

Lennox Head

Implications and Opportunities to UMR Quantitative Survey

DRAFT

Dated 27th March 2007

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TABLE OF CONTENTS

<u>1</u>	<u>EXECUTIVE SUMMARY.....</u>	<u>1</u>
<u>2</u>	<u>INTRODUCTION.....</u>	<u>6</u>
<u>3</u>	<u>COMMUNITY VIEWS: LENNOX HEAD VS PACIFIC PINES.....</u>	<u>7</u>
<u>4</u>	<u>TRANSPORT AND TRAFFIC.....</u>	<u>10</u>
<u>5</u>	<u>RETAIL AND COMMERCIAL.....</u>	<u>12</u>
<u>6</u>	<u>RESIDENTIAL PRODUCT MIX.....</u>	<u>15</u>

1 EXECUTIVE SUMMARY

PUBLIC PERCEPTIONS AND COMMUNITY OUTCOMES

- Key outcome is the significant difference in perceptions and issues when asked about Lennox Head and the Pacific Pines Estate.
 - It indicates that residents see the 'Lennox Village' as a completely different entity to the Pacific Pine / north creek area, with the vast majority of views held for Lennox Head, being very different for the Pacific Pines subject area.
 - Highest level of dissatisfaction with the existing availability of aged care and seniors housing, with levels increasing significantly with those aged 50+ and those long-term residents who had lived in Lennox for more than 10 years.
 - Car parking in the village is an issue
 - Low overall satisfaction levels with community activities, bus services and sporting facilities.
 - In terms of sporting facilities, the key user cohort (families with kids) had the highest level of dissatisfaction at 1 in 3.
 - In terms of community activities and the arts, the less than 50's age cohort had significant above average levels of dissatisfaction.
 - In terms of educational facilities in general (primary/high) – overall satisfied – with the key user group (families with kids) being most satisfied. Dissatisfaction levels (1 in 5) were higher in regards to a high school.
 - In terms of childcare, while the majority overall were satisfied, there was some levels of dissatisfaction (15%) from those families with children.
 - The majority of persons, approximately 50% disagree that Lennox Head needs a new primary school. Interestingly a high percentage of people were unsure. Opinions were less definitive in regards to a high school.
 - The highest level of agreement was with the view that Lennox was in danger of losing its village character and strong community spirit.
 - Parking in the village was again identified as an issues, as was traffic congestion on the coast road seen as an increasing problem.
 - Opinions on the rate of growth were divided. Long-term residents had a stronger view that it was too fast, while more recent arrivals (0-5yrs) saw the rate of growth as about right.
 - Differences in length of residency in general saw considerable variability in perceptions – specifically in regards to Village character and growth.
 - The majority (69%) agreed that there were not enough jobs in the area – this level was considerably higher for those renting.
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- Highest levels of support for community outcomes on the Pacific Pines Land – including parkland and open space, walkways, cycle ways and a sporting complex.
- Other highly supported community uses, included a community hall, child care centre and a centre for artistic activities.

OPPORTUNITIES

- ***Create a neighborhood activity centre that is both differentiated and at the same time supports the Village Character of Lennox.***
- ***Satisfy considerable public demand and frustration through the completion and support of the sports field/complex development.***
- ***Leverage considerable development support – through delivery of usable open space, parkland, walkways and cycle ways.***
- ***Develop community hall and support community building with additional identified uses such as a centre for artistic activities and adult education.***

TRANSPORT OUTCOMES

- 24% of persons work in Ballina, 16% work locally in Lennox and 27% are not in paid work.
- Current modal split of 83:17 – with only 2% using public transport.
- Strong levels of dissatisfaction with the current bus service provision.
- 60% traveling to Ballina every 2 days or more – with 24% traveling daily, which is consistent with the JTW data.
- As a minimum – over 10,000 trips per week – equates to over half a million trips per annum.
- At 12km both ways – trips to Ballina alone are resulting in excess of 250,000km traveled per week and over 13 million kilometers annually.
- High degree of car dependence, in addition to a high requirement for trips to Ballina – results in significant additional car usage and kilometers traveled.

OPPORTUNITIES

- ***Reduce requirement to travel to Ballina, through the provision of increased jobs and services locally.***
- ***Increases public transport provision and service levels to support modal split shifts.***
- ***Investigate road network options to alleviate growing pressure on the dual carriage coastal road.***
- ***Increase walk ability and reduce vehicle emissions through effective design and town planning of future growth. A reduction of just 1 trip to Ballina per week for each household will save approximately 1,000 tonne of CO2 emissions per annum.***

RETAIL AND COMMERCIAL OUTCOMES

- Significant levels of escape expenditure across all retail categories. 94% of all households do their major food and grocery shop in Ballina. This level is to be expected given the existing provision in Lennox, which is limited to a small (400sqm) IGA. It also indicates that the role currently provided by the Lennox Village is one of a convenience nature, small top-up shops and servicing the needs of visitors and tourists.
- Of those people who do the main grocery shop locally in Lennox, those renting represent the highest proportion. This is in-line with journey-to-work statistics, which suggests a higher proportion of renters, also work locally.
- In terms of household items, shopping destination is more widespread, with the majority still preferring to shop in Ballina (83%), 7% shopping in Lismore and another 7% elsewhere altogether. Currently none of this expenditure is captured in Lennox because no higher order retailing is provided.
- Lennox captures some clothing and accessories retailing (4%), given that it does have a surf shop and a couple of clothing boutiques. 73% of clothing and accessory shopping is undertaken in Ballina.
- This high level of escape expenditure is consistent with the frequency of trip data to Ballina, and in addition to journey-to-work reasons is a major contributor to local traffic generation.
- Only 30% of residents supported the view that "Lennox needs a large supermarket" – while 68% supported the idea of a supermarket on the Pacific Pines Estate. From this it is clear that residents support the idea of a supermarket locally (ie on a site like Pacific Pines), they do not however support a supermarket in Lennox where it will risk to the existing village character.
- Other key commercial uses that received public support on the Pacific Pines land included a child care centre, tavern and adult education facility. In terms of the child care centre, 89% of all people said its inclusion was a good idea, even higher for the key target market - families with kids (94%)

