RETAIL CENTRES STRATEGY REVIEW
~
WYONG SHIRE

Prepared For:

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This Report has been prepared for Wyong Shire Council (Council) by Leyshon Consulting Pty Ltd. The Report presents the findings of a review of the existing Retail Strategy which applies to Wyong Local Government Area (LGA).

The last formal review of Council's Retail Strategy was undertaken in the mid-1990s. Following this, Council prepared Development Control Plan No 81 – Retail Centres (DCP81) to give statutory force to the 1996 review's recommendations.

Context *Section 2*

DCP81 is the principal statutory planning instrument governing retail development in Wyong. DCP81 performs three key functions namely:

- it defines a retail hierarchy (both existing and proposed)
- it establishes notional floorspace limits for various types of centres in the hierarchy
- it sets out "variation criteria" or tests which must be satisfied by applicants who wish to undertake retail development in nominated centres in Wyong.

Since 2002 there have been changes to major centres identified in DCP81. These have included:

- **Westfield Tuggerah**–the expansion of the centre to 81,416 sq.m.
- **Bateau Bay District Centre**–approved expansion of the centre to 30,046 sq.m.
- **Homemakers Supa Centa Tuggerah**–approved addition of 10,000 sq.m. of factory outlet space
- **Lake Haven District Centre**–approved additional bulky goods development of 21,000 sq.m..

Council also has agreed not to proceed with a planned neighbourhood centre at Doyalson and to develop a new neighbourhood centre at San Remo.

Mooted/Proposed Development

There are a number of proposed or mooted retail developments in Wyong including:

- **Warnervale**–The Minister for Planning has "called in" the planning for the Warnervale district centre

EXECUTIVE SUMMARY

Context *Cont'd*

- **San Remo**–a centre of some 5,800 sq.m. anchored by a supermarket of 3,200 sq.m. is under construction

- **Wadalba**–a new Coles supermarket of 1,500 sq.m. has opened

- **Gwandalan**–a new centre at Gwandalan is proposed and would be anchored by a supermarket of 2,110 sq.m. together with 800 sq.m. of specialty retailing

- **Budgewoi**–a new Coles supermarket of 2,475 sq.m. and a liquor shop of 150 sq.m. is under construction.

Non-Retail Floorspace Survey
A survey of non-retail floorspace in centres in Wyong revealed Westfield Tuggerah, Bateau Bay and Lake Haven contain a relatively limited range of non-retail services ranging from between 890 sq.m. at Bateau Bay to 5,488 sq.m. at Westfield Tuggerah.

By contrast, the district centres of Wyong, The Entrance and Toukley contain relatively large components of non-retail floorspace ranging between 6,440 sq.m. at The Entrance and 10,110 sq.m. at Wyong.

Regional Issues
Since the mid-1990s some significant changes in regional-level retailing have occurred with consequent flow-on effects for centres in Wyong. The most significant of these has been the recent expansion and upgrading of Erina Fair. Erina Fair now contains some 106,971 sq.m. and dominates retailing in Gosford LGA.

To the north of Wyong, a major centre opened at Glendale in 1996. Stockland Glendale today contains some 38,464 sq.m. but is currently undergoing further expansion.

Retailing and Centre Trends
Since the mid-1990s a number of trends in relation to business centres in general and retail centres in particular have emerged which are of relevance to the future planning of such centres in Wyong. Key trends include:

- the so-called New Urbanist Movement has become a major force within town planning circles

- regional-scale shopping centres have grown considerably larger throughout Australia. Whereas these centres previously contained 60,000 to 80,000 sq.m. of retail floorspace today there are a significant number of centres exceeding 100,000 sq.m.

EXECUTIVE SUMMARY

Context *Cont'd*

- the incidence of "double DDS" centres is growing. Examples of these centres include Park Beach Plaza Coffs Harbour, Stockland Shellharbour and Stockland Wetherill Park. These types of centres can contain up to 40,000 sq.m. of floorspace and achieve annual sales of up to $200 million

- department store retailing around the world has generally stalled in terms of sales growth. The decline in department stores is widely attributed to the rise of so-called "category killers" such as Harvey Norman, Rebel Sport, Sleeping Giant and the like

- strong growth in the number of supermarkets and the sophistication of their "offer". Supermarkets' positioning in the retail system also has been strengthened through the linking of supermarket spending to petrol discounts

- the impact on traditional retail channels of purchasing goods on-line has been much less than originally predicted.

Resident Survey

In April 2005 a survey of 619 residents of Wyong Shire was undertaken by consultants Hill PDA. The key findings of that survey were:

- food and grocery shopping is essentially localised–that is, residents patronise the nearest centre containing a major supermarket

- unsurprisingly, Tuggerah dominates clothes shopping in Wyong although significant "escape spending" in this sector flows to Erina particularly from Wyong's southern suburbs. In Northern Wyong the Lake Haven District Centre is the dominant destination for clothes shopping

- Tuggerah and Erina are the two dominant centres for furniture and electrical goods shopping.

Demand Assessment *Section 3*

Assessment of the future demand for retail floorspace has been made based on population projections for Wyong LGA prepared for Council in late 2005 by id Consulting Pty Ltd. These projections indicate Wyong's population will grow from 135,498 persons in 2001 to 220,141 by 2031–an increase of +84,643 persons.

EXECUTIVE SUMMARY

Demand Assessment *Cont'd*

The majority of the projected growth will occur in:

- Warnervale/Wadalba ... 39,573 persons
- The Entrance ... 14,405
- Wyong ... 9,925.

The id Consulting projections indicate a decline in the proportion of Wyong's population aged 0-49 years and significant growth in the proportion of the population aged 50+ years up to 2031.

Total available annual retail spending by residents is estimated at $1.13 billion in 2006 and forecast to increase to $2.14 billion by 2031–growth of approximately +$1.0 billion ($2005). Annual available spending growth during the forecast time-frame will be greatest in:

- Warnervale/Wadalba ... +$359.6 million
- The Entrance ... +$174.3
- Wyong ... +$115.8
- San Remo ... +$83.0.

Between 2006-31 theoretical demand for an additional 183,453 sq.m. of retail floorspace is forecast for Wyong LGA as a whole. Actual demand will be significantly less than this and probably in the range of 146,700 to 156,000 sq.m. due to "escape spending" of various forms.

Centre Options *Section 4*

The current distribution of retail spending by Wyong residents across the retail hierarchy is broadly estimated to be:

- regional centre ... 25.2%
- bulky goods ... 9.6%
- district centres ... 37.1%
- village/neighbourhood centres ... 6.5%
- escape spending ... 21.6%.

Wyong LGA essentially has a "top heavy" retail hierarchy–that is, fully 71.9% of total spending by Wyong residents is estimated to be captured by the Tuggerah Regional Centre and the five district centres.

EXECUTIVE SUMMARY

Centre Options *Cont'd*

The notional demand for additional retail floorspace by centre type between 2006-31 is as follows:

- regional centre ... +46,230 sq.m.
- bulky goods ... +34,595 sq.m.
- district centres ... +62,558 sq.m.
- village/neighbourhood ... +14,574 sq.m.
- **Total ... +157,957 sq.m..**

Northern Wyong

The theoretical demand for additional retail floorspace in Northern Wyong between 2006-31 is estimated at 89,784 sq.m. distributed broadly as follows:

- regional centre ... 28,152 sq.m.
- bulky goods ... 21,068 sq.m.
- district centres ... 38,082 sq.m.
- village/neighbourhood ... 8,831 sq.m.
- **Total ... 96,133 sq.m..**

Southern Wyong

The theoretical demand for additional retail floorspace in Southern Wyong between 2006-31 is estimated at 57,640 sq.m. distributed broadly as follows:

- regional centre ... 18,072 sq.m.
- bulky goods ... 13,526 sq.m.
- district centres ... 24,448 sq.m.
- village/neighbourhood ... 5,670 sq.m.
- **Total ... 61,716 sq.m..**

Supermarket Demand

While the supply of and demand for supermarkets is roughly in balance across Wyong LGA as a whole three social planning districts (SPDs) have localised shortfalls of supermarket floorspace namely:

- San Remo ... -1.5 supermarkets
- Northern Lakes ... -1.1
- Warnervale/Wadalba ... -1.0.

Apart from the additional supermarket being contemplated for The Entrance, there is no pressing need for another supermarket in Southern Wyong during the period 2006-31. In Northern Wyong, by contrast, demand already exists for a supermarket in Northern Lakes SPD. This will be addressed in part by the proposed supermarket at San Remo. A second supermarket will be required in Lake Munmorah and up to two further supermarkets in the Warnervale/Wadalba area by 2031.

EXECUTIVE SUMMARY

Centre Options *Cont'd*

Northern Wyong will support a second DDS after 2016. The preferred strategy is for a second DDS in Northern Wyong to be located at Warnervale. Assuming the addition of a DDS in Warnervale, by 2031, Wyong would have five DDSs serving 220,000 persons or a ratio of about one store for every 44,000 persons. This appears to be a sustainable level of provision of DDSs.

Recommended Strategy

An appropriate retail centre strategy for Northern Wyong for the period 2006-31 can be summarised as follows:

- expansion of the Warnervale centre from 15,000 sq.m. to 25,000 sq.m. via a second stage of 10,000 sq.m. between 2016 and 2021
- development of a new Village centre of 5,000 sq.m. at Lake Munmorah by 2011.
- expansion of Lake Haven by some 5,000 sq.m. but not before 2016
- provision for bulky goods space of some 20,000 sq.m. by 2031
- a second supermarket developed in Toukley after 2021
- expansion of the Lake Munmorah centre to some 10,000 sq.m. by about 2026
- a new Village centre developed in Wadalba East by 2031.

The major changes proposed for Southern Wyong are as follows:

- expansion of The Entrance by 8,000 sq.m. by 2011 with an allowance of up to an additional 10,000 sq.m. to take account of tourist spending
- addition of 5,000 sq.m. of bulky goods at Bateau Bay by 2011
- expansion of Long Jetty by 5,000 sq.m. by 2021
- new centre of 5,000 sq.m. at Ourimbah by 2026.

Regional Centre Demand

The further expansion of Westfield Tuggerah by some 55,000 sq.m. (retail) could be contemplated by 2031. This would mean Westfield Tuggerah comprises some 124,324 sq.m. of retail floorspace and, (depending on the future addition of non-retail floorspace functions), 145,000-155,000 sq.m. of space in total.

EXECUTIVE SUMMARY

Centre Options *Cont'd*

It is also recommended that 15,000 sq.m. of additional bulky goods retail space be added to the Tuggerah Regional Centre between 2011-26.

Non-Retail Floorspace Demand

A theoretical requirement is estimated to exist for an additional 227,565 sq.m. of office space in Wyong during the period 2001-31.

Other Issues *Section 5*

Centre Design

Council should seek improvements in the design quality of centres by introducing a design-based DCP to guide future retail development in Wyong LGA.

Evaluation of Development Applications

DCP81 lacks some precision with respect to its optimum floorspace controls. For example, it is not clear whether controls relate to total floorspace or just to retail floorspace.

Council should recast the current variation criteria or establish new evaluation "tests" which take into account:

- Fabcot principles
- net community benefit principles.

Fabcot principles require applicants to demonstrate that either there will be no loss of facilities currently enjoyed by the public as a result of a new development or that any such "losses" are made good by the proposed development.

Net community benefit is a new concept as far as economic evaluation is concerned. Its most significant requirements are that applicants demonstrate:

- a proposal meets an identified community need for a certain type of retailing
- a project will not lead to unacceptably high negative external effects
- a project is both economically and environmentally sustainable
- the range of facilities available to the public will be improved.

EXECUTIVE SUMMARY

Recommendations *Section 6*

The recommended timing and quantum of changes to Wyong's existing retail hierarchy are as follows:

- addition of a Village centre at San Remo
- addition of a Village centre at Lake Munmorah
- addition of a Village centre at Wadalba East
- upgrading of Long Jetty to Village centre status
- upgrading of Ourimbah to Village centre status.

The recommended retail floorspace additions to centres are as follows:

2006-11

- Warnervale Stage 1 ... 15,000 sq.m.
- San Remo ... 5,500 sq.m.
- Budgewoi expansion ... 2,500 sq.m.
- Lake Munmorah ... 5,000 sq.m.
- Wadalba Neighbourhood ... 1,500 sq.m.
- Lake Haven Bulky Goods ... 20,000 sq.m.
- The Entrance expansion ... 8,000 sq.m.
- Bay Village bulky goods ... 5,000 sq.m.

2011-16

- Wadalba East Village ... 5,000 sq.m.
- Westfield Tuggerah expansion ... 15,000 sq.m.
- Tuggerah bulky goods ... 10,000 sq.m.
- Northern Wyong bulky goods ... 5,000 sq.m.

2016-21

- Lake Haven expansion ... 5,000 sq.m.
- Warnervale Stage 2 ... 10,000 sq.m.
- Northern Wyong bulky goods ... 10,000 sq.m.
- Long Jetty expansion ... 5,000 sq.m.
- Westfield Tuggerah expansion ... 15,000 sq.m.

2021-26

- Toukley expansion ... 5,000 sq.m.
- Lake Munmorah expansion ... 5,000 sq.m.
- Northern Wyong bulky goods ... 5,000 sq.m.
- Westfield Tuggerah expansion ... 25,000 sq.m.
- Tuggerah bulky goods ... 5,000 sq.m.
- Wyong expansion ... 5,000 sq.m.
- Ourimbah centre ... 5,000 sq.m..

EXECUTIVE SUMMARY

Recommendations *Cont'd*

It is recommended DCP81 should contain a minimum provision for non-retail floorspace in new centres to ensure that:

- such floorspace is provided
- such floorspace is not converted to retail uses over time.

It is recommended DCP81 be amended to contain a provision requiring that 10% of the total floorspace of new centres developed in Wyong between 2006-31 be occupied by non-retail uses.

It is recommended DCP81 be amended to introduce specific evaluation criteria requiring applicants to demonstrate to Council's satisfaction that:

- development proposals will either not lead to the loss of existing services in nearby centres; or
- proposals will make good the loss of such services; and
- there is a positive net community benefit associated with a proposal.

It is recommended DCP81 be amended to include provisions specifying desirable design elements for new retail centres developed in Wyong LGA.

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1 INTRODUCTION

1.1 Background

This Report has been prepared for Wyong Shire Council (Council) by Leyshon Consulting Pty Ltd. The Report presents the findings of a review of the existing Retail Strategy which applies to Wyong Local Government Area (LGA).

The last formal review of Council's Retail Strategy was undertaken in the mid-1990s. Following this, Council prepared Development Control Plan No 81 – Retail Centres (DCP81) to give statutory force to the 1996 review's recommendations. DCP81 is now incorporated as Chapter 81 in Wyong Development Control Plan 2005. For ease of reference, the term DCP81 is used in this Report hereafter.

Since 1996 retail development in Wyong Shire has proceeded generally in accordance with the provisions of DCP81. As might be expected in a newly developing area, however, there are pressures in various parts of the Shire for additional retail development–some of which is not specifically addressed by DCP81.

In addition, ongoing change in the retail sector and customer demands have led to changes within the retail sector, not all of which were foreseen in the 1996 study that preceded DCP81.

The 1996 study (and DCP81) concentrate primarily on retail floorspace. In reality, however, centres are more than just aggregations of retail floorspace: they include commercial uses as well as a range of community facilities. As part of this study, Council has required centres to be examined in a more holistic manner and recommendations provided not only about what non-retail facilities could be included in centres but also advice on appropriate principles for the design of new centres and the redevelopment of existing centres to achieve more attractive and useable centres.

1.2 Study Objectives

The following objectives were established for the study:

- to build on the economic modelling and assessment work that has been undertaken for Council in recent times

- to review current and possible future trends in retailing, commercial development and centre support development and how they will impact on Wyong Shire into the future

- to identify the current and future demand for retail, commercial and centre support floorspace and its spatial distribution within Wyong Shire

- to review the 1996 Wyong Shire Retail Strategy, DCP81 – Retail Centres and the associated hierarchy of centres in Wyong

- to identify a point of difference for each centre and nominate the sort of facilities that could be provided in the future in response to the specific demographics of centres' trade areas

- to identify appropriate floorspace limits for each centre within the hierarchy based on its nominated position in the hierarchy and projected growth within its trade area and the nominated site area

- to identify guidelines and principles for "good retail development"

- to prepare a new planning framework to facilitate growth and which identifies the current and future roles of centres

- to assist Council staff in communicating the new framework to the elected representatives and the general public.

1.3 Study Tasks

To meet the objectives outlined above Leyshon Consulting has undertaken a significant number of study tasks. These tasks have been grouped under the following useful headings:

- **Collection of Baseline Data** – this has involved generating retail spending projections based on population forecasts provided by Council; reviewing existing studies and reports; reviewing past decisions made by Council and the Land and Environment Court affecting business centres in Wyong.

- **Regional Context** – this has involved reviewing the regional context of Wyong as far as business centres are concerned.

- **Review of Existing Shopping Patterns** – data obtained from a survey undertaken on Council's behalf by Hill PDA has been interrogated and its implications for the future development of centres in Wyong considered.

- **Review of Retail Hierarchy Performance** – this has included a survey of vacancy levels and major tenancy types in sub-regional, district and neighbourhood centres in Wyong Shire. The survey has included estimates of both "centre support" retail space and commercial floorspace in each of these centre types.

- **Analysis of Specific Retail Development Issues** – development trends and pressures associated with bulky goods retailing, highway convenience retailing, standalone supermarkets, trends in the development of major centres, trends in the operational characteristics of major retailers and changes in household expenditure patterns have all been reviewed.

- **New Employment Centres** – this has included taking account of pressures to create new employment centres, such as business parks in Northern Wyong, as well as proposals for new retail centres in Northern Wyong.

- **Review of Centre Design** – this has involved a literature review of good retail design principles and formulating guidelines for Council on centre design issues which could be incorporated into a new DCP.

- **Analysis of Future Requirements** – the likely demand for retail and commercial floorspace by planning district (and centre) to 2031 has been assessed.

- **Recommended Actions** – providing recommendations to Council regarding the long-term floorspace requirements of specific centres, draft retail policy amendments which may be required and a redrafting of DCP81 designed to ensure Council has an appropriate level of control over the development of centres and sufficient incentives in place to encourage appropriate redevelopment of existing centres.

This study has required Leyshon Consulting to undertake a significant component of regional field research. Reliance also has been placed on certain data collected by others. In this regard, data obtained from a survey conducted on Council's behalf by Hill PDA in 2005 has been utilised. The survey was conducted by telephone throughout Wyong Shire and obtained information on residents' existing shopping patterns.

Separate to this study, Council commissioned the preparation of detailed population forecasts by Social Planning District (SPD) for the period 2006-31. These forecasts (prepared by id Consulting Pty Ltd) have been adopted as a basis for the projection of future retail demand in Wyong LGA presented in this Report.

1.4 Centres Terminology

As a consequence of a decision by Council to partially adopt the hierarchy of centres described in the Draft Central Coast Strategy, Leyshon Consulting was instructed by Council officers to adopt the term "village centre" to refer to what are currently known as "neighbourhood centres" and the term "neighbourhood centre" to refer to what are currently known as "local centres".

It should be noted that this approach may lead to confusion as the term "village centre" is not recognised in traditional retail planning methodology in Australia. Further, the term "neighbourhood centre" is currently used in existing planning instruments in Wyong to identify centres that are to be henceforth known as "village centres".

The changes in terminology we have been instructed to apply affect this Report from Section 3 onwards.

2

CONTEXT

2.1 Introduction

DCP81 was gazetted in 2002 and was the culmination of research undertaken for Council by JLW Advisory Services Pty Ltd in 1994 which examined the retail system in Wyong Shire and made various recommendations as to the future provision of retail centres.

Following the JLW study, Council prepared a Retail Development Policy and Strategy Plan for Wyong in 1996 which considered the implications of the JLW report and made certain modifications to the retail strategy recommended by JLW.

DCP81 is the principal statutory planning instrument governing retail development in Wyong. DCP81 performs three key functions namely:

- it defines a retail hierarchy (both existing and proposed)
- it establishes notional floorspace limits for various types of centres in the hierarchy; and
- it sets out “variation criteria” or tests which must be satisfied by applicants who wish to undertake retail development in the nominated centres in Wyong.

TABLE 2.1 has been extracted from DCP81 and summarises the existing retail hierarchy identified in DCP81. TABLE 2.1 also details the floorspace which existed in centres in 2002 (when DCP81 was gazetted) and the relevant floorspace caps which applied to the regional centre at Tuggerah and to the district centres of Wyong, The Entrance, Toukley, Lake Haven, Bateau Bay and in relation to the proposed district centre at Warnervale.

TABLE 2.1
APPROVED RETAIL HIERARCHY – WYONG SHIRE

Centre Type ...	Centre Name	Floorspace 2002 (Sq.M.)	Floorspace Cap (Sq.M.)	Approved Expansion Since 2002 (Sq.M.)
Regional	Tuggerah	45,000	70-80,000	81,416
District	Wyong	14,400	35,000	-
	The Entrance	21,930	35,000	-
	Toukley	21,400	35,000	-
	Lake Haven	32,500	35,000	-
	Bateau Bay	22,000	35,000	30,046
	Warnervale (P)	-	35,000	-
Neighbourhood	Killarney Vale	2,000	n.s.	-
	Chittaway	4,650	n.s.	-
	Budgewoi	3,500	n.s.	-
	Doyalson (P)	-	n.s.	-

Note: (P) = proposed.
Source: Wyong DCP81, Wyong Council.

