary of the land use survey identifying the land uses upon various zoned land parcels and also includes an assessment of the quantum of employment building floor space within the Study Area.
5. **Economic Analysis** – This section of the report addresses the strengths, weaknesses, opportunities and threats as they pertain to retail and commercial floor space within the Yass Commercial Precinct.

6. **Population and Demographic Analysis** – This section of the report assesses the socio-demographic profile of the Yass LGA as well as likely future population growth across the Yass LGA.
7. **Retail and Commercial Demand** – This section of the report assesses the employment growth potential of the Yass LGA and the Yass Commercial Precinct and translates this into a future floor space requirement. It also assesses the available retail expenditure pool and the likely retail floor space demand that the Yass Township could capture.
8. **Market Gaps and Opportunities** – This section of the report identifies future retail and commercial floor space demand and compares it with the supply of floor space within the commercial precinct. It also provides recommendations regarding the land requirements and the potential tenants or types of development that would be suitable within the Yass Township.
9. **Planning Implications** – This section outlines the recommended planning zones from the NSW Standard LEP Instrument template in order to achieve the potential commercial and employment outcomes from the previous sections. This section also outlines additional zone objectives under the standard template and additional advice/comments such as heritage or remediation issues.
10. **Key Findings and Recommendations** – This section summarises the key findings from the study and the recommended actions that Council should employ so that appropriate outcomes are achieved.

3 Themes and Methodology

3.1 Key Themes

The key themes that have underlined this report are the concepts of:

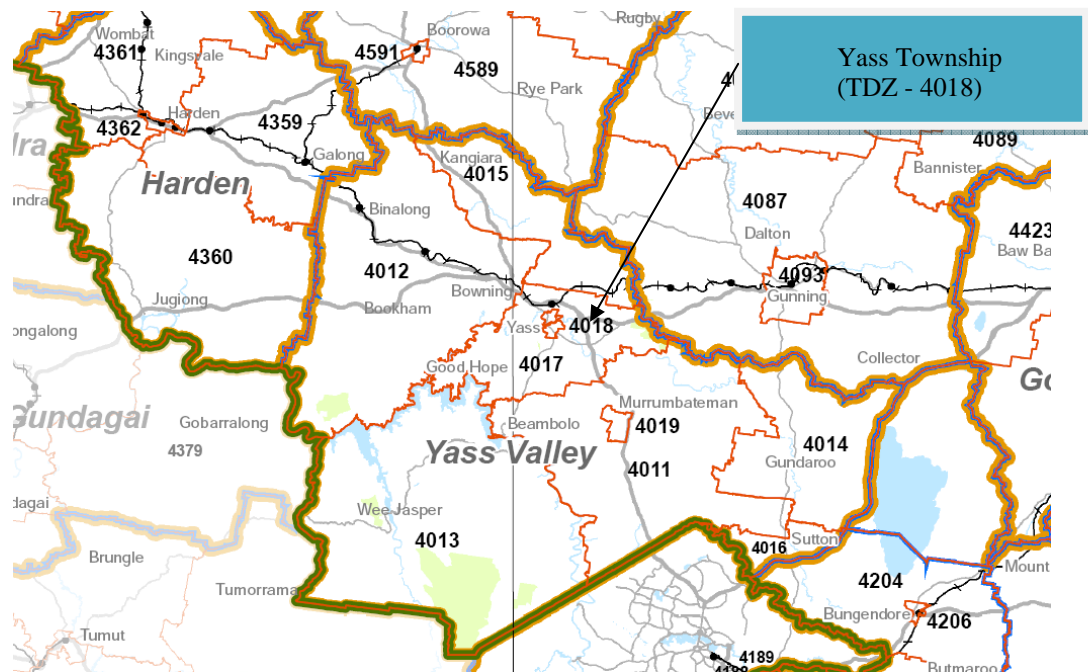
- Improving employment self-sufficiency
 - increasing the number of local jobs per resident employee
- Creating and encouraging economic sustainability
 - creating a self-sustaining local centre that can interact and support itself and reduce its reliance upon the ACT
- Creating commercial comparative advantages / attracting regional and national tenants
 - Where possible larger national tenants or major regional businesses should be encouraged to locate within Yass. Where there are major tenants the small to medium enterprises (SMEs) will follow. This will enable Yass to capitalise on its natural strengths.

3.2 Study Areas

In addition to the main Yass Commercial Precinct, several study areas have been referred to in this report. The Yass Township and the Yass Valley LGA are shown in figure 1 below, providing a regional context for the study area. The Yass Valley LGA is an amalgamation of the former Yass Shire, and parts of the former Yarrawluma and Gunning Shires. The LGA totals some 4,000 km² and is bounded by the Australian Capital Territory to the south, Boorowa and Upper Lachlan Councils to the north, Palerang Council to the east and Tumut, Gundagai and Harden Councils to the west.

The Yass Township is centrally located within the LGA and accommodated 5331 persons or about 40% of the LGA population in 2006. Overall there were about 3,554 jobs across the LGA of which about 2,200 jobs are located within the Yass Township. By 2009, the Project Team estimated there were about 4,000 jobs across the LGA with about 2,400 to 2,500 of these jobs located within the Yass Township.

Figure 1. Yass Valley LGA & Yass Township



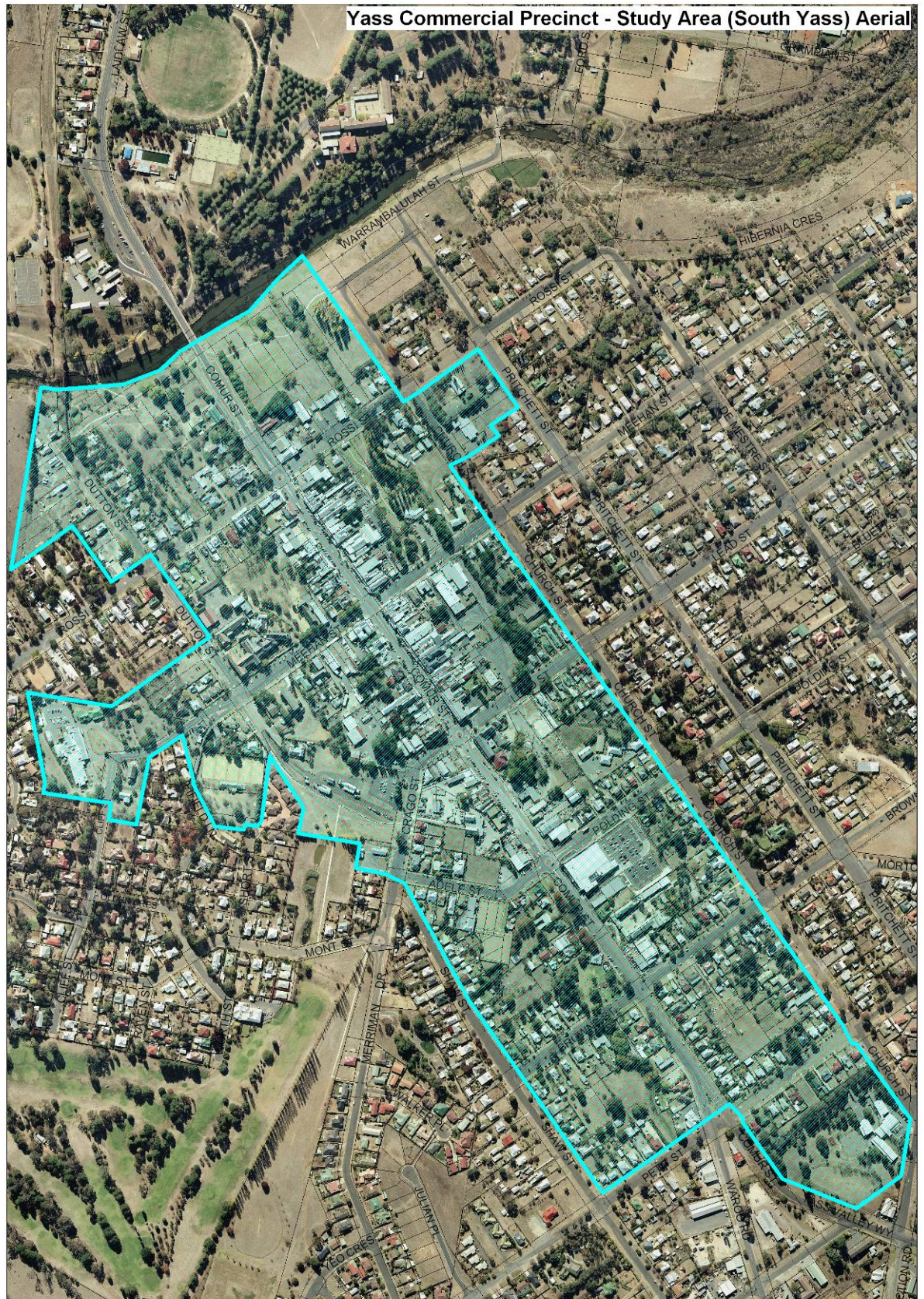
Source: NSW Department of Transport

The Yass Commercial Precinct is shown in figures 2 and 3 below. It accommodates most of the Business zoned land in the Yass LGA. The precinct stretches from Orion Street in North Yass to Petit Street and Grand Junction Road in South Yass – with the main focus around Comur /Laidlaw Street. The composition of zonings, land uses and building floor space are further detailed in subsequent sections of the report.

Figure 2. Yass Commercial Precinct – Study Area (North Yass)



Figure 3. Yass Commercial Precinct – Study Area (South Yass)



Source: Yass Valley Council

3.3 Methodology

In order to understand Yass Township's future commercial potential and ways to improve its competitiveness the Project Team has used demand modelling to understand the likely future growth or demand. The Project Team has assessed employment growth based on growth in the population of the Yass LGA, factoring in changes in the expected workforce profile and employment self-sufficiency. The methodology in determining employment floor space demand within the Yass Commercial Precinct is outlined as follows:

Employment Floor space Demand

- Estimate overall job mix by industry according to 2006 Census & JTW data
- Estimate overall residential employment pool
- Assess the levels of employment self containment and self sufficiency
- Estimate overall growth in employment type by industry assuming levels of increased self sufficiency
- Allocate appropriate share of jobs growth by employment type to the Yass Commercial Study Area
- Estimate building floor space (m²) demand to which this translates
- Estimate the land requirements to which this translates

The Project Team has assessed retail demand using an expenditure pool based methodology, based upon likely spend per capita, population growth and capture rates which the Yass Commercial Precinct could realistically achieve. The methodology is as follows:

Retail Floor space Demand

- Estimate likely trade area catchment (extent)
- Estimate the population and population growth across the catchment
- Estimate available retail expenditure pool and growth within the catchment
- Estimate floor space demand (m²) to which this translates
- Allocate likely capture rates (market shares) that the Yass Commercial Study Area could reasonably sustain
- Estimate floor space demand (m²) by retail category for the Yass Commercial Study Area and immediate surrounds

4 Strategic Context and Literature Review

This section of the report addresses some of the relevant land use strategies and policies relevant to the Study Area as well as outlining the objectives of other studies currently being undertaken by Yass Valley Council to inform the preparation of its Standard Instrument LEP. The following documents are referred to in this section:

- The NSW Department of Planning (DoP) Sydney-Canberra Corridor Regional Strategy 2006-2031 with Regional Strategy Updates
- The Yass Industrial Lands Study – AQ Planning / Yass Valley Council
- Other Studies (Non-Urban Lands Study, Town and Villages Study)
- The draft LEP Heritage Schedule (not yet finalised)

4.1 Regional Towns

Many small, regional towns across Australia are negotiating natural stagnation or decline of their town centre as their populations remain constant or declining and people out-migrate to larger regional centres or capital cities. Yass however, is one of the regional centres that is actually experiencing significant population growth and as a result of its close proximity to Canberra it has the potential to lever off the attractions of Canberra as a capital city whilst maintaining its own identity and being a self sustaining township.

Some of the challenges facing regional Australia include:

- the limited or declining growth of many smaller, inland towns, particularly in the wheat-sheep belt;
- persistently high unemployment in a number of regions;
- the rapid population growth in some coastal locations, largely associated with retirement and tourism;
- dramatic farm adjustment processes which have important consequences for rural communities;
- the steady growth of major regional centres which are increasingly absorbing government and private sector services, often at the expense of surrounding smaller centres; and
- difficult rural trading conditions

The project team has noted that some of these are currently affecting Yass however there are several positive factors that give Yass a competitive edge over the many other regional towns. These include:

- A positive house price differential with a nearby major city
- Strong population growth
- Low unemployment rate
- A relatively diverse economy (not purely reliant on primary production) although this comprises much of the current and historic land use in the LGA

These attributes explain the favourable historical growth in Yass and will contribute to its successful and sustained growth into the future. Commercial growth within the Yass Valley LGA will continue to focus on the existing town of Yass, and to a much lesser degree within the Villages. This is largely as a result of the physical location of Yass at the junction of the Hume and Barton Highways, as well as the availability of established infrastructure and access to reticulated water and sewer.

4.2 Sydney-Canberra Corridor Regional Strategy

The Sydney-Canberra Corridor regional strategy was prepared in 2004/05 and covers the area from the southern highlands of NSW to the ACT border. It is the primary State Government Strategic Planning Strategy of relevance for the Yass Valley. The regional strategy identifies a number of matters which will assist growth in the Yass Valley, such as:

- Identification of the need to create 2,500 new jobs in the Yass Valley LGA
- Support for the identification of additional employment lands with the LGA to meet employment requirements
- Identification of the potential to accommodate approximately 2,000 new dwellings with population growth of about 4,000 persons, primarily within the vacant residentially zoned land in the LGA and limited expansion in Yass and Murrumbateman
- Identifying the key determinant of growth in the Yass Valley as access to local water resources (new residential development is contingent on a secure water supply)
- Supporting an appropriate housing mix to cater for increasingly smaller households and ageing residents.
- Aligning growth and infrastructure by identifying the regional infrastructure requirements listed in the State Infrastructure Strategy.
- Identifying Yass as a site for a regional development node to be developed around the Barton and Hume Highways.

4.2.1 Regional Strategy Updates

In May 2009, the NSW Department of Planning released an update report which utilised data from the 2006 Census. This update revised some of the job and housing targets and land requirements across particular regions in NSW. The following points from this update are of relevance to Yass Valley LGA:

- The Strategy supports up to 27,800 new jobs, 25,400 new homes and 46,350 additional persons within the Sydney Canberra Corridor Region by 2031.
- The main centres identified for new housing and employment are Bowral, Goulburn and Queanbeyan – however it must be recognised that the Yass Valley has been the second fastest growing LGA in the Region behind Palerang and that there is potential for the Yass Township to accommodate significant future population and employment growth.
- The Strategy mentions that the NSW DoP has endorsed Yass Valley Council's Industrial Land Study 2008, which identifies an additional 131ha of employment land for the Yass Valley.

4.3 Yass Industrial Lands Study

The Yass Valley Council Industrial Lands Study (YVCILS) was commissioned by Yass Valley Council to provide an assessment of the current employment generating land supply in the town of Yass. The study is one of a suite of studies that will guide the development of a new Local Environmental Plan (LEP) and Development Control Plan (DCP). The Industrial Lands Study and the Yass Commercial Precinct Study relate to employment generating development in and around the town of Yass. The YVCILS was prepared by AQ Planning and Yass Valley Council. The YVCILS:

- Examines existing land use zones and controls in Yass
- Assesses the land supply, demand and likely uses for additional employment generating land (including possible re-location of the Yass Saleyards)
- Developed a GIS based land capability assessment for employment generating land

- Incorporated community opinion
- Recommended areas for rezoning based on a variety of input factors and policy directives.

The YVCILS employs the following methodologies and assumptions to project future demand for employment generating lands:

- Of the almost 365,000 ha of land across the LGA, some 33 hectares are zoned for Industrial and Related Development and 30 hectares for Business and Commercial Purposes. The majority (some 93.3%) is zoned for Rural Production – Agriculture.
- Population of the LGA in 2006 was 13,135, of which 40.6% were in Yass Township, 20.9% in villages across the municipality and 38.5% across the remaining rural areas of the LGA.
- Historically, Yass grew from 10,708 persons in 1996 to some 13,135 persons in 2006 at 2.06% per annum.
- The population projections used in the YVCILS are the Yass Valley Council projections from July 2005. These projections indicate the LGA population will reach about 23,000 persons by 2032, an increase of about 10,000 persons. Yass Township is forecast to reach close to its maximum potential in 2032 of 11,800 persons.
- The study identifies four (4) key precincts of 188 ha (net additional 131ha) of employment lands to accommodate future employment land demand across the Yass Valley and to stimulate potential growth in the industry sectors requiring employment lands. Two of these precincts - the Northern Business and Southern Business Precincts – will have a complementary relationship with the Yass Commercial Precinct and should be able to accommodate future demand for bulky goods retailing that will not be as functional within the study area.
- The study identifies that Irvine Square and the adjoining existing commercially zoned land should be zoned B2 Local Centre and B5 Business development. This is the only recommendation that encroaches upon the existing commercial area.

Some of the findings from within this study have been used in the preparation of the Yass Commercial Precinct Study. The Project Team's findings in regard to population growth and employment growth are consistent with those within the YVCILS. Figures 4 and 5 below show the Northern Business and Southern Business Precincts.

Figure 4. Yass Valley Council Industrial Lands Study - Northern Business Precinct

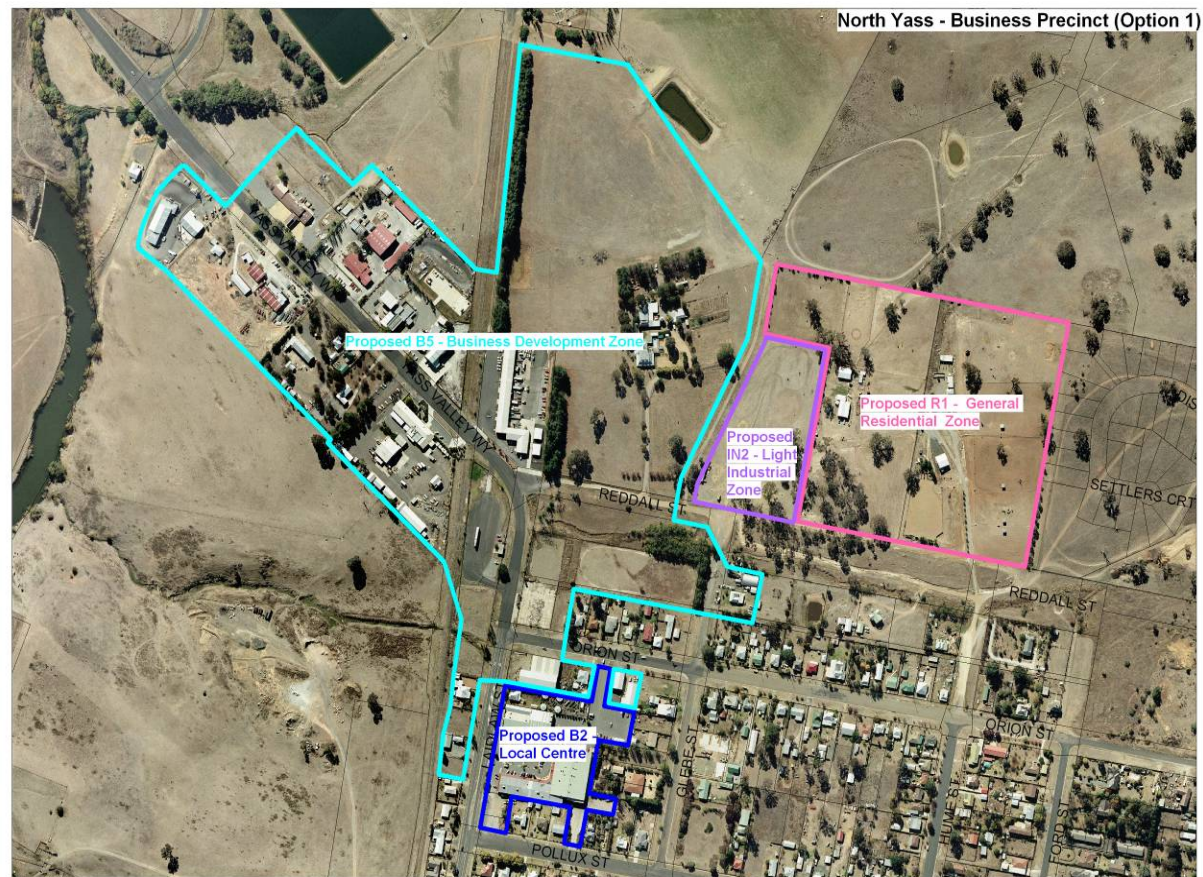


Figure 5. Yass Valley Council Industrial Lands Study - Southern Business Precinct



4.4

Other Studies

A suite of studies have been, or are presently being undertaken to inform the preparation of the new Yass Valley Standard Instrument LEP. These studies are currently being finalised and therefore any findings referenced in this report will only be draft in nature. These studies include:

- Yass Valley Non Urban Lands Study
- Yass Valley Town and Villages Study
- Amalgamation of previous Heritage Studies to compile a draft LEP Heritage Schedule

5 Planning Context and Land Uses

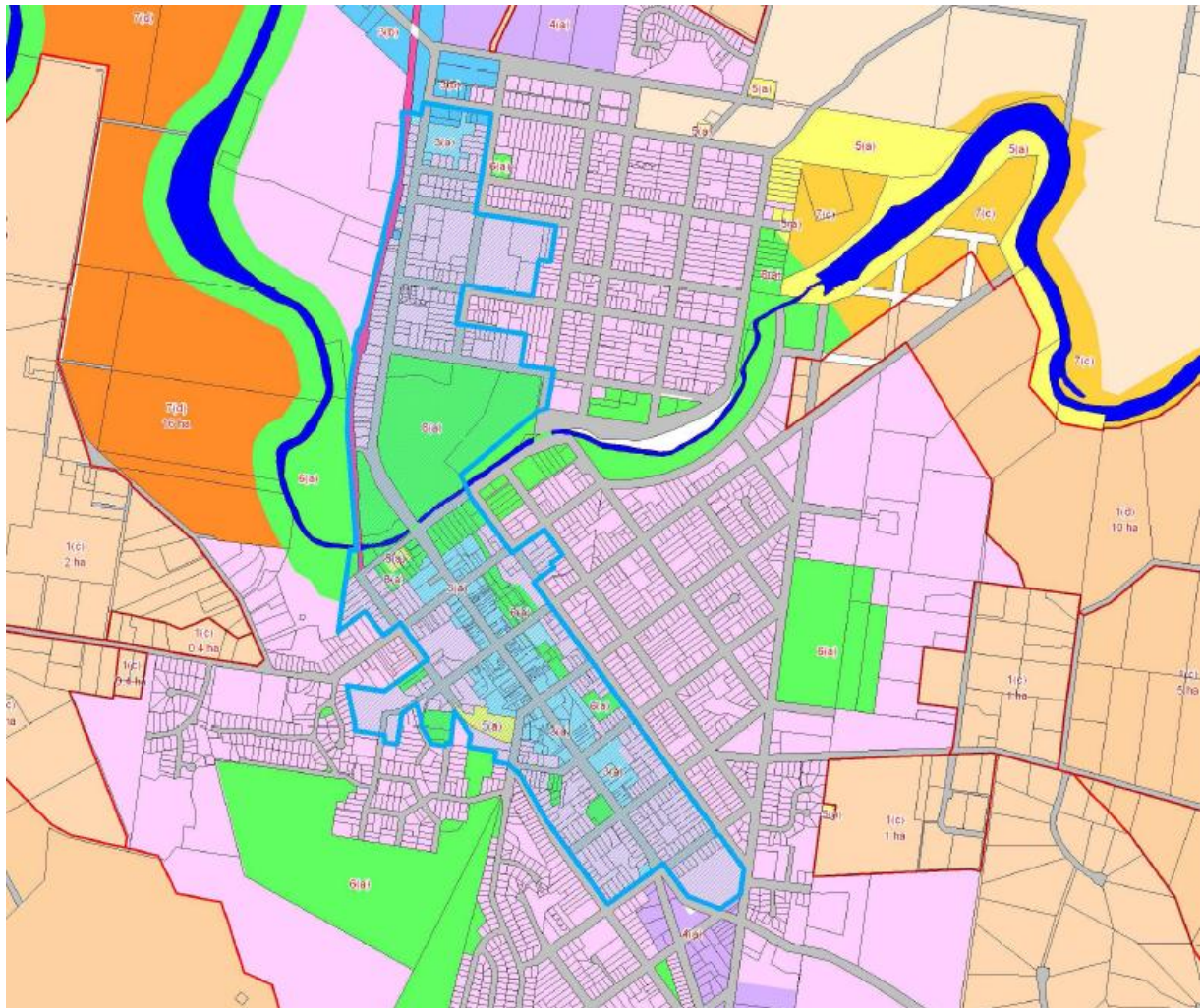
This section of the report reviews the current planning controls under the Yass Local Environmental Plan (LEP) 1987.