OPPORTUNITIES

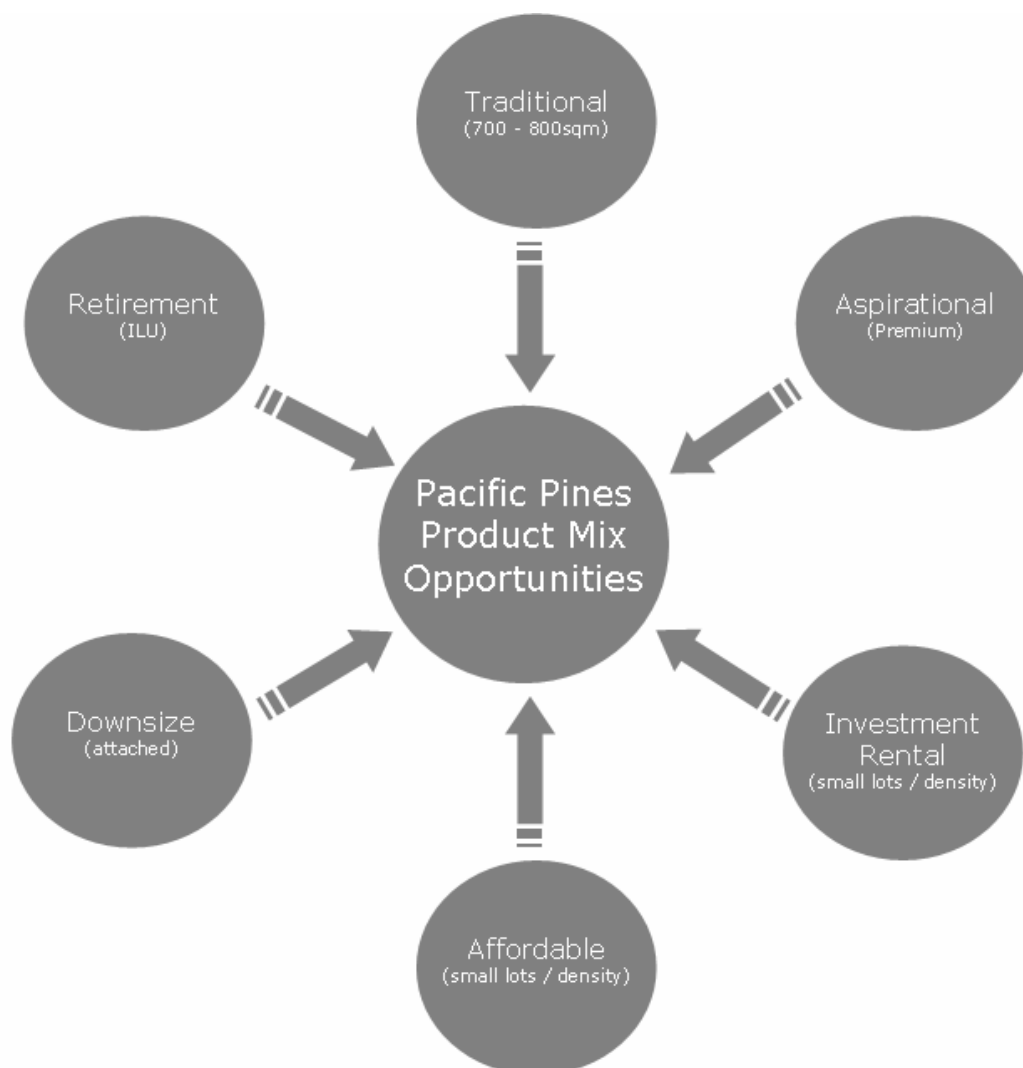
- ***Increase accessibility and walkability to key services for an ageing population and those reliant on public transport.***
- ***Support the existing convenience nature and character of the Lennox Village – by providing a supermarket at Pacific Pines and ensuring car parking pressure does not increase and the retailing dynamic does not change within the village itself.***
- ***Provide some associated complimentary retailing and services that fit within the wider retailing hierarchy and retail expenditure that currently went elsewhere.***
- ***Fill the current gap in child care provision***
- ***Support the public view that more job opportunities are required in the area with appropriate retail investment – delivering key youth employment opportunities and projects for the trade and construction industry***

RESIDENTIAL PRODUCT MIX OUTCOMES

- Overall the current Lennox Head dwellings mix is 74% separate house, 19% attached housing (duplex/townhouse) and 5% flats, units and apartments.
- In terms of the existing dwelling mix, it is evidenced that the more recent arrivals (0-5 years) have been catered for in smaller dwellings such as attached houses and flats units and apartments.
- On the other-hand the preference and take-up of 2-storey homes has declined.
- The key trend is that dwelling preferences and take-up are changing – affordability, smaller household sizes and lifestyle considerations are seeing an increasing number of persons choosing smaller / higher density dwelling options.
- 1 in 5 households are considering moving in the next 1 to 2 years. The majority (70%) of which are looking to remain in the FNC.
- Of those looking to move, the overall dwelling preference mix is for 67% separate house, 9% attached and 17% flat, unit or apartment.
- Of those looking to move locally (Lennox/Ballina), the overall dwelling preference mix is for 58% separate house (with a higher 2-storey preference), 19% attached and 9% flat, unit or apartment.
- In terms of future dwellings preferences of those Lennox residents looking to move, it is notable that dwellings requirements differ significantly with age. With those 50+ looking for smaller attached product – while those under 50 preferring the traditional single storey separate house.
- The key message is to understand different dwellings for different demographics. This is considerably important for Lennox, where an ageing population will see considerable pressure on dwelling construction as an ageing population seeks to downsize.
- In terms of the Pacific Pines estate, a diverse range of housing types and styles, including housing specifically for the aged were the most supported outcomes.
- This is consistent with the overall net dissatisfaction towards the provision of aged care and retirement housing in Lennox and the very high levels of support (83% of all respondents) for accommodation specifically designed for older people.
- Smaller more affordable product and villa and courtyards homes were all seen as favorable to the Pacific Pines offer.
- Larger more expensive homes and low rise apartments, while seen as favorable by many – were outweighed by a majority who viewed them as a less favorable outcome for the development.
- Opinions were particularly strong against low rise apartments, where 31% of all respondents stated they would be 'a lot less favorable' towards the development proposal.
- In terms of Lennox overall, opinions were divided in terms of whether additional carefully planned medium density was needed.

OPPORTUNITIES

- *Provide critical mass of traditional product lot size, aimed at meeting the bulk of local demand.*
- *In addition, provide a mix of dwelling types and sizes, to capitalise on changing dwelling needs and preferences.*
- *Provide a dedicated retirement housing offer for the aged*
- *Meet market demand for smaller product and increased density with location appropriate development.*
- *An diagrammatic overview of product mix opportunities for the Pacific Pines Estate is illustrated below:*



2 INTRODUCTION

The following report provides a condensation and graphical representation of the market research undertaken by UMR over the period 10th March 2007 till 13th March 2007.