DCP81 also identified three existing and one proposed neighbourhood centre. The existing centres are at Killarney Vale, Chittaway and Budgewoi while a new neighbourhood centre was identified for Doyalson. As indicated in TABLE 2.1 no floorspace caps exist in relation to neighbourhood centres.

2.2 Decisions Since 2002

Since 2002 there have been changes to major centres identified in DCP81. Firstly, in relation to Westfield Tuggerah, a combination of development consents issued by the Land and Environment Court of New South Wales and Council have resulted in the expansion of Westfield Tuggerah to some 81,416 sq.m.. This has involved an expansion of the Target discount department store (DDS), the addition of an Aldi supermarket, the expansion of cinemas, the addition of a new restaurant precinct and the addition of other mini-majors and specialty retail floorspace to the centre. Westfield Tuggerah now slightly exceeds the floorspace cap identified in DCP81. Indeed, DCP81 forecast that Westfield Tuggerah would not expand to 70,000 or 80,000 sq.m. before 2011.

The other major change is in relation to the Bateau Bay district centre. Council has approved an expansion of the centre which will take it to some 30,046 sq.m.. The expansion will involve the addition of an Aldi supermarket, enlargement of the existing DDS and the addition of further specialty floorspace. We understand that Council is also supportive of a proposal to develop about 5,000 sq.m. of bulky goods floorspace on land at the southern end of the centre.

Council has also approved the redevelopment of Wyong Plaza which has recently re-opened.

While not specifically referred to in DCP81, Council also has approved the addition of some 10,000 sq.m. of factory outlet space to the Homemakers Supa Centa which is located within the Tuggerah Regional Centre. This primarily involves the retailing of clothing, footwear and related products in addition to the bulky goods retailing already established at the centre.

At Lake Haven, Council also has approved additional bulky goods development of some 21,000 sq.m.. This development has recently commenced construction on a site located immediately to the north-east of the existing Lake Haven shopping centre.

Council also has agreed to vary the proposed neighbourhood centres identified in DCP81 to move the neighbourhood centre planned for Doyalson to San Remo.

2.3 Mooted/Proposed Developments

At the time of preparing this Report, there were a number of proposed or mooted retail developments relevant to centres identified in DCP81. In brief terms these are as follows:

- **Warnervale** – it is understood that Railcorp propose to construct a new station at Warnervale. The New South Wales state government has "called in" the planning of the Warnervale district centre.

- **The Entrance** – a proposal to redevelop Lakeside Plaza to contain a new full-line supermarket of 3,600 sq.m. together with 685 sq.m. of specialty shops was refused by Council in 2005.

- **The Entrance** – Council has had preliminary discussions concerning the proposed development of a managed resort facility at 39-47 The Entrance Road West. As well as a substantial number of residential buildings and convention facilities, it is proposed the site would contain an entertainment piazza and commercial retail tenancies of 3,710 sq.m..

- **San Remo** – Council has approved a development application for a centre of some 5,800 sq.m. anchored by a supermarket of 3,200 sq.m.. The centre has recently commenced construction.

We are aware of other proposals involving centres not identified in DCP81. These include the following:

- **Wadalba** – Council has approved a new Coles supermarket of 1,500 sq.m. which has recently opened.

- **Catherine Hill Bay** – Council has received a development application for some 900 dwellings at Catherine Hill Bay. The development is proposed to include a small component of retail floorspace (182 sq.m.) as well as 1,300 sq.m. of commercial floorspace.

- **Gwandalan** – Council has received an enquiry concerning the possibility of building a new centre at Gwandalan to be anchored by a supermarket of 2,110 sq.m. together with 800 sq.m. of specialty retailing, a medical centre, childcare facility and a swimming centre.

- **Budgewoi** – Council has approved a new Coles supermarket of 2,475 sq.m. and a new liquor shop of 150 sq.m.. The development has commenced construction.

- **Lake Munmorah** – Council has received a rezoning submission for development of a shopping centre anchored by a 3,000 sq.m. supermarket, 1,400 sq.m. of specialty shops, 1,680 sq.m. Of "lifestyle/homemakers" space, 2,000 sq.m. of bulky goods space and a medical centre of 400 sq.m..

2.4 Centre Characteristics

We conducted a review of existing centres identified in DCP81 in October 2005 to determine the extent of retail and non-retail floorspace they contain. We have also identified the extent and number of vacant premises and centres' non-retail services classified according to:

- Medical – doctors, optometrists, physiotherapists et cetera
- Professional – lawyers, accountants
- Finance – banks, building societies, credit unions, accounting and tax advisory services
- Other – other commercial services.

The summary of the findings of this survey are shown in TABLE 2.2.

TABLE 2.2
CHARACTERISTICS of CENTRES in WYONG RETAIL HIERARCHY, 2005

Category ...	Total Retail Floorspace *(Sq.M.)*	Estimated Non-Retail Floorspace *(Sq.M.)*[1]	Vacant Floorspace *(Sq.M.)*[1]	Number of Vacancies [1]	Number of Services: Medical [1]	Professional [1]	Finance [1]	Other [1]
Westfield Tuggerah	81,416	5,488	–	–	3	–	7	6
Bateau Bay	[2] 21,995	890	–	–	–	–	6	1
Lake Haven	[2] 32,196	2,420	120	3	–	1	12	10
Wyong	[3] 11,899	10,110	2,845	29	15	9	14	61
The Entrance	[3] 19,800	6,440	1,190	13	14	7	13	30
Toukley	[3] 15,902	8,810	1,750	19	21	6	13	36
Budgewoi	[3] 5,000	1,750	790	6	5	3	2	7
Chittaway Bay	[3] 4,650	320	–	–	2	–	–	1
Killarney Vale	[3] 2,000	1,700	590	3	7	1	3	9
Homemaker Supa Centre - Tuggerah	[2] 25,000	–	–	–	–	–	–	–

Sources:
1 Leyshon Consulting Survey, October 2005.
2. Property Council of Australia, 2004.
3. Hill PDA 2005.

As indicated in TABLE 2.2, the largest concentrations of retail floorspace predictably are found in Westfield Tuggerah, Bateau Bay and Lake Haven. Compared with other centres in the retail hierarchy, however, Westfield Tuggerah, Bateau Bay and Lake Haven contain a relatively limited range of non-retail services ranging from between 890 sq.m. at Bateau Bay to 5,488 sq.m. at Westfield Tuggerah. The three major centres also have very low vacancy rates. No vacancies were found at Westfield Tuggerah or Bateau Bay while Lake Haven had only three vacancies comprising just 120 sq.m..

By contrast to the three centres noted above, the district centres of Wyong, The Entrance and Toukley contain relatively large components of non-retail floorspace ranging between 6,440 sq.m. at The Entrance and 10,110 sq.m. at Wyong. In particular, the three centres have a relatively high level of medical, professional, finance and other commercial services. These three centres also had much higher vacancies ranging from 1,190 sq.m. at The Entrance to 2,845 sq.m. at Wyong. The number of vacant premises in these three centres ranged between 13 (1,190 sq.m.) at The Entrance and 29 (2,845 sq.m.) at Wyong.

A survey of the three nominated neighbourhood centres in DCP81, Budgewoi, Chittaway Bay and Killarney Vale, found they contained between 320 sq.m. and 1,750 sq.m. of non-retail floorspace. Although Chittaway Bay had no vacancies at the time of our survey, Killarney Vale and Budgewoi had 590 sq.m. and 790 sq.m. respectively of vacant floorspace. As indicated in TABLE 2.2, the extent of non-retail services in these centres was significantly less than is the case for the district centres of Wyong, The Entrance and Toukley but not too dissimilar from the level of non-retail services found in the major centres of Westfield Tuggerah, Bateau Bay and Lake Haven.

2.5 Regional Issues

Since completion of the 1994 JLW study there have been some changes of significance in regional-level retailing on the Central Coast with consequent flow-on effects for centres in Wyong. The most significant of these has been the recent expansion and upgrading of Erina Fair. Erina Fair now contains a total floor area of some 106,971 sq.m. and dominates retailing in Gosford LGA. Research previously conducted by Leyshon Consulting for Lend Lease found that Erina Fair draws a substantial proportion of its custom from residents of Wyong Shire particularly from those living in an arc extending from Mardi in the west to The Entrance in the east.

To the north of Wyong, a major centre opened at Glendale in 1996. Stockland Glendale today contains some 38,464 sq.m. but is currently undergoing further expansion. Stockland Glendale is known to attract retail sales from resident of the very northern part of Wyong LGA.

In recent years, two regional studies have been conducted under the auspices of the (former) Department of Infrastructure, Planning and Natural Resources (DIPNR) in relation to retail centres and employment areas on the New South Wales' Central Coast.

The most recent of these was prepared in May 2005 by Parsons Brinckerhoff and Hill PDA – *Central Coast Retail and Commercial Centre Study*. That study reviewed future retail and related floorspace requirements for Gosford and Wyong during the period 2001-26.

In relation to retail requirements in Wyong, the major conclusions of the report can be summarised as follows:

- the need for the development of a master plan to manage the future growth of Westfield Tuggerah

- the existence of demand to justify the immediate inclusion of a DDS at the proposed Warnervale district centre

- the need for a third DDS either at Warnervale or at Lake Haven (timing not specified)

- provision of additional bulky goods floorspace in the Lake Haven/Warnervale area and at The Entrance/Bateau Bay

- the immediate need for neighbourhood shopping facilities to be provided at Wadalba and Doyalson/San Remo; and

- the need to consolidate existing supermarket floorspace in the Budgewoi and Toukley town centres.

The second report referred to above was also undertaken by Parsons Brinckerhoff and Hill PDA – *Central Coast Employment Land Study Background and Issues Report*. This study was intended to provide the foundations upon which an employment and residential settlement strategy could be developed for the Central Coast.

The study concluded that available zoned industrial land on the Central Coast would be fully utilised over the next 10 to 15 years–that is, by 2018-19. To enable the Central Coast to remain competitive with both the Sydney and Hunter Regions, the study recommended that new employment land should be made available in the short-to-medium term. In relation to Wyong, the creation of more significant regional employment nodes was also recommended.

Since 1994 there has also been an important change to New South Wales' planning policy as it affects centres. The introduction of Draft State Environmental Planning Policy 66 (SEPP66)–Integrating Land Use and Transport has significant and direct relevance to centres in Wyong LGA.

Draft SEPP66 through an associated policy document (*The Right Place for Business and Services*), established guidelines for the development of centres in general and retail centres in particular. The overall aims of Draft SEPP66 are to encourage a network of vibrant mixed-use centres which are closely aligned with and accessible by public transport, walking and cycling.

Draft SEPP66 applies to retail development including markets, bulky goods warehouses, so-called "big box" super stores and factory outlet centres. It also applies to leisure and entertainment facilities and offices other than those offices which are ancillary to industrial or non-retail commercial land uses. Importantly, Draft SEPP66 supersedes the State Government's Draft Retail Policy of 1996 and Circular C11 which facilitated development of bulky goods retailing in industrial areas.

Draft SEPP66 promotes the following key planning outcomes:

- the location of trip-generating development in an adjoining accessible mixed-use centre; and

- the use of net community benefit assessment criteria to determine whether the objectives of the Policy are being met.

The Policy also identifies the preferred location for major urban centres in the Sydney, Newcastle and Wollongong regions. The two preferred centres on the Central Coast are Gosford/Erina and Wyong/Tuggerah.

These centres are identified as the preferred locations for large-scale suburban office development, higher order retail, entertainment, commercial and public facilities.

While Draft SEPP66 has not been formalised by the New South Wales state government, it has been given considerable statutory force by virtue of revised Section 117 Directions under the Environmental Planning and Assessment Act 1979. Direction No 17 (issued pursuant to Section 117) requires that any draft Local Environmental Plan (LEP) prepared by a council which involves the creation of new zones or the alteration of existing zoning be consistent with the aims, objectives and principles of the policy document referred to above, namely *The Right Place for Business and Services*. A copy of this document is provided as APPENDIX A to this Report.

2.6 Trends in Retailing and Centres

Since the mid-1990s there have been a number of developments in relation to business centres in general and retail centres in particular which are of relevance to the future planning of such centres in Wyong. These trends are summarised below.

2.6.1 New Urbanism

During the past decade the so-called New Urbanist Movement has become a major force within town planning circles. In simple terms the essential tenets of New Urbanism are:

- return to grid street patterns

- location of facilities within comfortable walking distance of most residents (400 metres)

- the development of shopfront retailing instead of enclosed centres.

While there have been a number of new retail centres developed along New Urbanist lines in the United States, there are limited examples of this type of development in Australia. The existing DCP for the Wadalba Village Centre is an example of an early attempt at New Urbanist planning. As discussed later in this Report, New Urbanism as it applies to the development of new centres gives rise to a number of practical issues which must be overcome in relation to ownership, management and the like.

2.6.2 Growth of Regional Centres

Since the mid-1990s regional-scale shopping centres have grown considerably larger throughout Australia. Whereas regional centres previously contained 60,000 to 80,000 sq.m. of retail floorspace today there are a significant number of these centres exceeding 100,000 sq.m.. This growth has been achieved by incorporating multiples of major tenants: for example, two department stores, two or three DDSs, three supermarkets and an increasing number and range of so-called mini-majors. The latter best can be described as large format stores (up to 3,000 sq.m.) as represented by tenants such as Rebel Sport, Best & Less, The Reject Shop, Dan Murphys Liquor, Borders Books, Lincraft and the like.

Examples of very large-scale regional centres include Castle Towers, Erina Fair, The Macquarie Centre at North Ryde, Warringah Mall, Westfield Miranda, Westfield Parramatta, Westfield Bondi Junction and Westfield Hornsby.

2.6.3 Double Discount Department Stores

In the 1980s and 1990s the typical model for DDS-based sub-regional centres was one DDS (Big W, Kmart or Target) and two supermarkets. Today there are a number of "double DDS" centres in selected locations. Examples of these centres include Park Beach Plaza Coffs Harbour, Stockland Shellharbour and Stockland Wetherill Park. These types of centres can contain up to 40,000 sq.m. of floorspace and achieve annual sales of up to $200 million.

Such centres appear to be viable where they are located at some distance from a regional centre. As a consequence, a centre of this type is unlikely to emerge in the central or southern part of Wyong LGA.

2.6.4 Decline of Department Stores

Since the mid-1990s department store retailing around the world has stalled in terms of sales growth. It is generally agreed that the decline in department stores has been caused by the rise of so-called "category killers" which have usurped certain segments of department store retailing. The clearest example of this in Australia is the development of large-scale specialist homewares and electrical goods, sporting goods and, to a lesser extent, clothing retailers. Branded DDSs (Kmart, Target and Big W) have also outperformed department stores. Coles Myer has recently announced the sale of its Myer chain of department stores which is indicative of the pressures which this market segment has been under in recent years.

2.6.5 Supermarket Growth

Since the 1990s there has been strong growth in the number and sophistication of supermarkets in Australia. In particular supermarkets have substantially expanded their fresh food offer. Their positioning in the retail system also has been strengthened through the linking of supermarket spending to discounted petrol. This has particularly benefited Coles and Woolworths supermarkets to the detriment of the smaller chains such as IGA, Franklins, Payless and the like.

In addition, both major chains have, since the mid 1990s, pursued a strategy of developing stores (as small as 2,000 sq.m.) in suburban areas and rural communities once considered too small. Examples of this can be seen in Wyong LGA with the interest of Coles Myer (and Woolworths) in establishing stores at Wadalba and Gwandalan.

2.6.6 E-Commerce

Despite dire predictions in the early to mid-1990s that traditional retail channels would be seriously affected by the purchase of goods on line, the reality has been much less dramatic. Most experts in the field now estimate that although there has been growth in electronic retailing it still constitutes less than 5% of the total retail market in Australia. In particular it appears that home computer-based shopping is of significant appeal only to higher socio-economic groups and works best for a limited range of products including books, office consumables, travel, veterinary and animal care products and the like.

Many analysts in the retail sector, together with retailers, point to the fact that the internet is used by people to examine and compare goods produced by rival manufacturers and to check prices within specific stores but that the majority of purchases are still made face-to-face by consumers armed with the knowledge they have obtained from internet searches.

In summary, there is no evidence that electronic retailing has or will substantially reduce the demand for physical building space for retailing activities.

2.7 Resident Survey

In April 2005 a survey of some 619 residents of Wyong Shire was undertaken by Hill PDA. The survey was conducted by telephone and obtained data on certain types of shopping–namely that for food and groceries, clothing, furniture and electrical appliances. Data from the survey is provided at APPENDIX B to this Report.

No data was collected by Hill PDA on the frequency with which residents of various suburbs of Wyong visit existing centres. Rather, the survey simply identifies those centres where the majority of respondents reported purchasing various types of goods.

The key findings of the survey are discussed below.

2.7.1 Food and Grocery Shopping

Data on food and grocery shopping patterns are provided in Tables 1 to 4, APPENDIX B. Table 1 indicates the main centres shopped for food and groceries by suburb of residence. As would be expected, the data indicates that food and grocery shopping is essentially localised–that is, residents patronise the nearest centre containing a major supermarket.

This observation is confirmed by data contained in Table 2 which identifies the reasons why respondents shop at particular centres for food and grocery items. In summary, the major reasons reported were:

- proximity to home ... 65.9% of responses
- variety/range of goods ... 13.4%
- familiarity with centre ... 5.4%
- availability/quality of parking ... 4.5%
- acceptable prices ... 4.5%.

It is interesting to note that despite the somewhat lower socio-economic status of Wyong, "acceptable prices" is an insignificant reason for choosing to shop for food and groceries at a particular centre. This may mean that either proximity to home is such a strong issue that it outweighs all others or that the supermarket sector is already price competitive in Wyong and hence little advantage is seen in shopping around to obtain a low price for groceries and the like. Or, more likely, some combination of both factors.

Table 3 identifies the reasons why particular centres were not shopped for food and groceries. The key reasons given were as follows:

- poor range of goods ... 41.2% of responses
- not close to home ... 24.2%
- expensive prices ... 8.0%
- parking difficult ... 7.5%.

The centres which scored particularly poorly with respect to having a poor range of goods were Budgewoi, San Remo, Summerland Point, Chittaway Bay and Wyong.

Table 4 provides data on the pattern of so-called "top-up" food and grocery shopping. Not unsurprisingly, the data indicate the smaller neighbourhood centres such as Budgewoi, Charmhaven, Chittaway Bay and the like are more likely to be patronised for “top-up” shopping than the larger centres. Lake Haven is the one exception to this pattern. Lake Haven captures both a high proportion of main food and grocery shopping as well as “top-up” shopping trips.

2.7.2 Clothes Shopping

Data on the pattern of clothing shopping for Wyong residents is provided in Table 5, APPENDIX B. As might be expected, Tuggerah dominates clothing shopping in Wyong although there is significant escape spending in this sector flowing to Erina–particularly from more southern suburbs such as Bateau Bay, Lisarow and Niagara Park notwithstanding that the latter two suburbs are actually located in Gosford LGA rather than Wyong.

Lake Haven is also a very significant centre for clothing shopping particularly for residents in the northern part Wyong.

2.7.3 Furniture and Electrical Goods Shopping

Table 6, APPENDIX B provides data on shopping for furniture and electrical appliances by households living in various suburbs in Wyong. The two dominant centres for such shopping are Tuggerah and Erina. It is noteworthy that Erina has widespread appeal throughout Wyong LGA as a destination for furniture and electrical goods shopping. For instance, Erina is as attractive for furniture and electrical appliances shopping to residents of Wadalba as it is to residents of Bateau Bay despite the fact Bateau Bay is far more proximate to Erina than is with Wadalba.

2.7.4 Trade Area Maps

Based on the data on shopping patterns found by the Hill PDA survey, we have identified and subsequently mapped the trade areas for major centres in Wyong. These are shown in FIGURES 2.1 to 2.9.

Tuggerah Regional Centre

FIGURE 2.1 indicates the primary and secondary trade areas for the Tuggerah Regional Centre. As might be expected, the Tuggerah Region Centre has an extensive primary trade area (PTA) stretching to the east of Killarney Vale and to Wyongah in the north. Tuggerah's secondary trade area (STA) essentially covers the entire balance of Wyong LGA. It should be noted that survey data cited by Westfield indicates the centre has a wider Tertiary Trade Area (TTA) which includes parts of Lake Macquarie and Gosford LGAs.