5.1 Yass LEP

The current Yass LEP 1987 has two zones which are specifically related to the development of Commercial areas in Yass Town. These are the 3 (a) (Business Zone) and the 3 (b) (Highway Services Zone). The following section outlines the location of these zones within Yass and the types of permissible uses / development.

Figure 6 below highlights the study area which stretches from Orion Street in the north to Petit Street and Grand Junction Road in the South.

Figure 6. Yass Commercial Precinct - Study Area –



Source: Yass Valley Council

The relevant zones as they apply to the study area are discussed below.

5.2 3 (a) Business Zone

This zone is centred around Comur Street between the Yass River and Browne Street and covers Irvine Square in North Yass between Orion and Pollux Streets.

The objective of this zone is to set aside certain land for retail, commercial, restricted light industry and warehousing purposes.

The following land uses are prohibited within the 3(a) zone:

Agriculture; animal boarding, breeding and training establishments; bulk stores; dwelling-houses (other than dwellings used in conjunction with purposes permissible in the zone); feed lots; forestry; generating works; helipads; home occupations; hospitals; industries (other than light industries); junk yards; liquid fuel depots; mines; piggeries; poultry farms; recreation establishments; road transport terminals; roadside stalls; rural workers' dwellings; sawmills; stock and sale yards; transport terminals; units for aged persons.

All other uses not listed above - currently require Development Consent within the 3 (a) Zone.

The predominant uses within the 3(a) zone area are retail and office, however it also includes all other complementary uses and services that one would expect within the core of a Regional Town. The existing narrow business strip of Comur Street is a product of the development history of the town.

The wide main street with many large ornate buildings dates back to early Yass's location on-route to Port Phillip (Melbourne), and the wealth that passed through the town is evidenced in the substantial buildings such as the Courthouse and various Banks. This role was consolidated with the advent of motor vehicle transport, and the large volumes of traffic that passed through the town. Since the Hume Highway bypass was opened, the town has gradually regenerated and is slowly reinventing itself as an independent commercial centre and tourism destination.

Many of the industrial type uses within the commercial area stem from the fact that Yass had been a highway town in the past and had catered largely for travelling tourists and the transport industry. The streetscape to a certain degree is still reflective of this previous "highway" townscape with a large number of petrol stations and service centre buildings and associated forecourts still in existence, some vacant and others being consumed by other uses.

The presentation to the streetscape of these types of buildings and essentially hard stand areas tends to detract from the overall aesthetic appeal of the precinct and they fail to meet the consistent setback common to most main street centres.



The Council has an adopted Industrial Lands Strategy which recommends further land to be rezoned for industrial and business purposes outside of this study area towards the north and south of the town. As such, industrial type uses will be well catered for in those areas and it is recommended that future zonings discourage industrial and warehouse uses within the South Yass commercial core area. By limiting these uses in Comur Street, Council will achieve a number of positive effects:

- Protection of the supply of retail floor space and the ability to monitor and forward plan for extra provision when required.
- Encourage like uses to co-locate.
- Advantages of co-location of industry include proper provision of infrastructure such as essential (water, power, gas etc) and special services (Water Recycling Systems, Fire safety, Waste Disposal).
- The advantages for retail areas include the removal of a large proportion of non-retail related heavy vehicles from the shopping environment, and positive economic spin offs from a compact centre.
- Reduction of traffic and trip generation by facilitating multi purpose business and shopping trips
- Ability to master plan for and create a Development Control Plan (DCP) focussing on the retail environment to improve streetscape, functionality and the aesthetic of the town centre.
- Council will still have flexibility to consider some limited light industrial uses which would complement the retail role of Comur Street (e.g. Artisan Premises where hand crafted goods are made and sold on site)

5.3 3 (b) Highway Services

The 3 (b) Highway Services Zone is centred on Yass Valley Way to the north of the Yass Township between Faulder Avenue to the north and Orion Street to the south. This zone was developed prior to the opening of the Hume Highway by-pass in 1994. Only eight (8) lots within the study area are currently zoned 3 (b).

The objective of this zone is to set aside certain land for the provision of services required by the travelling public and for the development of refreshment, accommodation and vehicle service facilities.

The following development is permissible with consent in this zone, with any other development being prohibited:

Advertising structures; bulk stores; car repair stations; dams; dwelling-houses used in conjunction with purposes permissible within the zone; helipads; heliports; hotels; light industries; liquid fuel depots; motels; recreation facilities; recreation areas; refreshment rooms; roads; road transport terminals; service stations; taverns; tourist facilities; transport terminals; utility installations; any other purpose specifically designed to cater for the travelling public.

Now that Yass is bypassed by the Hume Highway, this zone is considered to be redundant. Nevertheless, uses which have established and/or evolved due to the Highway remain in this zone. An appropriate zone from the Standard LEP Instrument needs to be selected to accommodate those remaining uses, address land use conflicts, and provide strategic direction for the area.

It is noted that under the Industrial Lands Study, the lots which abut Orion Street were recommended to be zoned B5 – Business Development Zone.

5.4 2 (a) Residential

Much of the land with frontage to Laidlaw Street in north Yass is zoned 2 (a) Residential, as is most of the remaining land within the study area. Despite the existing residential zoning, there are a number of existing commercial and industrial uses which are present along Laidlaw Street resulting in various levels of land use conflict. There are also high traffic volumes along Laidlaw Street, as well as potential contamination issues in this area due to uses associated with the old Hume Highway alignment through town. These factors result in a considerably reduced residential amenity. The 2 (a) Residential zoning in this area has not resulted in good planning outcomes for Yass Town.

The following development is permissible with consent in this zone, with any other development being prohibited:

Agriculture; bulk stores; car repair stations; commercial premises; feed lots; forestry; helipads; heliports; hotels; industries (other than home industries); junk yards; liquid fuel depots; mines; motels; motor showrooms; piggeries; poultry farms; recreation establishments; refreshment rooms; retail plant nurseries; road transport terminals; roadside stalls; rural workers' dwellings; sawmills; service stations; shops; stock and sale yards; taverns; tourist facilities; transport terminals; warehouses.

5.5 Other Lands

In addition to the 3(a) Business Zone, 3(b) Highway Services and 2(a) Residential Zones:

- Land which is associated with the various Parks, Chinaman's Creek, Yass Bowling Club, Tafe and Yass Public and Yass High Schools is within the 6(a) Open Space Zone.
- The 5(a) Special Uses Zone covers the Former Yass Tramway Station and Pumping Station within Riverbank Park.

The current Yass LEP otherwise supports its commercial core by adequately restricting the drift of commercial activities outside of these standard zones.

6 Supply Assessment

This section of the report presents the results of the Land Use Survey and quantifies and categorises the overall supply of zoned land across the study area by land use. It also outlines Council owned land, potential land parcels for re-development and analyses the provision of commercial floor space.

6.1 Land Use Survey

The Project Team undertook a land use survey on the 13th of January, 2010. This survey identified the different land uses within the Study Area.

The survey clarified that the Yass Township is serviced by two core retail areas, the majority of Comur Street to the south and Irvine Square to the north. The heritage aspects of the main street to the south of the river are prominent. The majority of these buildings are well maintained, particularly the first floor facades.



With a wide main street, the opportunity remains open to improve the interface of these buildings and shops at street level and in so doing improve the pedestrian environment. It is recommended that Council consider upgrades to footpaths to create more opportunity for alfresco dining etc and that the footpath grade be adjusted to assist persons with limited mobility to access buildings. It is noted that the intersections have received upgrades with paving and lighting.



The centre still reflects its previous core function as a highway service centre with a number of service station style buildings and forecourts present along the main roads within the study area most of which were supporting a new use. The survey area appears to be in a state of change with the ALDI construction site and the empty Commercial Hotel building providing considerable opportunities as well as a number of other underutilised sites. The main street itself however has a very low vacancy rate, and tenancies which are vacated (especially at ground floor level) appear to be re-leased relatively quickly.

The detailed results of the land use survey are attached as Appendix A. As part of the survey the Commercial Precinct Study Area was divided into twelve (12) precincts and the land uses were classified according to the following categories.

- Retail – supermarkets, takeaway food premises, cafes, restaurants, clothing stores etc
- Industrial – warehousing and light industry
- Open Space – parks, ovals, sporting facility.
- Commercial – non-retail businesses such as hotel/motel accommodation, accountants, lawyers, etc.
- Education – schools, learning centres
- Health – medical centres, doctors, dentists, physiotherapists.
- Civic / Government – Council offices, library, community hall.
- Residential – primary use of building is residential

The land use survey has been used in conjunction with GIS analysis to estimate the quantum of commercial and retail floor space that presently exists within the study area, the amount of vacant land/premises and the future unconstrained potential of the Yass Study Area to accommodate further employment generating floor space.

6.2 Land Supply

The total amount of zoned land within the Yass Commercial Study Area is approximately 94 ha. Residential lands comprised the majority of zoned land within the Yass Commercial Study Area totalling approximately 57ha or 60%, while commercial zoned lands accounted for just over 18ha or approximately 20%. The majority of these lands were located in the southern section of the precinct (about 90%). Open space and special uses (which provide schools and community facilities) totalled some 17ha (18%).

The table 1 below highlights the zoned land supply in hectares across the Yass Commercial Study Area.

The Commercial Study Area incorporates the following zones – 2 (a) (Residential Zone); 3 (a) (Business Zone); 3 (b) (Highway Services Zone); 5 (a) (Special Uses Zone) and 6 (a) (Open Space Zone).

Table 1. Land Supply – Yass Commercial Study Area

Type of Land	Total (ha)	% Total
2 (a) (Residential Zone);	57	60%
3 (a) (Business Zone);	18	20%
3 (b) (Highway Services Zone);	0.95	1%
5 (a) (Special Uses Zone) and	0.95	1%
6 (a) (Open Space Zone).	17	18%
TOTAL	93.9	100%

Source: Yass Valley Council, MacroPlan Australia & Lennon Salvestro Planning

In order to understand the potential capacity of the Yass Commercial Precinct Study area, the land identified above has been classified as to whether it is:

- Vacant or developable lands - which are lands that are vacant or have disused premises upon them.
- Constrained lands - which are lands with existing uses that are very unlikely to be redeveloped, or have topographical constraints or may have heritage issues.

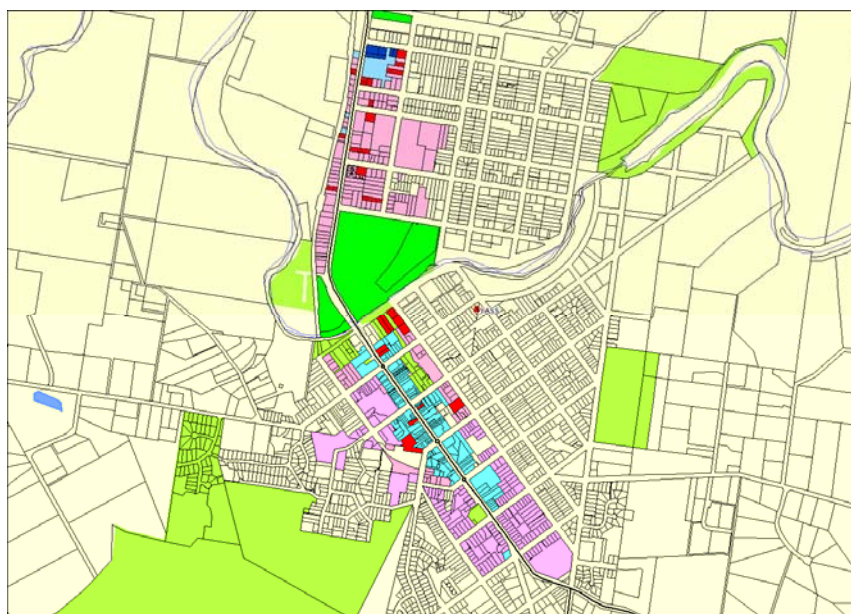
6.3 Vacant Land

At the time of the land use survey, the Project Team estimated that about 6 ha of land was vacant or unoccupied (categorised as vacant). Overall this 6ha of vacant land accounts for about 6.5% of the total land area. This can be further broken down as follows:

- 2 (a) - Residential Zone comprising 2.82ha, 5%, 13 lots
- 3(a) – Business Zone comprising 1.28ha, 7%, 8 lots
- 3 (b) – Highway Services Zone comprising 0.2ha, 20%, 1 lot
- 6 (a) – Open Space Zone comprising 1.56ha, 9%, 4 lots

The vacant land parcels are distributed across the Commercial Study Area, generally away from the main thoroughfares of Laidlaw Street and Comur Street. These land parcels are identified in red in figure 7 below.

Figure 7. Vacant Lands – Yass Commercial Study Area



Pink = Residential Zoned Land, Light Blue = Business Zone, Dark Blue = Highway Services,

Red = Vacant Land, Green = Open Space

Source: Yass Valley Council, MacroPlan Australia & Lennon Salvestro Planning

Table 2 below outlines the vacant lands by zoning type. Of the 2.82 ha of vacant residential lands about 2.4 ha are located in the northern part of the precinct, while the majority of commercially (3(a) & 3(b)) vacant lands are located within the southern area of the precinct (1.15ha).

Table.2 Vacant Lands – Yass Commercial Study Area

Type of Land	Total (ha)	Vacant (ha)	%
2 (a) (Residential Zone);	57.63	2.82	5%
3 (a) (Business Zone);	17.21	1.28	7%
3 (b) (Highway Services Zone);	0.95	0.19	20%
5 (a) (Special Uses Zone) and	0.95	0.00	0%
6 (a) (Open Space Zone).	17.25	1.56	9%
TOTAL	93.99	5.85	6%

Source: MacroPlan Australia & Lennon Salvestro Planning

6.4 Employment Floor Space Supply

The Project Team also assessed the supply of building floor space for employment generating uses. This enabled a detailed understanding of the existing situation, the relationship with residential workforce and the potential to identify future market gaps or opportunities.

Based on site visit analysis and GIS work the Project Team identified that there was a total employment floor space supply of about 38,400m². This total floor space was categorised as follows.

- “Retail” including supermarkets, cafes & restaurants, chemists, homewares, sports stores, etc.

- “Business” uses including accountants, banks, insurers, motels/hotels, pubs, real estate agents, the post office, a service station and other office uses.
- “Community” uses including accommodation, library / hall, bowls club and other sports facilities.
- “Government/Civic” facilities including the Council offices, the courthouse, the tourism centre and other civic facilities and
- “Health” including chiropractors, dentists, doctors, vets and physiotherapists
- “Education” including the several schools within the Commercial Study Area – such as the Yass Public School, Yass High School, Mt Carmel, Berinba Public School as well as the TAFE NSW – Illawarra Institute Yass Campus on Church Street.

The table 3 below shows that the Commercial Precinct Study Area is heavily oriented towards retail premises, which is commonplace in regional townships such as Yass. Retail comprised about 41% of floor space while, business/office type uses comprised about 24%. Education (mainly schools) totalled about 12%, while Government and community facilities combined totalled about 9-10%. The vacancy rate was about 5% which demonstrates quite a strong and well performing activity centre where rents / costs are relatively competitive, market and customer trade is sufficient and tenant demand is quite strong.

Table 3. Employment Floor Space Supply – Yass Study Area

Type	m2 (total)	% (total)
Business	12000	24%
Community	3000	6%
Education	6000	12%
Government	1400	3%
Health	4500	9%
Industrial	1000	2%
Retail	21000	41%
Vacant	1900	4%
TOTAL	50800	100%

Source: MacroPlan Australia & Lennon Salvestro Planning

There is a total of about 21,000m² of retail floor space across the Yass Commercial Precinct Study area. The remaining 29,800m² of employment floor space is comprised of:

- 12,000m² of business & office floor space, including:
 - 4,000m² of pubs and accommodation
 - 1,300m² of real estate agencies
 - 1,900m² of vacant building floor space
- 6,000m² of education floor space, including:
 - 1,000m² of the TAFE college
 - 5,000m² of schools
- 4,500m² of health floor space. This includes doctors, vets, dentists and physiotherapists and the medical centre.
- 3,000m² of community facilities (excluding-swimming pool and sports ovals). This includes the library/hall, tourism facilities and community accommodation.

- 1,400m² of government floor space including the Council offices and the Courthouse

The majority of this employment floor space is located within the southern component of the Commercial Precinct Study Area, with the north component primarily accommodating the retail node around the Irvine Square, some nearby industrial premises and a large percentage of the education floor space.

Retail Floor Space Supply

The Yass Township is anchored by two full-line supermarkets, a Franklins (2,400m²) at Irvine Square and a Woolworths (3,050m²) in south Yass. Including other small markets and butchers the total supermarket floor space is about 7,000m². The proposed Aldi store is expected to add about 1,700m² to this total, although they generally offer many products that would not generally be found in a typical supermarket.

Across the remainder of the Yass Commercial Precinct Study Area there is a strong provision of bulky goods retail (5,500m²) and non-food specialty retailing (4,200m²). There is a diversity of bulky goods retail offerings across floor coverings, furnishings, whitegoods, homewares and hardware and non-food specialty shops including chemists, newsagents, retail services (i.e. hairdressers) and sports and hobbies type stores.

There are some national chain retailers in addition to the major supermarkets such as Target Country, Retravisson, Subway, and GoLo and there are many other independent local shop owners. From a supply perspective there is not major Discount Department Store (DDS) or key major bulky goods tenants. The demand assessment assesses whether there is a market for these uses. A summary of the retail floor space supply is provided in table 4 below.

Table 4. Retail Floor Space Supply – Sub Categories

Retail	m2	%
Supermarket	7000	40%
Food (Café & Rest – ex. pubs)	500	3%
Non-Food Specialty Retail	5500	31%
Bulky Goods/Household Goods	4200	24%
DDS/Department Store	400	2%
Total Retail	17600	100%
Auto Retail	3400	16%
Total Retail (inc. Auto)	21000	100%

Source: MacroPlan Australia & Lennon Salvestro Planning

6.5 Key Tenants & Anchors

The Yass Commercial Precinct has several strong anchors which would generate significant levels of activity within the town centre, including Franklins, anchoring the northern node and Woolworths and other key activity generators such as the Post Office, banks and Council, anchoring the southern node.

These businesses would be the primary activity generators within the town centre and would also account for significant employment. The two largest employers in Yass at present are the Yass Valley Council and Transgrid. Yass Valley Council employs approximately 160 persons.

National brand retailers such as Target Country and Woolworths attract activity to the Town Centre as do important non-retail facilities such as the town hall, pubs/hotels, restaurants, business and health services. Building further regional and national franchises/businesses will be important in ensuring the continual growth and revitalisation of the town centre. Council can be proactive in this area by creating appropriate land use zones with suitable objectives and permitted uses as well as utilising its own land holdings to bring desired businesses to the township and see projects to fruition.

The following sections explore the market gaps and tenant opportunities in further detail while sections 10 and 11 discuss zoning and policy recommendations.

7 Economic Analysis

This section of the report contains a SWOT assessment (Strengths, Weaknesses, Opportunities and Threats) of the Yass Commercial Precinct which incorporates findings from consultation with stakeholders. The section also assesses national trends in activity centre evolution and retail and commercial development.

7.1 SWOT Analysis

The SWOT analysis outlines the key factors relevant to potential future development and the provision of retail and commercial floor space within the Yass Commercial Precinct. Each factor is outlined and its status as a strength, weakness, opportunity or threat is justified. In the case of a strength or opportunity – the potential to further capitalise is discussed, while in the case of a weakness or threat – the potential to mitigate or eliminate is discussed.