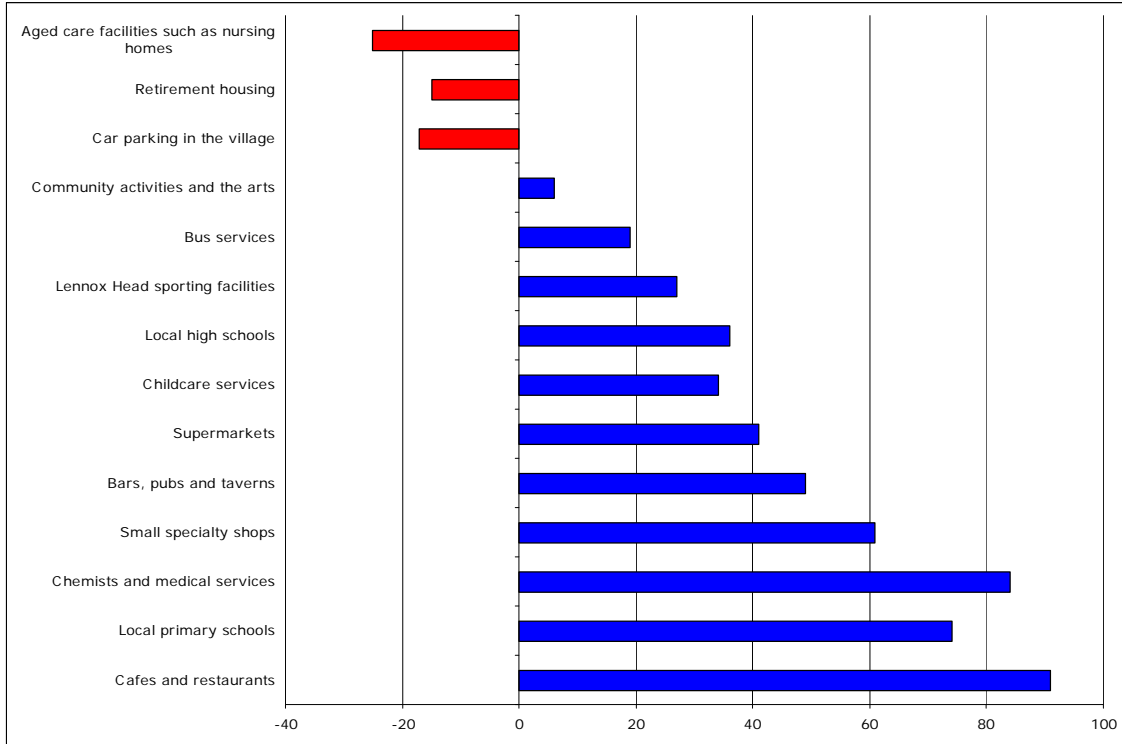
The results represent responses from 300 respondents within Lennox Head – approximately 10% of all households. The sample was both geographically and demographically stratified and given its size results in extremely low relative standard error.

That is, the results are statistically valid and can be relied upon as an accurate representation of Lennox community views.

The report has been broken down into key areas of interest, with significant outcomes to inform both the design and development process.

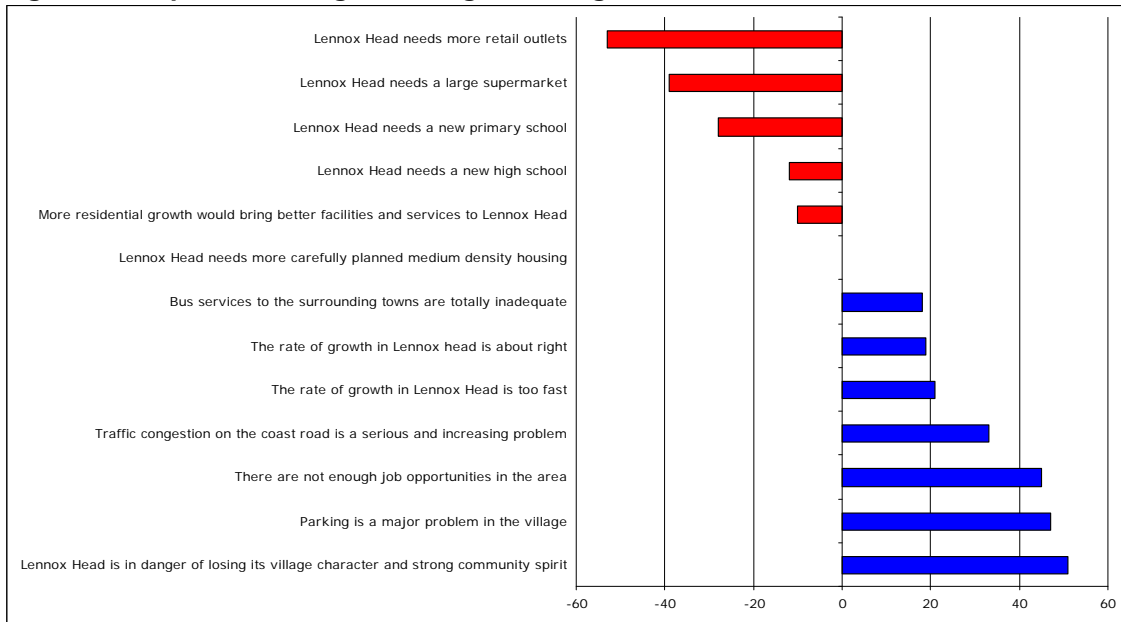
3 COMMUNITY VIEWS: LENNOX HEAD VS PACIFIC PINES

Figure 1: Service and Amenity Net Satisfaction – Lennox Head



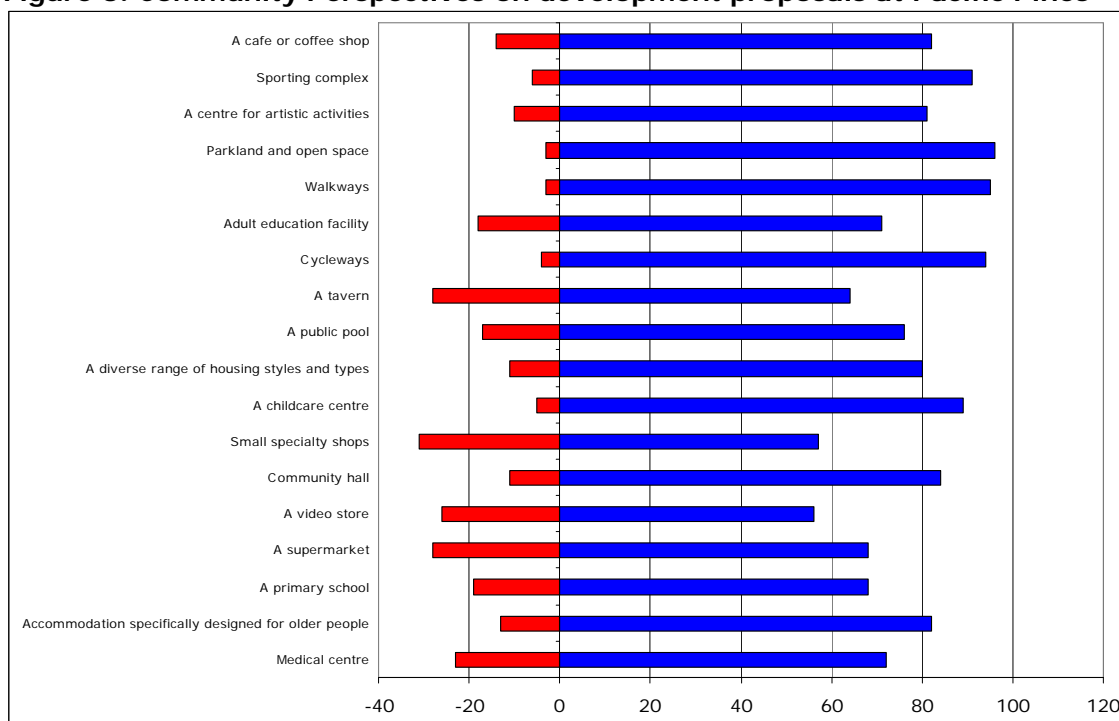
- Highest level of dissatisfaction with the existing availability of aged care and seniors housing, with levels increasing significantly with those aged 50+ and those long-term residents who had lived in Lennox for more than 10 years.
- Car parking in the village an issue
- Low overall satisfaction levels with community activities, bus services and sporting facilities.
- In terms of sporting facilities, the key user cohort (families with kids) had the highest level of dissatisfaction at 1 in 3.
- In terms of community activities and the arts, the less than 50's age cohort had significant above average levels of dissatisfaction.
- In terms of educational facilities in general (primary/high) – overall satisfied – with the key user group (families with kids) being most satisfied. Dissatisfaction levels (1 in 5) were higher in regards to a high school.
- In terms of childcare, while the majority overall were satisfied, there was some levels of dissatisfaction (15%) from those families with children.