Bateau Bay

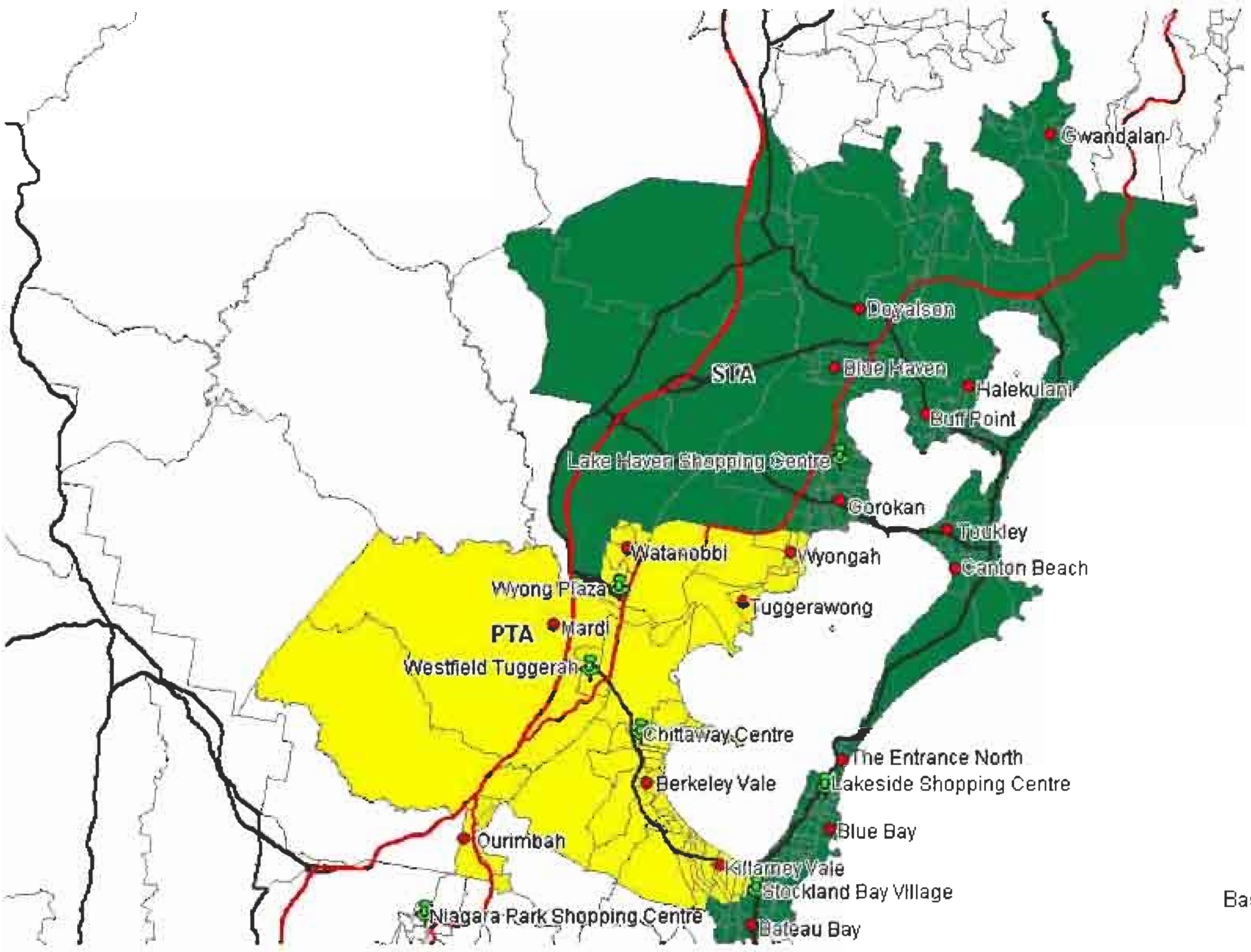
The Bateau Bay trade area is shown in FIGURE 2.2. Bateau Bay has a PTA encompassing Long Jetty and extending west to Berkeley Vale and south into some of the northern suburbs of Gosford LGA. Suburbs around The Entrance comprise the centre's STA. Bateau Bay also could be considered to have a TTA extending to the north up to Noraville and in the west as far as Chittaway Bay.

Lake Haven

The trade area for Lake Haven is shown in FIGURE 2.3. By virtue of a lack of significant competition in Northern Wyong, Lake Haven has a very extensive trade area in the northern part of Wyong LGA extending as far as Gwandalan in the north and to North Wyong in the south. The centre has an STA which includes Toukley and Budgewoi while it attracts a smattering of trade from a TTA which includes Wyong and Norah Head. It is reasonable to expect that the extent of the current

FIG 2.1: Tuggerah Regional Centre Trade Area

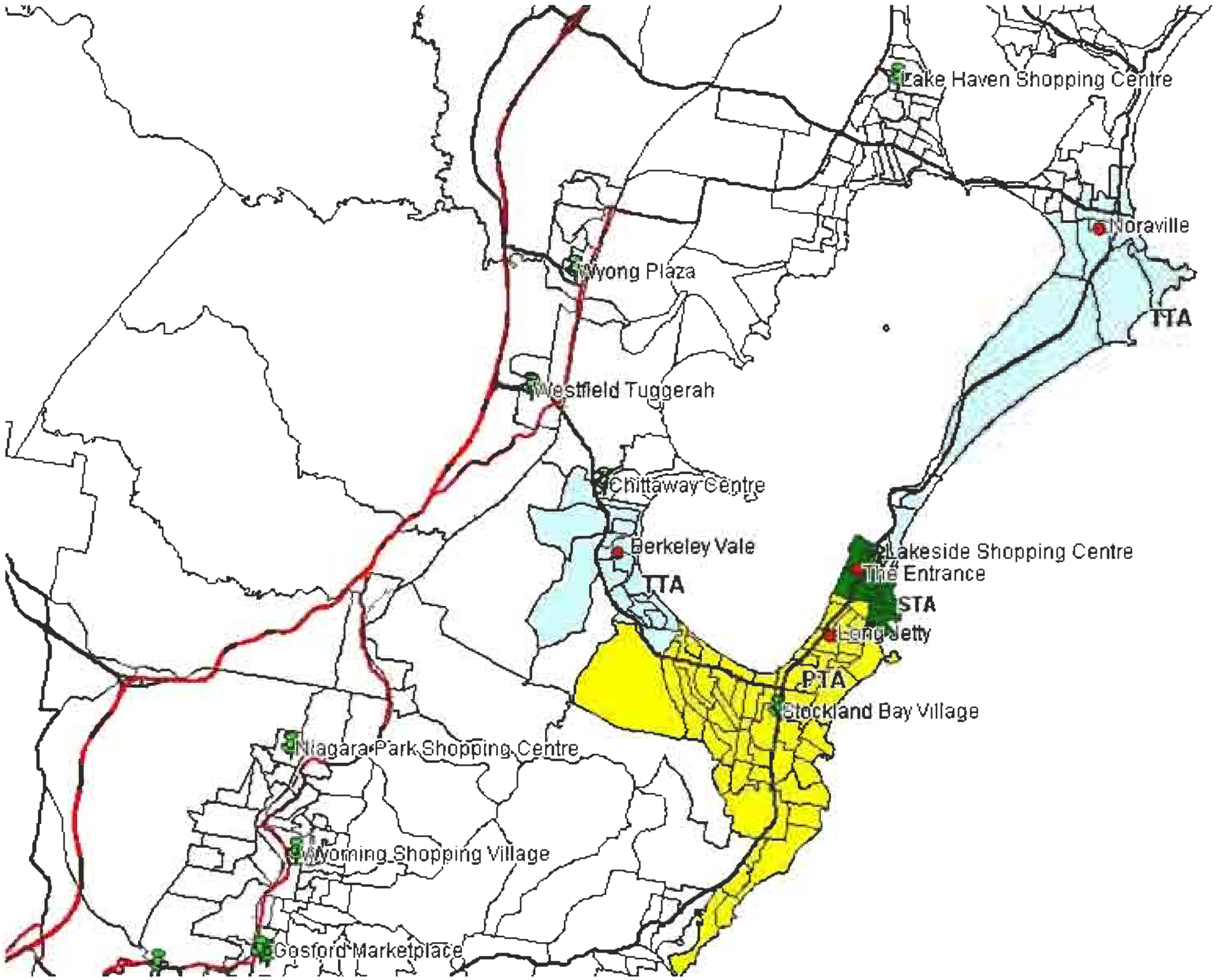
and surrounding areas



Based on 2001 Collection District Boundaries
Source: 2001 Census
Produced by: Leyshon Consulting

FIG 2.2: Bateau Bay Trade Area

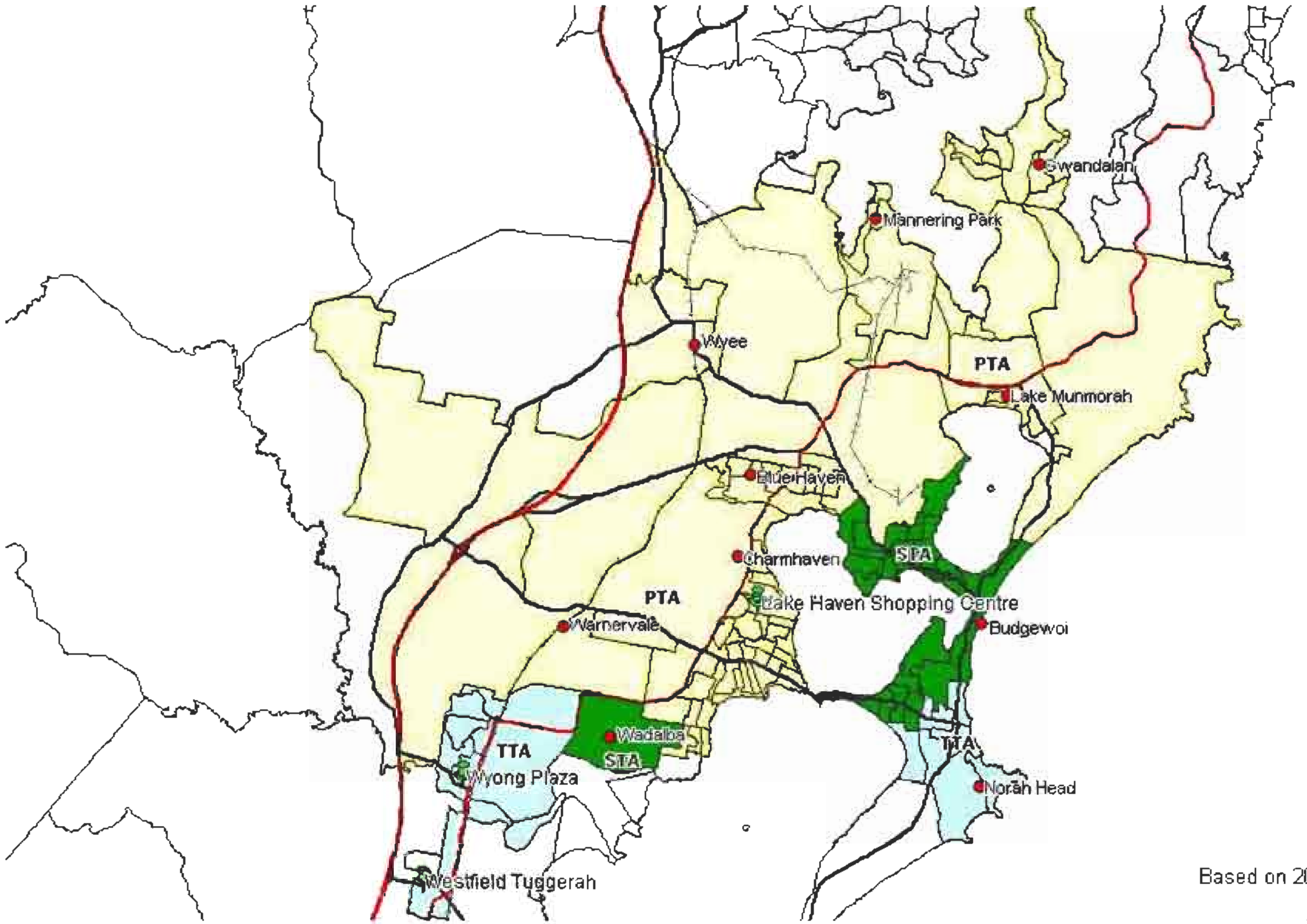
and surrounding areas



Based on 2001 Collection District Boundaries
Source: 2001 Census
Produced by: Leyshon Consulting

FIG 2.3: Lake Haven Trade Area

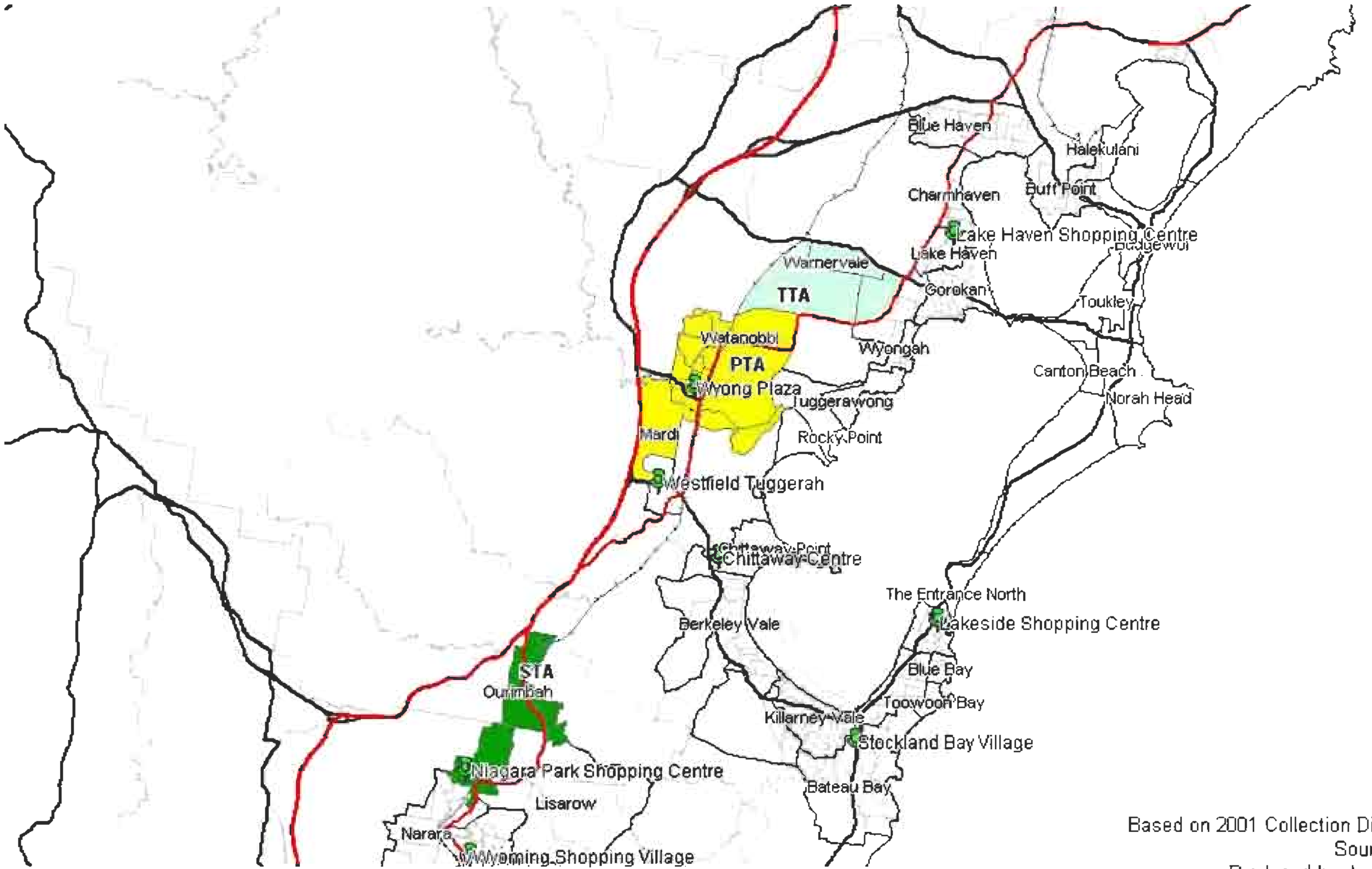
and surrounding areas



Based on 2001 Collection District Boundaries
Source: 2001 Census
Produced by: Leyshon Consulting

FIG 2.4: Wyong Trade Area

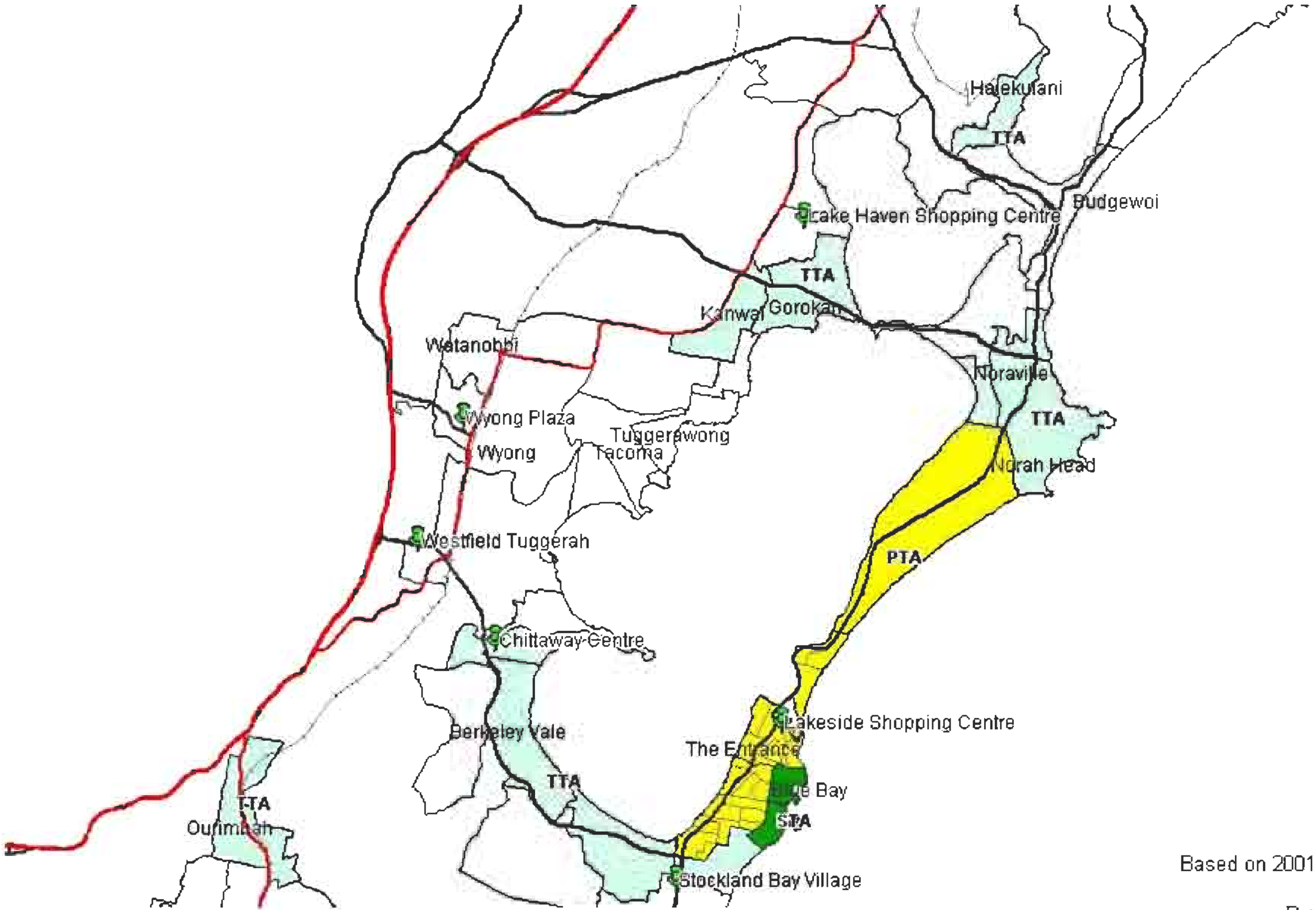
and surrounding areas



Based on 2001 Collection District Boundaries
Source: 2001 Census
Produced by: Leyshon Consulting