The table 5 below summarises the findings from the analysis:

Table 5. SWOT Analysis – Yass Commercial Study Area

Strengths	Weaknesses	Opportunities	Threats
Council Landholdings	Existing premises (non compliant / non-conforming)	National / Regional tenants / Business (agricultural strength)	Heritage (issues re: development costs / potential)
House price differential (Yass v ACT) & Strong Population Growth	Zonings are not representative of present requirements / length of commercial core	83% of jobs in Yass are undertaken by Yass residents (work, shop and live opp.)	Canberra / Gungahlin Building Market Share
Business Rents differential	Lack of suitable commercial floor space (e.g. buildings above 1000m2 rare and offices about 100m2 rare)	Barton Highway Duplication / Or no duplication (both present an opportunity)	Out of centre development
Major National Tenants	Population Threshold in Yass c. 12,000 persons	Consolidation of the northern anchor into a neighbourhood centre and the southern anchor as the primary commercial core	Land fragmentation, contamination and commercial viability

Source: MacroPlan & Lennon Salvestro Planning

7.1.1 Strengths

Council Land Holdings

Yass Valley Council maintains considerable land holdings across the whole LGA and within the Yass Commercial Study Area. Several of its land parcels within the Study Area are largely underutilised. There is potential for many of these land parcels to be utilised for alternative land uses and where appropriate, commercial and employment generating uses.

In some instances these land parcels are isolated and there is potential for larger scale projects to be delivered through the purchase of adjacent properties. Broader Council ownership would create greater land ‘liquidity’ for redevelopment. Private land holdings can sometimes be more difficult to sell and redevelop, particularly if several parcels are required and the outcomes on sites are not always in the best interests of the community.

If further land parcels need to be acquired to bring projects on in the short / medium term to create critical mass and generate investment then solutions to achieve this should be found. Council should actively pursue deal structures that allow maximum return on investment as well as community beneficial outcomes to be achieved.

Strong Population Growth & Affordable Housing

Historically, population growth over the last five years has been in excess of the national and NSW averages (i.e. 2.2% per annum). Yass Valley Council, the Project Team and the consultants in the Yass Industrial Lands Study have projected that the population will continue to increase at a strong rate, well in excess of out-dated NSW DoP projections informing the Sydney-Canberra Corridor Strategy.

The relative affordability of house prices within Yass have been much lower than in Canberra and given the relative proximity this provides an affordable housing option for those who also work in Canberra. Median house prices in Canberra exceed \$600,000 whereas in the Yass Valley median house prices of less than \$300,000 can be expected (RPData – March 2010.) Housing affordability in Yass is beginning to be an issue for Blue Collar workers as house prices in Yass Town continue to rise. The availability of affordable housing therefore needs to be addressed to cater for workers employed as part of Yass Town's future industrial and commercial expansion.

Major Activity Anchors / National Tenants

Major regional developments such as a potential regional saleyard to the north of the study area will create significant economic multipliers across the Yass Township. Major anchors, be they retail, primary industry or office/commercial buildings will attract additional activity and a regional presence resulting in further interest being generated by residents, tenants and developers.

The imminent development of Aldi in addition to the existing Woolworths and Franklins in the township demonstrates that there is significant retail expenditure in the catchment to be captured by new tenants and existing tenants. These major anchors attract activity and will drive the trading performances of other businesses within the town. The additional players in the market will provide greater community benefits as a result of increased competition and diversity of choice.

Council can work closely with major national / regional tenants to generate solutions in the best interests of the community by potentially utilising its land holdings to accommodate these types of tenants and ensuring that development occurs in a manner appropriate for the community.

Costs of Doing Business

From a 'costs of doing business' perspective, the rental prices for tenants in Yass Township are much cheaper than within the ACT borders. The general types of rents for retail premises within the Town Centre are close to \$130-\$150/m², whereas rents in key Town Centres within the ACT for strip retail premises are about \$350-\$400/m² for strip retailers and office tenancies. In certain industries, Yass does exhibit a comparative advantage in rental costs.

Most tenants looking to locate to Yass or within Canberra are at an automatic advantage. However tenants will also choose to locate to a particular location based upon access to markets and access to a suitable workforce. The location of Yass at the junction of the Hume and Barton Highways is an advantage in terms of freight as well as travel times for employees and clients/customers.

Business & Community Support

Based on discussions with Council staff and real estate agents, the local community is quite supportive of moves to re-invent and invigorate the Yass Town Centre. There is strong anecdotal tenant demand with the only obstacles to growth being the lack of suitable premises and locations for new businesses to operate in. The greater the diversity of services to the local community the greater the triple bottom line sustainability returns that they will achieve due to less car trips, greater local employment opportunities, improved amenity and functionality.

7.1.2 Weaknesses

Lack of Potential Premises

Consultation with real estate agents and analysis during the land use survey have highlighted one of the key issues for the Yass town moving forward as being a the lack of appropriately sized premises to suit prospective tenants. In regional areas small businesses involved in particular areas of the business cycle may require slightly larger premises than those which exist at present.

Many of the premises are too small for office space and mid to larger retail businesses. There is a significant percentage less than 100m², however there has been interest in the mid to large sized offices requiring at least 150m². There are virtually no premises in excess of 1,000m² in the Yass Commercial Study Area.

Accommodating medium sized businesses in Yass is being stifled by these constraints. Small business owners will continue to operate home based or mobile business or potentially look elsewhere (i.e. the ACT) to progress through to the next stage of their business lifecycle.

The lack of existing premises is a product of factors such as inappropriate zoning, topographical constraints, land ownership patterns and the large number of heritage buildings.

Land Fragmentation

Land ownership constraints are an inhibitor to development within the Yass Commercial Precinct Study Area. These include the many different (individual & collective) land owners who own land within the Study Area. This includes the owners of residential housing, private commercial land owner/occupiers and larger corporations such as Woolworths and Aldi.

Land fragmentation presents an issue in regard to the potential to amalgamate larger sites for bigger projects. Council can proactively involve itself in delivering projects for the benefit of the community utilising its land or purchasing and amalgamating parcels for redevelopment.

Other Commercial Constraints and Weaknesses

Chinaman's Creek runs parallel with Comur Street for much of the main business area. While this has presented a constraint for development and uses in the past, much of this has been overcome through the piping of the Creek. Flooding issues are now mainly limited at the northern end of the creek – towards its junction with the Yass River. As such, some of the land currently zoned 6 (a) – Open Space, behind Atherfield Medical Centre and the Australian Hotel can be reviewed.

There may also be financial constraints in facilitating the adaptive reuse of heritage buildings – depending upon the level of repairs or the type of fit out proposed. There are several good examples of how this has been achieved with minimal impact on the streetscape and heritage value of the building. Council is in the process of finalising a draft Heritage LEP Schedule and a Conservation area for Yass Town. This will provide a much greater level of certainty about the significance of certain sites within the town. Yass Valley Council already offers a free Heritage Advisory Service, as well as an annual Local Heritage Funds Programme to assist property owners in the conservation/repair of their buildings and associated structures. Council will need to continue to be proactive and offer incentives and flexibility to achieve the appropriate re-use of heritage buildings.

The provision of adequate car parking within the Yass commercial core will be an ongoing issue for both Yass Valley Council and business owners. This issue will be enhanced as the demand for larger sites (which require more car parking) continues to grow. Council will need to proactively involve itself in addressing this issue to ensure that redevelopment is not stifled by the current level of car parking contributions and the stringent requirement to provide onsite car parking.

Population Threshold

At present the population within the Yass Valley LGA is about 14,500 persons, of which the Yass Township accommodates about 5,500 persons. Population growth over the last five years has been strong (2.2%) and the relative affordability of the housing will continue to make Yass attractive. However the population of Yass Township and the broader LGA is limited by its potential to provide (cost-effective) drinking water.

Based upon the capacity of the Yass River, the Township's end capacity is likely to be about 12,000 persons. Similarly across various residential growth fronts, there are limitations in regards to the total end capacity that the Yass town and LGA can accommodate.

The following sections of the report assess likely future population growth across Yass into the future accounting for the end capacity constraints. However the potential market or trade catchment of the commercial precinct is broader than just the LGA boundaries. Residents in LGAs to the west and north are likely to undertake significant proportions of business and retail shopping within the Yass Commercial Precinct if it is able to provide adequate services to out compete its rivals. These populations should be considered in assessing the demand for retail and commercial floor space into the future.

Strong population growth alone however makes Yass a very viable and attractive short to medium term location for new businesses.

7.1.3 Opportunities

Consolidation of Activity Nodes and Commercial Core

The Commercial Precinct Study Area stretches about 3km from north to south and incorporates a variety of non-commercial uses. In fact, more than half of the zoned lands within the commercial core are residential.

Local Centres function most effectively as radial designs, ideally anchored around a key public transport node or hub. Town Centres typically might have a radius of about 800m of activity (i.e. a walkable catchment). Yass however, has evolved as a result of the original main highway thoroughfare and a car based approach. This design cannot be significantly altered however strategies to consolidate activity around a 'northern local centre node' and a 'southern commercial and mixed use core' would help to achieve sustainability objectives and create a more effective Yass Township which could accommodate more significant commercial growth by spreading east-west rather than continually expanding north-south.

As development evolves, the northern node could be expanded further to the south which would maintain the length of the whole Commercial Study Area while accommodating growth.

Opportunity for National and Regional Tenants

At present there is no major national DDS (Target Country is not full-line) located within the Yass LGA and there are significant opportunities for major chain bulky goods retailers. Similarly there are other national chain retailers which would make a useful addition to the retail network within Yass. The Council owns land parcels in well positioned strategic locations which could enable the delivery of a Target, Kmart or Big W, while appropriate designated precincts to the north and south could accommodate large floor area bulky goods tenants unsuited to the Town Centre core.

DDS retailing would suit the socio-demographic profile of the catchment and from an analysis of the existing retail environment and population base. A location adjacent to the Woolworths and proposed Aldi would be ideal as the supermarket anchors will be the main activity generators and the DDS in close proximity will encourage multi-purpose trips. Bulky goods (home improvements / homewares) retail is also well suited to the market given the relatively significant proportions of new young homeowners moving to new housing developments.

Regional sale yards and agri-business premises located on employment lands beyond the Commercial Study Area will also build the profile of the Yass Township and create potential flow-on impacts. Synergistic and supporting businesses typically tend to flow where major tenants locate.

Barton Highway

The Roads and Traffic Authority (RTA) in conjunction with the Australian Government is proposing to upgrade the Barton Highway from Canberra to Yass as a dual carriageway. The preliminary planning for this is currently under way. There are significant studies and investigations required before a final designation of the Murrumbateman by-pass route is decided upon while land acquisitions need to be also be completed along the extent of the route. Given this timely process it is very unlikely that the upgrade will occur in the short or medium term, and no indications regarding construction dates or timeframes have been provided on the RTA website.

Whether the highway upgrade occurs or not, there is an opportunity for the Yass town ship to capitalise positively. Once the upgrade is completed it will have the effect of bringing Yass 'closer' to Canberra. This will increase the attractiveness of Yass as a 'place to live' – with Canberra a 'place to work' – having the effect of ensuring strong population growth within and around Yass and driving potential to capture local expenditure.

At the same time Yass can build on its linkages with Canberra rather than compete directly in the employment market. Relationships between ACT universities and Yass employers would be an example. Being ready to capitalise on the duplication and understanding its impacts will also be important.

In the meantime (and in the case the upgrade does not go ahead in the reasonable future) the connection to Canberra will continue to be slightly more tenuous creating the potential for Yass to build into a 'self-sustaining' township. Residents are more likely to shop locally, undertake local business and work locally within Yass. The 'convenience' of Canberra as a place to visit and shop would not be the same as if there were a dual carriageway. Building up the commercial strength and integrity of the Yass Township will mean that it can benefit whether the duplication occurs or not.

Local Workforce

An assessment of the local job mix and resident employment mix and flows of workers have been undertaken in Section 8 of this report. This assessment confirmed that a very high proportion of local jobs within the Yass LGA are undertaken by local residents (83%). This means about 44% of local residents remain within the LGA for work each day while 56% leave to travel outside of the LGA, primarily to Canberra.

With appropriate zonings and strategies to encourage investment and commercial development within the Yass Commercial Town Centre there is significant opportunity to increase the number of workers who live and work locally and therefore reap significant sustainability benefits from this.

Other Strengths

An additional strength is the attractive Heritage streetscape and buildings within the town. The character of the southern commercial precinct is a tourist attraction in its own right, and commercial tenants need to exploit this asset in better ways. The restored heritage buildings and streetscape in general can continue to attract high end Boutique retail and Food and Drink Premises and has the capacity to offer diversity from the more structured and planned commercial centres in the ACT.

7.1.4 Threats

Canberra and the ACT

Given its size and role as a major metropolitan city, Canberra will always present a challenge for the future commercial growth potential of Yass. The northern suburbs of Canberra (i.e. Gungahlin and Belconnen Districts) are about 40-45km from the Yass Township, with the Canberra CBD about 55km away.

While Yass will be able to compete with Canberra in some areas of the retail market (i.e. convenience/core retailing, some bulky goods and niche retail) it will always struggle to capture the market share in retail categories such as department store shopping, higher order – national brand specialty stores and entertainment facilities such as cinemas, bowling, sports clubs etc. This will always remain a threat to retail development within the Yass Township. The solution will be for Council and private investors to develop and deliver to the strengths of the Yass market.

Out-of-Centre Development

In regional towns, quite often there may be only a smaller independent supermarket within the town centre and as the town grows in size, or as sites become available, large national chain retailers attempt to obtain market share by developing within or adjacent to the towns. Quite often 'development constraints' exist and these types of developments are proposed at stand-alone locations outside of the main street and can generally have a detrimental effect on the businesses in the town centre.

Fortunately, Yass Commercial Precinct Study Area accommodates three major supermarket retailers (including the proposed Aldi). Council however needs to ensure that future non-bulky goods retailing is located within this commercial core to ensure it remains the primary hub of activity.

With the future residential expansion of Yass limited by geographical and historical zoning constraints, it is almost inevitable that post 2031 – Yass will need to expand outside its established core. As such there will be pressure to establish new residential estates. In the event of this occurring, Council needs to be strong in ensuring that no major commercial developments occur within new estates, and instead is limited to neighbourhood facilities. Bulky goods retailers should also be encouraged to locate in the proposed north and south Yass business precincts identified by the Yass Industrial Lands study just beyond the Commercial Precinct Study Area.

Heritage

The Yass Township has a rich history and the nature of the town's evolution has meant that many of the old buildings still remain within the Commercial Core. Historically older buildings have been typically re-fitted internally to accommodate new uses with the external building structure remaining. Council is currently finalising a Draft LEP Heritage Schedule which will identify individual items as well as a revised Conservation Area for the town.

The future commercial growth and redevelopment of Yass will be somewhat constrained by heritage requirements. Some of the issues with heritage buildings include:

- Inappropriate size or unsuitable configuration for proposed use
- Lack of continuation, cohesion and difficulties in amalgamating several sites for larger developments to meet broader objectives.
- Buildings which have been neglected may require significant capital investment to repair and restore.

The town has however evolved over time with these constraints and there are several (albeit not as well located) parcels of land that could potentially be utilised / amalgamated to meet future market demand if particular buildings cannot be redeveloped completely.

Contamination

Contamination issues are present within Yass Town due to its historical function as a service centre on the Hume Highway. Council has identified sites which may potentially have contamination issues due to their former uses (e.g. Service Stations). Depending on the proposed use and /or development, as well as the degree of contamination, remediation of the site may mean some proposals are cost prohibitive. A prime example of this is the former Service Station and Ford Dealership in Comur Street which is a prime redevelopment site which could deliver employment yielding businesses.

7.2 National Trends & Best Practice

Across Australia Councils and State Governments are becoming more astute in their approach to re-development and re-vitalisation of local centres and main street design. Some of the key economic principles that should underpin the future planning of the Yass Commercial Centre are as follows:

7.2.1 Activity Centres

Maximising Economic Development & Employment

As with many regional townships, the retail sector is a key employer in Yass and has significant economic multipliers across other sectors of the economy including wholesale trade, transport and distribution. It is important to ensure enough retail floor space is provided in the study area that maximises economic development and employment in this and other sectors.

Encouraging a mix of uses

Apart from a diversity of retail, other supporting and complementary uses need to be accommodated within Yass for it to achieve its full-potential as a commercially viable Local Centre with maximum sustainability potential. There already exists quite a strong diversity within the Commercial Core, however further business activities requiring office floor space as well as entertainment, Government, education or health type employment should also be pursued where possible.

These principles are designed to encourage sustainable economic development and maximise the wealth of residents in Yass by reducing the cost of shopping, undertaking other household business activities and commuting to work.

Activity Centre Rating

MacroPlan has undertaken a scorecard assessment of the Yass Town commercial core to test its effectiveness as a Local Centre. This assessment involves testing the centre across three bottom line indicators:

- Economic
- Social
- Environmental

The Yass Town commercial core has been compared with Parramatta CBD (an exemplar example) and Wyong Town Centre, which is a regionally located centre of comparable distance from Metropolitan Sydney as Yass is to Canberra.

The scorecard has rated particular indicators out of 5, which enables an overall average indicator for each bottom line indicator to be determined and subsequently, an overall activity centre rating. This overall rating determines the future potential for the Activity Centre (i.e., whether it needs much improvement, whether it can be improved or whether it is unable to be improved). An activity centre describing this comparison is provided in table 6 below.

Table 6. Activity Centre Matrix

Economic Principle	Parramatta	Yass	Wyong
Number of Jobs	4.5	1.5	1.5
Population Catchment	4.5	1.5	2.5
Mix of Employment	4.5	2.0	2.5
Anchors/Retail Network	4	2.0	1.5
Social Principle	Parramatta	Yass	Wyong
Day / Night Activity	4	2	2
Community Cohesion	4	3	3
Accessibility	4	2.5	3.5
Safety	3.5	4	3.5
Higher Residential Density	4.5	1.5	2.5
Environmental Principle	Parramatta	Yass	Wyong
Optimise Public Transport Networks	4	1	3
Visual Environment	3.5	3.5	2.5
Land Use Efficiency	4.5	2	3.5
Triple Bottom Line	Parramatta	Yass	Wyong
Economic Principle	4.4	1.8	2.0
Social Principle	4.0	2.6	2.9
Environmental Principle	4.0	2.2	3.0
Activity Centre Rating	Exemplar	Negative	Marginal

Source: Macroplan and Lennon Salvestro Planning

When compared with Parramatta, the Yass Town commercial core clearly has potential to become a more effective Local Centre. It will always be limited by unalterable factors such as critical mass of size, capacity constraints within the town centre (including land owner realities), high density development feasibility and the end capacity of the Yass catchment.

Parramatta – as an exemplar centre rates above 4 out of 5 across each bottom line indicator. Yass is given a ‘negative’ to ‘marginal’ rating. It performs best in the social factors such as community cohesion and safety. It also performs well aesthetically with the preservation of historical buildings fundamental to this. From an economic perspective, Yass has a similar number of jobs to Wyong (about 2,000) however when compared with Parramatta (about 30,000) this is quite small. The mix of employment is helped by the Council offices however there is a reliance on retail type employment in Yass. Broadening the employment base would assist this indicator. Yass has some strong anchors already in the Town Centre and this will create a good basis for further anchors and development. Over all, the economic principles in Yass will improve as the population base grows, new and more applicable zonings are applied and Council becomes more active in creating opportunities, thus transforming the town centre.

As certain sites are developed across the Town Centre and land use efficiency ratings improve over time it is likely that higher residential densities will be achieved as a result. As residential density builds so to does the potential for a more active day night economy to evolve. Overall, the Yass Town commercial core, while performing slightly below average at the moment, has significant room for achievable improvement if appropriate mechanisms are put in place. These improvements will be primarily driven by strong population growth and competitive housing prices.

8 Population and Demographics

This section of the report addresses the socio-demographic characteristics of the Yass LGA and the likely Primary and Secondary Trade Areas that the Yass Commercial Precinct would support from a retail perspective.

8.1 Socio-Demographics

Table 7 overleaf provides a snapshot of the socio-demographic characteristics of the Yass LGA as at the ABS 2006 Census of Population and Housing. The key points from this table are summarised as follows:

- The Yass LGA exhibited a population of approximately 12,708 persons in approximately 4,484 households at an average dwelling density of 2.83 persons per dwelling.
- Median individual incomes (-18%) and median household incomes (-13%) were lower than the respective medians in the ACT, although they are about 54% and 66% greater than across Regional NSW.
- The proportion of blue collar workers (28%) is higher than the ACT at 19% but lower than Regional NSW at about 36%. White collar employment contributes about 56% of the workforce, with this proportion much higher (64%) in the STA South area of the catchment.
- The Yass LGA has a higher than average proportion of residents aged 0-14 years (23%) compared with the ACT (19%) and Regional NSW (20%).
- In North Yass the proportion of persons aged above 65 years (20%) is much larger than the LGA wide average (12%), the ACT (9%) and Regional NSW (17%). South Yass comprises about 17% of persons aged 65 years.
- The Yass LGA exhibits a higher proportion of family households at 78% than the ACT and Regional NSW (both at 71%). It also comprises a very significant proportion of households that fully own their homes (37%) compared with the ACT (30%). This is less than the Regional NSW proportion of 41%. In North Yass about 50% of households own their homes. This means a lower proportion of household income is being directed at rental or household repayments and thus more household income is available for disposal.
- More than 94% of dwellings are in the form of detached housing, compared with 73% across the ACT and 84% across Regional NSW. Achieving significant proportions of higher density housing may prove to be unrealistic across the Yass LGA and within the Yass Township.

These socio-demographic characteristics are accounted for in the estimation of future retail expenditure demand and supportable retail floor space within the Yass Township. The Project Team has used MarketInfo data which is based on the ABS Household Expenditure Survey, incorporating socio-demographics and other data sources (eg. Tax, National accounts) to understand the types of retail expenditure available across the Yass catchment.