Figure 2: Topical Message Testing – Net Agreement: Lennox Head



- 75% disagree that Lennox Head needs more retail outlets, as opposed to the 1 in 4 that agree.
- 69% disagree that Lennox Head needs a large supermarket, as opposed to the 30% who do.
- In both cases regarding retail – the more recent the arrival to Lennox, the higher the level of perceived need for new retail and visa versa.
- The majority of persons, approximately 50% disagree that Lennox Head needs a new primary school. Interestingly a high percentage of people were unsure. Opinions were less definitive in regards to a high school.
- Opinions were divided in terms of whether Lennox Head needed additional carefully planned medium density.
- The highest level of agreement was with the view that Lennox was in danger of losing its village character and strong community spirit.
- Parking in the village was again identified as an issues, as was traffic congestion on the coast road seen as an increasing problem.
- Opinions on the rate of growth were divided. Long-term residents had a stronger view that it was too fast, while more recent arrivals (0-5yrs) saw the rate of growth as about right.
- Differences in length of residency in general saw considerable variability in perceptions – specifically in regards to Village character and growth.
- The majority (69%) agreed that there were not enough jobs in the area – this level was considerably higher for those renting.

Figure 3: Community Perspectives on development proposals at Pacific Pines



- Highest levels of support for community outcomes on the Pacific Pines Land – including parkland and open space, walkways, cycle ways and a sporting complex.
- Other highly supported community uses, included a community hall, child care centre and a centre for artistic activities.
- In terms of residential product – 82% of respondents thought that accommodation specifically designed for older people was a good idea – and 80% supported a diverse range of housing styles and types.
- In terms of retail and commercial outcomes – more than 2 out of 3 people supported a supermarket as part of the Pacific Pines proposal – while only 7% thought it a very bad idea.
- Other strongly supported commercial uses included medial centre and café/coffee shop.
- The highest level of opposition was to small specialty shops – while the majority were in favour, some 31% thought they would be a bad idea.