FIG 2.5: The Entrance Trade Area

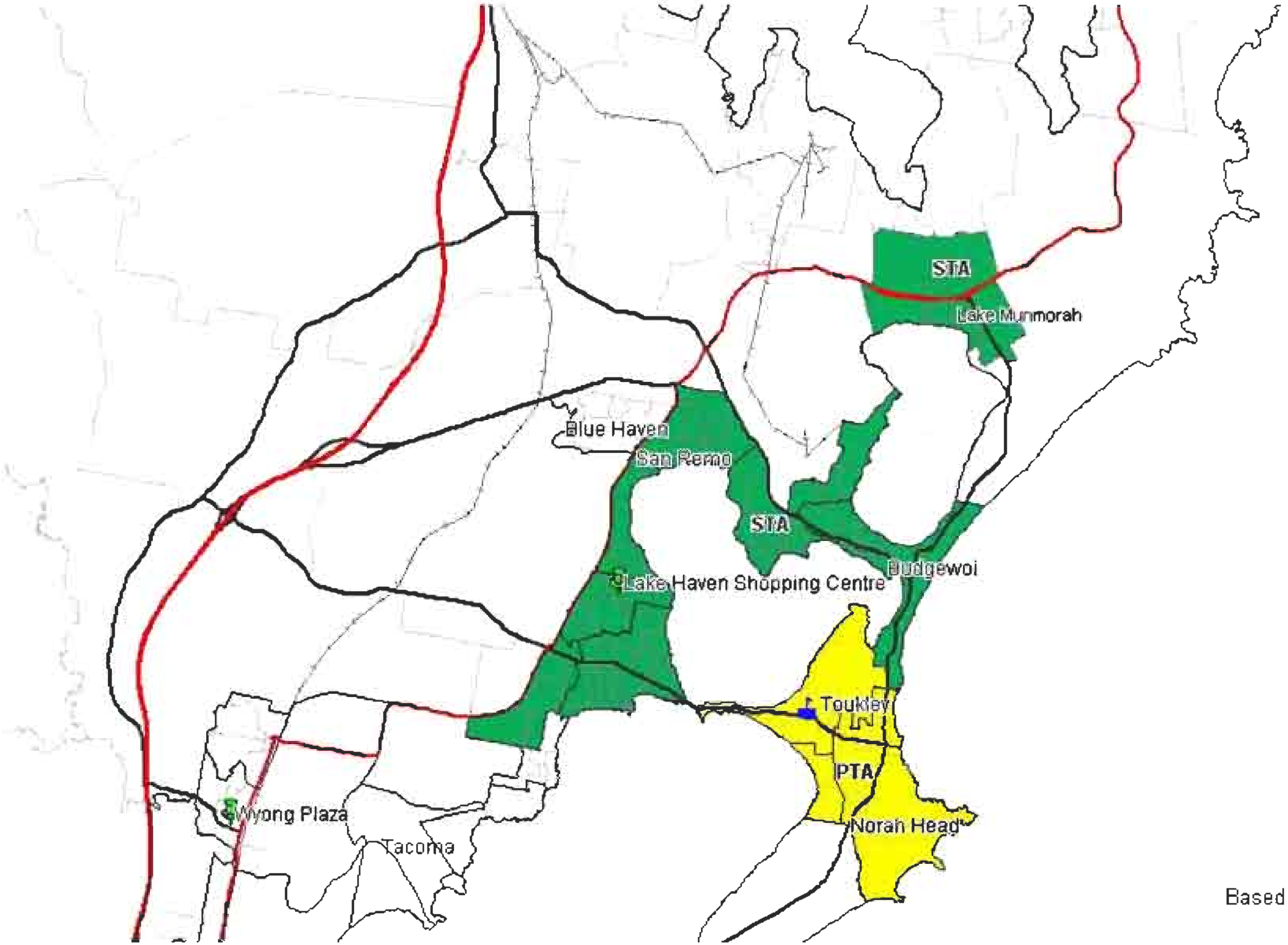
and surrounding areas



Based on 2001 Collection District Boundaries
Source: 2001 Census
Produced by: Leyshon Consulting

FIG 2.6: Toukley Trade Area

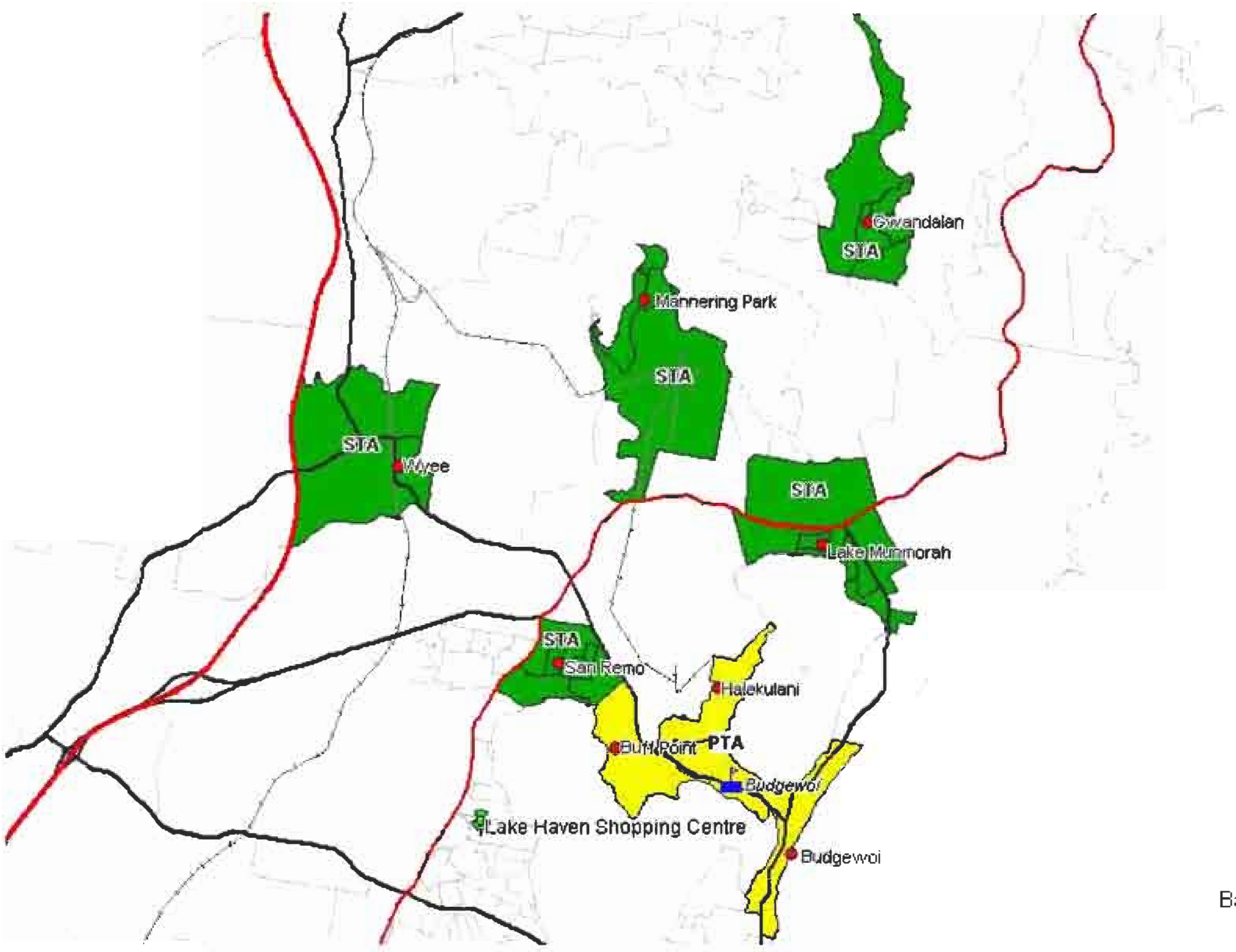
and surrounding areas



Based on 2001 Collection District Boundaries
Source: 2001 Census
Produced by: Leyshon Consulting

FIG 2.7: Budgewoi Trade Area

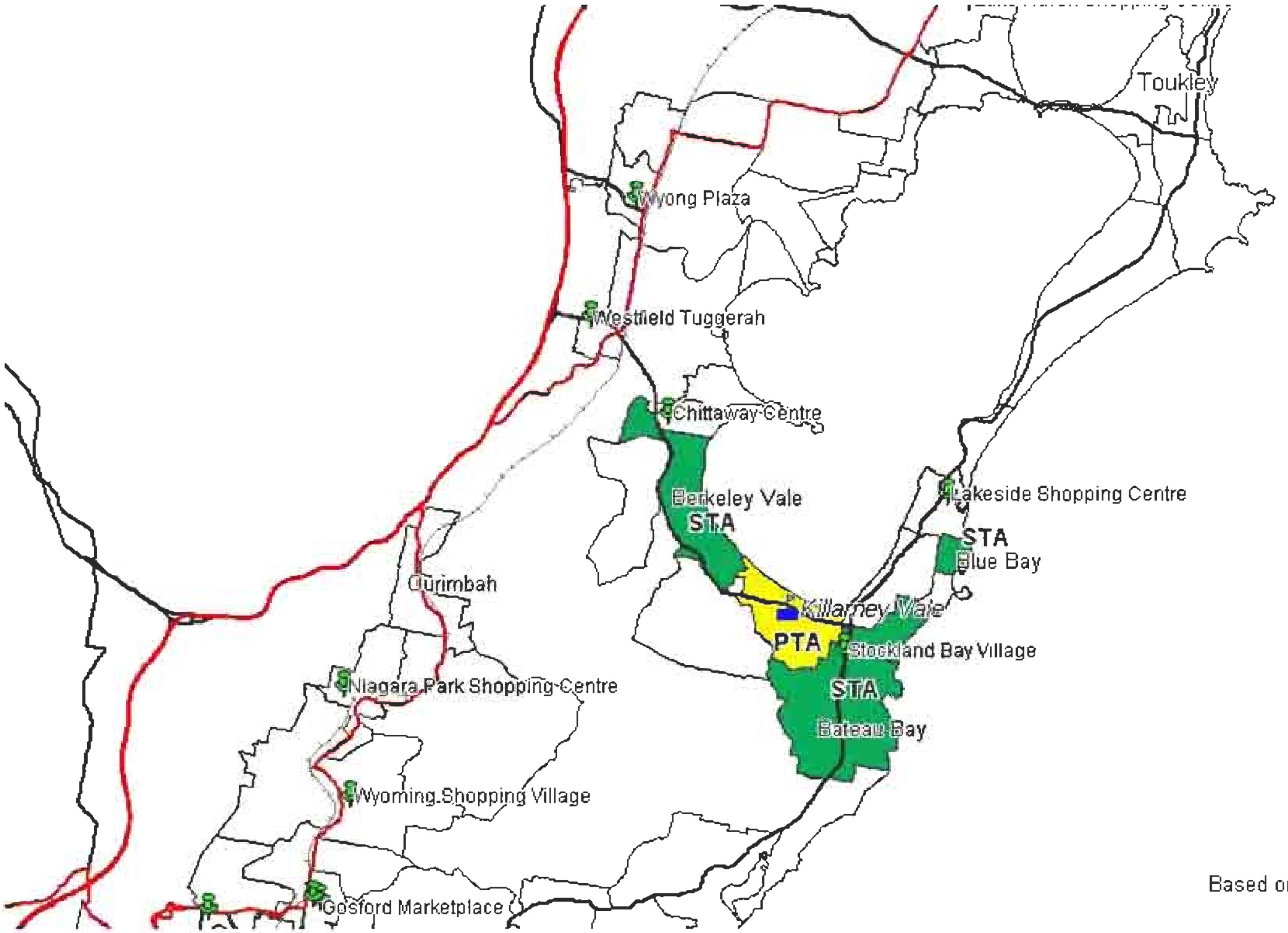
and surrounding areas



Based on 2001 Collection District Boundaries
Source: 2001 Census
Produced by: Leyshon Consulting

FIG 2.8: Killarney Vale Trade Area

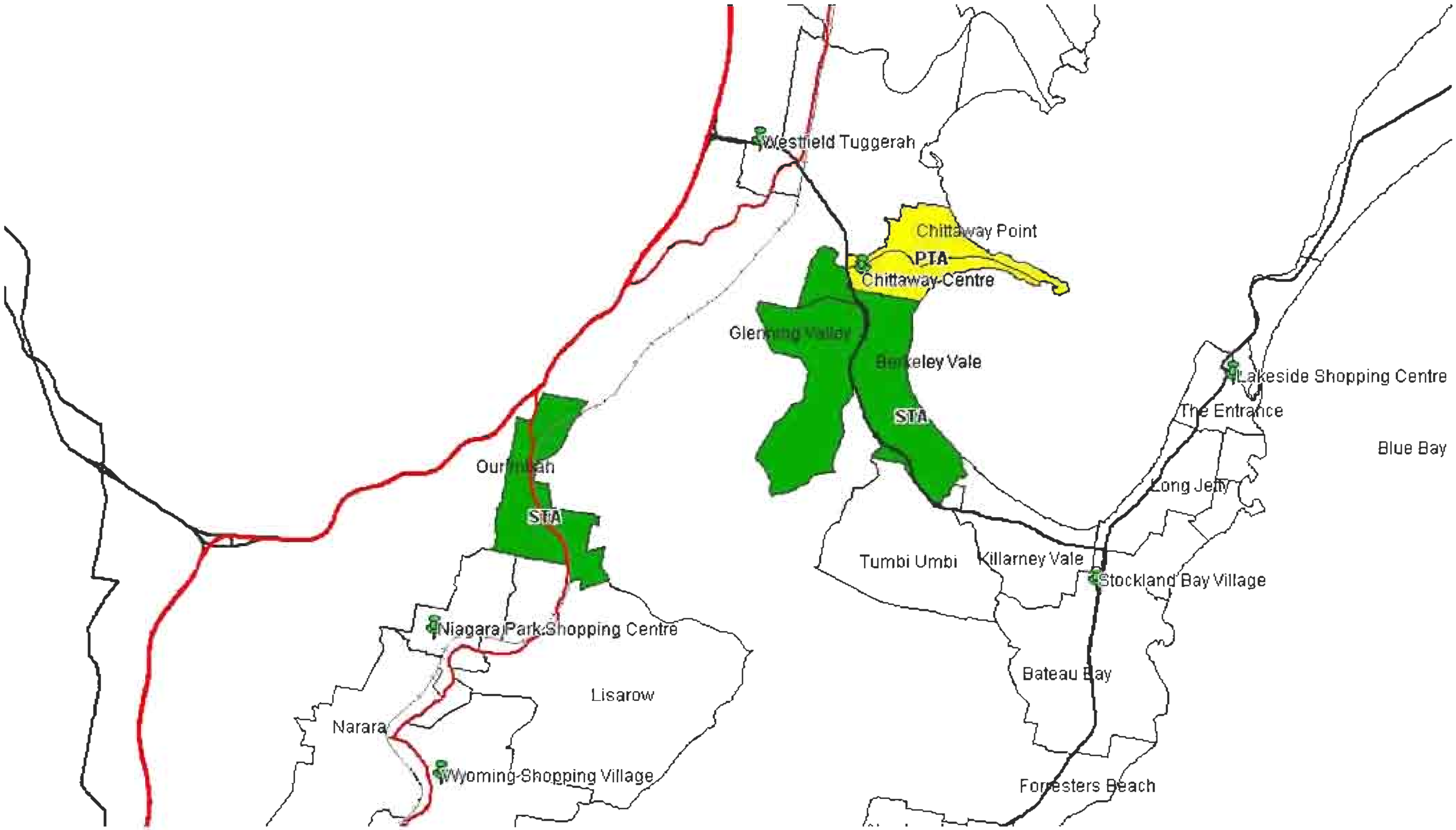
and surrounding areas



Based on 2001 Collection District Boundaries
Source: 2001 Census
Produced by: Leyshon Consulting

FIG 2.9: Chittaway Bay Trade Area

and surrounding areas



Based on 2001 Collection District Boundaries
Source: 2001 Census
Produced by: Leyshon Consulting

trade area enjoyed by Lake Haven will contract when the proposed Warnervale centre is developed.

Wyong

The trade area of the Wyong district centre is shown in FIGURE 2.4. Compared with both Bateau Bay and Lake Haven, Wyong has a very restricted trade area. The PTA is small encompassing the suburbs of Mardi, Wyong and Watanobbi. The centre also has a small STA around Ourimbah: this is possibly due to the fact Wyong is on the rail system which links it to Ourimbah. Wyong also has a TTA focussed on the Warnervale/Wadalba area.

The Entrance

The trade area for The Entrance is shown in FIGURE 2.5. The Entrance has a lineal PTA including The Entrance and Long Jetty and areas north of The Entrance stretching up to Norah Head. The centre has a small STA around Blue Bay and a relatively expansive TTA including suburbs on the southern side of Tuggerah Lake and encompassing the area from Killarney Vale to Chittaway Bay and north of the lake in an arc stretching from Kanwal through to the Toukley Peninsula.

Toukley

The Toukley trade area is shown in FIGURE 2.6. Toukley has a PTA restricted to the suburbs which comprise the Toukley Peninsula including Toukley, Noraville, Hargraves, Norah Head and Canton Beach. The centre's STA includes Kanwal, Gorokan, San Remo and Budgewoi. Toukley also attracts a small proportion of trade from the Lake Munmorah area to the north of the centre. Toukley's trade area is restricted in the west by the presence of Lake Haven. Anecdotal evidence suggests that some residents of Gorokan may be shopping in Toukley as a consequence of congestion at Lake Haven.

Neighbourhood Centres

The **Budgewoi** trade area is shown in FIGURE 2.7. Budgewoi attracts the majority of its trade from a PTA which includes Buff Point, Halekulani and Budgewoi. The centre also attracts a smattering of trade from an STA which includes San Remo, Lake Munmorah, Mannering Park, Wyee and Gwandalan.

The trade area of **Killarney Vale** is shown in FIGURE 2.8. The centre's PTA essentially is restricted to the suburb of Killarney Vale. Given the centre's prominent location on The Entrance Road it also attracts trade from an STA which in the east includes Bateau Bay and in the west Berkeley Vale.

The trade area of the **Chittaway Bay** centre is shown in FIGURE 2.9. Chittaway Bay has a relatively localised trade area with the majority of its custom being derived from a PTA which comprises the suburb of Chittaway Bay/Chittaway Point. The centre has an STA which includes Berkeley Vale and Glenning Valley.

3 DEMAND ASSESSMENT

3.1 Introduction

The purpose of this section of the Report is to assess the potential demand for retail floorspace in Wyong Shire during the period 2006-31. This assessment relies on population growth projections and estimates of retail expenditure levels within Wyong's Social Planning Districts (FIGURE 3.1 refers) which have been used to generate estimates of the likely growth in available resident retail spending during the forecast period. In turn, these estimates have been converted into projections of the future demand for retail floorspace at various levels of the retail hierarchy.

3.2 Population Growth

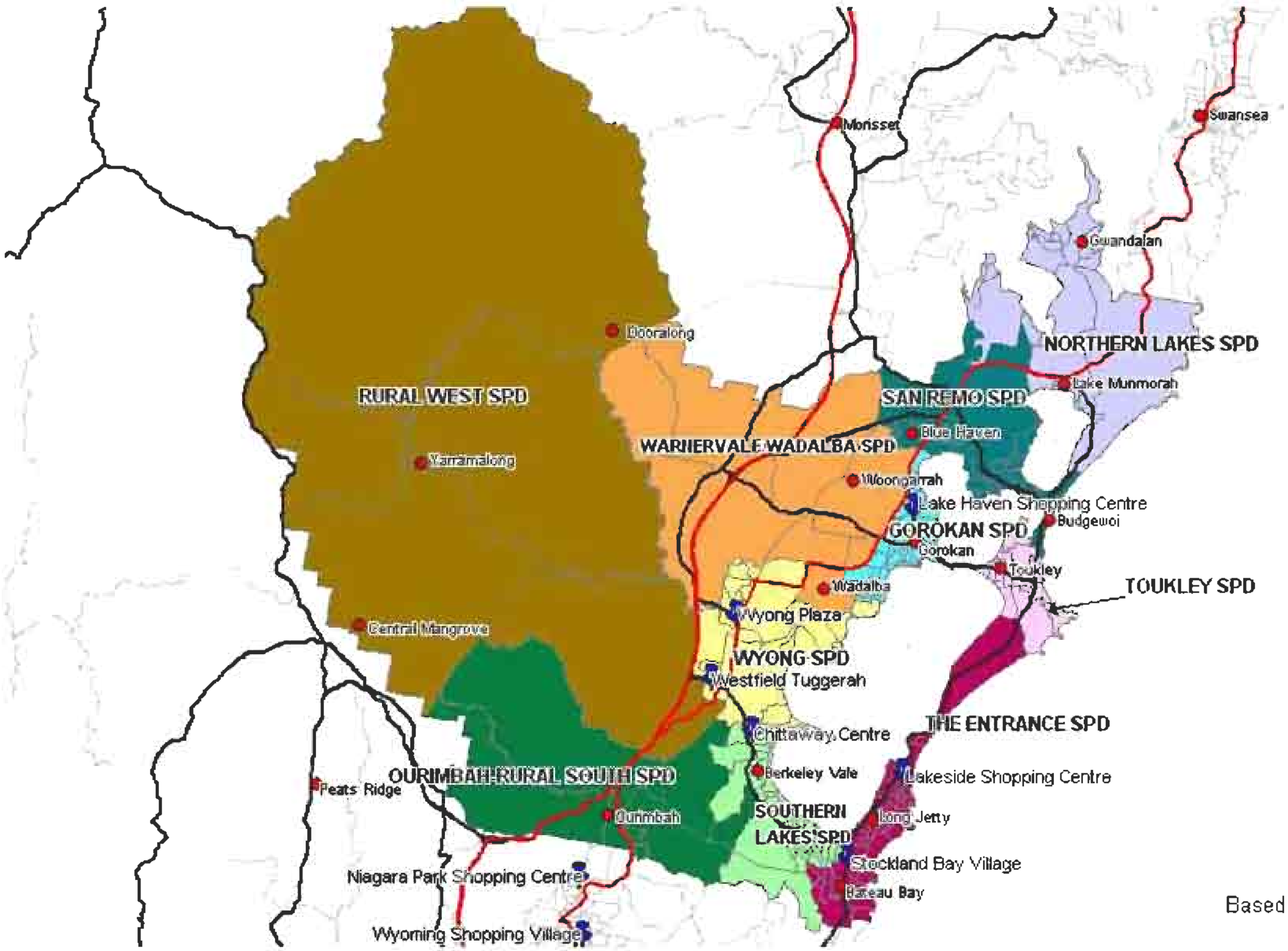
As noted earlier in this Report, at the request of Council we have utilised population projections for Wyong prepared by id Consulting Pty Ltd for Council in late 2005. These projections indicate that the population of Wyong will grow from some 135,498 persons in 2001 to 220,141 persons by 2031–an increase of +84,643 persons. This represents an overall increase of +62.5% in the resident population between 2001-31.