Table 7. Socio-Demographic Data – 2006 Census

	Yass LGA	PTA	STA South	STA North	Australian Capital Territory	Metropolitan Canberra	Regional New South Wales
Headline Indicators (2006)							
Population and Households							
Persons	12,708	6,604	4,776	4,430	324,048	323,062	2,430,046
Households	4,484	2,480	1,562	1,762	116,916	116,834	904,790
<i>Average Household Size</i>	2.83	2.66	3.06	2.51	2.77	2.77	2.69
Socio-Economic Snapshot							
Income and Wealth							
<i>Median Individual Income</i>	\$30,893	\$22,975	\$36,631	\$18,780	37,544	37,596	0
<i>variation from Australian Capital Territory</i>	-17.7%	-38.8%	-2.4%	-50.0%	-	-	-
<i>Median Household Income</i>	\$68,564	\$48,587	\$85,967	\$34,948	78,468	78,468	0
<i>variation from Australian Capital Territory</i>	-12.6%	-38.1%	9.6%	-55.5%	-	-	-
Occupation							
Professionals	20%	15%	22%	9%	30%	30%	17%
Managers	21%	17%	26%	26%	16%	16%	15%
Clerical and Administrative Workers	15%	14%	16%	10%	19%	19%	13%
Sales Workers	7%	10%	5%	7%	8%	8%	10%
Community and Personal Service Workers	9%	11%	7%	7%	9%	9%	10%
Technicians and Trades Workers	14%	15%	13%	15%	11%	11%	16%
Labourers	5%	7%	3%	8%	3%	3%	7%
Machinery Operators And Drivers	9%	12%	8%	18%	5%	5%	13%
Occupation by Sector							
White Collar	56%	46%	64%	45%	65%	65%	44%
Blue Collar	28%	34%	24%	41%	19%	19%	36%
Service Sector	16%	20%	12%	14%	17%	17%	20%
Age Distribution							
0-4 years	7%	7%	8%	6%	6%	6%	6%
5-14 years	16%	15%	16%	15%	13%	13%	14%
15-24 years	11%	11%	10%	10%	16%	16%	12%
25-54 years	41%	38%	44%	36%	45%	45%	39%
55-64 years	13%	12%	14%	14%	11%	11%	12%
65-74 years	7%	9%	6%	10%	5%	5%	9%
75+ years	5%	8%	2%	10%	4%	4%	8%
Family Types							
Couple family with children	48%	43%	52%	41%	47%	47%	41%
Couple family without children	41%	42%	43%	43%	36%	36%	41%
One parent family	11%	15%	5%	15%	15%	15%	17%
Other family	1%	0%	1%	1%	2%	2%	1%
Family Household	78%	72%	85%	68%	71%	71%	71%
Non Family Household	22%	28%	15%	32%	29%	29%	29%
Tenure Type							
Owner	37%	39%	37%	50%	30%	30%	41%
Purchaser	41%	34%	47%	26%	39%	39%	31%
Renter	21%	25%	15%	22%	30%	30%	28%
Other	1%	1%	1%	2%	1%	1%	1%
Dwelling Type							
Separate House	94%	92%	96%	96%	76%	76%	84%
Semi-detached	2%	3%	1%	2%	13%	13%	6%
Flat, Unit, Apartment	3%	4%	1%	0%	10%	10%	8%
Other	2%	2%	2%	1%	0%	0%	2%
Birthplace							
Australia	84%	89%	82%	91%	73%	73%	84%
Overseas	16%	11%	18%	9%	27%	27%	16%

Source: MapInfo, ABS Census of Population and Housing, 2006

8.2 Population Projections

Demand for retail and employment floor space is primarily driven by growth in the residential catchment around a particular locality. There are various methods and sources for projecting a population for a given region. In estimating the likely growth rates of the population across the likely retail and employment catchment for Yass Township and the broader LGA, the Project team has assessed:

- Recent historical population growth across the Yass Township and Yass LGA using the ABS Regional Population publication Cat No. 3218.0.
- Housing market characteristics within the Yass LGA, particularly in comparison with Canberra and the ACT
- Housing release data and land capacity information provided by Yass Council
- Various official population projections including:
 - Department of Health and Ageing Projections 2007-2027 (2006 Census data)
 - NSW DoP - Transport Data Centre Projections
 - NSW DoP – Regional Strategy Targets
 - Yass Valley Council Endorsed Projections
 - Yass Industrial Lands Study (projections by Council 2005)
 - Draft Non-Urban Lands Study

8.2.1 Historical Population Growth

According to the ABS Census, the Yass LGA grew at about 2.6% per annum between 2001 and 2006 from 12,103 persons to 13,762 persons. By 2008, this population had increased further at 2.3% per annum to 14,395 persons. This strong population growth was underestimated by the NSW Department of Planning Transport Data Centre population projections which were prepared in 2005 without 2006 Census data. Local Government Amalgamations occurred in 2004 – between the 2001 and 2006 Census periods and this has the potential to have distorted the growth rate given that the former Yass Shire absorbed some of the former Gunning and Yarrowlunla Shires including Sutton and Gundaroo. Historical population growth across the Yass Valley LGA between 2001 and 2008 is shown in table 8 below.

Table 8. Historical Population Growth

Yass LGA	2001	2006	2008
ABS Regional Pop	12,103	13,762	14,395
		2.6%	2.3%
NSW DoP	12,102	13,089	n.a.
		1.6%	n.a.

Source: ABS Regional Population Cat No. 3218.0, NSW Department of Planning Transport Data Centre

These projections have been shown to be conservative, underestimating the growth between Census periods by about 68%, projecting growth at 1.6% per annum. These projections may have failed to recognise the residential capacity of Yass, and its role as a significant growth area. The housing market continues to hold a competitive edge over the ACT, where median house prices differ by more than 100% (>\$600,000 vs. <\$300,000).

This house price differential means that Yass has the potential to continue capturing some of the Canberra and ACT growth as house and unit prices there become unaffordable for many first home buyers and young families. Yass and the surrounding LGA also offer an alternative country lifestyle choice to that available within Canberra.

8.2.2 Population Projections

Based on the historical analysis, it appears that the NSW DoP population projections are conservative and may not reflect the future potential of the Yass LGA. The Project Team has assessed other official projections as well as local housing release areas to arrive at likely population projections for the Yass LGA. The figure below highlights three sources of population projections.

The Yass Industrial Lands Study contains projections for the Yass Township which show that the Township is expected to grow at about 2.6% per annum to 2031 reaching about 11,614 persons, close to its capacity. According to Council the capacity of the Yass Township is about 12,000 persons, however this is largely dependent upon the availability of an increased, secure water supply. The proposed Yass Dam Wall Raising project is therefore critically linked to increases in the potential for Residential, Industrial and Commercial growth.

The Project Team has also assessed the Department of Health and Ageing's SLA population projections and the Jackson Partner's projections contained within the Draft Urban Lands Study (see table 9). These projections are very similar to those used in the other relevant studies being used to inform the preparation of the new Yass LEP. These projections are very close differing by only a few hundred persons by 2027, the last year of the projections overlapping. The majority of the growth is projected to occur in the medium term to 2017. Both data sources estimated future population growth over the next 20-25 years to be about 2.1% annum (long term average).

Table 9. Population Projections – Various Sources

YASS LGA	2009	2017	2027	2031	Overall
Dept of Health and Ageing	14,844	17,793	21,488	n.a.	
		2.3%	1.9%	n.a.	2.1%
Draft Urban Lands (Jackson)	14,205	17,874	21,223	22,576	
		2.9%	1.7%	1.6%	2.1%
YASS TOWNSHIP	2009	2016	2026	2031	Overall
Draft Industrial Study (Council)	6,638	8,761	10,663	11,614	
		4.0%	2.0%	1.7%	2.6%

Source: Yass Council, Jackson Partners, Department of Health and Ageing.

Overall, the Project Team has been conservative and has estimated the population across the LGA to grow at about 2.0% per annum from 2009 to 2031. This accounts for the slightly more rapid recent growth that has already occurred from 2006 to 2009. The LGA population is expected to increase from 14,712 persons to about 22,785 by 2031 equating to an increase of about 8,073 persons or 2,800 to 3,200 dwellings (see table 10).

Table 10. Population Projections – Yass LGA & Yass Township

	2009	2016	2021	2026	2031	Overall
Yass LGA	14,712	17,607	19,250	21,046	22,785	
		2.6%	1.8%	1.8%	1.6%	2.0%
Yass Township (Locality)	5,955	7,571	8,393	9,215	10,036	
		3.5%	2.1%	1.9%	1.7%	1.3%

Source: MacroPlan Australia

Note: A population growth rate of 1.3% in the Yass Township has been used to understand the future demand for commercial floor space

This is much greater than the 2,000 extra dwellings and 4,000 extra persons estimated in the Sydney to Canberra Corridor Strategy. However this new growth incorporates the 2004 Council amalgamations which increased the overall size of the Yass Valley Council area and recognises the more rapid than expected recent historical growth across the LGA. It should also be noted that the Yass Valley Town and Villages Study is being prepared concurrently with this study, and will make recommendations for the potential expansion of Yass town and the Villages. Given the existing demand for residential properties – especially from the ACT, any additional land releases will further accelerate growth.

9 Commercial Demand

This section of the report builds on the population projections estimated in Section 8 by estimating the likely future employment scenario and subsequently, demand for employment floor space into the future. This section assesses:

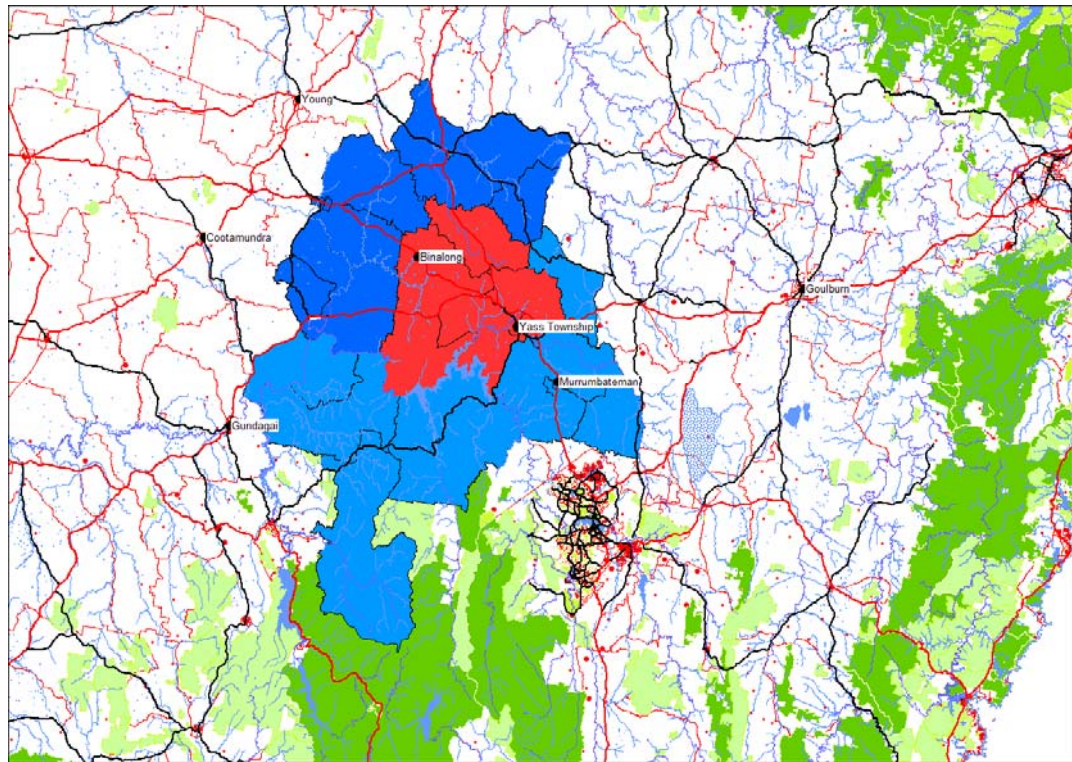
- Population and expenditure driven demand for retail floor space supportable within the Yass Commercial Precinct Study Area from 2009 to 2031.
- The existing employment profile across the Yass LGA and within the Yass Commercial Precinct Study Area
- The demand for employment uses across the Yass LGA and within the Yass Commercial Precinct Study Area over the period 2009-2031 based upon likely population growth and assumptions regarding employment self sufficiency and future industry mix.

9.1 Retail Demand

9.1.1 Trade Area

Retail floor space demand is driven by population growth and growth in real retail expenditure per capita from a particular defined trade catchment. The likely trade area from which the Yass Commercial Precinct could potentially draw trade from is shown in the figure below. The Main Trade Area (MTA) is a combination of a Primary Trade Area (PTA) and two Secondary Trade Areas (STAs). The capture of expenditure from within the PTA will be more significant than across the STAs as the distances to other competing retail offers decreases and the distance from Yass Township increases.

Figure 8. Yass Commercial Precinct – Retail Trade Catchment



Red = Primary Trade Area, Dark Blue = Secondary North Area, Blue = Secondary South Area

Source: MapInfo, MacroPlan Australia

Retail catchments are predominately driven by convenience and need, with customer behaviour dictating that residents generally travel to the most convenient location to satisfy a particular retail requirement. However the critical mass and offer provided at a particular location also determines the trade area. Trade area delineation is driven by a range of accessibility and convenience factors including:

- Competitive framework and existing supply
- Road networks and traffic flows;
- Natural and man-made physical boundaries such as rivers, rail, freeways etc;
- Ease of parking;
- Co-location with higher order facilities and/or services
- Level of employment and journey-to-work patterns; and
- Population distribution and proximity to the proposed premises

9.1.2 Population Growth

The existing population within the Main Trade Area (MTA) is estimated to be about 17,076 persons of, which about 7,133 persons (42%) comprise the Primary Trade Area (PTA). Based on the population growth rates used in the previous sections of this report, the MTA is expected to grow at about 2.0% per annum, reaching a population of about 26,446 persons by 2031 (see table 11).

Table 11. Main Trade Area - Population

Trade Area	2009	2016	2021	2031	Avg. Growth Rate	Yr
PTA	7,133	8,537	9,333	11,047	2.0%	
STA North	5,158	6,174	6,750	7,989	2.0%	
STA South	4,785	5,726	6,261	7,410	2.0%	
MTA	17,076	20,436	22,343	26,446	2.0%	

Source: ABS, MacroPlan Australia

9.1.3 Retail Expenditure Profile

The expenditure profile of residents is primarily determined by income. The Project Team has identified regional spending profiles based on the aggregation of MarketInfo¹ small area retail estimates (i.e. built up from Census Collector District level). This data source is used by many retail consultants and retailers themselves to determine the spend characteristics of a specific trade area and retail floor space need.

Table 12 below shows the retail expenditure profile per capita within each trade catchment for the various retail formats. The figure shows that residents within the MTA spend about 6.7% more on retail per year than the Regional NSW average, with a higher spend across non-food specialty (10.4%) and department stores / discount department stores (10.7%).

In fact, across most discretionary categories, resident expenditure is much greater than across Regional NSW however expenditure directed towards supermarkets is just 2.9% greater than Regional NSW.

Table 12. Main Trade Area – Expenditure Profile

Category	PTA	STA North	STA South	MTA	NSW Reg
Supermarket	\$4,340	\$4,497	\$4,899	\$4,544	\$4,418
Catering (Restaurant and Café)	\$857	\$1,021	\$1,430	\$1,067	\$980
Bottle-shop	\$703	\$817	\$1,142	\$860	\$783
Non-Food Specialty	\$1,853	\$2,198	\$3,004	\$2,280	\$2,066
Bulky Goods	\$1,967	\$2,340	\$3,124	\$2,404	\$2,231
Department Store/DDS	\$671	\$813	\$1,109	\$837	\$756
Total Retail Exp per Capita	\$10,390	\$11,685	\$14,708	\$11,991	\$11,234

Source: MarketInfo 2006/07, MacroPlan 2009

9.1.4 Growth in Retail Expenditure Pool

To estimate the available residential retail expenditure pool across the MTA, the Project Team has combined the projected population growth with the retail expenditure profile per person and applied a real retail growth assumption of 1.1% across each retail category based on long-term historical real growth.

¹ MacroPlan considers MarketInfo to be the current best practice data source used in the calculation of retail expenditure. MarketInfo is a micro-simulation model developed by MDS Market Data Systems Pty Ltd. This model is based on information from the national ABS Household Expenditure Survey (HES), the Census of Population and Housing as well as other information sources (i.e. ABS National Accounts, Australian Tax Office Statistics, Medicare data etc), and uses micro-simulation techniques to combine propensity to spend on particular commodities with socio-economic characteristics of individuals.

Table 13 shows that there is about \$205 million of resident retail expenditure available as at 2009. This expenditure pool is expected to grow at about 3.2% per annum to \$308 million by 2021 and almost double by 2031, reaching \$406 million.

The growth across categories is expected to be quite similar with supermarket expenditure comprising about 38% of total spend, bulky goods about 20%, non-food specialty comprising about 19% and department store/discount department store about 7%.

Table 13. Main Trade Area – Expenditure Pool

Category	2009	2011	2016	2021	2031
Supermarket	\$77.6	\$84.0	\$100.9	\$116.5	\$153.9
Catering (Restaurant and Café)	\$18.2	\$19.7	\$23.7	\$27.4	\$36.2
Bottle-shop	\$14.7	\$15.9	\$19.1	\$22.1	\$29.1
Non-Food Specialty	\$38.9	\$42.2	\$50.7	\$58.5	\$77.2
Bulky Goods	\$41.0	\$44.5	\$53.4	\$61.7	\$81.5
Department Store/DDS	\$14.3	\$15.5	\$18.6	\$21.5	\$28.4
Total Retail Exp Pool	\$204.8	\$221.9	\$266.4	\$307.7	\$406.2

Source: MarketInfo 2006/07, MacroPlan 2009

9.1.5 Retail Floor Space

To translate this retail expenditure pool into an estimate of retail floor space demand, appropriate industry standard Retail Turnover Densities (RTD's) have been applied. These RTDs are based upon standard industry data sources as well as MacroPlan's retail experience and knowledge of trading performance across the Yass LGA, the ACT and Regional NSW. The following RTDs have been applied. These have been assumed to increase about 1% per annum:

- Supermarket - \$9,000/m²
- Food Catering - \$6,000/m²
- Bottle-Shop - \$10,000/m²
- Non-Food Specialty - \$6,000/m²
- Bulky Goods - \$4,000/m²
- Department Stores/DDS - \$3,000/m²

Table 14 below highlights the total retail floor space demand generated across the MTA. As at 2009, there is demand for about 34,640m² of retail floor space of which bulky goods contributes 10,260m² of floor space and supermarket about 8,620m². By 2031, the overall demand is expected to increase by about 20,578m² or about 935m² per year.

Table 14. Main Trade Area – Sustainable Retail Floor Space

Category	2009	2011	2016	2021	2031
Supermarket	8,621	9,153	10,459	11,491	13,736
Catering (Restaurant and Café)	3,037	3,226	3,686	4,050	4,841
Bottle-shop	1,469	1,560	1,783	1,959	2,342
Non-Food Specialty	6,488	6,893	7,875	8,653	10,344
Bulky Goods	10,262	10,902	12,457	13,687	16,361
Department Store/DDS	4,762	5,059	5,781	6,351	7,592
Retail Floor Space Demand	34,638	36,795	42,041	46,191	55,216

Source: MacroPlan Australia

9.1.6 Retail Supply Network

The previously defined MTA was defined based upon the distances to nearby towns and the provision of retail opportunities within these towns. Canberra is the closest major retail node and there is in excess of 1 million m² of retail floor space across the city. Canberra's relative proximity and critical mass limits the extent of the catchment to the south, as well as the likely market shares from within all areas of the MTA. The complete retail hierarchy is catered for by Canberra and this centre will always capture a proportion of trade from the residents of the Yass MTA particularly across areas of the retail hierarchy not catered for in smaller regional centres or within Yass itself. Department stores, cinemas, major bulky goods retailers, factory outlet retailing and major national tenants are only available in Canberra itself.

Limiting the catchment to the north is the town of Young, which accommodates an Aldi and Supa IGA supermarkets as well as a Harvey Norman. Slightly closer to Yass is the town of Boorowa which also has a small IGA centre catering for the convenience needs of local residents. Binalong – which is within the Yass Valley LGA is located partly within the Harden retail and service catchment, while Sutton and Gundaroo are within the ACT and Queanbeyan catchment due to their close proximity.

To the east is Goulburn, which accommodates a larger amount of retail floor space than Yass, with major anchors including Harvey Norman, Coles and Aldi.

The provision of retail floor space within these centres determines the potential capture of trade from within each area of the MTA, i.e. the likely market shares.

9.1.7 Market Shares

Not all retail floor space demand (i.e. expenditure) generated within a trade area is captured by the retail market within that trade area and conversely not all trading turnover is generated by residents within a particular trade area. There will be leakage to other retail outlets outside of the trade area particularly in the ACT. Residents will leave the catchment to undertake some of their higher order retail shopping or bulky goods retailing and will also shop near places of work which may be outside of the catchment.

At the same time the Yass Commercial Precinct will benefit from retail expenditure from visitors and non-resident workers from beyond the defined MTA (i.e. Regional NSW and the ACT). MacroPlan has applied appropriate market shares to reflect these inflows and outflows of expenditure (see table 15). The market shares from within the PTA will be the highest, while the STA North should experience quite similar high market shares given that the Yass Township is located between this area and the ACT. The market shares from the STA South are likely to be quite low given the distance to the ACT (i.e. Gungahlin) which has a substantial and diverse retail offering.

Table 15. Main Trade Area – Market Shares

	PTA	STA North	STA South	BTA
	2009	2009	2009	2009
Supermarket	75%	60%	25%	20%
Catering (Restaurant and Café)	75%	60%	25%	20%
Bottle-shop	80%	70%	25%	20%
Non-Food Specialty	50%	50%	10%	20%
Bulky Goods	30%	30%	10%	20%
Department Store/DDS	30%	30%	10%	20%

Source: MacroPlan Australia

9.1.8 Potential Retail Floor Space Demand

After applying the above market shares across the various parts of the catchment, it is possible to determine the likely future demand that is supportable within and directly adjacent to the Commercial Precinct Study Area. The reason why the areas directly adjacent are considered is because this accounts for the demand for bulky goods floor space. Major bulky goods tenants typically do not locate within town centres as they perform most effectively with good main road access, ample car-parking and larger sites to accommodate larger floor areas.

Overall retail demand is expected to increase by about 21,300m² over the next 22 years to 2031 or about 1,000m² per year. The most significant demand increases will be for supermarket retailing (6,540m²), although some of this demand will be met by the imminent development of Aldi. The demand for bulky goods floor space will be somewhat similar while non-food specialty floor space is expected to increase by about 4,000m² by 2031 (see table 16). This demand growth is compared with the existing supply in section 10 of this report to assess the market gaps and future land requirements.