4 TRANSPORT AND TRAFFIC

Figure 4: Journey-To-Work

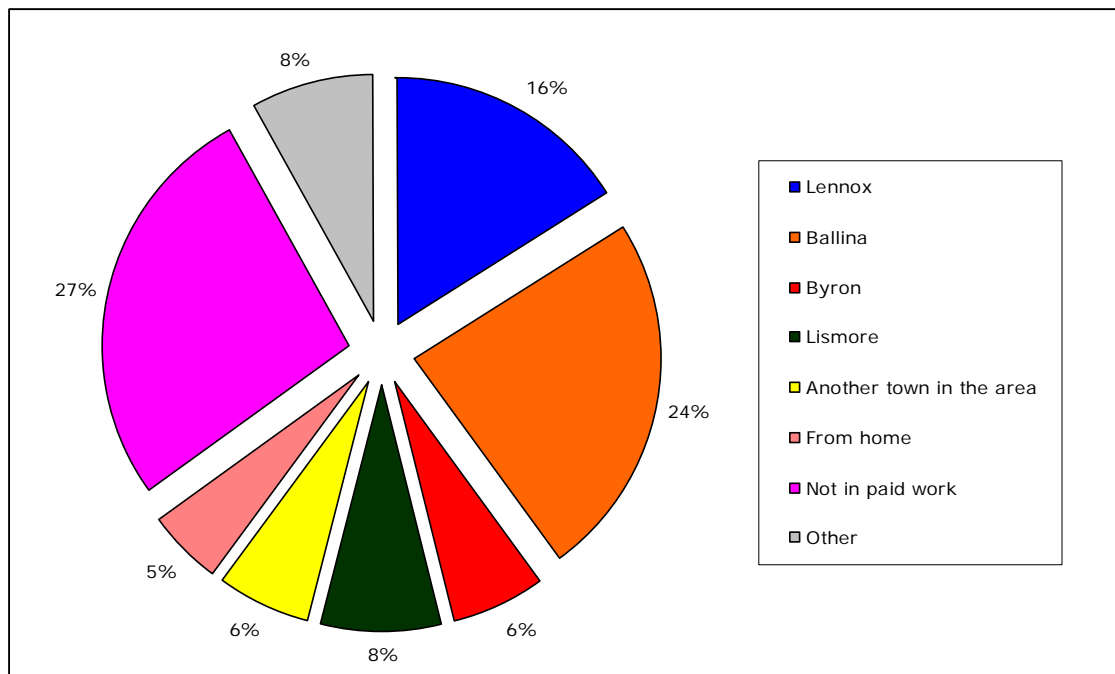
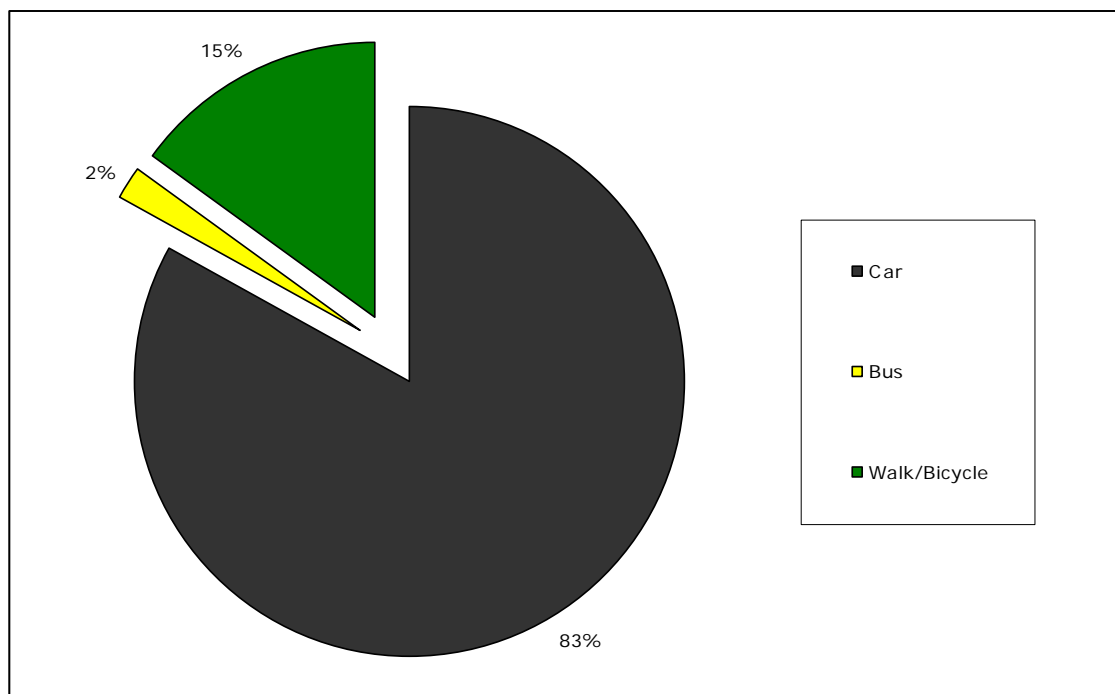
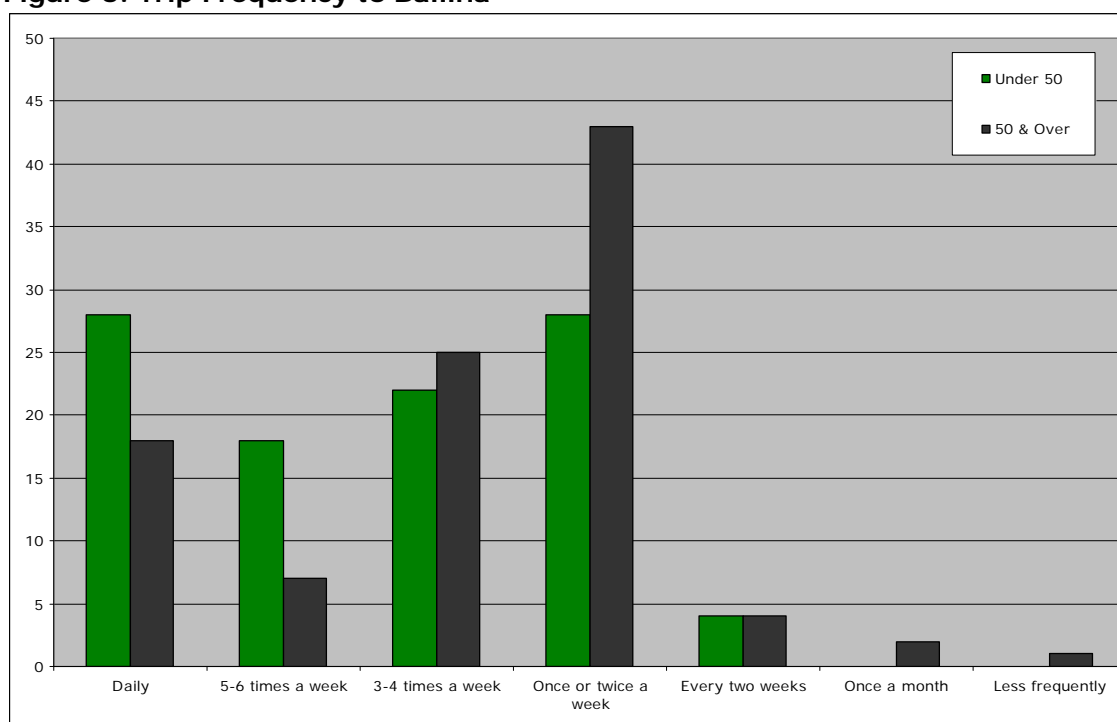


Figure 5: Modal Split



- While 27% of respondents were not in paid work – the majority that were, worked in Ballina (24%) and Lennox (16%).
- Interestingly, those that work in Lennox have a higher proportion of persons aged under 50 and more likely to be renting.
- In terms of modal split, 83% of journey-to-work trips are taken by car – with only 2% using public transport (bus). Bus usage was highest with those people renting, than when compared to other tenure types.
- Despite the low public transport usage for work purposes (2%) – 46% stated that they were satisfied with the current bus service level, 27% unsatisfied and 27% unsure or neutral.
- In terms of services to surrounding towns – when asked to consider the statement that “Bus services to the surrounding towns are totally inadequate” – 51% agreed and 33% disagreed.
- In terms of other journey-to-work modes, 15% either walk or bike to work, which is in-line with the 16% who both live and work in Lennox Head.

Figure 6: Trip Frequency to Ballina



- 60% of persons travel to Ballina more than once every two days – with 24% traveling daily.
- Based on some 3,000 households – this equates to a minimum of 10,000 trips per week or over 500,000 trips per annum.
- 65% of all respondents agreed with the statement that “traffic congestion on the coast road is a serious and increasing problem”

5 RETAIL AND COMMERCIAL

Figure 7: Destination for main food and grocery shop

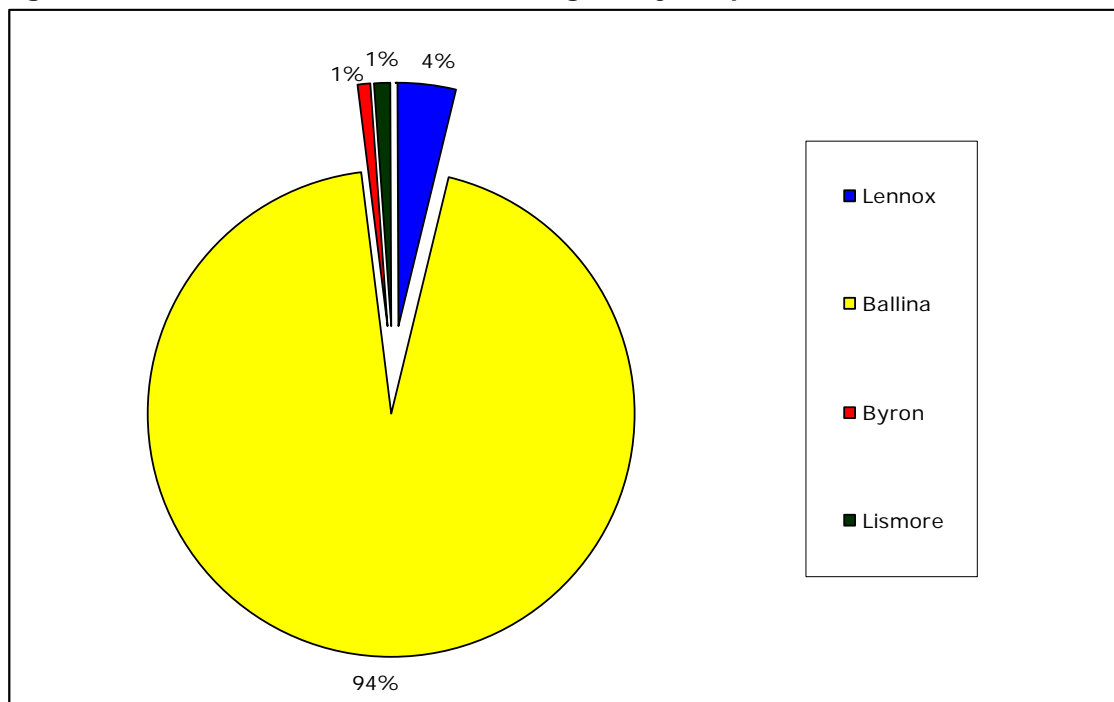


Figure 8: Destination for major household items (furniture / white goods)