As noted in TABLE 3.1 below, population growth will be concentrated in specific SPDs. Between 2001-31 the majority of growth will occur in the following:

- Warnervale/Wadalba ... 39,573 persons
- The Entrance ... 14,405
- Wyong ... 9,925

FIG 3.1: Wyong Social Planning Districts (SPDs)

and surrounding areas



Based on 2001 Collection District Boundaries
Source: 2001 Census
Produced by: Leyshon Consulting

- San Remo ... 6,171
- Toukley ... 5,965.

TABLE 3.1
FORECAST POPULATION – WYONG SHIRE SOCIAL PLANNING DISTRICTS, 2001-31

	— Social Planning Districts —										
Period ...	**Northern Lakes**	**San Remo**	**Gorokan**	**Toukley**	**Warnervale /Wadalba**	**Ourimbah-Rural South**	**Wyong**	**The Entrance**	**Rural West**	**Southern Lakes**	**Total**
2001	14,044	18,302	19,327	9,083	6,058	4,569	13,581	23,444	2,236	24,854	135,498
2006	14,579	19,724	19,452	9,708	12,278	4,879	14,648	26,715	2,397	26,008	150,388
2011	14,576	19,865	19,497	10,581	20,650	5,199	16,974	29,851	2,444	26,453	166,090
2016	14,958	19,743	19,644	11,664	27,131	5,472	18,830	32,707	2,519	26,737	179,405
2021	15,809	20,147	19,913	12,669	34,701	5,744	20,139	34,877	2,620	27,024	193,643
2026	15,881	22,690	20,372	13,865	40,460	5,964	21,778	36,812	2,752	27,257	207,831
2031	15,958	24,473	20,890	15,048	45,631	6,143	23,506	37,848	2,882	27,762	220,141
Change 2001-11	*532*	*1,563*	*170*	*1,498*	*14,592*	*630*	*3,393*	*6,407*	*208*	*1,599*	*15,702*
Change 2011-21	*1,233*	*282*	*416*	*2,088*	*14,051*	*545*	*3,165*	*5,026*	*176*	*571*	*27,553*
Change 2021-31	*149*	*4,326*	*977*	*2,379*	*10,930*	*399*	*3,367*	*2,971*	*262*	*738*	*26,498*
Change 2001-31	*1,914*	*6,171*	*1,563*	*5,965*	*39,573*	*1,574*	*9,925*	*1 4,404*	*646*	*2,908*	*84,643*

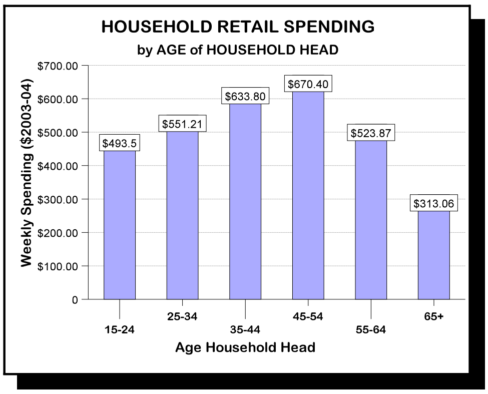
Source: id Consulting Pty Ltd 2005.

3.3 Demographic Change

Associated with preparing population projections by SPDs, id Consulting also projected demographic change as indicated by the change in the age and household structure of Wyong's SPDs.

With respect to changes in the age structure between 2001-31, the id Consulting projections indicate a decline in the proportion of the population aged 0-49 years across Wyong LGA as a whole and significant growth in the proportion of the population aged 50+ years. Those SPDs forecast to experience the most significant growth in the proportion of the population aged 50+ years during the forecast period are San Remo, Wyong and Ourimbah-Rural South.

The projected changes in the population age profile in various SPDs and in Wyong LGA as a whole will have implications for future retail spending. Data available from the Australian Bureau of Statistics' (ABS) Household Expenditure Survey since the mid-1980s consistently has shown there is a sharp decline in the retail spending of households (compared to the average) when adults in the household are aged 55+ years *(see Chart)*.

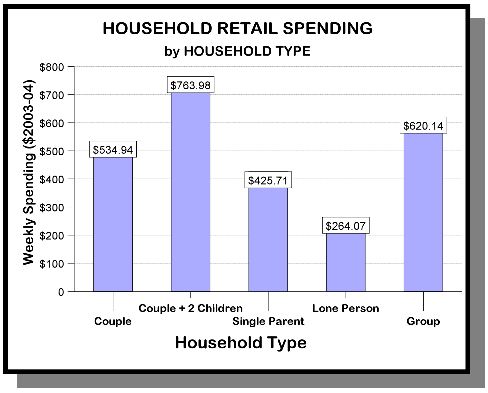


Source: ABS Household Expenditure Survey, 2003-04

As a consequence of general population ageing over the period 2006-31, there will also be changes in the household structure of Wyong in general and within particular SPDs.

For Wyong LGA as a whole, id Consulting predicts a notable decline in the proportion of total households comprised of couples with dependents–down from 29.0% of all households in 2006 to 24.6% in 2031. They also project an increase in lone person households (up from 25.5% in 2006 to 27.5% in 2031) and couple households without dependent children (up from 29.0% in 2006 to 32.6% in 2031).

Again, data from the ABS's household expenditure survey over time highlight how the highest levels of retail spending occur in so-called traditional households–that is couples with dependent children *(see Chart)*.



Source: ABS Household Expenditure Survey 2003-04

The most significant falls in the proportion of households constituted by couples with dependents are projected by id Consulting to occur in the San Remo, Ourimbah-Rural South, Wyong and Rural West SPDs.

3.4 Per Capita Spending Levels

A projection has been made of per capita retail spending levels in all of the Wyong SPDs. This projection takes into account data from the 2001 Census on the demographics of the population in each SPD together with data from the 2003-04 Household Expenditure Survey published by the ABS which provides detailed information on the retail and other expenditure patterns of Australian households with differing demographic characteristics. In summary, the per capita retail spending levels ($2005) for each SPD are estimated to be as follows:

- Northern Lakes ... $7,247
- San Remo ... $7,119
- Gorokan ... $7,376
- Toukley ... $7,827
- Warnervale/Wadalba ... $7,777
- Ourimbah-Rural South ... $8,084

- Wyong ... $7,475
- The Entrance ... $7,986
- Rural West ... $8,405
- Southern Lakes ... $7,217
- Wyong Total ... $7,522.

In relation to future per capita retail spending growth we have assumed a +1.0% real growth rate during the period 2006-31. This real growth is over and above movements in the consumer price index which will occur during the forecast period.

A real growth rate of +1.0% is a conservative assumption. Over the past one to two decades in New South Wales real growth in retail spending has averaged some +2.0% per annum. We consider that a more conservative rate of +1.0% is warranted in this instance, however, given the comparatively low household and per capita incomes which apply to Wyong Shire, its above average unemployment levels and the significant population ageing which will occur over the next 25 to 30 years.

3.5 Total Available Retail Spending

TABLE 3.2 provides estimates of total available retail spending by residents of Wyong Shire by SPD for the period 2006-31 at constant 2005 prices. A detailed breakdown of spending by commodity group category by SPD for the period 2006-31 is provided in APPENDIX C to this Report.

TABLE 3.2
ESTIMATED TOTAL AVAILABLE RETAIL SPENDING – WYONG SHIRE SOCIAL PLANNING DISTRICTS, 2006-31 *($ Mil; $2005)*

— Social Planning District —

Period ...	Northern Lakes	San Remo	Gorokan	Toukley	Warnervale /Wadalba	Ourimbah-Rural South	Wyong	The Entrance	Rural West	Southern Lakes	Total
2006	$105.6	$140.4	$143.5	$76.0	$95.5	$39.4	$109.5	$213.3	$20.1	$187.7	$1,131.0
2011	$111.0	$148.6	$151.1	$87.0	$168.8	$44.2	$133.4	$250.6	$21.6	$200.6	$1,316.9
2016	$119.7	$155.3	$160.1	$100.8	$233.1	$48.9	$155.5	$288.5	$23.4	$213.1	$1,498.4
2021	$133.0	$166.5	$170.5	$115.1	$313.3	$53.9	$174.8	$323.4	$25.6	$226.4	$1,702.5
2026	$140.4	$197.1	$183.3	$132.4	$383.9	$58.8	$198.6	$358.7	$28.2	$240.0	$1,921.4
2031	$148.3	$223.4	$197.6	$151.0	$455.1	$63.7	$225.3	$387.6	$31.1	$256.9	$2,140.0
Growth 2006-31	**$42.7**	**$83.0**	**$54.1**	**$75.0**	**$359.6**	**$24.3**	**$115.8**	**$174.3**	**$11.0**	**$69.2**	**$1,009.0**

Source: Leyshon Consulting Estimates, February 2006.

As indicated in TABLE 3.2, total available annual retail spending by residents is estimated at $1.13 billion in 2006 and is forecast to increase to $2.14 billion by 2031–growth of approximately +$1.0 billion.

The most significant increases in annual available retail spending are projected to occur in the following SPDs:

- Warnervale/Wadalba ... +$359.6 million per annum
- The Entrance ... +$174.3 million
- Wyong ... +$115.8 million
- San Remo ... +$83.0 million.

Given the importance of supermarkets to all centres within the retail hierarchy in Wyong, an estimate also has been made of total available supermarket spending by SPD during the forecast period. As indicated in TABLE 3.3, Wyong is estimated to generate in the order of $362.0 million of available supermarket spending in 2006. By 2031 this is projected to rise to $684.7 million per annum–growth of +$322.8 million.

TABLE 3.3

ESTIMATED TOTAL AVAILABLE SUPERMARKET SPENDING – WYONG SHIRE SOCIAL PLANNING DISTRICTS, 2006-31 *($ Mil; $2005)*

	— Social Planning District —										
Period ...	**Northern Lakes**	**San Remo**	**G orokan**	**Toukley**	**Warnervale /Wadalba**	**Ourimbah-Rural South**	**Wyong**	**The Entrance**	**Rural West**	**Southern Lakes**	**Total**
2006	$33.8	$44.9	$45.9	$24.3	$30.6	$12.6	$35.0	$68.3	$6.4	$60.1	$361.9
2011	$35.5	$47.6	$48.4	$27.9	$54.0	$14.1	$42.7	$80.2	$6.9	$64.2	$421.5
2016	$38.3	$49.7	$51.2	$32.3	$74.6	$15.6	$49.8	$92.3	$7.5	$68.2	$479.5
2021	$42.6	$53.3	$54.6	$36.8	$100.3	$17.3	$55.9	$103.5	$8.2	$72.5	$545.0
2026	$44.9	$63.1	$58.7	$42.4	$122.9	$18.8	$63.6	$114.8	$9.0	$76.8	$615.0
2031	$47.5	$71.5	$63.2	$48.3	$145.6	$20.4	$72.1	$124.0	$9.9	$82.2	$684.7
Growth 2006-31	**$13.7**	**$26.6**	**$17.3**	**$24.0**	**$115.0**	**$7.8**	**$37.1**	**$55.7**	**$3.5**	**$22.1**	**$322.8**

Source: Leyshon Consulting Estimates, February 2006.

Between 2006-31, the most significant growth in annual available supermarket spending will occur in the following SPDs:

- Warnervale/Wadalba ... +$115.0 million
- The Entrance ... +$55.7 million
- Wyong ... +$37.1 million
- San Remo ... +$26.6 million.

It should be noted that the available spending estimates discussed above exclude certain types of retail expenditure attracted to Wyong LGA from various sources including:

- shoppers from the surrounding region
- daytrippers
- tourists and visitors.

Undoubtedly some sales are attracted from residents of southern parts of Lake Macquarie LGA by major centres such as Westfield Tuggerah, Tuggerah Homemakers and Lake Haven. Westfield, for example, has estimated that about 20% to 30% of sales at its Tuggerah centre come from beyond the borders of Wyong LGA. Other centres in Wyong would capture a much lower percentage of their total sales from persons living outside the LGA.

Spending by daytrippers and tourists is notoriously difficult to measure. In any event it would only benefit certain centres such as The Entrance, Budgewoi, Toukley and the like. Such expenditure is not significant in aggregate as it is unlikely to exceed $70 million per annum ($2006).

3.6 Floorspace Demand

The estimates of available retail spending discussed above have been converted into a notional future demand for retail floorspace. In doing so, we have adopted an assumption of an average sales rate of $5,500 per sq.m. per annum ($2005) as representing a reasonable average for newly constructed retail space across the spectrum from traditional retailing to bulky goods retailing. The resultant demand for retail floorspace is summarised in TABLE 3.4. As can be noted from TABLE 3.4, between 2006-31 a theoretical total demand of +183,453 sq.m. is forecast for Wyong as a whole.

In summary, during the forecast period the most significant growth in the demand for additional retail floorspace is projected to occur in the following SPDs:

- Warnervale/Wadalba ... +65,382 sq.m.
- The Entrance ... +31,692 sq.m.
- Wyong ... +21,060 sq.m..

TABLE 3.4
THEORETICAL GROWTH in RETAIL FLOORSPACE DEMAND – WYONG SPDs, 2006-31

Social Planning District ...	Floorspace Growth *(Sq.M.)*
Northern Lakes	7,755
San Remo	15,094
Gorokan	9,840
Toukley	13,648
Warnervale/Wadalba	65,382
Ourimbah-Rural South	4,408
Wyong	21,060
The Entrance	31,692
Rural West	1,985
Southern Lakes	12,589
Total Wyong	**183,453**

Source: Leyshon Consulting Estimates, February 2006.

Significant growth in demand is also evident in San Remo (+15,094 sq.m.), Toukley (+13,648 sq.m.) and in the Southern Lakes SPD (+12,589 sq.m.).

In relation to these figures it should be recognised that:

- in reality this theoretical demand will be distributed over the entire retail hierarchy–that is, centres at the regional, district, and village levels as well as "special" centres such as bulky goods/homemaker centres

- a substantial component of demand associated with non-food spending will escape to centres outside Wyong, for example to Erina and the like

- a proportion of this demand will be accounted for by holiday spending by Wyong residents (that is, directed to retailers outside of Wyong) or as a result of internet purchasing.

Hence, the actual level of demand for additional retail floorspace arising from population growth in Wyong during the period 2006-31 will be significantly less than the maximum figure of 183,453 sq.m. noted above. As a broad measure, a discount of 15% to 20% should be applied to this estimate to account for spending by Wyong residents which takes place outside Wyong LGA. Hence, the actual demand for additional retail floorspace in Wyong LGA during the period 2006-31 is estimated to be in the range of 146,700 to 156,000 sq.m..

4

CENTRE OPTIONS

4.1 Indicative Floorspace Demand

4.1.1 Introduction

To determine an appropriate retail strategy for Wyong for the forecast period 2006-31 it is necessary to allocate the floorspace estimates discussed in Section 3.5 of this Report to various levels of the retail hierarchy.

Retail analysts have developed broad allocation models for available retail spending and floorspace demand. These models have been particularly useful where "greenfields" development is involved. Examples of this have included the ACT, planning for new urban release areas in New South Wales such as South Creek, and for new urban growth corridors such as the northern suburbs of Perth and the northern suburbs of the Gold Coast.

These models allocate spending to various levels of the hierarchy according to preset assumptions about the likely distribution of sales between regional, sub-regional, district and neighbourhood/village centres.

Such allocation models have their limitations, however, particularly where it is sought to apply them to environments like Wyong which effectively combine both established urban areas (with established retail centres) and areas of greenfields development like that at Warnervale/Wadalba.

4.1.2 Existing Sales Distribution

Rather than adopt preset assumptions about the market shares of various types of centres, we have prepared estimates of the current distribution of retail spending across various levels of Wyong's existing retail hierarchy (TABLE 4.1 refers). We acknowledge there is potential for error in these estimates. For instance, while reasonably reliable turnover data is available for planned centres, for a number of district centres (Toukley, Wyong and The Entrance) and neighbourhood/village centres ,it has been necessary to estimate turnover levels.

Estimates also have been made concerning the proportion of sales by centre type derived from spending by Wyong residents as opposed to sales attributable to spending by tourists and visitors who reside outside Wyong LGA.

As indicated in TABLE 4.1, we estimate the distribution of spending by Wyong residents across the hierarchy in 2005-06 broadly to be as follows:

- regional centre ... 25.2%
- bulky goods ... 9.6%
- district centres ... 37.1%
- village/neighbourhood centres ... 6.5%
- escape spending ... 21.6%.

TABLE 4.1
ESTIMATED MARKET SHARE by CENTRE TYPE – WYONG SHIRE, 2006

Centre Type ...	Sales 2006 *($ Mil. p.a.)*	Derived from Wyong *(%)*	Derived from Wyong *($ Mil. p.a.)*	Share of Wyong Spend *(%)*
Regional	$380.0	75.0	$285.0	25.2
Bulky	$127.5	85.0	$108.4	9.6
District				
Lake Haven	$174.3	85.0	$148.2	13.1
Bay Village	$137.4	88.0	$120.9	10.7
Toukley	$66.7	95.0	$63.4	5.6
Wyong	$41.0	95.0	$39.0	3.4
The Entrance	$61.5	80.0	$49.2	4.3
District Sub-Total	*$480.9*	*87.5*	*$420.7*	*37.1*
Village/ Neighbourhood	$77.0	95.0	$73.2	6.5
Escape	–	–	–	21.6

Source: Leyshon Consulting Estimates, March 2006.

The Tuggerah Regional Centre has the highest "market share" of any retail centre in Wyong. By combining the Regional Centre share with the bulky goods share (that is, the proportion of spending captured by the Tuggerah Homemakers Centre and retailers on Tuggerah Straight), the overall market share of the Tuggerah Town Centre is put at approximately 34.8% of available retail spending.

Our principal comment in relation to the estimates contained in TABLE 4.1 is that Wyong LGA essentially has a "top heavy" retail hierarchy–that is, fully 71.9% of total spending generated by Wyong residents in 2006 is estimated to be captured by the Regional Centre and the five district centres. Compared with other retail hierarchies we have studied, a neighbourhood/village centres' market share of 6.5% (as estimated for Wyong) is well below average. In other environments like the ACT, for instance, historically neighbourhood centres have captured between 12% and 15% of available resident spending.

We also note that by contemporary standards Wyong has had (until recently) a relatively under-developed bulky goods sector. This results in a low market share for the sector–estimated at 9.6% of available spending in 2006.

The opening of a new 20,000 sq.m. bulky goods centre at Lake Haven by Walker Corporation in 2007 will increase the market share held by the bulky goods sector in Northern Wyong in particular and Wyong in general in future years.

Wyong LGA has a high level of escape spending–estimated at about 21.6%. This spending "escapes" to centres such as Erina and centres in the Sydney Region including Hornsby. Escape spending is expected to decline over time as retail facilities are improved and expanded at centres such as Westfield Tuggerah.

TABLE 4.2 provides an indicative assessment of the demand for additional retail floorspace in Wyong by centre type during the period 2006-31. This assessment is based on the assumption that resident spending will increase by +$1.009 billion between 2006-31. It also assumes some changes in the existing proportion of retail spending distributed by centre type to take account of improvements in the retail "offer" in Wyong over time.

The analysis presented in TABLE 4.2 makes certain assumptions as to average retail sales standards by centre type in order to determine notional floorspace demand. In summary, the average sales rates assumed for the analysis are as follows:

- regional centre ... $5,500 per sq.m. per annum
- bulky goods ... $3,500
- district centres ... $6,000
- village/neighbourhood ... $4,500.

These sales rates are regarded as the sales "hurdles" necessary to justify the development of **new** retail space in Wyong.

As indicated in TABLE 4.2, the resultant notional demand for **additional** retail floorspace by centre type between 2006-31 is as follows:

- regional centre ... +46,230 sq.m.
- bulky goods ... +34,595 sq.m.
- district centres ... +62,558 sq.m.
- village/neighbourhood ... +14,574 sq.m.
- **Total ... +157,957 sq.m..**

TABLE 4.2
ESTIMATED DEMAND for ADDITIONAL RETAIL FLOORSPACE by CENTRE TYPE – WYONG, 2006-31

Centre Type ...	Share of Spending (%)	Increase in Spending ($.Mil. p.a.)	Average Sales ($/Sq.M./p.a.)	Notional Floorspace Demand (Sq.M.)
Regional	25.2	$254.3	$5,500	46,230
Bulky	12.0	$121.1	$3,500	34,595
District	37.2	$375.3	$6,000	62,558
Village/ Neighbourhood	6.5	$65.6	$4,500	14,574
Escape	19.1	$192.7	–	–
Total	**100.0**	**$1,009.0**		**157,957**

Note: Errors due to rounding.
Source: Leyshon Consulting Estimates, March 2006.