Table 16. Main Trade Area – Market Shares

Category	2009	2016	2026	2031	2009-2031
Supermarket	6,669	8,663	11,552	13,210	6,540
Catering (Restaurant and Café)	1,519	1,774	2,212	2,835	1,317
Bottle-shop	889	1,155	1,541	1,762	873
Non-Food Specialty	4,317	5,610	7,481	8,555	4,237
Bulky Goods	6,281	8,164	10,887	12,449	6,168
Department Store/DDS	2,225	2,893	3,857	4,411	2,186
Yass Commercial Precinct	21,900	28,259	37,530	43,222	21,323

Source: MacroPlan Australia

9.2 Employment Growth

In order to understand the demand for non-retail commercial and employment floor space within the Yass Township an assessment of the local resident workforce and the likely future workforce has been undertaken. These projections incorporate the projected population estimates and are based upon assumptions in regard to the future of the Yass economy and the likely share of employment that particular industries will capture.

9.2.1 Existing Employment Profile

The complete employment profile of residents of the Yass LGA from 1996 to 2006 is attached as Appendix B to this study. Of the 13,762 residents of Yass LGA in 2006, 49% or 6,752 were employed as at the 2006 Census, with the most significant industries of employment as follows:

- Public Administration and Safety – 1,108 employees (16%)
- Agriculture, Forestry and Fishing – 720 employees (11%)
- Retail Trade – 644 employees (10%)

The most significant growth over the period 1996 to 2006 has occurred across Construction (+123%), Professional, Scientific and Technical Services (109%) and Public Administration & Safety (95%). The only sectors to experience declines were Mining (-30%) and Information, Media and Telecommunications (-25%).

9.2.2 Local Jobs

According to the 2006 Census, there were 3,548 jobs in Yass LGA. The major industries of employment within Yass are:

- Agriculture, Forestry and Fishing – 708 jobs (20%)
- Accommodation and Food Services – 434 jobs (12%)
- Retail Trade – 426 jobs (12%)

The complete industry mix is outlined in Appendix B.

9.2.3 Employment Self Sufficiency and Containment

As at the latest Census in 2006 there were 3,548 local jobs available within the Yass LGA and about 6,752 employed residents. This translates to a self sufficiency ratio of 53% (i.e. local jobs/resident employed). This ratio remained static between 2001 and 2006 at 53%, with resident employment growing by 1,084 employees and local job opportunities growing by 584 jobs.

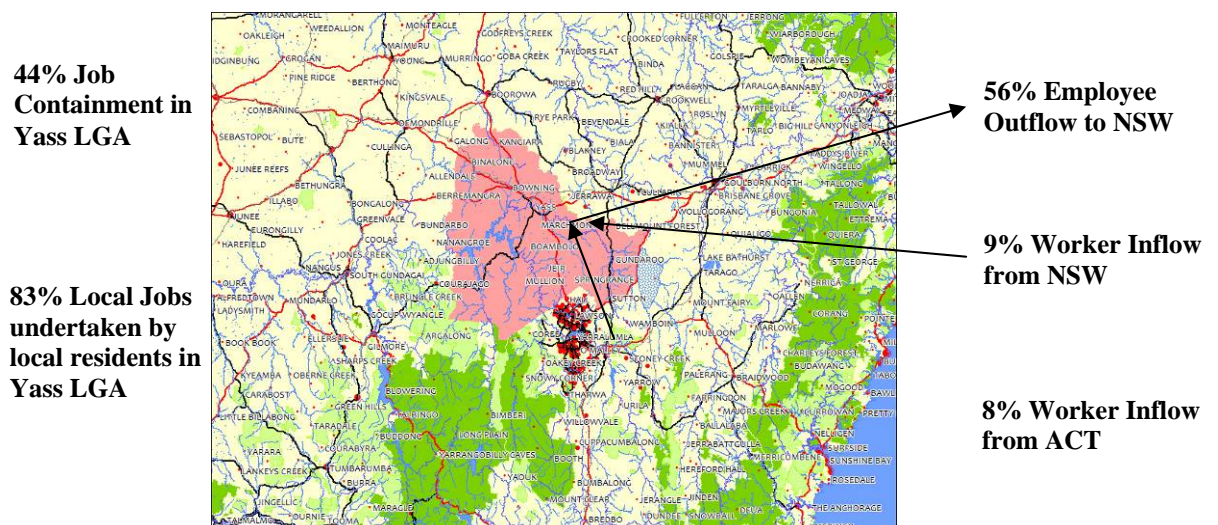
Of the 3,548 jobs undertaken within the LGA, 2,958 are undertaken by residents who live within the Yass Valley LGA, or about 83%. This equates to a self-containment ratio of about 44%. About 9% of workers within Yass are from the rest of NSW while about 8% are from the ACT. Table 17 and figure 9 below highlight the worker flows as at the 2006 Census.

Table 17. Worker Flows 2001-2006

	2001	2006
Resident Employment	5,668	6752
Local Jobs	2,984	3548
Local Jobs by Local Residents	n.a.	2958
Self Sufficiency	53%	53%
Self Containment	n.a.	44%

Source: ABS Census of Population and Housing (2001, 2006) and ABS Journey to Work Data

Figure 9. Worker Movements



Source: MacroPlan Australia, ABS Census of Population and Housing (2001, 2006) and ABS Journey to Work Data

9.2.4 Yass Township

The NSW Ministry of Transport defines transport destination zones to understand travel patterns in order to make transport planning decisions. These transport destination zones are the lowest delineation available to assess local jobs on-the-ground. ABS Journey to Work (JTW) data within these zones incorporates industry of employment, occupation, method of travel and the Statistical Local Area origin of work journey. This data provides an insight into the employment composition within and adjacent to the Yass Commercial Precinct.

The smallest assessable employment area incorporates the entire Yass Township, which includes the Yass Commercial Precinct Study Area and the nearby industrial land precincts to the north and south. Employment by industry type has been collated into applicable categories to understand the 'on-the-ground' floor space requirements in more detail.

Table 18 below demonstrates that industrial employment is a significant employer across the entire LGA (contributing 40%), with retail employment comprising about 24% of the total.

Table 18. Yass Township and Yass SLA – Employment Mix

	Yass Township	% Total	% LGA	Yass LGA	% Total
Industrial	609	28%	43%	1419	40%
Retail	623	29%	73%	856	24%
Office	198	9%	61%	325	9%
Service	83	4%	57%	144	4%
Govt	191	9%	91%	210	6%
IT Related	11	1%	79%	14	0%
Education	190	9%	69%	277	8%
Health	277	13%	90%	309	9%
Total	2181	100%	61%	3554	100%

Source: MacroPlan Australia, ABS Journey to Work Data

9.2.5 Industry Job Growth

The Project Team has used its assessment of the existing industry mix and worker flows in conjunction with the population projections from Section 8 to understand the future growth in employment across the Yass LGA and within the Yass Commercial Precinct.

Population will be the key driver of the workforce and hence jobs growth however there are several other assumptions that must be made to understand the future job composition and therefore possible floor space demand within the Yass LGA.

The key assumptions are:

- **Labour Force to Population Ratio:** As at 2001, about 52.1% of residents within Yass were in the labour force, increasing to about 52.8% by 2006. In the longer term, the Commonwealth Treasury (in its intergenerational report 2010) predicts that with the ageing of the population, labour force and workforce participation rates will reduce over time. The report suggests that workforce participation rates for those of working age will reduce by about 4% by 2050. The Project Team has assumed that the Yass LGA will experience a slight reduction in its Labour Force to Population ratio of about 1.5% by 2031.
- **Employment rates:**
 - Will vary across time. In 2001, the unemployment rate was 4.3%, this decreased to about 2.6% as at the 2006 Census.
 - According to the most recent Small Area Labour Markets (SALM) data produced by the Department of Education, Employment and Workplace Relations (DEEWR), the Yass LGA's unemployment rate was at 2.3% in December 2009 (labour force 8,982 workers), having increased from 1.4% in December 2008.
 - The Project Team has assumed that the average long term rate of unemployment will be about 3.0% across the study timeframe. This accounts for the inevitable cyclical variations of the business cycle.
- **Self Sufficiency:** The project team has assumed two scenarios, one where employment self sufficiency across Yass remains constant over time and a second scenario where the employment self sufficiency increases slightly by about 1% every five years.

Table 19 below shows that the Yass LGA could potentially support an extra 2,600 jobs between 2006 and 2031 maintaining self sufficiency or up to 3,200 jobs if self sufficiency were to increase slightly to a more self-sustainable, yet still conservative level. It is acknowledged that Canberra will always have a strong impact upon the potential of some business types and jobs in Yass. When compared with other regional LGAs a self sufficiency ratio of just below 60% is easily achievable should the appropriate zoning, planning controls and policy measures be implemented.

Table 19. Employment Growth – Yass LGA

Yass LGA	2006	2009	2011	2021	2031	2009-2031
Population	13,135	14,712	17,607	21,046	22,785	8,073
Labour Force to Pop. Ratio	53%	53%	53%	53%	53%	
Labour force	6,931	7,763	9,291	11,105	12,023	5,092
Employment rate	2.6%	2.3%	3.0%	3.0%	3.0%	
Resident workforce	6,751	7,584	9,012	10,772	11,662	4,911
Self Sufficiency (constant)	53%	53%	53%	53%	53%	
Local Jobs	3,547	3,985	4,736	5,661	6,128	2,581
Self Sufficiency (increasing)	53%	54%	55%	57%	58%	
Local Jobs	3,547	4,096	4,957	6,140	6,764	3,217

Source: MacroPlan Australia, ABS Census of Population and Housing (2001 & 2006), DEEWR (February 2010)

The Project Team has assessed the employment mix by industry type and has applied industry shares based upon the likely future of the Yass economy in accordance with the overall expected job growth within the Yass LGA. The share that each industry contributes to overall employment has been adjusted or held constant depending on likely future industry trends.

For example the share that manufacturing contributes to overall employment is expected to decline slightly as Australia shifts towards a more knowledge and serviced based economy. The share of employment in health and education is expected to increase slightly, while Yass is expected to continue being competitive in the agricultural sector and thus this sectors share will remain relatively stable and grow in line with overall employment growth.

Table 20 below outlines the expected growth in employment across the Yass Township. The majority of this employment growth should be captured within and adjacent to the Yass Commercial Precinct Study Area. This is based upon the increasing self sufficiency scenario. The industries of employment have been aggregated to be representative of 'on the ground' land use types and the employment growth has been translated into full-time equivalent employment in order to apply appropriate employment density targets to determine the floor space demand.

The table shows the increase in jobs across the LGA and the amount of jobs that could be supported within the Yass Township between 2009 and 2031. There is expected to be growth of about 2,665 jobs in the LGA over this period of which about 1,844 jobs will be within the Yass Township.

This growth includes growth in retail jobs as well as home based, transient, and industrial businesses adjacent to the study area. For the purposes of understanding the floor space requirements within the Commercial Precinct Study Area the employment growth has focussed upon the need for future office (business) floor space, health and education floor space. The demand for retail floor space will be driven by the available retail expenditure and provision of retail generally drives employment outcomes. Furthermore there is some overlap in industry of employment categories such as accommodation and services, retail, wholesale trade, and industrial that makes estimating retail demand from an employment perspective somewhat inaccurate. Therefore the retail demand estimated in section 9.1 has been applied throughout this analysis.

Table 20. Employment Growth - Yass

Yass LGA	2006	2009	2031	09-31	09-31(FTE)
Office	607	700	1155	455	387
Education	277	319	526	207	176
Health	309	356	588	232	197
Other (inc. Retail)	2361	2721	4492	1771	n.a
Total	3554	4096	6761	2665	n.a.
Yass Township	2006	2009	2031	09-31	09-31(FTE)
Office	430	496	970	475	404
Education	190	219	368	150	127
Health	277	319	558	240	204
Other (inc. Retail)	1284	1480	2461	981	n.a.
Total	2181	2513	4358	1844	n.a.

Source: MacroPlan Australia (FTE = Full Time Equivalent)

By applying the employment density ratios to the supportable job growth across the Yass Commercial Precinct the amount of floor space required can be determined. These density ratios have been applied to the number of full-time equivalent jobs, as part-time and casual jobs lessen the demands for floor space.

Some of the employment growth will be across the industries or jobs not requiring land - such as home based businesses or mobile businesses such as tradespersons and construction labourers. The demand for retail floor space was assessed in section 9.1 which showed there was demand for about 21,300m² of retail floor space by 2031 however there was an existing market gap for a discount department store and bulky goods retail, which means that the total supportable retail floor space would be closer to 23-24,000m².

Other employment types within the Yass Commercial Precinct Study Area would generate the need for a further 14,000m² of health related floor space, 6,000m² of education floor space and about 10,000m² of office related floor space. Industrial employment growth is expected to be accommodated in the various precincts beyond the Study Area, identified in the Yass Valley Council Industrial lands Study.

Table 21 below shows the floor space that would be required to accommodate the projected employment growth and retail expenditure demand across the Yass catchment. This floor space has been translated into a land requirement. This land requirement will inform the determination of appropriate zonings for the Yass Commercial Precinct Study Area. Section 10 and 11 assesses the market gaps and discusses the appropriate quantum and location of future floor space and zoned lands.

Table 21. Employment Floor Space Demand – Yass Commercial Precinct

Category	09-31(FTE)	Density (FTE)	m2
Office	475	25	10088
Education	150	45	5723
Health	240	70	14252
Retail*	n.a	n.a.	21300
Total	n.a.	n.a.	51363

Source: MacroPlan Australia

*Retail demand has been determined in previous section based upon capture of retail expenditure.

9.3 Other Considerations

A major weakness in the existing Yass Commercial Precinct is trading hours. While this study deals more with appropriate zones and the provision of floor space – businesses need to accommodate extended trading hours. At present there is an obvious lack of trading past 5 pm, Saturday afternoons and Sundays, particularly in the Food and Retail Industries. While this may be typical of many regional towns, there are many sections of the community which are not being adequately catered for. Yass also has the advantage of being so close to the ACT, that extended weekend trading has the potential to attract many ‘day trippers’ from the surrounding area. The greater the critical mass of businesses extending their trading hours – the more prominent Yass will become as a shopping and tourist destination for the region – not to mention catering for local un-tapped markets.

It should also be noted that the proximity of the existing Yass Service Centre on the Hume Highway currently draws Yass residents out of the town centre, as there are often limited food services available after hours and on weekends. Once alternatives are offered in the town centre, this will not only provide for the Yass community – it will also increase the number of travellers entering the town rather than bypassing it.

The key to driving future growth in Yass is to encourage and attract major retail tenants, and also to offer a more diverse business, shopping and dining experience to that on offer in the ACT. Retail tenants will support the growing population and will be sufficiently attracted to the competitive land and/or rental prices, attractive streetscape and customer potential within Yass and surrounds. Major anchors can sometimes be considered to have negative impacts upon town centres however this is generally from out-of-centre developments away from the Town Centre (i.e. well outside the main activity area).

The provision of major non-bulky goods tenants in the Commercial Precinct Study Area should be encouraged where possible. Bulky goods tenants would prefer to locate on lands with lower land costs and more space to accommodate larger floor areas and as such may not be ideally located within the Commercial Precinct Study Area. The B5 Business Development zones identified within the Yass Valley Industrial Lands Study to the north and south of these precincts should be more than suitable to accommodate new bulky goods tenants.

10 Market Gaps and Opportunities

This section of the report analyses the projected demand for commercial and retail floor space in comparison with the existing supply across the Yass Commercial Precinct. As well as analysing some of the prevailing retail trends across Australia.

10.1 Market Gaps and Tenant Opportunities

As with many regional townships, the retail sector is a key employer in Yass and has significant economic multipliers across other sectors of the economy including wholesale trade, transport and distribution. As such it is important to ensure that enough retail floor space is provided in the study area in order to maximise economic development and employment in this and other sectors.

Apart from a diversity of retail opportunities other supporting and complementary uses need to be accommodated within Yass for it to achieve its full-potential as a commercially viable Local Centre with maximum sustainability potential. A strong diversity already exists within the Commercial Core however further business activities requiring office floor space as well as entertainment, Government, education or health type employment should also be pursued where possible.

These principles are designed to encourage sustainable economic development and maximise the wealth of residents in Yass by reducing the cost of shopping, undertaking other household business activities and commuting to work.

The Project Team's assessment of demand has identified that there is expected to be demand growth for a further 21,300m² of retail floor space which will be supportable by the residential and worker catchment by 2031. At present the provision of supermarkets within the Study Area appears to be at full capacity and with the imminent development of Aldi on Comur Street, there does not appear to be significant potential for another major supermarket chain to locate within the centre until beyond 2020. The Aldi store will also provide goods across a broader product range than traditional supermarkets – essentially operating as a quasi department store or bulky goods outlet, selling TV's, cameras, sporting goods and homewares.

There is a noticeable gap in specialty fresh food retail, including Fruit and Vegetables, Delicatessens, Seafood/Poultry and Bakery businesses. Many Yass residents travel to the ACT for these types of purchases, or utilise the increasingly popular home delivery services for fruit/vegetables and meat which now service Yass town. This demand may also be partly met by the recently established Yass Farmers Market – which will operate fortnightly from the Yass Showground.

Yass already has a saturated 'Pub' market with three hotels in operation, as well as the Soldier's, Bowling and Golf Clubs. These premises do not cater for a broad range of groups within the community and specifically exclude those under the age of 18. There is enormous potential for a greater diversity of food and drink premises within the town especially high end eating opportunities to complement the existing wineries and local produce within the area.

There is a slight market gap at present for bulky goods floor space and a possible gap for a discount department store (DDS). Including the market gaps at present, the overall future retail demand will be about 23,000m² - 24,000m² by 2031 or about 1,200m² per year. Importantly, retail development should generally be provided ahead of market demand so that the community benefits from appropriate diversity and competition between retailers.

At an FSR of 0.5, this equates to about 46-50,000m² of site area or about 5 ha of land. Aldi will absorb some of the supermarket growth across the catchment and future retail (between 2020 and 2031) should be delivered within either the Commercial Core or adjacent to the existing Franklins in the north to encourage competition and multi-propose trips.

The future requirements for food and drink premises, clothing & accessories and other non-food specialties translates to a land demand of about 1.5ha, while bulky goods demand translates to about 1.5ha and DDS demand about 1ha.

There are Council sites in the southern area along Comur Street which could accommodate a future major tenant DDS and its ideal location would be adjacent to an existing supermarket to ensure the cross-over shopping opportunities are present to make it viable and to achieve net community benefits.

The existing commercial spine, should be sufficient to accommodate the future demand for non-food specialties such as newsagents, hobbies, retail services, clothing stores, while the demand for bulky goods floor space of about 1.5 to 2ha could be accommodated within the existing precinct if site opportunities arise or as part of the lands to the north of the Study Area identified in the Yass Industrial Lands Study as a B5 Business Development zoning.

The project team also identified a need for a further 30,000m² of non-retail employment floor space to be accommodated across the Yass Commercial Precinct. The demand is broken down as follows:

- 10,000m² of office type floor space
- 6,000m² of education floor space
- 14,000m² of health floor space

This estimate does not include industrial land floor space demand, which is expected to be significant requiring 130ha according to the Yass Industrial Lands Study.

Health sector employment has been one of the fastest growing sectors in the Yass LGA. With an ageing population the requirements for health care in the longer term will become more significant. There is the potential for Yass to deliver a multi-purpose health clinic and rejuvenated hospital facility. This would most easily be accommodated through a staged medical 'precinct' style development within the existing boundaries of the current Hospital and Community Health Centre site. The site area is 2.1 ha and therefore would be able to satisfy the majority of the projected 3 ha future land requirement to 2031.

Education sector growth could similarly be provided as extensions to existing school facilities, through new schools or new tertiary education facilities. These could be accommodated across the existing boundaries of the Study Area. At present Yass Schools receive students from Murrumbateman and surrounds as there is no school within Murrumbateman village (or Hall village), despite the population and demand. If and when a school is provided at Murrumbateman, this will free up spaces within the existing Yass Schools reducing the need for expansion up to 2031.

Office floor space will require 2ha of land given that most of this will be delivered as one or two storey development. If suitable sites are available then this type of development would be ideally located in the southern part of the precinct along Comur Street. The B2 – Local Centre zoning will enable this type of floor space to be accommodated but finding vacant sites for redevelopment or buildings to accommodate this type of floor space may be difficult. Some of this development could be delivered within the Business zones to the north and south as per tenant requirements (i.e. not as reliant on town centre traffic or may have storage requirements etc).

There is also the opportunity to explore locations for smaller professional businesses or remote operators which can be based in Yass and service the region. For example: Architects, IT services, Accountants etc could ideally be accommodated through adaptive re-use of some of the existing heritage dwellings within the town. This is already occurring successfully for tenants such as Surveyors and Land Valuers in existing dwellings in Crago and Adele Streets.

The projected employment and retail demand requirements do not warrant expansions to the north or the south of the Yass Commercial Precinct, except for further floor space to accommodate potential bulky goods tenants. Ideally these could be located adjacent to the existing Irvine Square Shopping centre, thus strengthening the node and increasing its competitiveness or they could be accommodated within the B5 – Business Development Zone identified in the Industrial Lands Study, although these lands may take longer to be completely developed.

10.2 National Retail Trends

In regional towns, quite often there may be only a smaller independent supermarket within the town centre and as the town grows in size, or as sites become available, large national chain retailers attempt to obtain market share by developing within or adjacent to the towns. Quite often ‘development constraints’ exist and these types of developments are proposed at stand-alone locations outside of the main street and can generally have a detrimental effect on the businesses in the town centre.

Yass is fortunate in that two major supermarkets servicing the town centre are both located within the main street and actually assist in the overall functionality and performance of the retail. With the imminent arrival of Aldi, it is highly unlikely that Yass will receive proposals for major supermarket developments outside of the main street however if Council does receive proposals these need to be very seriously considered through an assessment of demand and economic impacts but it is highly likely that they would present disorderly planning with little community and economic benefit.

Supermarkets are tending to provide a broader range of goods these days and are creating cross-category centres which compete with traditional retailers and discount department stores. Aldi is a good example of this providing significant non-food and household goods. However there is a trend in regional areas for a large DDS to co-locate with a full-line supermarket with the latter being the primary anchor for the former and allowing the community to benefit by receiving a full range of goods at competitive prices.

Given that there will be strong population growth in the short to medium term and that Canberra’s main bulky goods precinct, Fyshwick is about 70km from Yass from a preliminary perspective there appears to be potential for bulky goods retailing to be delivered within Yass. Strong population growth driven by new housing and first home buyers means demand for household goods to fill these new homes.