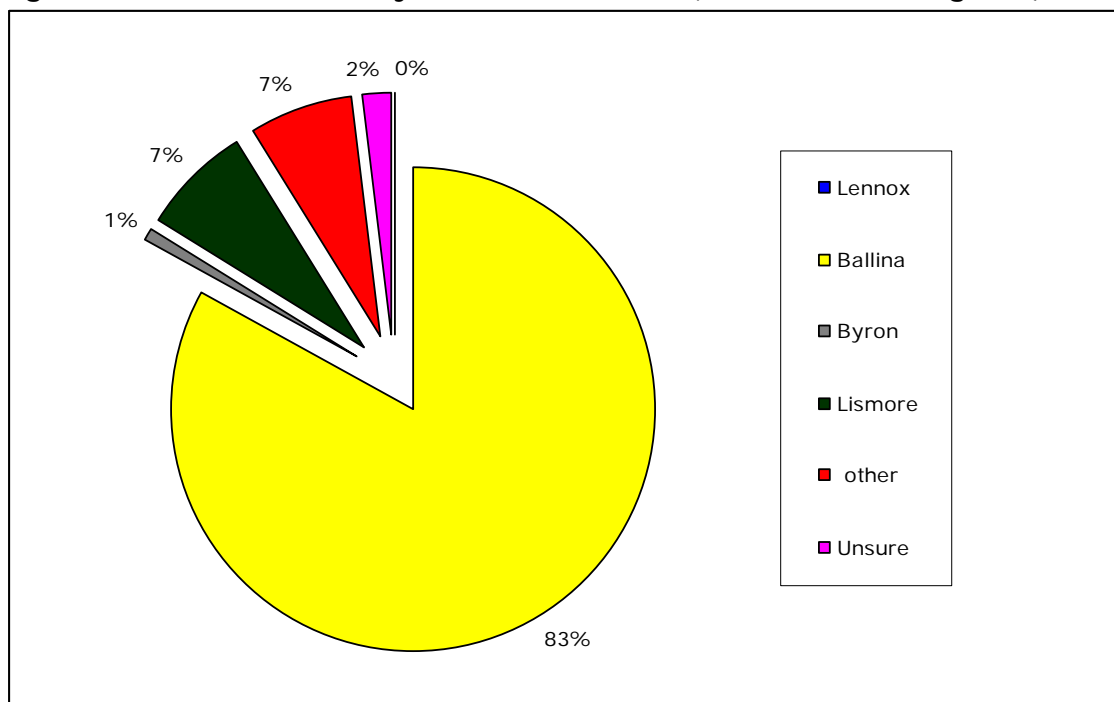
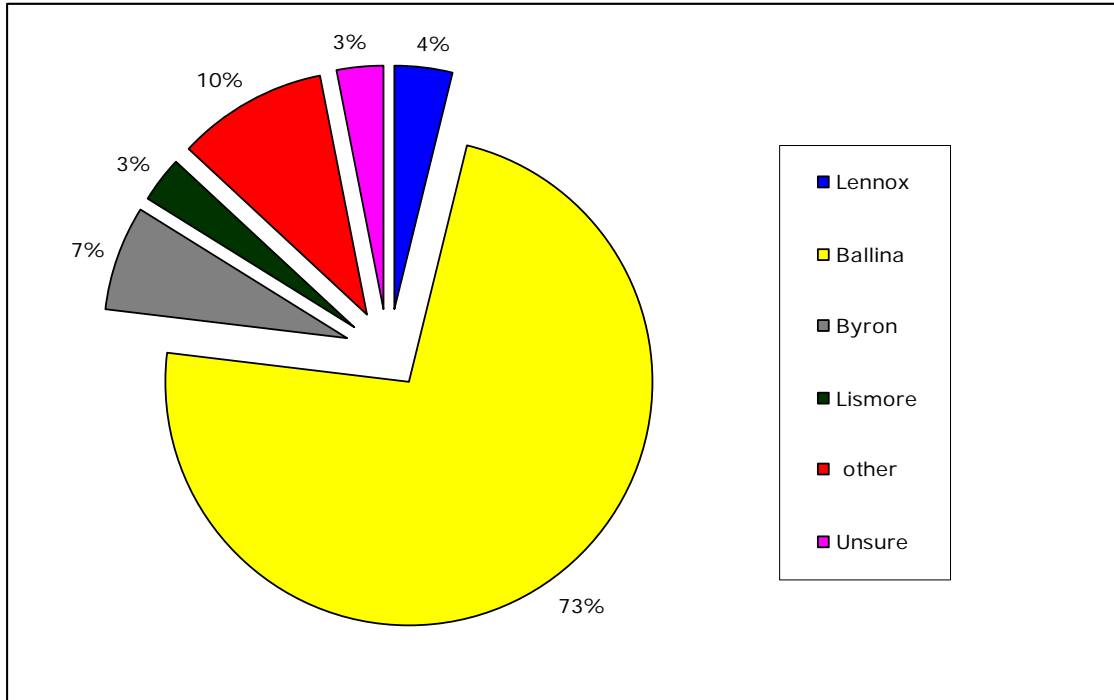
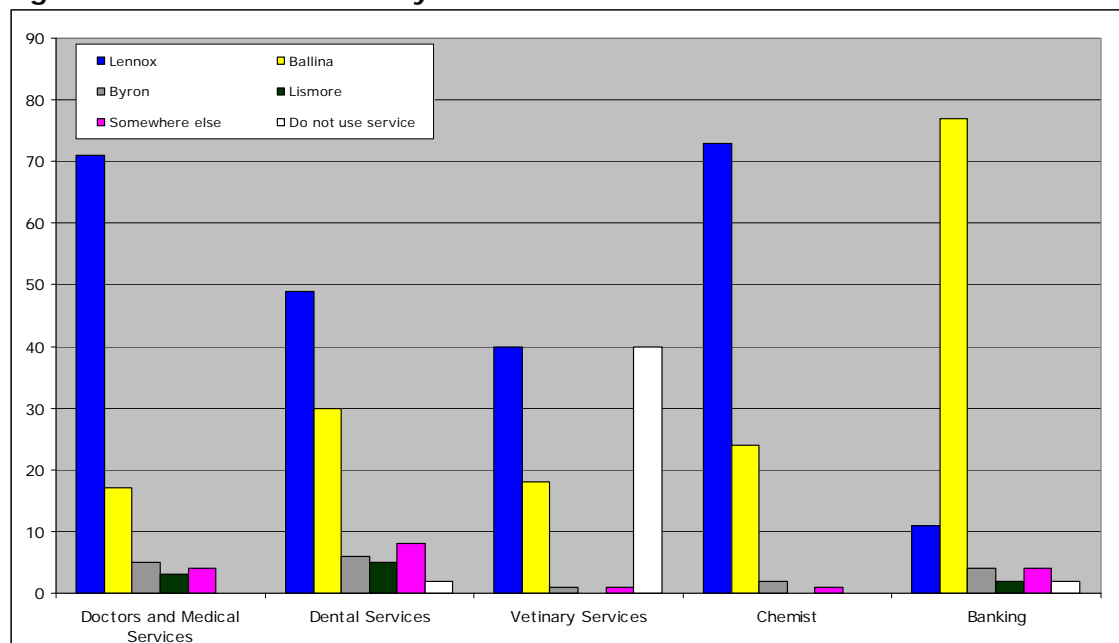