4.1.3 Indicative Demand – Northern Wyong

If the broad market shares noted above are applied to geographic areas within Wyong Shire, it is possible to estimate the likely demand for additional floorspace by centre type in Northern and Southern Wyong for the period 2006-31.

Northern Wyong is defined as including the SPDs of Northern Lakes, San Remo, Gorokan, Toukley and Warnervale/Wadalba. Southern Wyong is defined as including the SPDs of Ourimbah/Rural, Wyong, The Entrance, Rural West and Southern Lakes.

As indicated in TABLE 4.3, the overall theoretical demand for additional floorspace in Northern Wyong between 2006-31 is some 96,133 sq.m. distributed broadly as follows:

- regional centre ... 28,152 sq.m.
- bulky goods ... 21,068 sq.m.
- district centres ... 38,082 sq.m.
- village/neighbourhood ... 8,831 sq.m.
- **Total ... 96,133 sq.m..**

As there is no regional centre in Northern Wyong, notional regional floorspace demand generated in that area by an increase in available resident spending during the forecast period primarily would be directed to Tuggerah. Some demand would also be directed to Erina as well as to other regional-scale centres outside the Central Coast.

TABLE 4.3
ESTIMATED DEMAND for ADDITIONAL RETAIL FLOORSPACE by CENTRE TYPE – NORTHERN WYONG, 2006-31

Centre Type ...	Share of Spending (%)	Increase in Spending ($ Mil. p.a.)	Average Sales ($/Sq.M./p.a.)	Notional Floorspace Demand (Sq.M.)
Regional	25.2	$154.8	$4,500	28,152
Bulky	12.0	$73.7	$3,500	21,068
District	37.2	$228.5	$6,000	38,082
Village/ Neighbourhood	6.5	$39.7	$4,500	8,831
Escape	19.1	$117.8	–	–
Total		**$614.5**		**96,133**

Source: Leyshon Consulting Estimates, March 2006.

4.1.4 Indicative Demand – Southern Wyong

The theoretical demand for additional floorspace in Southern Wyong between 2006-31 is shown in TABLE 4.4. In summary, total theoretical additional demand of some 61,716 sq.m. is estimated distributed broadly as follows:

- regional centre ... 18,072 sq.m.
- bulky goods ... 13,526 sq.m.
- district centres ... 24,448 sq.m.
- village/neighbourhood ... 5,670 sq.m.
- **Total ... 61,716 sq.m..**

TABLE 4.4
ESTIMATED DEMAND for ADDITIONAL RETAIL FLOORSPACE by CENTRE TYPE – SOUTHERN WYONG, 2006-31

Centre Type ...	Share of Spending (%)	Increase in Spending ($.Mil. p.a.)	Average Sales ($/Sq.M./p.a.)	Notional Floorspace Demand (Sq.M.)
Regional	25.2	$99.4	$5,500	18,072
Bulky	12.0	$47.3	$3,500	13,526
District	37.2	$146.7	$6,000	24,448
Village/ Neighbourhood	6.5	$25.5	$4,500	5,670
Escape	19.1	$75.6	–	–
Total		**$394.5**		**61,716**

Source: Leyshon Consulting Estimates, March 2006.

4.2 Centre Strategy

In addition to the theoretical estimates of potential demand discussed above, an analysis has been undertaken of potential centre development options in both Northern and Southern Wyong during the forecast period (2006-31). This analysis takes into account a number of factors including:

- the existing distribution of centres in both broad localities
- existing approvals for new retail development
- the differential market share of the Regional Centre in both Northern and Southern Wyong
- the existing supply of floorspace at various levels of the retail hierarchy

- the differing turnover or productivity levels that apply to various types of centres within the hierarchy.

In this instance the latter issue is of particular importance. While the analysis set out in TABLES 4.2 to 4.4 provides an estimate of the **theoretical** demand for **new** retail floorspace (based on the level of average sales required to justify new retail floorspace), existing centres typically have much lower average sales levels. Hence, to determine what the likely demand in reality would be for additional floorspace at various levels of the retail hierarchy in both areas, it is essential to take into account the fact that existing centres (for example Toukley and Wyong) can (and do) trade acceptably at much lower average sales rates than district centres such as Lake Haven or Stockland Bay Village.

Secondly, in formulating development options it needs to be recognised there are in fact relatively limited options for new centres in Northern Wyong given existing approvals and commitments to a new district centre at Warnervale, the proposed village centre at San Remo, an additional supermarket at Wadalba and the existing consent for a major bulky goods centre at Lake Haven.

To a significant extent the future retail strategy for Northern Wyong and Southern Wyong will be considerably influenced by the demand for additional supermarkets and, in the case of Northern Wyong, the demand for an additional DDS.

The demand for supermarkets between 2006-31 is particularly influential as far as the development of new centres or expansion of existing centres is concerned. Principally this is because supermarkets are found at every level of the retail hierarchy and in and of themselves command around 32% of total available retail spending. Consequently, the demand for supermarkets by location has a direct and very great influence on centre strategy.

With the above in mind, TABLE 4.5 provides an estimate of the demand for full-line supermarkets in 2006, 2016 and 2031. The assessment detailed in TABLE 4.5 is based on the following assumptions:

- an average sales rate of $8,500 per sq.m. per annum

- an average full-line supermarket size of 3,500 sq.m.

- existing supermarkets of <2,500 sq.m. are counted as 50% of a full-line supermarket.

In relation to the assessment of the demand for supermarket floorspace it is possible some of the demand could be absorbed by increases in the average size of supermarkets over time.

As indicated in TABLE 4.5, at present in Wyong there is sufficient demand for 12.0 full-line supermarkets. The current supply of these stores totals 12 meaning that there is an approximate balance (across the Shire) between demand and supply. There are, however, three SPDs with a clear localised shortfall of supermarket floorspace namely:

- San Remo ... -1.5
- Northern Lakes ... -1.1
- Warnervale/Wadalba ... -1.0.

TABLE 4.5
INDICATIVE DEMAND for FULL-LINE SUPERMARKETS – WYONG SHIRE SOCIAL PLANNING DISTRICTS, 2006, 2016 and 2031

	— Social Planning Districts —										
Period ...	Northern Lakes	San Remo	Gorokan	Toukley	Warnervale/ Wadalba	Ourimbah-Rural South	Wyong	The Entrance	Rural West	Southern Lakes	Total
2006											
Available Spending *($ Mill. p.a.)*	$33.8	$44.9	$45.9	$24.3	$30.6	$12.6	$35.0	$68.3	$6.4	$60.2	$362.0
Floorspace Supportable *(Sq.M.)*	3,977	5,286	5,402	2,861	3,595	1,485	4,122	8,032	758	7,066	42,584
Stores Supportable *(No.)*	1.1	1.5	1.5	0.8	1.0	0.4	1.2	2.3	0.2	2.0	12.0
Existing Stores *(No.)*	0.0	0.0	2.0	1.0	0.0	0.0	3.5	3.0	0.0	2.5	12.0
Difference *(No.)*	(1.1)	(1.5)	0.5	0.2	(1.0)	(0.4)	2.3	0.7	(0.2)	0.5	0.0
2016											
Available Spending *($ Mill. p.a.)*	$38.3	$49.7	$51.2	$32.3	$74.6	$15.6	$49.8	$92.3	$7.5	$68.2	$479.5
Floorspace Supportable *(Sq.M.)*	4,508	5,845	6,025	3,797	8,774	1,840	5,853	10,863	880	8,024	56,409
Stores Supportable *(No.)*	1.3	1.7	1.7	1.1	2.5	0.5	1.7	3.1	0.3	2.3	16.2
Existing Stores *(No.)*	0.0	1.0	2.0	1.0	2.5	0.0	4.0	4.0	0.0	2.5	17.0
Difference *(No.)*	(1.3)	(0.7)	0.3	(0.1)	0.0	(0.5)	2.3	0.9	(0.3)	0.2	0.8
2031											
Available Spending *($ Mill. p.a.)*	$47.5	$71.5	$63.2	$48.3	$145.6	$20.4	$72.1	$124.0	$9.9	$82.2	$684.7
Floorspace Supportable *(Sq.M.)*	5,583	8,411	7,439	5,686	17,133	2,398	8,483	14,594	1,169	9,674	80,570
Stores Supportable *(No.)*	1.6	2.4	2.1	1.6	4.9	0.7	2.4	4.2	0.3	2.8	23.0
Existing Stores *(No.)*	0.0	1.0	2.0	1.0	2.5	0.0	4.0	4.0	0.0	2.5	17.0
Difference *(No.)*	(1.6)	(1.4)	(0.1)	(0.6)	(2.4)	(0.7)	1.6	(0.2)	(0.3)	(0.3)	(6.0)

Source: Leyshon Consulting Estimates, March 2006.

By 2016 we have assumed that a new supermarket has opened at San Remo, two full-line supermarkets are open at the Warnervale Town Centre together with half a full-line supermarket at Wadalba. Wyong meanwhile is assumed to have an upgraded supermarket to full-line status and an additional full-line supermarket has been added to The Entrance.

As indicated in TABLE 4.5, by 2016 there would be a slight oversupply in supermarket floorspace within the Shire as a whole (0.8 of a store). The only under-supplies of supermarkets in local areas of any significance are in Northern Lakes (-1.3) and San Remo (-0.7).

Assuming no further additions of supermarkets by 2031, some significant shortfalls of supermarket floorspace would arise. By 2031 our analysis indicates Wyong could support 23 full-line supermarkets. But assuming no increase in the number of stores between 2016-31 Wyong would have only 17 supermarkets–a shortfall of six stores. The most significant shortfalls are evident in:

- Warnervale ... -2.4
- Northern Lakes ... -1.6
- San Remo ... -1.4.

There are slight shortages in most other SPDs but not sufficient to warrant the addition of a full-line supermarket. In Toukley SPD, for example, sufficient demand may emerge between 2016-31 for another smaller-scale supermarket such as an Aldi or IGA. A similar situation applies in the Ourimbah/Rural South SPD.

In summary, this analysis suggests that apart from the additional supermarket being contemplated for The Entrance, there is no pressing need for another supermarket in Southern Wyong during the period 2006-31. In Northern Wyong, by contrast, demand already exists for another supermarket in Northern Lakes SPD. This will be addressed in part by the proposed supermarket at San Remo. A second supermarket is required in Lake Munmorah and up to two further supermarkets in the Warnervale/Wadalba area by 2031.

The other major retail element which will affect future centre strategy will be the addition of a DDS. Most analysts agree that a population catchment of around 50,000 persons is required to support a full-line DDS (that is, >6,000 sq.m.). Currently one DDS (Kmart) is located at Lake Haven in Northern Wyong, two (Big W and Target) are located at Tuggerah in Southern Wyong together with a Kmart at Bateau Bay.

With respect to Northern Wyong, the population of the area is some 75,741 persons at present and will pass the threshold required for a second DDS (100,000 persons) somewhere between 2016-21. By 2031 Northern Wyong is projected to have an overall population of 122,000. This is insufficient to support a third DDS.

We are aware some observers advocate the proposed Warnervale district centre should be developed to contain two DDSs. If this were to occur before 2021 it would place considerable competitive pressure on the existing DDS at Lake Haven (Kmart) and any other DDS developed at Warnervale itself. It would also have some competitive effects (albeit of a modest nature) on Westfield Tuggerah by reducing the flow of department store-type spending to that centre from Northern Wyong.

Given the above we recommend that the preferred course of action is for the second DDS in Northern Wyong to be located at Warnervale.

By 2031 the total population for Wyong Shire is projected to be in the order of 220,140 persons. Assuming the addition of a DDS in Warnervale, the Shire by that time would have five DDSs serving 220,000 persons or a ratio of about 44,000 persons per store. This appears to be a sustainable level of provision of DDSs.

4.2.1 Northern Wyong

TABLE 4.6 provides an estimate of the theoretical demand for additional floorspace in Northern Wyong during the period 2006-31 based on adjusted market shares (to reflect current sales volumes) for the major centre types and lower average sales rates ($ per sq.m. per annum) than those utilised in the analysis shown in TABLES 4.2 to 4.4.

As indicated in TABLE 4.6, in 2006 it is estimated that Northern Wyong has a theoretical shortfall of some -48,213 sq.m. of retail floorspace. Of this, an estimated 18,360 sq.m. relates to demand at the regional centre level which of course is satisfied by Westfield Tuggerah. Thus Northern Wyong is estimated to have an existing shortfall of about -29,853 sq.m. of district, village and bulky goods retail floorspace at present.

We have assumed that by 2011 the existing approved bulky goods centre at Lake Haven is constructed (20,000 sq.m.), the first stage of Warnervale has been developed (15,000 sq.m.), a new village centre has been developed at San Remo (5,500 sq.m.) and a new supermarket at Wadalba has been constructed (1,500 sq.m.). We have also assumed the addition of a 5,000 sq.m. village centre in Northern Lakes SPD by 2011.

This analysis indicates that demand and supply of bulky goods space would broadly be in balance in 2031 with an oversupply of 2,479 sq.m. at the village/neighbourhood level but a slight under-supply of space at the district centre level (-1,293 sq.m.).

As noted in TABLE 4.6, we have assumed a second stage of the Warnervale district centre by 2016 of some 10,000 sq.m.. This produces a theoretical oversupply of district centre-type space of 5,275 sq.m. in 2016. By 2021 this oversupply will have dissipated due to spending growth. This growth would permit an expansion of Lake

Haven by some 5,000 sq.m. by 2021. By 2016 there will also be an under-supply of bulky goods floorspace estimated at -5,270 sq.m..

TABLE 4.6
ESTIMATED DEMAND for ADDITIONAL FLOORSPACE by CENTRE TYPE – NORTHERN WYONG, 2006-31

Centre Type ...	Share of Spending (%)	Available Spending ($ Mil. p.a.)	Average Sales ($/Sq.M./p.a.)	Notional Floorspace Demand (Sq.M.)	Existing Floorspace (Sq.M.)	Surplus/ (Deficit) (Sq.M.)
2006						
Regional	18.0	$101.0	$5,500	18,360	–	(18,360)
Bulky	9.6	$53.8	$3,500	15,371	–	(15,371)
District	47.6	$267.0	$4,800	62,865	53,900	(8,965)
Village/Neighbourhood	8.5	$47.7	$4,000	12,517	7,000	(5,517)
Escape	16.3	$91.5	–	–	–	0
Total	**100.0**	**$561.0**		**109,113**	**60,900**	**(48,213)**
2011						
Regional	18.0	$120.0	$5,500	21,813	–	(21,813)
Bulky	10.5	$70.0	$3,500	20,000	20,000	0
District	46.6	$310.6	$5,000	70,193	68,900	(1,293)
Village/Neighbourhood	9.5	$63.3	$4,000	16,621	19,100	2,479
Escape	15.4	$102.6	–	–	–	0
Total	**100.0**	**$666.5**		**128,627**	**108,000**	**(20,627)**
2016						
Regional	17.0	$130.7	$5,500	23,769	–	(23,769)
Bulky	11.5	$88.4	$3,500	25,270	20,000	(5,270)
District	46.6	$358.4	$5,500	73,625	78,900	5,275
Village/Neighbourhood	10.5	$80.7	$4,500	18,841	19,100	259
Escape	14.4	$110.8	–	–	–	0
Total	**100.0**	**$769.0**		**141,505**	**118,000**	**(23,505)**
2021						
Regional	17.0	$152.7	$5,500	27,769	–	(27,769)
Bulky	11.5	$103.3	$3,500	29,520	20,000	(9,520)
District	46.6	$418.7	$5,500	86,014	83,900	(2,114)
Village/Neighbourhood	10.5	$94.3	$4,500	22,011	19,100	(2,911)
Escape	14.4	$129.4	–	–	–	0
Total	**100.0**	**$898.4**		**165,314**	**123,000**	**(42,314)**

TABLE 4.6
ESTIMATED DEMAND for ADDITIONAL FLOORSPACE by CENTRE TYPE – NORTHERN WYONG, 2006-31

Centre Type ...	Share of Spending (%)	Available Spending ($ Mil. p.a.)	Average Sales ($/Sq.M./p.a.)	Notional Floorspace Demand (Sq.M.)	Existing Floorspace (Sq.M.)	Surplus/ (Deficit) (Sq.M.)
2026						
Regional	17.0	$176.3	$5,500	32,056	–	(32,056)
Bulky	12.0	$124.5	$3,500	35,560	20,000	(15,560)
District	46.6	$483.3	$5,500	99,294	78,900	(20,394)
Village/Neighbourhood	10.5	$108.9	$4,500	25,409	19,100	(6,309)
Escape	13.9	$144.1	–	–	–	0
Total	**100.0**	**$1,037.1**		**192,319**	**118,000**	**(74,319)**
2031						
Regional	17.0	$199.8	$5,500	36,331	–	(36,331)
Bulky	12.0	$141.0	$3,500	40,300	20,000	(20,300)
District	46.6	$547.7	$5,500	112,535	78,900	(33,635)
Village/Neighbourhood	10.5	$123.4	$4,500	28,797	19,100	(9,697)
Escape	13.9	$163.5	–	–	–	0
Total	**100.0**	**$1,175.4**		**217,963**	**118,000**	**(99,963)**

Source: Leyshon Consulting Estimates, March 2006.

With no further additions to the retail hierarchy significant shortfalls of space emerge over the period 2021-31. By 2031 the estimated shortfalls of space are as follows:

- regional centre ... -36,331 sq.m.
- bulky goods ... -20,300 sq.m.
- district centres ... -33,635 sq.m.
- village/neighbourhood ... -9,697 sq.m..

Based on the analysis set out in TABLE 4.6, we consider an appropriate retail centre strategy for Northern Wyong during the period 2006-31 can be summarised as follows:

- permit the expansion of the Warnervale centre from 10,000 sq.m. to 25,000 sq.m. via a second stage of 10,000 sq.m. in about 2021

- introduce a new centre of 5,000 sq.m. at Lake Munmorah by 2011

- permit the expansion of Lake Haven by some 5,000 sq.m. but not before 2016

- provide for development of an additional bulky goods space in Northern Wyong of up to 20,000 sq.m. by 2031

- add a second supermarket to Toukley after 2021

- expansion of Lake Munmorah after 2021 to some 10,000 sq.m.

- add a new village centre in Wadalba East by 2031.

We understand that additional residential development has been mooted at both Catherine Hill Bay (600 dwellings) and Gwandalan (up to 920 dwellings). These developments are not yet approved and have not been factored into the population/expenditure projections detailed in this Report. If these two developments proceed they will increase the demand for local convenience retail services in both localities. They should be evaluated on a site-specific basis following approval of the subdivision/development proposals. It is unlikely that a provision of more 1,500 sq.m. of local retail services would be required in either locality.

4.2.2 Southern Wyong

Compared to Northern Wyong (discussed above), the analysis for Southern Wyong is significantly affected by the existence of the Tuggerah Regional Centre which attracts trade from throughout the LGA and beyond and by the Tuggerah Homemakers centre which has similar characteristics.

Any analysis for Southern Wyong along the lines of that conducted for Northern Wyong simply would produce significant notional oversupplies of floorspace as several centres including Tuggerah, The Entrance, Tuggerah Homemakers and Bateau Bay have effective catchments that include both Northern and Southern Wyong as well as areas outside of Wyong LGA. For this reason, the same exercise as that conducted for Northern Wyong has not been undertaken for Southern Wyong.

As indicated in TABLE 4.4, by 2031 the Southern Wyong region is projected to require 24,448 sq.m. of district centre space, 5,670 sq.m. of neighbourhood/village centre space and some 13,526 sq.m. of additional bulky goods retailing.

The options open to Council with respect to centres in Southern Wyong essentially are limited. It is therefore likely that the demand identified in TABLE 4.4 for district and village floorspace in 2031 will be met by the redevelopment and expansion of existing centres. With respect to district centres, the two centres with the most capacity for expansion/redevelopment appear to be The Entrance and Wyong. Given the scale and sophistication of Bateau Bay any further expansion of that centre does not appear necessary particularly if expanded district centre retailing can be achieved at both The Entrance and Wyong. In our opinion, the most logical strategy with respect to the Wyong district centre would be to encourage retail redevelopment on the back of residential development with the aim of adding a second full-line supermarket to the centre after 2021.

In relation to The Entrance, some flexibility as far as the expansion proposals recommended in this Report are appropriate to take account of spending in this centre by tourist and visitors.

We also recommend Council give consideration to the expansion of retail facilities at Ourimbah. By 2016, the Ourimbah/Rural South SPD could support a medium-scale supermarket (1,500-2,500 sq.m.). It is further recommended Council review options for additional retailing at Ourimbah as part of a more general review of how the University of Newcastle campus can be integrated better with existing development.

4.2.3 Regional Centre Demand

In relation to the Tuggerah Regional Centre, taking into account both demand from residents as well as that likely to originate from outside the trade area, the further expansion of Westfield Tuggerah by some 55,000 sq.m. (retail) could be contemplated by 2031. This would mean that Westfield Tuggerah would contain some 124,324 sq.m. of retail floorspace and, (depending on the future addition of non-retail floorspace functions), some 145,000-155,000 sq.m. of space in total. These estimates exclude existing and proposed floorspace in Tuggerah Straight and adjacent areas.