Bulky goods tenancies are best co-located in order to achieve sustainability outcomes. Bulky goods retailers tend to provide comparison shopping goods - the types of goods that are purchased less frequently and are typically more expensive. Co-location of these goods means that consumers can undertake less trips and the precinct can also generate increase activity levels improving its overall viability and functionality.

One of the potential problems with bulky goods, or proposed bulky goods development in regional areas are speculators who purchase lands, obtain a rezoning and then look to on-sell a site for a profit without delivering an outcome. A co-ordinated approach using the outputs from the Industrial Lands Study to identify a particular region for bulky goods retailing will help to ensure that this does not occur in Yass.

From a spatial perspective, the lands just to the north of the Commercial Study Area appear to be the most appropriate to accommodate the larger floor space demands that these uses command. The Industrial Lands Study identifies these lands for industrial/bulky goods uses and a proposed zoning of B5 – Business Development is recommended.

Furthermore, ensuring adequate market demand assessments support future proposed retail developments will enable appropriate community outcomes to be achieved.

11 Planning and Implications

This section of the report provides tangible on-the-ground zoning and planning recommendations to enable the projected commercial and retail growth demand to be accommodated across the Yass Commercial Precinct.

A number of issues have been taken into account in considering future zones for Yass Commercial Precinct. These include the:

- precinct is currently an elongated town centre running north to south.
- centre is constrained to the east and west by topography, drainage (Chinaman's Creek) and railway infrastructure.
- opportunity for Yass to grow as a regional development node at the intersection of the Barton and Hume highways.
- Sydney Canberra Corridor Regional Strategy identifying the Yass Valley as having the potential to grow to support 2500 new jobs. Correctly zoned land is required to facilitate this development.
- largely fragmented existing land banks in separate ownership.
- issues associated with current owner's lack of desire to actually develop land.
- Yass Industrial land Strategy identifying an additional 131ha of land to be zoned for industrial and associated bulky goods uses.

South Yass

Specific issues for the main commercial core in Comur Street include:

- Topography - limited land is available on level ground with land inclining steeply away from the core in both east and west directions
- The Yass River and associated riparian and flood plain areas at the northern edge of the precinct
- Older building stock with smaller floor areas
- The extent of existing commercial zoning not reflecting existing land uses
- Limited opportunity for sites to be amalgamated for development which requires larger floor spaces
- Some commercial sites being occupied by uses better suited to industrial areas (i.e. bus depot, vehicle repair stations)
- Some sites within Comur Street being occupied by uses which require large floor areas such as bulky electrical goods and home furnishings showrooms, which should eventually be encouraged to relocate out of the business core.

North Yass

Specific issues to the north of the commercial core include:

- The existing residential zoning either side of Laidlaw Street.
- Physical restrictions to the west created by the disused rail line and catchment into the Yass River.
- A very elongated stretch along Laidlaw Street between an existing neighbourhood centre (Irvine Square) and the Comur Street commercial core.
- Existing mix of uses, lack of character and contextually imbalanced
- Irregular boundary of Irvine Square and interface with Orion and Pollux Streets
- Cluster of buildings on the east side of Laidlaw Street with heritage significance

Other Land Uses

Other land uses within the Commercial Precinct which require specific zones include:

- Open Space
- Schools and Churches
- Former Gasworks

The project team has considered the above issues and has made a number of recommendations in relation to potential future land use zones in order to ensure the growth of Yass as a commercial centre for the surrounding region.

11.1

Proposed Rezoning

North Yass

It is proposed to rezone the land within the north Yass portion of the Yass Commercial Precinct Study area generally in accordance with map provided in figure 10. The proposed changes to the land use zonings shown on this map are discussed below and have been selected from the new Standard Instrument LEP template. Detailed discussion in relation to the new Standard Instrument LEP template zones is provided in section 11.2 below.

B1 Neighbourhood Centre - 2.15 hectares

The existing Irvine Square and allotments to the south of the shopping centre are proposed to be zoned B1 Neighbourhood Centre. Currently, the centre provides services to businesses and residential development in North Yass and to a lesser extent South Yass. The express functions of the neighbourhood centre will also service the future B5 Business Development zone to the north acting as a node for those employed in the area.

The main change to the extent of the commercial zoning on this block is to the south of the current commercial development. The zoning now picks up three existing dwellings between the vacant land on the corner of Laidlaw Street and Pollux Street extending to the loading bay entrance of Franklins. While the residential use of these dwellings can be continued with existing use rights, the residential amenity of these dwellings is compromised having direct abuttal to Irvine Square and the Franklins loading area. A preferred planning outcome would be that these sites are consolidated and redeveloped for a large commercial use.

The B1 - Neighbourhood Centre would be linked to the B2 - Local Centre located along Comur Street through a B6 - Enterprise Corridor Zone, and would function as a complementary support node to the main commercial core of the town.

B5 Business Development - 6202m²

The land abutting the north of Irvine Square is proposed to be zoned B5 Business Development, as recommended by the Industrial Lands Study – which has been endorsed by the Director General of the NSW Department of Planning.

B6 Enterprise Corridor – 7.79 hectares

An Enterprise Corridor is proposed along Laidlaw Street extending from Irvine Square south to Victoria Park and the Yass Motel. This zone is generally intended to be applied to land where commercial or industrial development is to be encouraged along main roads. The corridor will connect the proposed B5 Business Development and B1 Neighbourhood Centre zones to the existing commercial core in Comur Street and will ensure that retail uses – such as the sale of food and clothing do not establish and detract from the viability of the Comur Street core.

Although this entire spine is currently zoned Residential with the exception of two small lots zoned 3(b) Highway Services – the mix of uses is not typical of a residential area. The existing uses include a takeaway shop, motels, place of worship, earthmovers depot, veterinary clinic and mechanics. Some of these uses were established prior to the Hume Highway bypass in 1994, however zonings for this area have not been reviewed or adjusted to reflect this significant change.

The existing land uses and the resulting conflicts between them, combined with frontage onto a main road have resulted in a poor outcome for Yass. This is made worse by the fact that this area is the gateway into a town characterised by its attractive and relatively intact main streetscape. The proposed B6 Enterprise Corridor zoning aims to boost investment and development within this part of town, by encouraging new land uses and developments which will benefit from a main road frontage and the resultant passing traffic. It will also reflect the existing uses such as the motels which have established appropriately within the area and are consistent with the role that this corridor will continue to have into the future.

Existing Use Rights will continue for the current residential uses within the proposed B6 zone, however this use will cease to become the preferred future use along Laidlaw Street to 2031. Future residential development in the corridor will still be considered if it is in conjunction with an associated business.

R1 – General Residential – 16.21 hectares

With the exception of Victoria Park, Yass Public and High Schools, three small lots on the western side of Laidlaw Street and Irvine Square, all other land within the North Yass Precinct is currently zoned 2(a) Residential. Some of the implications of this have been discussed above with regard to the proposed introduction of the B6 zone along Laidlaw Street.

Outside the eastern extent of the proposed B1, B5 and B6 zones, it is proposed to retain a general residential zoning. This will clearly define the extent of ‘pure’ residential uses within the Commercial Precinct up to 2031. A large area of land (7.171 ha) is associated with Aged Care and Seniors Housing. As these uses will still be permitted with development consent in the R1 General Residential Zone, it was decided that no zoning change was required. Future development or expansion of this Aged Care precinct will still be determined in accordance with the State Environmental Planning Policy for Housing for Seniors or People with a Disability. It is also proposed to develop specific policy for the future development of this precinct within the Development Control Plan (DCP) that will be prepared post LEP finalisation.

One existing Bed and Breakfast business is located within this area on Grampian Street, and again this use can continue within the proposed R1 General Residential zone.

Under the existing Yass LEP, the lot on the corner of Orion and Glebe Streets is zoned 3(b) Highway Services Zone. This site is proposed to be zoned R1 – General Residential, inline with the owner’s previous request during the consultation process of the Draft Industrial Lands Study. To change the zone will reflect its residential use and will be consistent with the uses to the east and south. This will also ensure that the Business/Industrial Streetscape does not begin to encroach into Glebe Street.

SP2 – Infrastructure

At present the Yass Public School and Yass High School are zoned 6(a) Open Space, which is the incorrect zoning for an Educational use. These sites are therefore proposed to be zoned SP2 Infrastructure to rectify this zoning anomaly. The new Baptist Church along Laidlaw Street is also proposed to zoned SP2. This zone is generally intended to cover a wide range of physical and human infrastructure uses including community uses and educational uses.

RE1 – Public Recreation

Victoria Park, the Yass Caravan Park and the riparian areas along the Yass River are currently zoned 6(a) Open Space. This land use zoning will be replaced by the RE1 Public Recreation zone in the new standard instrument LEP template. Accordingly, this land is now proposed to be zoned RE1 Public Recreation.

Figure 10. Proposed Zonings – Yass Commercial Precinct (North Yass)



South Yass

It is proposed to rezone the land within the south Yass portion of the Yass Commercial Precinct Study area generally in accordance with map provided in figure 11. The proposed changes to the land use zonings shown on this map are discussed below and have been selected from the new standard instrument LEP template. Detailed discussion in relation to the new Standard Instrument LEP template zones is provided in section 11.2 below.

SP1 – Special Activities – 2497m²

The area formally referred to as the Yass Gasworks site will be zoned SP1 Special Activities. The zone is generally intended for special land uses or sites with special characteristics that can not be accommodated in other zones. The Yass Gasworks contains potentially contaminated land that will require rehabilitation at some stage. The specific nature of this site is not easily accommodated within any of the other zone provisions.

SP2 – Infrastructure – 10.47 ha

It is proposed to zone the following sites: St Clement's, St Andrew's, St Augustine's, Mt Carmel and Berinba Schools as well as the TAFE and Hospital SP2 Infrastructure. This zone is generally intended to cover a wide range of physical and human infrastructure uses including community uses and educational uses and will better reflect the current usage of these sites.

R1 General Residential – 11.66 ha

The area to the west of Church Street will remain in a residential zone except for the TAFE site and Berinba School.

On the western side of Comur Street, there are several changes proposed to the current residential Zoning however R1 is proposed to remain on the east side of Dutton Street excluding Mt Carmel School. This reflects the established single dwelling use of the land in this area.

R3 Medium Density Residential – 3.22 ha

The land located on the western side of Dutton Street has been identified for rezoning to R3 Medium Density Residential to reflect the existing Medium Density Developments in the area and to accommodate future medium density development. These sites have been selected due to the relatively flat topography and reasonably easy walk to the Main Street and other community facilities. This will involve the rezoning of existing 2(a) Residential and 6(a) Open Space zoned land under the current LEP.

There are three specific sites which have been identified as having potential for redevelopment for Medium Density Residential purposes:

- These include the Yass Lawn Tennis Club in Fifield Lane – as a response to requests previously made to Council to enable development. This site is currently zoned 6(a).
- Two vacant adjacent lots in Dutton Street opposite the Mt Carmel school entry. These lots are currently zoned 6(a) Open Space although they are not currently used for this purpose.
- The land to the immediate south of the former Gasworks site which is predominantly vacant with the exception of some items of potential heritage significance. These can be retained where feasible leaving residual land which is in single ownership for Medium Density Residential Development.

RE1 – Public Recreation – 8.26 ha

An RE1 zoning is proposed to cover Coronation Park, Miles Franklin Park, Riverbank Park and the northern section of Chinaman's Creek which were all formerly zoned 6(a).

The only additional areas to be included within this Public Recreation Zone are:

- The area within Miles Franklin Park which directly abuts the southern boundary of the former Yass Tramway Station. At present this land is zoned Residential, however it contains the main pedestrian and cycle paths from south and south west Yass and is low lying with potential drainage issues. As such it cannot feasibly be used for purposes other than recreation.
- Two lots to the east of Chinaman's Creek north of Rossi Street. This land is low lying and flood prone and unsuitable for inclusion within the residential zone. This land may also be incorporated into future works associated with restoration and improvements associated with Chinaman's Creek including a proposed wetland.
- Council is in the process of acquiring some additional land at the rear of O'Mara's on Rossi Street. This land is also low lying and will most likely also be included in works associated with Chinaman's Creek. This land will therefore be rezoned from 3(a) Business to RE1 – Public Recreation.

B2 – Local Centre – 25.65 ha

This zone is generally intended for centres that provide a range of retail, business, entertainment and community functions that typically service a wider catchment than a neighbourhood centre. Approximately 10 hectares of land is proposed to be changed from its existing zoning (Residential, Open space and Special Uses Zones) to B2 Local Centre. In most instances, this zone is proposed to be introduced to reflect the business related uses which already exist on site.

From north to south within the South Yass Study Area the following changes are proposed:

- The B2 zone is recommended to be extended to the west along Rossi Street to include the Goodradigbee Centre. This building currently contains the offices of the Yass Valley Home Living Support Service and Home and Community Care (HACC) Services, and is therefore more appropriately included within the B2 Zone. The site was also the home of the former Goodradigbee Shire Council Depot and contains contaminated land as a result of this previous land use.
- Three lots to the west of the Police Station and Residence on Rossi Street are proposed to be incorporated into the B2 Zone. One of these lots is vacant and adaptive re-use of the existing dwellings could be considered. Either way, the location and size of these lots presents a significant opportunity for increased and diverse development in such close proximity to the commercial core.
- The lots opposite on Rossi Street are also proposed to be included within the B2 zone. This will include the Globe Hotel, Ronocco and the Physiotherapist. It will also take in some small cottages which would lend themselves to possible conversion for professional rooms/offices particularly given their minimal setbacks from the street.
- Along Meehan Street, the "Vinnies" Shop has been incorporated within the B2 zone, as it is currently located within the 2(a) Residential Zone.
- The Yass Early Childhood Centre (YECCA), the Country Women's Association (CWA) rooms and the adjacent car park have been withdrawn out of the 6 (a) Open Space zone and are proposed to be zoned B2. This arrangement will more accurately reflect the actual boundaries of the park, the use and ownership of the buildings and may facilitate the future redevelopment of either or both of these sites.

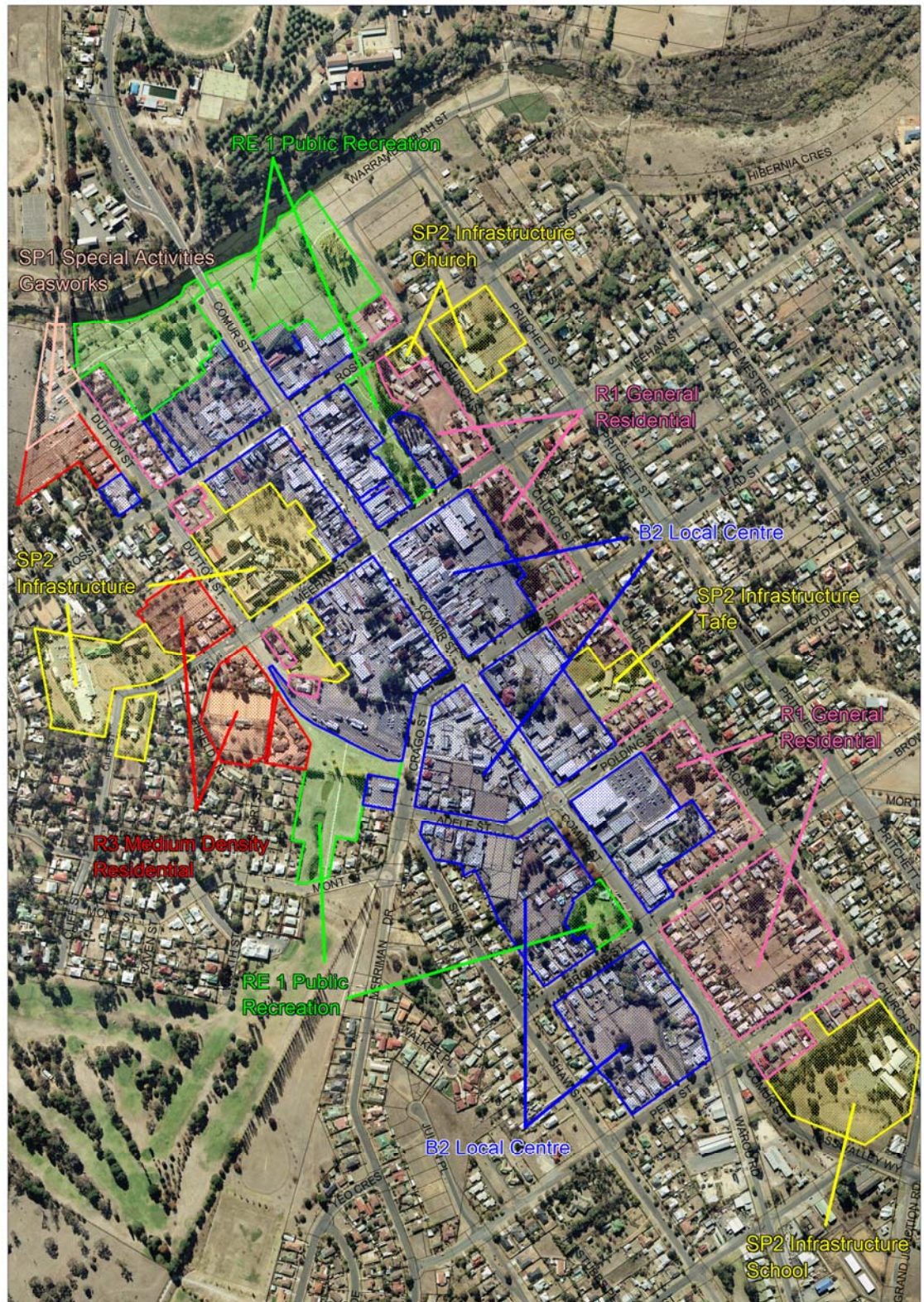
- The zoning around the Soldier's Club, the rear of the Australian Hotel and Atherfield Medical Centre has been reviewed and adjusted to remove redundant 6 (a) Open Space zoning. This zoning is no longer relevant given Chinaman's Creek is now piped for much of this area and a 6(a) zoning is not applicable to paved car parking areas and access ways.
- The Vine Church at 66 Lead Street is proposed to be included within the B2 zoning to better reflect the existing use of the site and allow for flexibility into the future. The site is adjacent to the existing commercial core area, and opposite the Atherfield car park.
- The former Yass Tramway Station is currently zoned 5 (a) Special Use and is currently used as the Yass Heritage Railway Museum. Given the use of the site as a Museum none of the new Standard Instrument 'SP' zones are suited. It is therefore proposed to zone the Yass Tramway Station B2.

Zoning the Yass Tramway Station site B2 has the potential to secure its future viability. This would be facilitated through providing the opportunity to develop the interface with the Comur Street commercial core and provides the potential to consider other retail and office uses which could complement the museum use currently on the site. Overall the site is underutilised, particularly the vacant areas around its northern edge. The car park area could also be designed more efficiently, thus freeing up valuable land for commercial development. Land at the rear of Comur Street premises (e.g. rear area of former Kelly & Co) is also underutilised and could therefore be consolidated with some of the aforementioned land.

- The ABC Childcare Centre on Crago Street is currently zoned Residential. While this use can be accommodated within that zoning, it is more appropriate to include the site within the B2 zone, given that it will be opposite and adjacent (with the exception of the Miles Franklin Park walkway) to that zone. This will have the effect of clearly delineating a defined boundary for future commercial development.
- The street block bound by Comur Street, Crago and Adele Streets is currently zoned part 3(a) Business, and part 2 (a) Residential. The development of the Aldi store within this block is imminent and other land is occupied by former garages and workshops, the existing Council Offices and Crago's Mill. All of this land is proposed to be zoned B2. The old tennis courts and dwellings facing Adele and Crago Streets should also be rezoned to B2. There are three existing businesses operating out of former dwellings in this block, and as a result they have been restored and are well maintained. This area will become more frequented and accessible over time, given its proximity to the proposed Aldi development, and any new Council Office re-development. The existing dwellings will retain their existing use rights but will also be able to be considered for alternative commercial uses in the future. This block also presents significant opportunities for the future development of a discount department store.
- A physiotherapist and massage therapist currently operate out of a cottage with frontage to Polding Street opposite the Woolworths car park. It is a very small site, and should be included within the existing adjacent commercially zoned area. It is also proposed to include the adjacent dwelling in the B2 zoning to encourage redevelopment of that site to take advantage of the site's proximity to Woolworths.
- The B2 zone boundary is also proposed to be adjusted to take in the north eastern sections of the Woolworths car park and the Thunderbird Motel site.
- The land contained within the block bounded by Adele, Comur, Shaw and Browne Streets is currently zoned 2 (a) Residential - with the exception of the Yass Bowling Green (not club), and Coronation Park (including an adjacent dwelling). This zoning does not reflect the existing land uses in this block.

- It is proposed to remove the dwelling referred to above out of the RE1 zoning that will be applied to Coronation Park. With the exception of the houses fronting Shaw Street, all of the other land is proposed be included within the B2 - Local Centre zone. The Bowling Club will retain its existing use rights, and hence can continue to operate as it does. Should it wish to relocate elsewhere, it will open up possibilities for the commercial redevelopment of the site.
- The dwellings west of this, again can continue with existing use rights, however alternative uses may also be considered such as professional rooms or offices which will complement the zoning recommended on the opposite side of Adele Street.
- The B2 - Local Centre zoning will also include the Yass Museum and Scout Hall, and again provide for the adaptive re-use of some of the existing dwellings with potential Heritage Significance. At present the two largest residential buildings are the former Mill Workers housing on the corner of Comur and Adele Street. Both of these buildings are in a very poor state of repair and currently detract from a very prominent corner within the town. Rezoning these buildings in particular will allow for alternative uses to be considered. In the event that alternative uses cannot be found in the long term, the condition of these buildings will continue to deteriorate and the site may be eventually considered for redevelopment.
- The southernmost portion of the proposed B2 - Local Centre is the block bounded by Comur, Shaw, Browne and Petit Streets. At present, Martin's General Store is the only lot which currently has a 3(a) Business Zoning. To the north of this site along Comur Street is the existing United Petrol Station. These existing commercial sites and the two dwellings in between were considered as part of the Industrial Lands Study. It recommended that this strip be included within the B5 area, which will extend along Waroo Road to the south. This recommendation has now been reviewed, as the existing uses will sit well within a B2 - Local Centre zone. Extending the B2 - Local Centre zone this far south along Comur Street and including the majority of the block allows for a smooth zoning transition to the proposed B5- Business Development Zone.
- A large vacant site is located centrally within the block referred to above. This site has previously been considered for potential Medium Density Residential development. This development would result in a poor outcome with regard to the amenity of future occupants as the site has a negligible interface with its Petit Street frontage and abuts an existing petrol station and general store. As such, this site would be more appropriately included within the B2 zoning.
- The dwellings along Browne Street and the northern side of Petit Street will, as previously stated, retain their existing use rights. Future uses along Browne Street would ideally complement the location of Coronation Park and the Visitor Information Centre – especially catering for tourists and the large number of families which utilise the park on a daily basis. This could include café or studio/gallery type uses, both of which could be achieved through adaptive re-use of some of the attractive older building stock within Browne Street. The existing dwellings along Petit Street will most likely retain their residential use in the foreseeable future. The B2 zoning will however provide the opportunity to expand and consolidate commercial uses in this area to 2031.