Figure 9: Destination for clothing and accessories shopping



- 94% of all main food and grocery shopping of Lennox residents is done in Ballina – this level is to be expected given the existing provision in Lennox, which is limited to a small (400sqm) IGA.
- It also indicates that the role currently provided by the Lennox Village is one of a convenience nature, small top-up shops and servicing the needs of visitors and tourists.
- This high level of escape expenditure is consistent with the frequency of trip data to Ballina, and in addition to journey-to-work reasons is a major contributor to traffic generation to Ballina.
- Of those people who do the main grocery shop locally in Lennox, those renting represent the highest proportion. This is in-line with journey-to-work statistics, which suggests a higher proportion of renters, also work locally.
- In terms of household items, shopping destination is more widespread, with the majority still preferring to shop in Ballina (83%), 7% shopping in Lismore and another 7% elsewhere altogether. Currently none of this expenditure is captured in Lennox because no higher order retailing is provided.
- Lennox captures some clothing and accessories retailing (4%), given that it does have a surf shop and a couple of clothing boutiques. 73% of clothing and accessory shopping is undertaken in Ballina.
- Only 30% of residents supported the view that " Lennox needs a large supermarket" – while 68% supported the idea of a supermarket on the Pacific Pines Estate.

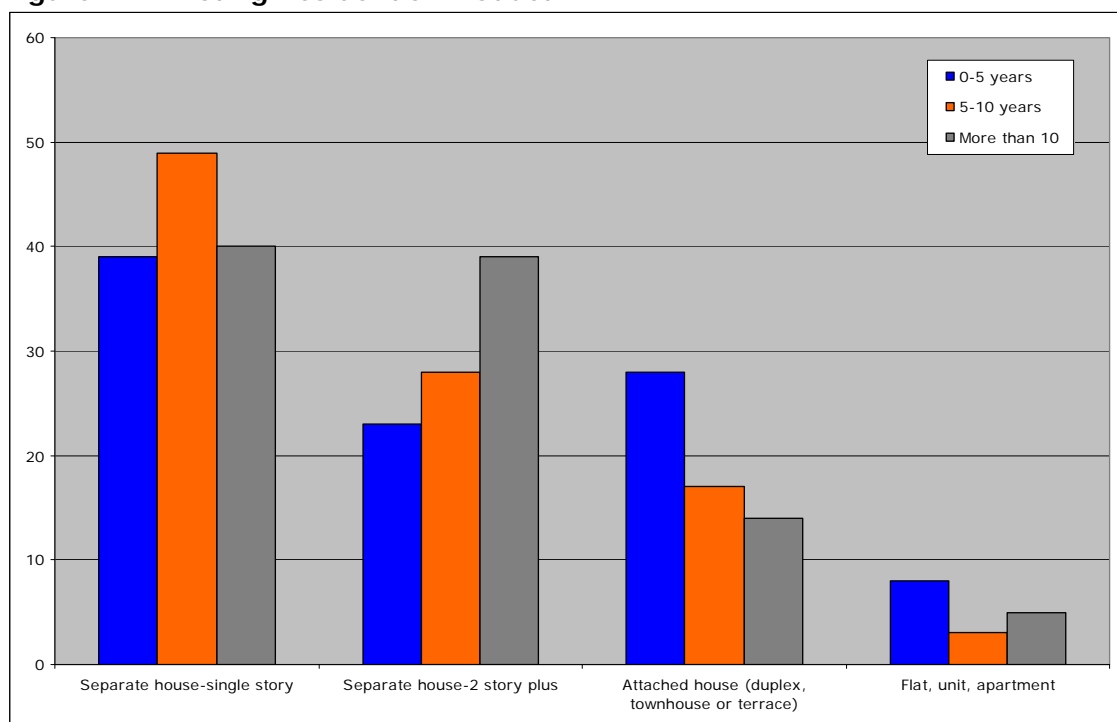
Figure 10: Destination for Key Services



- In terms of key services - 71% of residents use doctors and medical services located in Lennox Head – notably this level is considerably lower for males than females. 17% of respondents use medical services in Ballina.
- Similar percentages (73%) of respondents use the Lennox Head chemist for their pharmaceutical needs and another 24% in Ballina.
- This is consistent with the 88% of respondents who were satisfied with the current availability of medical services (inc. chemists) in Lennox. That said, 72% of residents indicated that a medical centre would be a good idea on the Pacific Pines Estate.
- Dental preference is more widespread, with only 49% using Lennox services and 30% traveling to Ballina.
- The largest service gap in Lennox evidenced from Figure 10 above is in terms of banking – with only 11% doing banking in Lennox and 77% using Ballina.
- Other key commercial uses that received public support on the Pacific Pines land included a child care centre, tavern and adult education facility. In terms of the child care centre, 89% of all people said its inclusion was a good idea, even higher for the key target market - families with kids (94%)