Given the potential for a substantial expansion in bulky goods retailing in Northern Wyong during the period 2006-31, the prospects for a similar expansion of such retailing in the Regional Centre are limited. Despite this, we consider it is appropriate to allow for an increase of 15,000 to 20,000 sq.m. to take account of:

- changes in the bulky goods retail sector which are leading to increases in average store sizes; and

- the ability of retailing in the Regional Centre to attract sales from outside Wyong Shire.

The further development of Westfield Tuggerah should proceed under the provisions of an agreed master plan which focuses on how the Westfield centre could be integrated better with other parts of the overall Tuggerah Regional Centre.

4.3 Non-Retail Floorspace Demand

There is no accepted methodology for estimating the demand for non-retail floorspace in centres. The demand for this type of floorspace is driven principally (but not exclusively) by the growth in office-based employment in a given region.

While it is relatively easy to model workforce growth, estimating the demand for floorspace to accommodate growth in employment is complicated by the following factors:

- home-based employment is a growing but poorly understood trend

- some employment in this sector is essentially mobile and thus makes limited (if any) demands on traditional office space

- the provision of significant components of office accommodation for State and Commonwealth government functions being determined by political factors which defy modelling.

Notwithstanding the above, given the scale of expected population (and therefore workforce) growth during the forecast period, demand for the further provision of non-retail (commercial) floorspace in Wyong undoubtedly will continue.

We have prepared some estimates of this potential growth (TABLE 4.7 refer). These estimates assume no change in the current proportion of jobs in Wyong which could be classified as being office-based (that is, 68.4%). Broadly, we estimate the total number of persons employed in office jobs in Wyong Shire could rise from 21,209 in 2001 to 36,380 in 2031–an increase of +15,171 workers in this sector. Assuming a provision of 15 sq.m. per worker this produces a theoretical requirement for an additional +227,565 sq.m. of office space in Wyong during the period 2001-31.

TABLE 4.7
PROJECTED OFFICE FLOORSPACE DEMAND – WYONG SLA, 2006-31

Year ...	Total Workers in Home SLA	Office Jobs in Work SLA (%)	Number Office Jobs in Work SLA	Current Office Floorspace (Sq.M.)
2001	46,647	68.4	21,209	318,135
2006	61,508	68.4	25,954	389,317
2011	67,831	68.4	28,622	429,337
2016	72,615	68.4	30,641	459,618
2021	77,441	68.4	32,677	490,162
2026	82,079	68.4	34,635	519,521
2031	86,216	68.4	36,380	545,703
Growth 2001-31	**39,569**			**227,568**

Source: Leyshon Consulting Estimates, March 2006.

As highlighted above, in reality some of this space will not be required due to persons choosing to work from home rather than from commercial office space.

In our opinion, existing State and Regional planning policies (for instance, draft SEPP66) point to the requirement for such additional employment and floorspace being concentrated in Wyong's three major centres which will have a high degree of public transport accessibility–namely Warnervale, Wyong and the Tuggerah Regional Centre.

At a practical level some of this employment will be accommodated in the proposed Warnervale Employment Zone (WEZ). The WEZ will consist of some 300 hectares of employment/industrial land to the west of the Warnervale District Centre.

Notwithstanding the above, strategies are required to encourage office and other non-retail activities to locate in smaller centres in Wyong LGA. This is particularly so as far as new village centres are concerned.

In relation to other planned centres, we consider it appropriate for Council to consider a requirement of up to 10% of the gross leasable area of new centres be allocated to non-retail commercial purposes. In a village centre of 5,000 sq.m., for instance, this would equate to about 500 sq.m. of space being developed for such uses.

Clearly, a higher rate of provision of non-retail commercial space would apply with respect to the proposed Warnervale District Centre. This is due to the role of this centre in providing district-level services to the population residing in Warnervale/Wadalba and adjacent areas.

In relation to the WEZ, it is recommended that a minimum floorspace limit be applied to individual development proposals involving "pure" office space. In such cases, a minimum tenancy size of 500 sq.m. should be applied to prevent small-scale offices from establishing in out-of-centre locations as opposed to existing or proposed business centres.

5 OTHER ISSUES

5.1 Introduction

Council has requested advice from Leyshon Consulting in relation to several issues ancillary to the provision of a new retail centres strategy for the Shire. These issues include:

- design principles which should be applied to new retail development in Wyong
- the possible need to amend Wyong DCP 63 which relates to home-based employment; and
- policies that should be adopted with respect to the economic evaluation of new retail development proposals.

Our advice in relation to these issues is set out below.

5.2 Design Criteria

It is our impression that to date the principal focus of planning activity in Wyong has been on the development of new centres per se rather than their design quality. Increasingly, however, residents not only in Wyong but elsewhere in Australia have rising expectations about the need for centres to be both accessible and to exhibit a relatively high standard of urban design.

In practice, retail centres fall into two broad categories namely enclosed centres and traditional retail strips. It is fair to say that contemporary retail design practice is increasingly trying to blend many of the characteristics of strip centres with those of enclosed centres.

The first enclosed shopping centre was constructed in the United States in 1956–Southdale Center Mall at Edina in the city of Minneapolis. Southdale was an enclosed building surrounded by a sea of surface car parking. In essence, Southdale became a model for retail development that persists today. Within Wyong LGA Westfield Tuggerah, Stockland Bay Village and Lake Haven are direct descendants of this type of development.

Fundamentally, such centres operate on simple principles of having at least two anchor tenants preferably located at either end of the centre and with specialty tenants located between the two anchors, thus creating a high traffic precinct which enables the specialty tenants to survive.

Over the years there have been a number of justifiable criticisms of enclosed shopping centres. Prominent among these have been:

- an over-emphasis on the internal design quality of the centre
- bland or poorly articulated exteriors
- poor quality/lack of landscaping
- separation of centres from other land uses by large car parking areas
- the limited range of uses provided on the same site particularly the limited range of commercial, community and other related uses.

Critics of enclosed centres also have pointed to the relative "isolation" of these centres from the communities in which they are located. This is reinforced by the fact that centres are usually closed to the public in the evenings.

In recent years the retail development industry worldwide has been making some attempts to change the nature of enclosed centres. In particular major enclosed centres have been increasing the number of external facing shops they contain to try and "activate" their facades. Other initiatives have included the increasingly common incorporation of a range of non-retail activities such as cinemas and restaurant precincts so as to extend the trading hours of particular centres.

In our opinion, the most significant influence on enclosed centre design in recent times has been the so-called New Urbanist movement. New Urbanism takes as its guiding principle (as far as centres are concerned) that mixed use, traditional main street centres are preferable to enclosed shopping centres. The movement has developed a number of principles concerning the design of shopping centres which apply to both strip centres and to the development of new enclosed centres. These are intended to improve the integration of centres with the surrounding community as well as enhancing the experience of shoppers.

Kohl[1] has enunciated these principles in a paper presented to the Congress for the New Urbanism in June 1999 generally as follows:

[1] Kohl J. "Transforming Main Street Retail" Congress for the New Urbanism, June 1999

Pedestrian Amenity

- wide sidewalks to provide enough room for friends to walk side by side
- provide shelter from summer sun and from rain
- ensure buildings are aligned with the sidewalk to create spatial enclosure and a sense of place.

Improving Pedestrian Safety

- providing large storefronts and upper storey windows which face the street to provide surveillance
- provide on-street parking to create a physical barrier between cars and pedestrians
- aligning building facades so as to minimise the intervening spaces which could provide security problems
- incorporating mixed uses (including residential) into centres to increase pedestrian activity at all hours of the day and night
- providing small kerb radii at corners and reducing the width of roadways to make it easier to walk across streets and to slow vehicles
- providing narrow car lanes to minimise pavement and to slow vehicles.

Improving Architectural Character

- articulate facades and avoid blank facades
- ensure storefronts face the sidewalk
- provide benches and planters or low walls to provide places for shoppers to rest
- ensure doors face the sidewalk.

Many of these principles have been incorporated into new retail centres developed in a variety of settings in the United States. Examples include Santana Row in San Jose, Celebration in Florida, St Johns Town Centre in Jacksonville, Florida, The Waterfront Homestead in Pittsburgh, Market Street in Scottsdale and the like.

To date, very few such centres have been developed in Australia. Some major centres like Knox City in Melbourne have incorporated some of the elements described above in a recent expansion. In Queensland the Orion Town Centre at Springfield will incorporate a central main street. Stage 1 of this centre is due to open in mid-2006. In addition, recent plans for the new regional centre at Rouse Hill indicate that the proposed centre has been designed to incorporate some New Urbanist principles such as a central main street and active street frontages.

In New Zealand, the Botany Town Centre developed by AMP in south Auckland is a regional-scale centre on some 17.6 hectares developed along "New Urbanist" lines.

In relation to examples from the United States, it needs to be recognised that many of these centres are relatively large in size. For instance, St Johns Town Centre in Jacksonville, Florida contains some

90,000 sq.m. of space while The Waterfront in Pittsburgh comprises about 60,000 sq.m.. There is some evidence that it is only developments of this scale which can “afford” the design input necessary to fully articulate and realise an outcome along New Urbanist guidelines.

Notwithstanding the above, implementation of some of the New Urbanist guidelines doubtless would be worthwhile for small centres. For instance, it should be possible to incorporate some of the principles noted above into a design-based DCP to guide future retail development in Wyong.

5.3 Evaluation of Development Applications

In recent years Council has been called upon to evaluate a number of applications for retail development in Wyong. Given the high level of population growth forecast for Wyong up to 2031, this requirement undoubtedly will continue.

Section 79C of the Environmental Planning and Assessment Act 1979 requires Council to take account of the social and economic effects of new development proposals. Further, DCP81 contains what are known as “variation criteria” which are intended to be used by Council in evaluating new development applications which relate to centres identified in DCP81. These variation criteria differ from centre to centre but include a requirement for applicants to demonstrate the following:

- that the application maintains the centre’s current role and range of functions

- that there is an appropriate increase in household income levels and expenditure giving rise to a need for additional floorspace

- that the expansion will not adversely affect other retail centres and is not in conflict with the Wyong Shire retail hierarchy

- that the proposed floorspace does not exacerbate the amount of existing vacant floorspace in the centre

- that additional floorspace and car parking can be integrated with the existing centre and surrounding urban areas.

DCP81 also identifies optimum floorspace levels for regional and district centres namely:

- regional centre ... 70-80,000 sq.m. by 2011
- district centres ... 35,000 sq.m..

In our opinion, DCP81 lacks some precision with respect to its optimum floorspace controls. For example, it is not clear whether the controls relates to total floorspace or just to retail floorspace.

It would appear that the variation criteria have been moderately successful in terms of assisting Council in evaluating new retail development proposals although the optimum floorspace criteria identified for the Tuggerah Regional Centre seem to have been ignored. Further, in the case of certain district centres, the 35,000 sq.m. "optimum floorspace" figure appears to have been treated by centre owners as constituting a "planning right". That is, the view has been expressed that this provision of DCP81 confers the right for a district centre to expand up to 35,000 sq.m.. This is irrespective of the fact that DCP81 clearly requires an expansion proposal to be considered in relation to the variation criteria applying to the particular centre.

In terms of future policy, we consider it is important that Council recast the current variation criteria or establish new evaluation "tests" which take into account:

- Fabcot principles
- net community benefit principles.

5.3.1 Fabcot Principles

The so-called Fabcot principles derive from a landmark case before the Land and Environment Court of New South Wales namely Fabcot Pty Ltd-v-Hawkesbury City Council (93LGERA 373). This case concerned a proposal by Woolworths to construct a freestanding supermarket in South Windsor. The Court heard argument about the likely economic effect of the proposed development and was persuaded that a sufficient planning risk existed that facilities in the Windsor town centre would be put at risk by the proposal and would not be made good by the development itself. That is, the Court accepted evidence it was possible that at least one of the existing supermarkets in the Windsor town centre could close and such closure would have an adverse flow-on effect to specialty shops. As the Woolworths application did not involve the provision of specialty shops, and because the development site was located at some distance from the Windsor town centre, the Court concluded residents of the area who use the Windsor town centre may have a diminished range of facilities available to them if development of the Woolworths supermarket at South Windsor proceeded.

These important principles have been reinforced by a number of subsequent cases in particular Cartier-v-Newcastle City Council (2001 NSW LEC 170). It is our opinion that revised evaluation criteria for new retail development proposals in Wyong should include an explicit requirement for applicants to demonstrate that the proposal will not lead to the reduction of facilities currently enjoyed by the public in any nearby centre.

5.3.2 Net Community Benefit

The concept of "net community benefit" has been specifically addressed in SEPP66–Integrating Land Use and Transport. Net community benefit is a new concept as far as economic evaluation is concerned. It appears to require applicants to demonstrate the following:

- that a proposal meets an identified community need for a certain type of retailing
- that the project will not lead to unacceptably high negative external effects
- that the project is both economically and environmentally sustainable
- that the range of facilities available to the public will be improved (in net terms)
- whether the proposal is accessible from the catchment by public transport, walking and cycling
- whether the proposal will increase private car use
- whether the proposal has a direct and indirect effect on public infrastructure or leads to costs to the public sector

- whether there are practical alternatives to provide the services proposed; and

- whether (in the case of a rezoning) there are alternative sites within or adjacent an existing centre.

It should be acknowledged that requiring applicants to address both Fabcot principles and net community benefit criteria substantially "raises the bar" as far as retail development applications are concerned. Given the nature of Wyong, in some cases it may be impossible for applicants to demonstrate that new retail development proposals are acceptable in relation to some aspects. For example, public transport in Wyong–particularly Northern Wyong–is relatively limited and new proposals doubtless will have difficulty demonstrating they are accessible by anything other than private motor vehicles.

Notwithstanding the above, it is considered that incorporating these two principles into an updated version of DCP81 should result in a more comprehensive evaluation of new retail development proposals than is the case at present.

6 RECOMMENDATIONS

6.1 Retail Hierarchy

Based on the analysis contained in this Report we **recommend** the following changes to the retail hierarchy as identified currently in DCP81 namely:

- addition of a Village centre at San Remo
- addition of a Village centre at Lake Munmorah
- addition of a Village centre at Wadalba
- upgrading of Long Jetty to Village centre status
- upgrading of Ourimbah to Village centre status.

The amended retail hierarchy for Wyong is depicted in FIGURE 6.1. The proposed hierarchy in 2011 and 2031 is shown in FIGURES 6.2 and 6.3 respectively.

6.2 Terminology

Currently DCP81 describes centres using the terms traditionally found in retail hierarchies–namely regional, district, village and neighbourhood centres. Recent amendments to the planning system in New South Wales make some of these terms obsolete.

The Department of Planning has recently introduced a standard LEP throughout New South Wales. This sets out seven new business zones