Figure 11. Proposed Zonings – Yass Commercial Precinct (South Yass)



11.2 Proposed Standard Instrument LEP Zones

South Yass Precinct

The following is an extract from the Standard LEP Template and lists the objectives and land uses that are mandatory in these zones.

Zone B2 - Local Centre

1. Objectives of zone

- To provide a range of retail, business, entertainment and community uses that serve the needs of people who live in, work in and visit the local area.
- To encourage employment opportunities in accessible locations.
- To maximise public transport patronage and encourage walking and cycling.

2. Permitted without consent

Yass Valley Council may propose land uses to be included here within the draft Yass Valley LEP.

3. Permitted with consent

These uses are mandated 'Permitted with consent' by the NSW Department of Planning in this zone. Yass Valley Council may propose additional land uses to be included within the draft Yass Valley LEP.

Boarding houses; Business premises; Child care centres; Community facilities; Educational establishments; Entertainment facilities; Function centres; Information and education facilities; Office premises; Passenger transport facilities; Recreation facilities (indoor); Registered clubs; Retail premises; Service Stations; Shop top housing; Tourist and visitor accommodation.

4. Prohibited

Yass Valley Council may propose land uses to be included here within the draft Yass Valley LEP.

Zone R1 General Residential

1 Objectives of zone

- To provide for the housing needs of the community.
- To provide for a variety of housing types and densities.
- To enable other land uses that provide facilities or services to meet the day to day needs of residents.

2 Permitted without consent

This use is mandated 'Permitted without consent' by the NSW Department of Planning in this zone. Yass Valley Council may propose additional land uses to be included within the draft Yass Valley LEP.

Home occupations

3 Permitted with consent

These uses are mandated 'Permitted with consent' by the NSW Department of Planning in this zone. Yass Valley Council may propose additional land uses to be included within the draft Yass Valley LEP.

Attached dwellings; Boarding houses; Child care centres; Community facilities; Dwelling houses; Group homes; Hostels; Multi dwelling housing; Neighbourhood shops; Places of public worship; Residential flat buildings; Semi-detached dwellings; Seniors housing; Shop top housing

4 Prohibited

Yass Valley Council may propose land uses to be included here within the draft Yass Valley LEP.

Zone R3 Medium Density Residential

1 Objectives of zone

- To provide for the housing needs of the community within a medium density residential environment.
- To provide a variety of housing types within a medium density residential environment.
- To enable other land uses that provide facilities or services to meet the day to day needs of residents.

2 Permitted without consent

Yass Valley Council may propose land uses to be included here within the draft Yass Valley LEP.

3 Permitted with consent

These uses are mandated 'Permitted with consent' by the NSW Department of Planning in this zone. Yass Valley Council may propose additional land uses to be included within the draft Yass Valley LEP.

Attached dwellings; Boarding houses; Child care centres; Community facilities; Group homes; Multi dwelling housing; Neighbourhood shops; Places of public worship; Seniors housing

4 Prohibited

Yass Valley Council may propose land uses to be included here within the draft Yass Valley LEP.

Zone SP1 Special Activities (Gasworks)

1 Objectives of zone

- To provide for special land uses that are not provided for in other zones.
- To provide for sites with special natural characteristics that are not provided for in other zones.
- To facilitate development that is in keeping with the special characteristics of the site or its existing or intended special use, and that minimises any adverse impacts on surrounding land.

2 Permitted without consent

Yass Valley Council may propose land uses to be included here within the draft Yass Valley LEP.

3 Permitted with consent

The purpose shown on the Land Zoning Map, including any development that is ordinarily incidental or ancillary to development for that purpose

4 Prohibited

Yass Valley Council may propose land uses to be included here within the draft Yass Valley LEP.

Zone SP2 Infrastructure

1 Objectives of zone

- To provide for infrastructure and related uses.
- To prevent development that is not compatible with or that may detract from the provision of infrastructure.

2 Permitted without consent

Yass Valley Council may propose land uses to be included here within the draft Yass Valley LEP.

3 Permitted with consent

The purpose shown on the Land Zoning Map including any development that is ordinarily incidental or ancillary to development for that purpose (i.e Health,, Education, Place of Worship)

4 Prohibited

Yass Valley Council may propose land uses to be included here within the draft Yass Valley LEP.

Zone RE1 Public Recreation

The following must be included as either “Permitted without consent” or “Permitted with consent” for this zone:

Environmental facilities

Environmental protection works

Roads

1 Objectives of zone

- To enable land to be used for public open space or recreational purposes.
- To provide a range of recreational settings and activities and compatible land uses.
- To protect and enhance the natural environment for recreational purposes.

2 Permitted without consent

Yass Valley Council may propose land uses to be included here within the draft Yass Valley LEP.

3 Permitted with consent

These uses are mandated ‘Permitted without consent’ by the NSW Department of Planning in this zone. Yass Valley Council may propose additional land uses to be included within the draft Yass Valley LEP.

Kiosks; Recreation areas

4 Prohibited

Any development not specified in item 2 or 3

North Yass Precinct

Its objectives and mandatory land uses are outlined below in the extract from the Standard Instrument Template:

Zone B1 Neighbourhood Centre

1 Objectives of zone

- To provide a range of small-scale retail, business and community uses that serve the needs of people who live or work in the surrounding neighbourhood.

2 Permitted without consent

Yass Valley Council may propose land uses to be included here within the draft Yass Valley LEP.

3 Permitted with consent

These uses are mandated 'Permitted with consent' by the NSW Department of Planning in this zone. Yass Valley Council may propose additional land uses to be included within the draft Yass Valley LEP.

Boarding houses; Business premises; Child care centres; Community facilities; Neighbourhood shops; Shop top housing

4 Prohibited

Yass Valley Council may propose land uses to be included here within the draft Yass Valley LEP.

Zone B6 Enterprise Corridor

1 Objectives of zone

- To promote businesses along main roads and to encourage a mix of compatible uses.
- To provide a range of employment uses (including business, office, retail and light industrial uses) and residential uses (but only as part of a mixed use development).
- To maintain the economic strength of centres by limiting retailing activity.

2 Permitted without consent

Yass Valley Council may propose land uses to be included here within the draft Yass Valley LEP.

3 Permitted with consent

Business premises; Community facilities; Hotel or motel accommodation; Landscape and garden supplies; Light industries; Passenger transport facilities; Timber and building supplies; Warehouse or distribution centres

4 Prohibited

Yass Valley Council may propose land uses to be included here within the draft Yass Valley LEP.

Also –

Zone R1 General Residential (as outlined above)

Zone RE1 Public Recreation (as outlined above)

Zone SP2 Infrastructure (as outlined above)

11.3 Other Considerations

There is a small overlay of the Yass Commercial Precinct Study area with the area which was previously covered by the Yass Valley Council Industrial Lands Study. The adopted Study which has been endorsed by the Director-General of the Department of Planning makes the recommendation that Irvine Square is to be zoned B2 – Local Centre and four lots opposite the centre to the west of Laidlaw Street are to be zoned B5- Business Development. The Yass Commercial Precinct Study has since found that the zoning on the western side of Laidlaw Street would be more appropriately included within the proposed B6 – Business Enterprise Corridor zone, rather than the B5- Business Development zone. This allows for better extension of the corridor into the larger proposed B5 – Business Development area. Furthermore the size of the four allotments is too small for the intended Business Development uses such as warehouses and retail premises which require large floor areas.

The Yass Valley Council Industrial Lands Study acknowledged that the existing uses at Irvine Square could facilitate the land being rezoned to a B1 Neighbourhood Centre however at the time the study was conducted the site was thought to have greater potential as a B2 – Local Centre. A review of this proposal has shown that the uses within the designated neighbourhood centre should not be seen as limiting but rather a great potential to improve the existing centre to better service North Yass. The creation of two (2) B2 – Local Centres connected by an enterprise corridor would have a detrimental effect on the retail trade in the Yass commercial core and would potentially split the town into two for the purposes of retail, business, and entertainment and community functions.

In this regard, it is acknowledged that the Yass Valley Council Industrial Lands Study was finalised in the absence of any known expansion of commercially zoned land or any recommended zones.

11.4 Recommendation Summary

The following is a summary of the key recommendations for the Yass Commercial Precinct Study Area:

Northern Precinct

- The Irvine Square Shopping Centre should be zoned B1 Neighbourhood Centre, and the abutting northern lots with frontage to Orion Street should be zoned B5 Business Development consistent with the recommendations of the Industrial Lands Study.
- Other land with frontage to the Laidlaw Street ‘spine’ is recommended to be included within a B6 Enterprise Corridor zoning, with the exception of residential land to the south of the Yass Motel.
- Yass Public School, Yass High School and the Baptist Church should be zoned SP2 Infrastructure zone, consistent with their existing use.
- Victoria Park and land adjacent to the Yass River should be zoned RE1 Public Recreation
- The remainder of the land within the Study Area should be transferred to R1 General Residential.

Southern Precinct

- The existing commercial core along Comur Street should be zoned B2 Local Centre consistent with its existing use

- The B2 Local Centre zoning should be extended to the south west of Comur Street to take in areas adjacent to Rossi/Dutton Street, Crago/Adele Street, Browne and Petit Streets, and the former Yass Tramway Station.
- The B2 Local Centre zoning should also be extended over YECCA, the CWA and the adjacent car park, as well as the Atherfield car park, rear of the Australian Hotel and adjacent premises.
- An R3 Medium Density Residential zone is recommended over the Fifield Lane Tennis Courts, and sites on Dutton and Meehan Streets.
- An RE1 Public Recreation is recommended over Riverbank Park, Coronation Park, Miles Franklin Park and Banjo Patterson Park.
- An SP1 Special Activities zone is recommended over the former Gasworks site.
- An SP2 Infrastructure zone is recommended to cover Mt Carmel, St Augustine's Church, St Andrew's, St Clements, TAFE, Yass Hospital and Community Centre and Berinba Public School.
- The remainder of the land within the Study Area should be transferred to R1 General Residential.

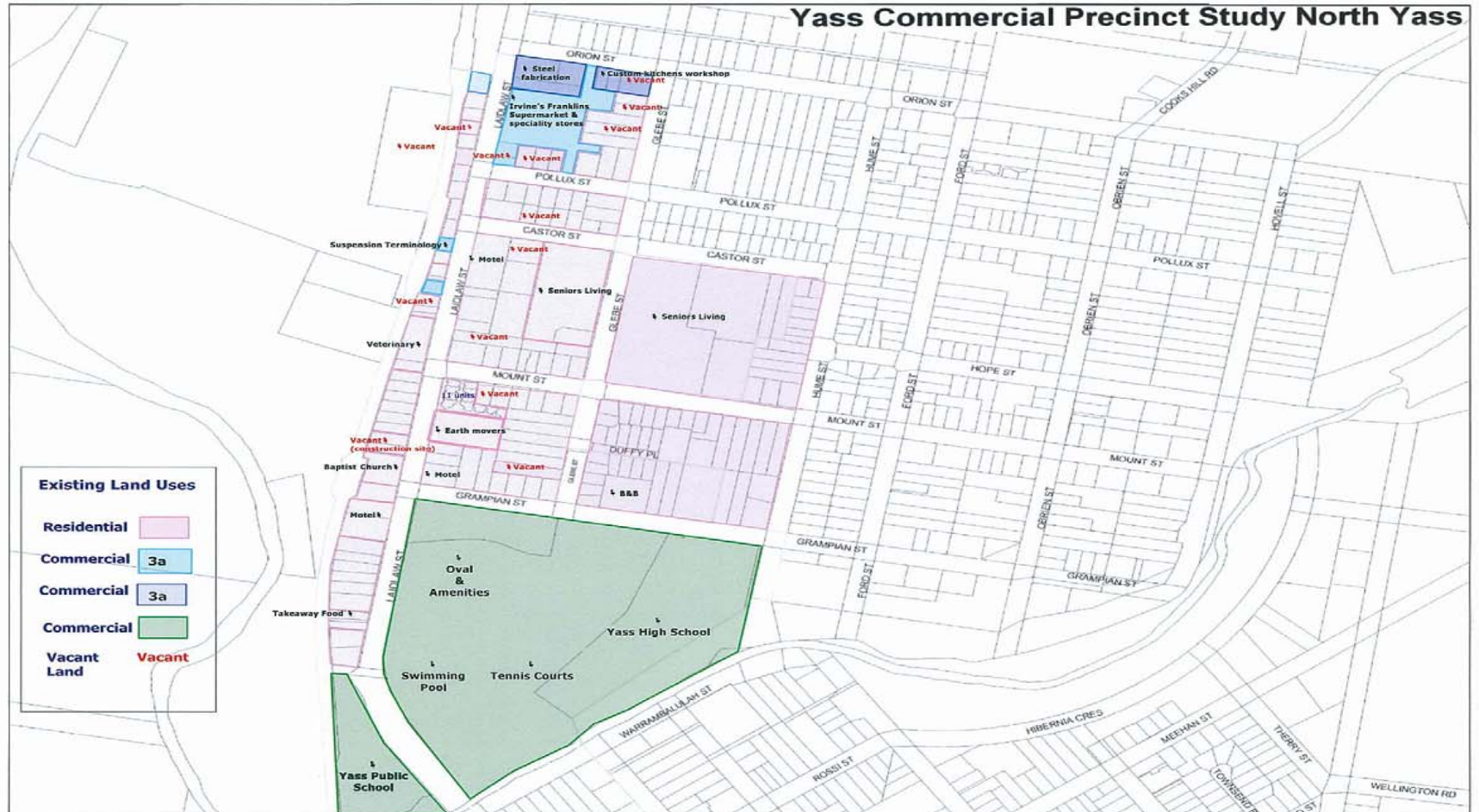
The recommendations above will allow for future job creation, additional commercial floor space, a greater network of services and will provide opportunities for competitiveness.

The proposed application of the new B6 Enterprise Corridor zoning will cover approximately 8 hectares of land along Laidlaw Street. This zoning will open up significant opportunities for development of a mix of commercial uses along the main road and gateway into Yass Town.

Importantly, an additional 10 hectares of land is proposed to be zoned B2 Local Centre however it must be noted that some of this land contains existing business premises. This increase in the size of the Local Centre is in keeping with the recommendations of the study. These recommendations suggest that significant increases in commercially zoned land are required to provide for potential additional retail and non retail uses. The additional areas proposed to be rezoned are seen as advantageous for the growth of Yass and will help to retain and encourage employment, education and medical facilities into the future.

12 Appendix A – Land Use Survey

This appendix contains the various maps comprising the land use survey undertaken by the Project Team in January 2010.



Precinct 1 – South West Yass



* Asterisk denotes nonconforming land use

YASS COMMERCIAL LAND USE SURVEY JANUARY 2010

Ref	Street	Land Use	Comment	Code
1	Comur Street	Take away food		Food
2	Comur Street	Dwelling		Residential
3	Comur Street	Dwelling		Residential
4	Comur Street	United Service Station	3 lots	Fuel
5	Comur Street	Dwelling		Residential
6	Comur Street	Dwelling		Residential
7	Comur Street	Dwelling		Residential
8	Comur Street	Dwelling		Residential

Precinct 2 – South West Yass

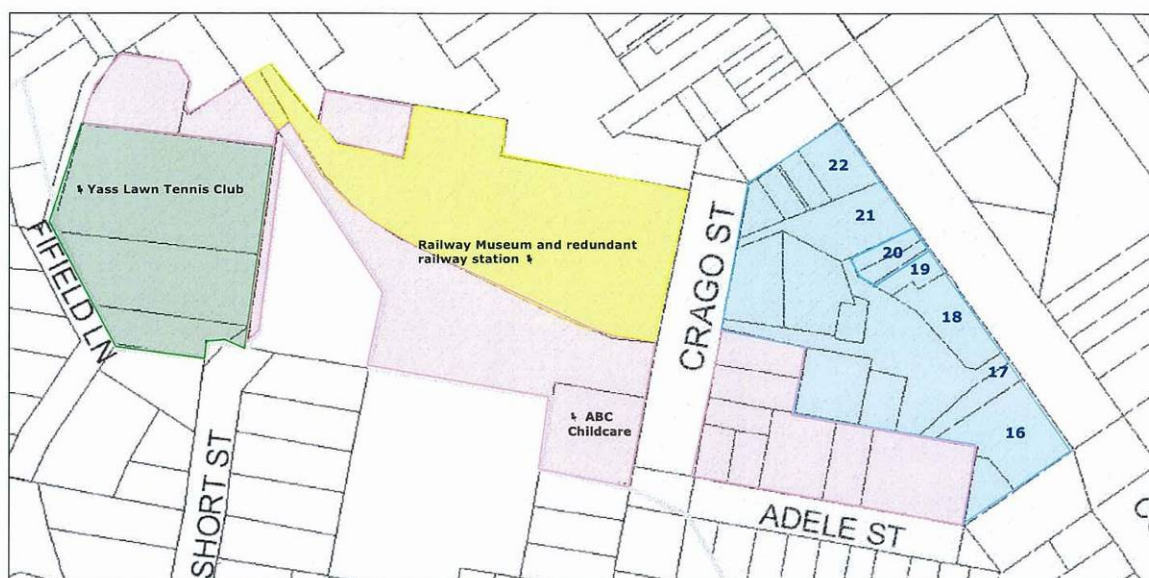


* Asterisks denotes nonconforming land use

YASS COMMERCIAL LAND USE SURVEY JANUARY 2010

Ref	Street	Land Use	Comment	Code
9	Comur Street	Coronation Park /Tourist Information Centre / Toilet Facilities		Public Open space
10	Comur Street	Dwelling	unsure - looks like residence	Residential
11	Comur Street	Yass District Museum		
12	Comur Street	Dwelling		Residential
13	Comur Street	Yass Scouts and Girl Guides		Community
14	Comur Street	Dwelling		Residential
15	Comur Street	Dwelling		Residential

Precinct 3 – South West Yass



* Asterisk denotes nonconforming land use

YASS COMMERCIAL LAND USE SURVEY JANUARY 2010

Ref	Street	Land Use	Comment	Code
16	Comur Street	Vacant	Former automotive and service station	Vacant
17	Comur Street	Yass Council Carpark		Civic
18	Comur Street	Yass Valley Council		Civic
19	Comur Street	Bathroom supplies	Extension of Council	Civic / Retail
20	Comur Street	Yass Valley Youth Centre		Community
21	Comur Street	Vacant	proposed Aldi site	Supermarket
22	Comur Street	Scissors with Style / Melross Homes / Café		Commercial / Retail

Precinct 4 – South West Yass



* Asterisk denotes nonconforming land use

YASS COMMERCIAL LAND USE SURVEY JANUARY 2010

Ref	Street	Land Use	Comment	Code
23	Comur Street	Craft Shop	Former Cinema Building	Retail
24	Comur Street	Yass Curtains		Retail
25	Comur Street	Liberty Take Away		Food
26	Comur Street	Access to shop top residence		Access
27	Comur Street	Blissful Hair Design	Hairdresser	Retail
28	Comur Street	Barber Shop	Hairdresser	Retail
29	Comur Street	Kim's Tailoring		Commercial
30	Comur Street	Image Photography		Commercial / Retail
31	Comur Street	Commonwealth Bank		Commercial
32	Comur Street	Little Dog Book Shop	Former City State Building 1865	Retail
33	Comur Street	Old Linton Medical Practice	Former Mechanics Institute 1869	Health
34	Comur Street	Vacant	Former Kelly & Co Rural Centre	Vacant
35	Comur Street	Axon Chartered Accountants		Commercial
36	Comur Street	Westpac Bank		Commercial
37	Comur Street	Yass First National Real Estate		Commercial
38	Comur Street	MP's Office	Katrina Hodgkinson	Office
39	Comur Street	Café Dolcetto		Food
40	Comur Street	Ron Firth Floor Coverings		Retail
41	Comur Street	Country Charm Home Furnishings		Retail
42	Comur Street	Subway	Fast Food	Food
43	Comur Street	Royal Hotel	Tiffanies Restaurant	Food / Entertainment

Precinct 5 – South West Yass



* Asterisk denotes nonconforming land use

YASS COMMERCIAL LAND USE SURVEY JANUARY 2010

Ref	Street	Land Use	Comment	Code
44	Comur Street	NAB National Australia Bank		Commercial
45	Comur Street	Yass Computers / Jaycar	Shop top unit (103 Comur Street)	Retail
46	Comur Street	Australia Post	Heritage Building established 1884	Commercial
47	Comur Street	Yass Jewellers		Retail
48	Comur Street	Yass Country Kitchen	Café	Food
49	Comur Street	Kidz Blitz	Toyshop	Retail
50	Comur Street	Phillip's Hair Studio		Hair & Beauty
51	Comur Street	Aged Care	Community Office	Community
52	Comur Street	Yass Valley Property	Real Estate	Commercial
53	Comur Street	Love Photography		Commercial
54	Comur Street	Ray White Real Estate	Real Estate	Commercial
55	Comur Street	Heritage House Antiques		Retail
56	Comur Street	Beauty on Comur		Beauty
57	Comur Street	Ladies Accessories		Retail
58	Comur Street	The Sheeps Back	Shop located upstairs 1st floor	Retail
59	Comur Street	Full Circle Serenity	Gift ware	Retail
60	Comur Street	Second Hand Bric-a-brac	3 shopfronts on 1 lot	Retail
61	Comur Street	Patrick's Butchery		Food
62	Comur Street	Hair Spiral		Retail
63	Comur Street	Yass Chiropractic	Williamson Building - 2 x shop top units	Health
64	Comur Street	Eagles Nest Christian Centre		Community