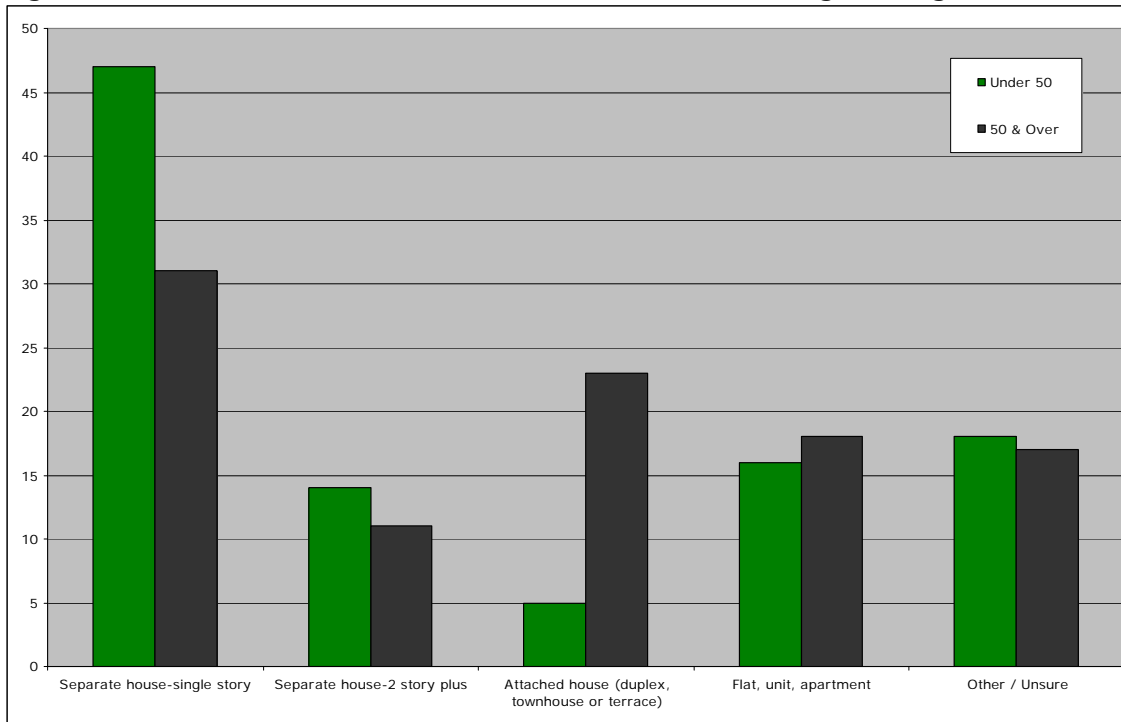
6 RESIDENTIAL PRODUCT MIX

Figure 11: Existing Residential Product Mix



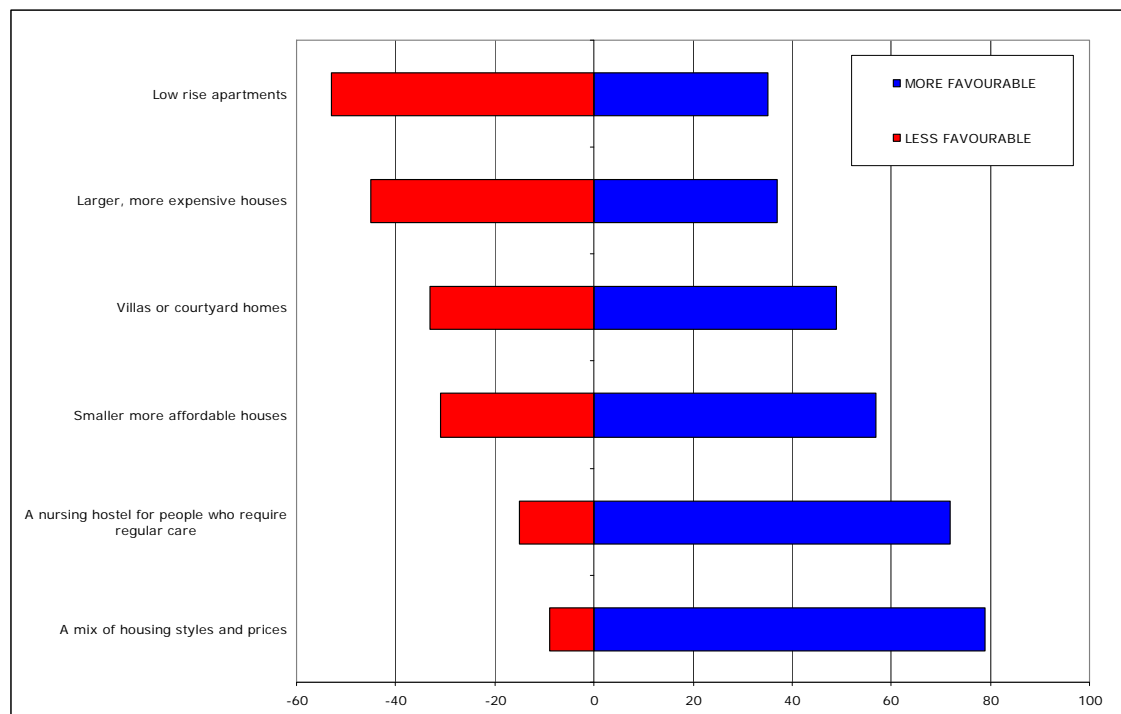
- Overall the current Lennox Head dwellings mix is 74% separate house, 19% attached housing (duplex/townhouse) and 5% flats, units and apartments.
- Figure 11 illustrates the Lennox Head existing dwelling mix by the length of residency
- It indicates that over time, more recent arrivals (0-5 years) have been catered for in smaller dwellings such as attached houses and flats units and apartments.
- On the other-hand the preference and take-up of 2-storey homes has declined.
- The key trend is that dwelling preferences and take-up are changing – affordability, smaller household sizes and lifestyle considerations are seeing an increasing number of persons choosing smaller / higher density dwelling options.

Figure 12: Future Product Preference (of those considering moving)



- 1 in 5 households are considering moving in the next 1 to 2 years, with the majority (70%) looking to remain in the FNC.
- Figure 12 illustrates the future dwellings preference of those Lennox residents looking to move.
- Of those looking to move, the overall dwelling preference mix is for 57% separate house, 9% attached and 17% flat, unit or apartment.
- Of those looking to move locally (Lennox/Ballina), the overall dwelling preference mix is for 58% separate house (with a higher 2-storey preference), 19% attached and 9% flat, unit or apartment.
- Notably, dwellings requirements differ significantly with age. Those 50+ looking for smaller attached product – while those under 50 preferring the traditional single storey separate house.
- The key message is to understand different dwellings for different demographics. This is considerably important for Lennox, where an ageing population will see considerable pressure on dwelling construction as an ageing population seeks to downsize.

Figure 13: Public Perceptions on Pacific Pines Product Mix



- In terms of the Pacific Pines estate, a diverse range of housing types and styles, including housing specifically for the aged were the most supported outcomes.
- 79% supported housing diversity for the Pacific Pines Estate and 72% supported a nursing hostel for people who require regular care.
- This is consistent with the overall net dissatisfaction towards the provision of aged care and retirement housing in Lennox and the very high levels of support (83% of all respondents) for accommodation specifically designed for older people.
- Smaller more affordable product and villa and courtyards homes were all seen as favorable to the Pacific Pines offer.
- Larger more expensive homes and low rise apartments, while seen as favorable by many – were outweighed by a majority who viewed them as a less favorable outcome for the development.
- Opinions were particularly strong against low rise apartments, where 31% of all respondents stated they would be 'a lot less favorable' towards the development proposal.