Precinct 6 – South West Yass

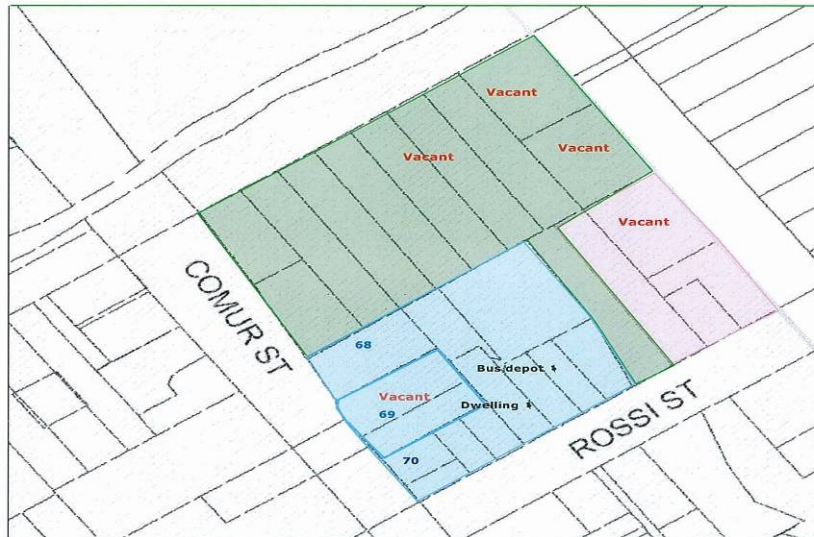


* Asterisk denotes nonconforming land use

YASS COMMERCIAL LAND USE SURVEY JANUARY 2010

Ref	Street	Land Use	Comment	Code
65	Comur Street	Yass Courthouse		Civic
66	Comur Street	Dwelling		Residential
67	Comur Street	Cobblestone Cottage		Residential

Precinct 7 – South West Yass

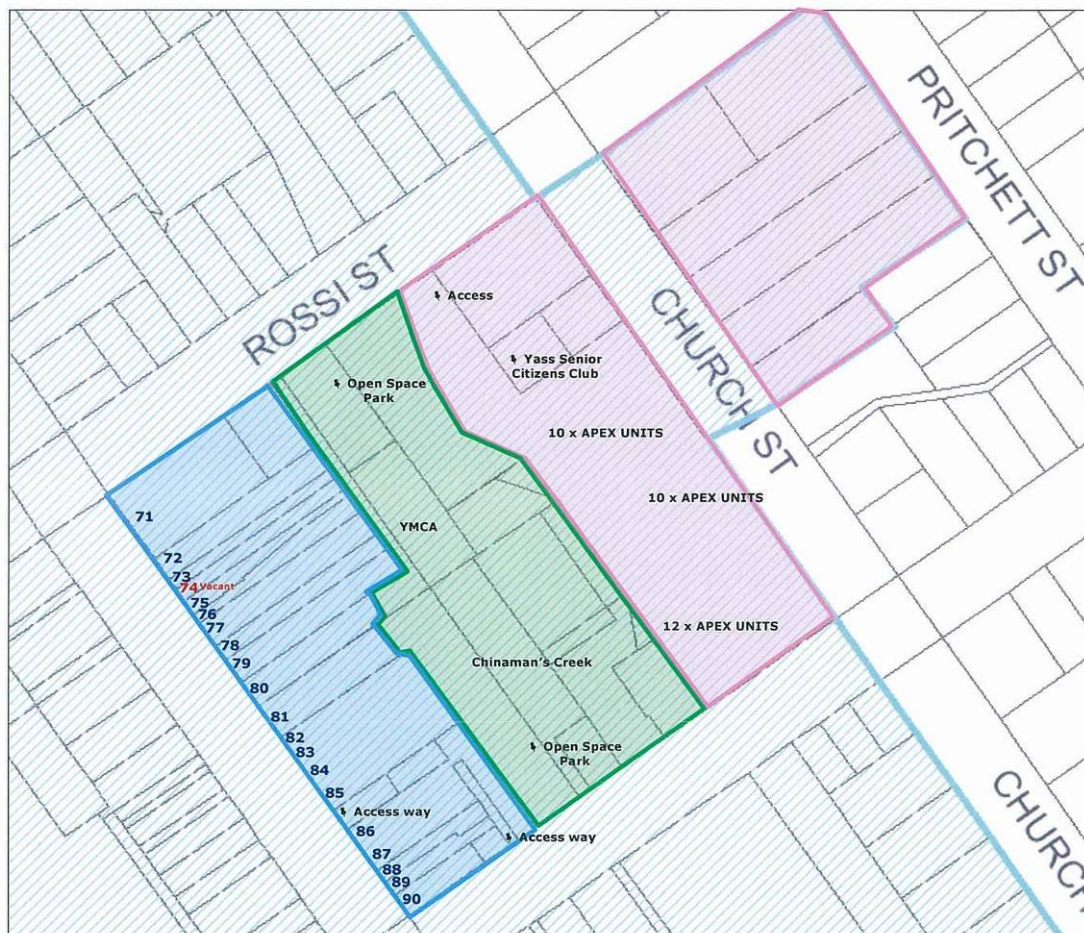


* Asterisk denotes nonconforming land use

YASS COMMERCIAL LAND USE SURVEY JANUARY 2010

Ref	Street	Land Use	Comment	Code
67	Comur Street	Cobblestone Cottage		Residential
68	Comur Street	Valmar Support Services		Community
69	Comur Street	Vacant	former service station	Vacant
70	Comur Street	Hume Tyrepower Tyre Shop		Retail

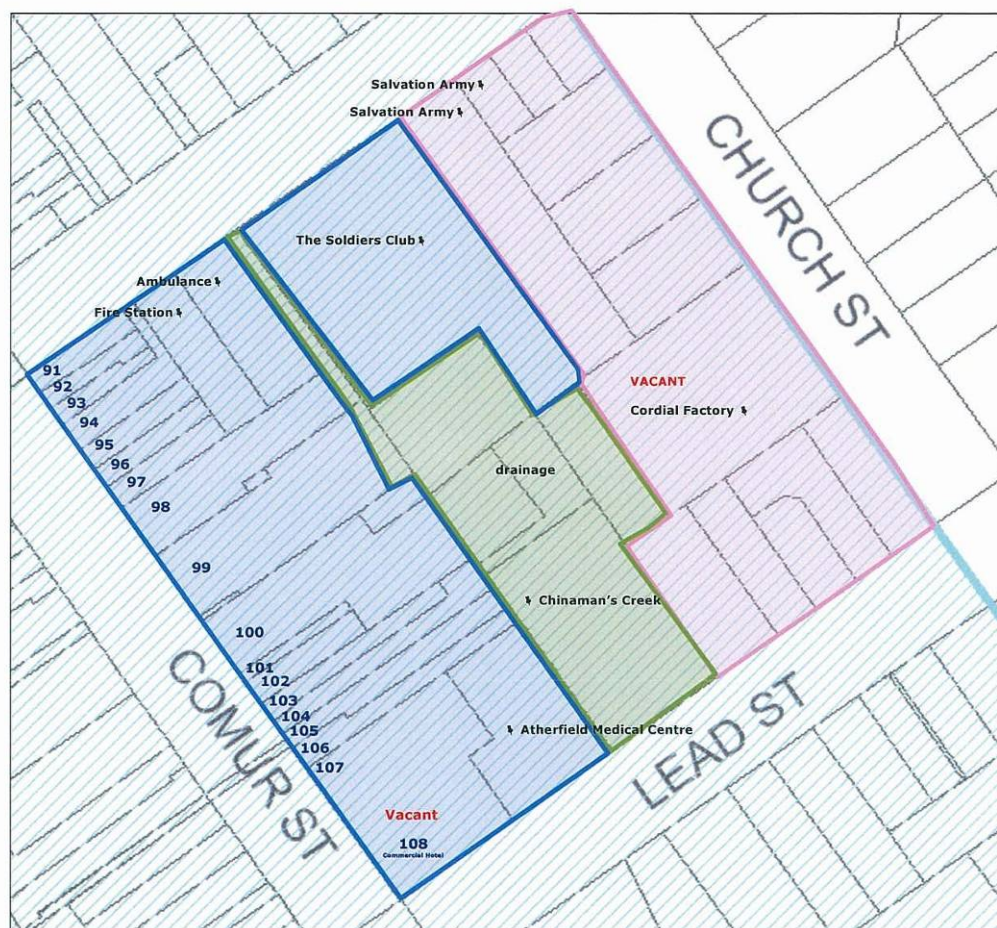
Precinct 8 – South East Yass



* Asterisk denotes nonconforming land use

Ref	Street	Land Use	Comment	Code
71	Comur Street	Delta Agribusiness	Includes former Mobile service station	Commercial
72	Comur Street	dwelling	residential at street level	Residential
73	Comur Street	dwelling	Residential at street level	Residential
74	Comur Street	Vacant	56 Comur Street	Vacant
75	Comur Street	Chinese Restaurant		Food
76	Comur Street	Community Street Café		Community / Food
77	Comur Street	Dry Cleaners		Commercial
78	Comur Street	Offices	64-66 Comur Street	Offices
79	Comur Street	B&G Hardware and Paint		Retail
80	Comur Street	Department of Community Services		Community / Government
81	Comur Street	Allambee House	Ladies Club (76 Comur)	Public assembly
82	Comur Street	Residence	76a Comur	residential
83	Comur Street	Community Employment		Community
84	Comur Street	Elders Real Estate	(moving to new location)	Commercial
85	Comur Street	Soldiers Memorial Hall / Lead Employment / Library		Entertainment / Community
86	Comur Street	NRMA		Commercial
87	Comur Street	Retravision / Westpac and St George ATM's		Retail
88	Comur Street	Soul Pattinson Chemist		Retail
89	Comur Street	Anthony Rose Gallery		Retail
90	Comur Street	Newspower Newsagency		Retail

Precinct 9 – South East Yass

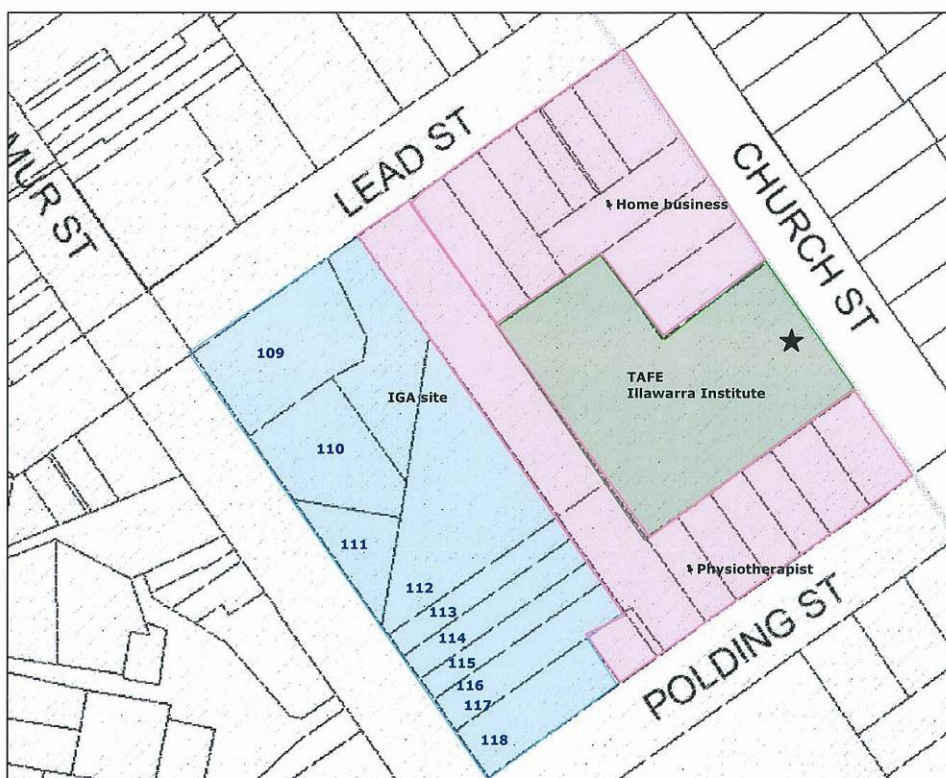


* Asterisk denotes nonconforming land use

YASS COMMERCIAL LAND USE SURVEY JANUARY 2010

Ref	Street	Land Use	Comment	Code
91	Comur Street	Millers Pharmacy		Retail
92	Comur Street	India Hicks Body & Home Collections	(Comur House) Giftware / soft furnishings	Retail
93	Comur Street	The Abbey Footwear	Shoe shop	Retail
94	Comur Street	Erlington Boradman and Allport Lawyers		Office
95	Comur Street	DJ's Butchery		Retail
96	Comur Street	Sportfirst Sports Store		Retail
97	Comur Street	Club Polo Clothing		Retail
98	Comur Street	Womens Fashion		Retail
99	Comur Street	Target		Retail
100	Comur Street	Vacant (new Elders Real Estate)		Commercial
101	Comur Street	GoLo		Retail
102	Comur Street	Australian Hotel		Entertainment
103	Comur Street	Yass Outdoor Sports & Camping		Retail
104	Comur Street	Charcoal Chicken		Food
105	Comur Street	Lien's Vietnamese Restaurant		Food
106	Comur Street	Technique Hair & Beauty		Retail
107	Comur Street	Bob Roger Clothing	Male fashion	Retail
108	Comur Street	Vacant	Commercial Hotel	Vacant

Precinct 10 – South East Yass

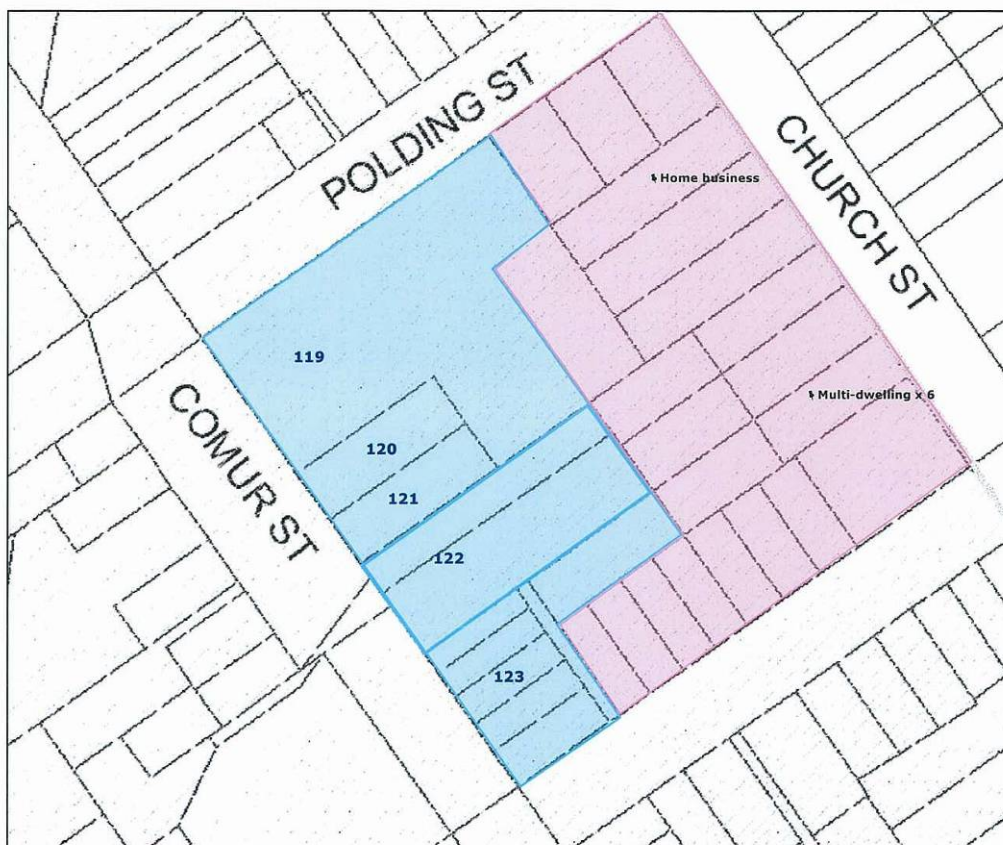


★ Star denotes nonconforming land use

YASS COMMERCIAL LAND USE SURVEY JANUARY 2010

Ref	Street	Land Use	Comment	Code
109	Comur Street	Club House Hotel		Entertainment
110	Comur Street	Jewellery Shop		Retail
111	Comur Street	Shoe Repairs		Retail
112	Comur Street	Petite & Belle		Retail
113	Comur Street	Centrelink		Government
114	Comur Street	Yass Real Estate		Commercial
115	Comur Street	Caltex Service Station (Woolworths)		Fuel
116	Comur Street	Yass Outdoor Power Centre		Retail
117	Comur Street	Chic Monkei		Retail
118	Comur Street	AutoPro Automotive + Telstra		Retail / Commercial

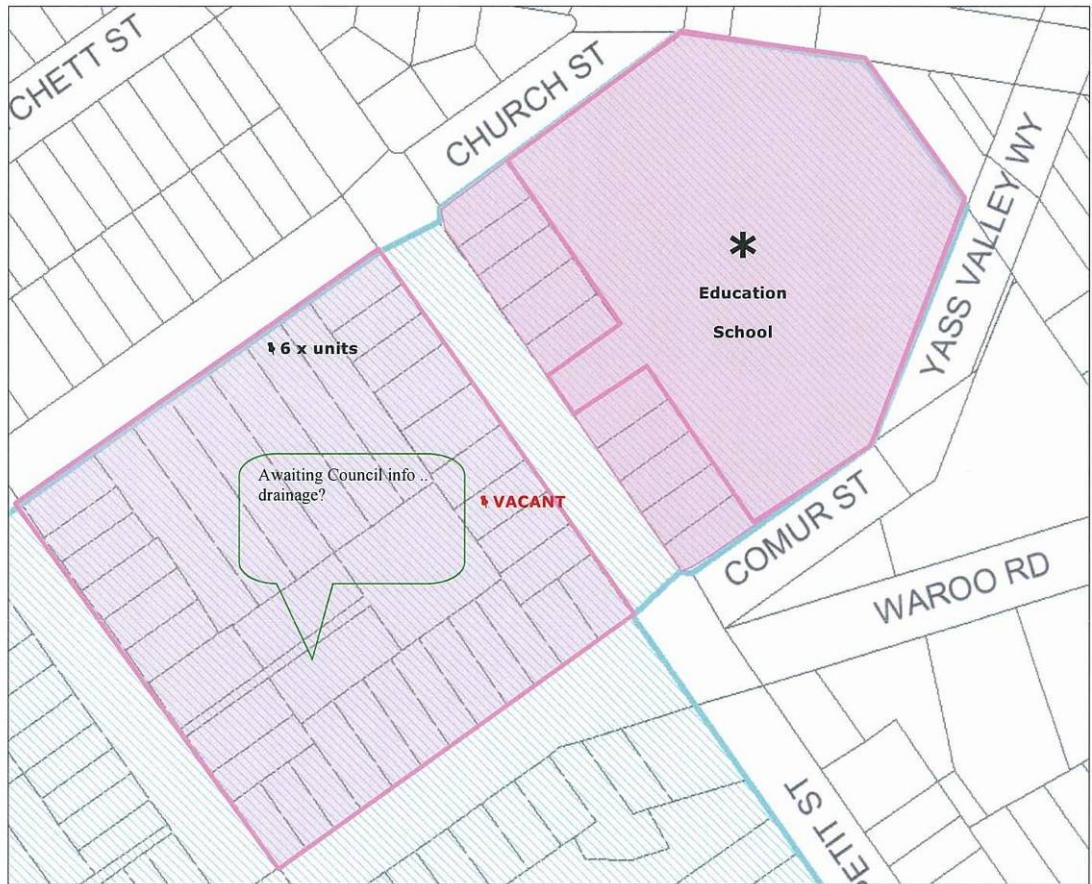
Precinct 11 – South East Yass



YASS COMMERCIAL LAND USE SURVEY JANUARY 2010

Ref	Street	Land Use	Comment	Code
119	Comur Street	Woolworths Supermarket		Food
120	Comur Street	Furnishings		Retail
121	Comur Street	Australia House		Accommodation
122	Comur Street	Motel		Accommodation
123	Comur Street	Toyota Dealership		Retail

Precinct 12 – South East Yass



* Asterisk denotes nonconforming land use

14 Appendix B – Employment

Yass LGA Resident Employment 1996 to 2006

Figure 12. Yass LGA Resident Employment (1996-2006)

Industry of Employment	1996	2006	96-06	% of Total
Agriculture, forestry & fishing	702	720	18	10.7%
Mining	10	7	-3	0.1%
Manufacturing	156	242	86	3.6%
Electricity, gas, water & waste services	107	127	21	1.9%
Construction	283	631	348	9.3%
Wholesale trade	143	156	12	2.3%
Retail trade	424	644	220	9.5%
Accommodation & food services	326	475	149	7.0%
Transport, postal & warehousing	202	230	28	3.4%
Information media & telecommunications	149	111	-38	1.6%
Financial & insurance services	87	98	11	1.5%
Rental, hiring & real estate services	68	96	29	1.4%
Professional, scientific & technical services	261	546	284	8.1%
Administrative & support services	78	138	61	2.1%
Public administration & safety	565	1,108	542	16.4%
Education & training	319	512	193	7.6%
Health care & social assistance	336	632	296	9.4%
Arts & recreation services	51	72	21	1.1%
Other services	188	208	20	3.1%
Total	4,453	6,752	2,299	100.0%

Source: ABS Census of Population and Housing (1996 to 2006)

Yass LGA Local Jobs 2006

Figure 13. Yass LGA Local Jobs (2006)

Industry of Employment LGA	2006	% of Total
Agriculture, forestry & fishing	708	20%
Mining	0	0%
Manufacturing	129	4%
Electricity, gas, water & waste services	95	3%
Construction	299	8%
Wholesale trade	73	2%
Retail trade	426	12%
Accommodation & food services	434	12%
Transport, postal & warehousing	118	3%
Information media & telecommunications	15	0%
Financial & insurance services	41	1%
Rental, hiring & real estate services	59	2%
Professional, scientific & technical services	172	5%
Administrative & support services	61	2%
Public administration & safety	205	6%
Education & training	269	8%
Health care & social assistance	305	9%
Arts & recreation services	26	1%
Other services	112	3%
Total	3,548	100%

Source: ABS Census of Population and Housing (2006)