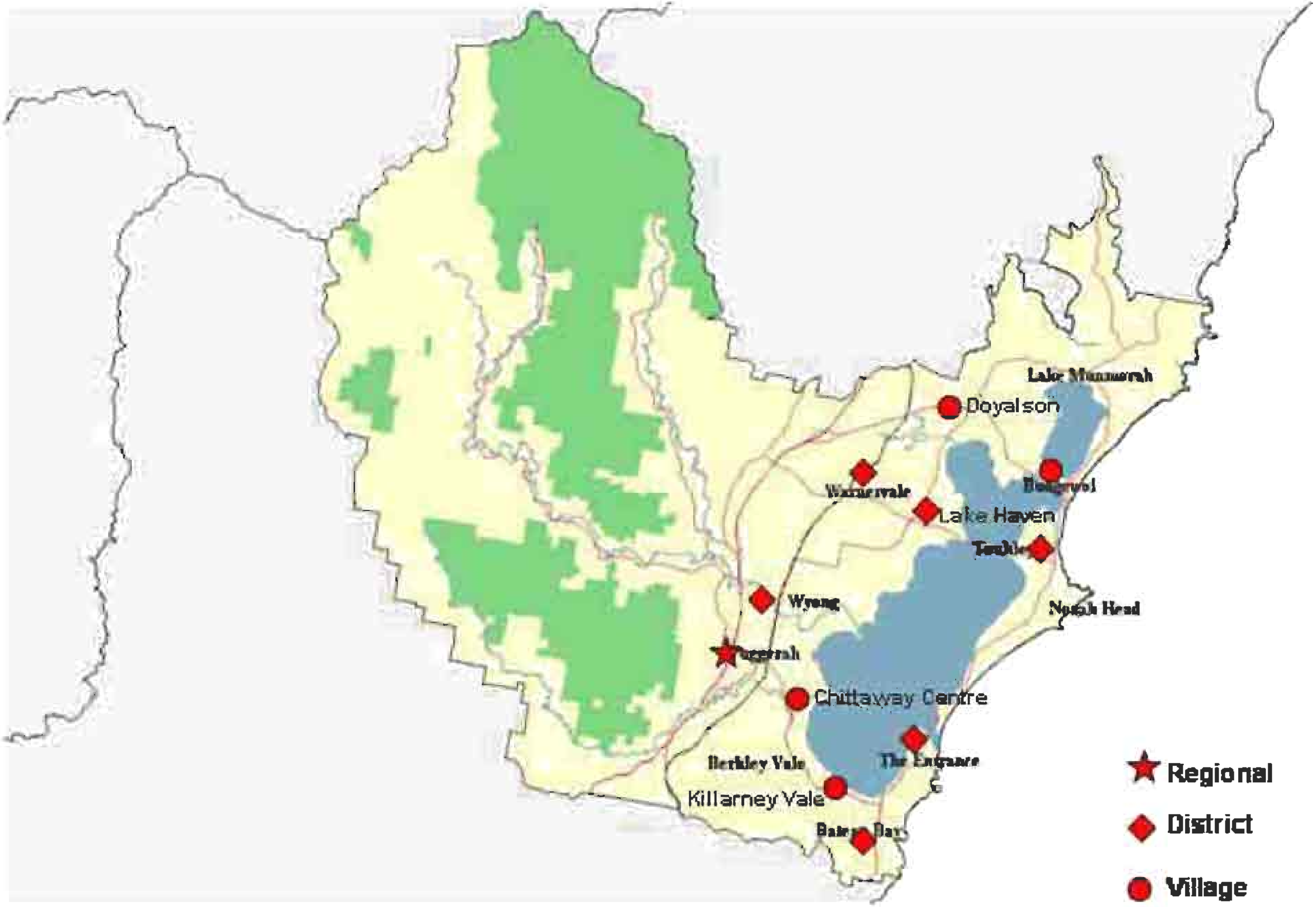


FIG 6.1: Existing Retail Hierarchy

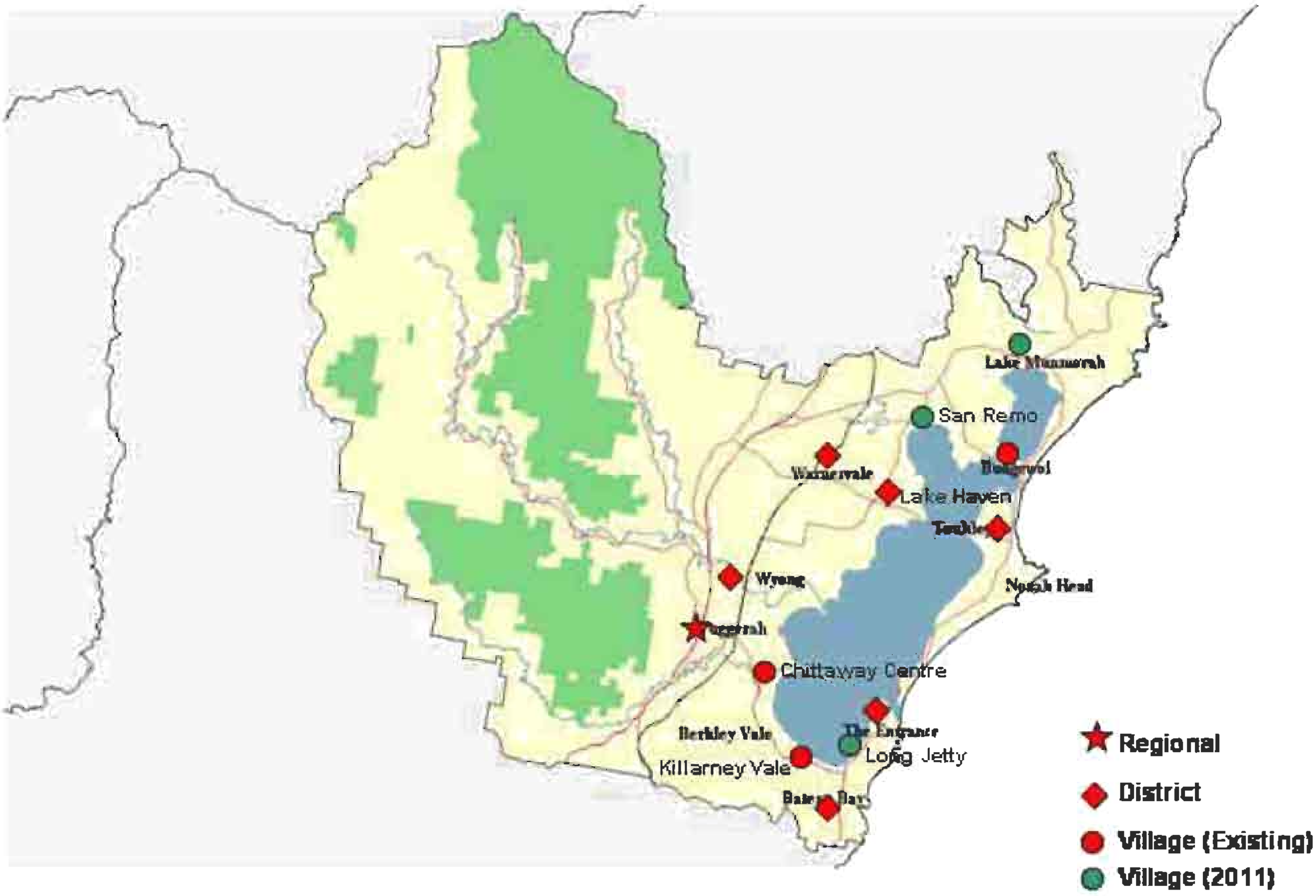


FIG 6.2: Proposed Retail Hierarchy - 2011

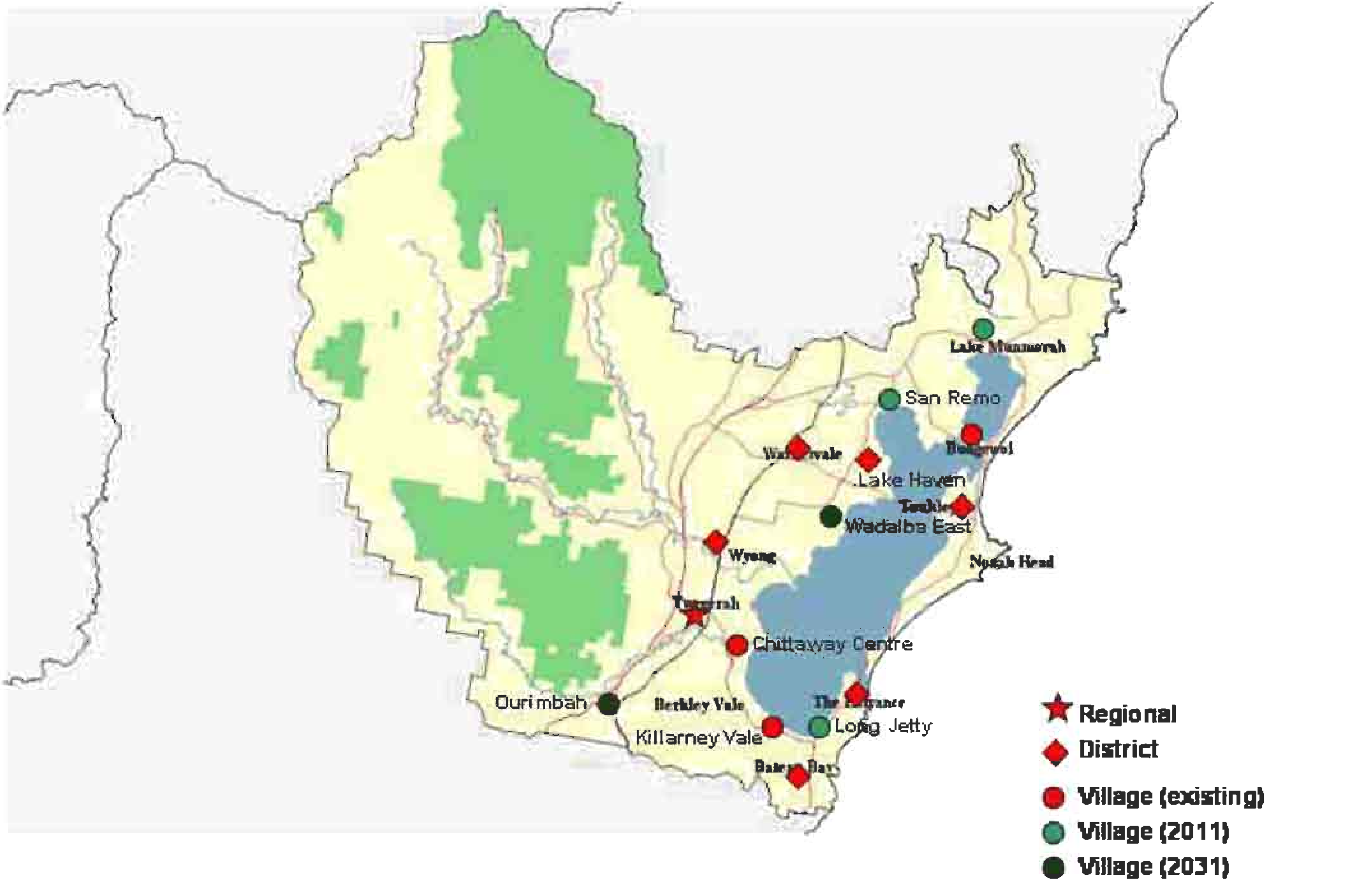


FIG 6.3: Proposed Retail Hierarchy - 2031

which we understand replace the current zones used by Council. The zones are:

- B1 – Neighbourhood Centre
- B2 – Local Centre
- B3 – Commercial Core
- B4 – Mixed Use
- B5 – Business Development
- B6 – Enterprise Corridor
- B7 – Business Park.

In our opinion these zones do not relate well to the concept of a retail hierarchy in that they do not provide a clear distinction between various types of centres. Furthermore, the zones do not recognise the intention to plan large centres, like the Tuggerah Regional Centre, in an holistic fashion. For example, based on the definitions contained in the standard LEP it is our opinion the Tuggerah Regional Centre would need to have at least three zonings–namely Commercial Core (covering Westfield Tuggerah), Enterprise Corridor (covering Tuggerah Straight and the SupaCenta) and Business Park (covering the Tuggerah Business Park) and taking into account the retail hierarchy set out in the recently released Draft Central Coast Regional Strategy.

Notwithstanding the above, we **recommend** that existing and proposed centres in Wyong be classified as set out below.

Village Centres

Budgewoi, San Remo, Lake Munmorah, Chittaway Bay, Berkeley Vale, Long Jetty, Ourimbah and Wadalba East.

Neighbourhood Centres

All small centres in Wyong–for example Kanwal, Charmhaven and Cresthaven Avenue.

District Centres

Toukley, Lake Haven, Warnervale, Wyong, Bateau Bay and The Entrance.

Regional Centre

Westfield Tuggerah.

Regional Centre Support

Tuggerah Straight and Tuggerah SupaCenta.

6.3 Centre Size and Timing

TABLE 6.1 summarises the **recommended** size of existing and proposed retail centres in Wyong Shire and the broad timing for the introduction of the latter between 2006-31. These timings should be regarded as indicative and subject to applicants demonstrating net community benefit outcomes as far as their particular development proposals are concerned. The **recommended** retail floorspace additions to centres can be summarised as follows:

2006-11

- Warnervale Stage 1 ... 15,000 sq.m.
- San Remo Village ... 5,500 sq.m.
- Budgewoi expansion ... 2,500 sq.m.
- Lake Munmorah Village ... 5,000 sq.m.
- Wadalba Neighbourhood ... 1,500 sq.m.

- Lake Haven Bulky Goods ... 20,000 sq.m.
- The Entrance expansion ... 8,000 sq.m.
- Bay Village bulky goods ... 5,000 sq.m.

2011-16

- Wadalba East Village ... 5,000 sq.m.
- Westfield Tuggerah expansion ... 15,000 sq.m.
- Tuggerah bulky goods ... 10,000 sq.m.
- Northern Wyong bulky goods ... 5,000 sq.m..

2016-21

- Lake Haven expansion ... 5,000 sq.m.
- Warnervale Stage 2 ... 10,000 sq.m.
- Northern Wyong bulky goods ... 10,000 sq.m.
- Long Jetty expansion ... 5,000 sq.m.
- Westfield Tuggerah expansion ... 15,000 sq.m..

2021-31

- Toukley expansion ... 5,000 sq.m.
- Lake Munmorah expansion ... 5,000 sq.m.
- Northern Wyong bulky goods ... 5,000 sq.m.
- Westfield Tuggerah expansion ... 25,000 sq.m.
- Tuggerah bulky goods ... 5,000 sq.m.
- Wyong expansion ... 5,000 sq.m.
- Ourimbah ... 5,000 sq.m..

As noted previously with respect to The Entrance, up to 10,000 sq.m. of additional retail floorspace may be appropriate in this centre due to demands generated by the spending of tourists and visitors.

It should be noted that the floorspace areas identified in TABLE 6.1 relate to the retail component of the centre in question. It is **recommended** that no floorspace constraints be identified in DCP81 with respect to non-retail floorspace. The principal reason for this is that non-retail floorspace generally does not have any significant economic effect and the absence of a control should encourage all centres to be developed along mixed use rather single use lines. Obviously, however, any expansion proposals for the non-retail elements of centres should be subject to the usual town planning and urban design considerations.

DCP81 should, however, contain a minimum provision for non-retail floorspace in new centres to ensure that:

- such floorspace is provided; and
- such floorspace is not converted to retail uses over time.

6.4 Office Space Development

It is **recommended** that three centres be identified as the preferred locations for major office employment–namely Warnervale, Wyong and the Tuggerah Regional Centre. These three locations are appropriate for office and commercial activity which is likely to have a significant reliance on public transport. Examples of the latter include government agencies or private sector organisations employing significant numbers of low and semi-skilled workers.

It is further **recommended** a provision be inserted into DCP81 which requires 10% of the total floorspace of new centres developed in Wyong between 2006-31 be occupied by non-retail uses. This provision would be designed to encourage the development of mixed use centres and to provide appropriate accommodation for small business.

It is **recommended** that a minimum tenancy size of 500 sq.m. be applied in the WEZ to prevent the establishment of small offices in out-of-centre employment areas.

6.5 Evaluation Criteria

It is **recommended** that DCP81 be amended to introduce specific evaluation criteria requiring applicants to demonstrate to Council's satisfaction that:

- proposals will either not lead to the loss of existing services in nearby centres; or
- proposals will make good the loss of such services; and
- there is a positive net community benefit associated with a proposal.

TABLE 6.1
RECOMMENDED CENTRE SIZE and TIMING – WYONG SHIRE, 2006-31

			— Floorspace Increase *(Sq.M.)* —					
Centre ...	**Existing**	**2011**	**2016**	**2021**	**2026**	**2031**	**Total 2031**	**Increase 2006-31**
Northern Wyong								
District Centres								
Lake Haven	32,196	-	0	5,000	-	-	37,196	5,000
Toukley	15,902	-	-	-	5,000	-	20,902	5,000
Warnervale *(Proposed)*	-	15,000	-	10,000	-	-	25,000	25,000
Total District	*48,098*	*15,000*	-	*15,000*	*5,000*	-	*83,098*	*35,000*
Village Centres								
Budgewoi	5,000	2,500	-	-	-	-	7,500	2,500
San Remo *(Proposed)*	-	5,500	-	-	-	-	5,500	5,500
Lake Munmorah *(Proposed)*	-	5,000	-	-	5,000	-	10,000	10,000
Wadalba East *(Proposed)*			5,000	-	-	-	5,000	5,000
Total Village	*5,000*	*13,000*	*5,000*	-	*5,000*	-	*28,000*	*23,000*
Other								
Bulky Goods	-	20,000	5,000	10,000	5,000	-	40,000	40,000
Sub-Total Northern Wyong	*53,098*	*48,000*	*10,000*	*25,000*	*15,000*	-	*151,098*	*98,000*
Southern Wyong								
Regional Centre								
Westfield Tuggerah	69,234	-	15,000	15,000	25,000	-	124,234	55,000
Other Bulky	40,000	-	10,000	-	5,000	-	55,000	15,000
Total Regional/ Other Bulky	*109,234*	-	*25,000*	*15,000*	*30,000*	-	*179,234*	*70,000*
District Centres								
Bateau Bay	30,046	-	-	-	-	-	30,046	0
Bateau Bay Bulky Goods	-	5,000	-	-	-	-	5,000	5,000
The Entrance	19,800	8,000	-	-		-	27,800	8,000
Wyong	11,899	-	-	-	5,000	-	16,899	5,000
Total District	*61,745*	*13,000*	-	-	*5,000*	-	*79,745*	*18,000*
Village Centres								
Chittaway Bay	4,650	-	-	-	-	-	4,650	0
Killarney Vale	2,000	-	-	-	-	-	2,000	0
Long Jetty	3,800	-	-	5,000	-	-	8,800	5,000
Ourimbah	-	-	-	5,000	-	-	5,000	5,000
Total Village	*10,450*	-	-	*10,000*	-	-	*20,450*	*10,000*
Sub-Total Southern Wyong	*181,429*	*13,000*	*25,000*	*25,000*	*35,000*	-	*279,429*	*98,000*
Total Wyong	*234,527*	*61,000*	*35,000*	*50,000*	*50,000*	-	*430,527*	*196,000*

Source: Leyshon Consulting Estimates, September 2007.

6.6 Design Issues

It is **recommended** DCP81 be amended to include provisions specifying desirable design elements for new retail centres developed in Wyong Shire. The provisions also should apply to expansion proposals for existing centres. It is **recommended** these design guidelines should address the issues identified in Section 5.2 of this Report and in particular:

- provision of adequate footpath widths
- building alignment
- articulation of facades
- positioning of major tenancies so as to minimise blank facades
- encouraging mixed use centres
- traffic management.

✤✤✤✤✤

APPENDIX A

Direction No.17 – Integrating Land Use and Transport

Objective

To ensure that urban structures, building forms, land use locations, development designs, subdivision and street layouts achieve the following planning objectives:

- improving access to housing, jobs and services by walking, cycling and public transport
- increasing the choice of available transport and reducing dependence on cars
- reducing travel demand including the number of trips generated by development and the distances travelled, especially by car
- supporting the efficient and viable operation of public transport services
- providing for the efficient movement of freight.

Where this direction applies

This direction applies to all councils.

When this direction applies

This direction applies when a council prepares a draft LEP that creates, removes or alters a zone or a provision relating to urban land, such as for residential, business or industrial purposes.

What a council must do if this direction applies

(1) A draft LEP shall locate zones for urban purposes and include provisions that give effect to and are consistent with the aims, objectives and principles of:
  (a) Improving Transport Choice – guidelines for planning and development (DUAP 2001), and
  (b) The Right Place for Business and Services – Planning Policy (DUAP 2001).

(2) A draft LEP may be inconsistent with this direction only if council can satisfy the Director-General that any particular provision or area should be varied or excluded having regard to the provisions of section 5 of the Environmental Planning and Assessment Act, and
  (a) the land has been identified in a strategy prepared by the council and approved by the Director-General, or
  (b) the rezoning is justified by an environmental study, or
  (c) the rezoning is in accordance with the relevant Regional Strategy prepared by the Department, or
  (d) the rezoning is, in the opinion of the Director-General, of a minor significance.

(3) For the purposes of (2)(b), an environmental study has the same meaning as in s.57 of the Environmental Planning and Assessment Act.

APPENDIX B

Table 1 – Origin and Destination for Major Proportion of Food and Grocery Shopping

Suburb (Origin of Households)	Count	Shopping Centre (Destination)														TOTAL
		Bateau Bay	Budgewoi	Charmhaven	Chittaway Bay	Erina	Killarney Vale	Lake Haven	NOT STATED	OTHER	The Entrance	Toukley	Tuggerah	Watanobbi	Wyong	
Bateau Bay	20	95%	-	-	-	5%	-	-	-	-	-	-	-	-	-	100%
Berkeley Vale	20	20%	-	-	10%	-	10%	-	5%	-	5%	-	50%	-	-	100%
Blue Bay	10	40%	-	10%	-	10%	10%	-	-	-	20%	-	10%	-	-	100%
Blue Haven	15	-	-	-	-	-	-	87%	-	-	-	-	13%	-	-	100%
Budgewoi	15	-	53%	-	-	-	-	33%	-	-	-	7%	7%	-	-	100%
Buff Point	10	-	40%	-	-	-	-	50%	-	-	-	-	10%	-	-	100%
Canton Beach	15	-	-	-	-	-	-	7%	7%	-	-	87%	-	-	-	100%
Caves Beach	15	-	-	-	-	-	-	-	13%	87%	-	-	-	-	-	100%
Charmhaven	15	-	-	-	-	-	-	100%	-	-	-	-	-	-	-	100%
Chittaway Bay	15	-	-	-	33%	-	-	-	-	13%	20%	-	33%	-	-	100%
Gorokan	15	-	-	-	-	-	-	87%	-	-	-	7%	7%	-	-	100%
Gwandalan	30	3%	7%	-	-	-	-	67%	7%	10%	-	-	7%	-	-	100%
Halekulani	10	-	30%	-	-	-	-	60%	-	-	-	10%	-	-	-	100%
Hamlyn Terrace	20	-	-	-	-	-	-	85%	-	-	-	5%	5%	-	5%	100%
Kanwal	15	-	-	-	-	-	-	93%	-	-	-	7%	-	-	-	100%
Killarney Vale	20	75%	-	-	-	-	15%	-	-	-	10%	-	-	-	-	100%
Lake Haven	15	-	-	-	-	-	-	87%	-	-	-	7%	-	-	7%	100%
Lake Munmorah	15	-	13%	-	-	-	-	67%	-	-	-	13%	-	7%	-	100%
Lisarow	10	-	-	-	-	10%	-	-	80%	10%	-	-	-	-	-	100%
Long Jetty	20	75%	-	-	-	-	-	-	-	-	25%	-	-	-	-	100%
Mannering Park	15	-	7%	-	-	-	-	80%	7%	7%	-	-	-	-	-	100%
Mardi	15	-	-	-	-	-	-	-	-	7%	-	-	87%	-	7%	100%
Niagara Park	16	-	-	-	-	-	-	-	-	94%	-	-	-	-	6%	100%
Norah Head	15	7%	-	-	-	-	-	7%	-	-	7%	80%	-	-	-	100%
Noraville	15	7%	-	-	-	-	-	20%	-	7%	-	67%	-	-	-	100%
Ourimbah	15	-	-	-	13%	-	-	-	-	27%	-	-	53%	-	7%	100%
San Remo	15	-	7%	-	-	-	-	87%	-	-	-	7%	-	-	-	100%
Shelly Beach	15	100%	-	-	-	-	-	-	-	-	-	-	-	-	-	100%
Summerland Point	15	7%	-	-	-	-	-	67%	-	20%	-	-	7%	-	-	100%
Swansea	10	-	-	-	-	-	-	-	50%	50%	-	-	-	-	-	100%
The Entrance	20	40%	-	-	-	10%	-	-	5%	-	45%	-	-	-	-	100%
Toukley	20	-	-	-	-	-	-	25%	-	-	-	70%	5%	-	-	100%
Tuggerah	10	-	-	-	-	-	-	10%	-	-	-	-	90%	-	-	100%
Wadalba	20	-	-	-	-	-	-	45%	-	-	-	-	55%	-	-	100%
Warnervale	20	-	-	-	-	-	-	65%	5%	-	-	5%	20%	-	5%	100%
Watanobbi	20	-	-	-	-	-	-	-	-	-	-	5%	85%	-	10%	100%
Wyee	10	-	10%	-	-	-	-	70%	10%	-	-	-	10%	-	-	100%
Wyong	20	-	-	-	-	-	-	5%	-	-	-	-	80%	-	15%	100%
Wyongah	13	-	-	-	-	-	-	77%	-	-	-	-	23%	-	-	100%

Table 2 – Reason for Retail Centre Selection (no. of responses)

Retail Centre	Location / Close to Home	Familiarity / Awareness	Environment / Design of Shops	Parking	Price	Service	Variety / Range of Goods	Other	TOTAL
NOT STATED	18	2	0	2	1	0	3	1	**27**
Bateau Bay	64	4	1	3	2	1	19	5	**99**
Budgewoi	20	1	0	1	3	0	1	1	**27**
Charmhaven	0	0	0	1	0	0	0	0	**1**
Chittaway Bay	7	2	1	0	2	0	0	0	**12**
Erina	2	1	1	0	1	0	1	1	**7**
Killarney Vale	6	1	0	1	0	0	0	0	**8**
Lake Haven	181	10	0	3	10	1	26	8	**239**
The Entrance	15	2	0	1	0	1	5	2	**26**
Toukley	51	2	1	6	2	0	0	5	**67**
Tuggerah	60	8	1	4	1	0	37	6	**117**
Watanobbi	0	0	0	0	1	0	0	0	**1**
Wyong	4	0	1	5	1	2	1	2	**16**
OTHER	38	5	0	5	8	2	2	0	**60**
TOTAL	**466**	**38**	**6**	**32**	**32**	**7**	**95**	**31**	**707**

Table 2 – Reason for Not Selecting Local Centre (no. of responses)

Retail Centre	Location/ Not Close to Home	Environment / Design of Shops	Parking Difficult	Access Difficult	Expensive	Poor Range of Goods and Services	Other	TOTAL
Bateau Bay	4	0	2	4	1	2	3	**16**
Budgewoi	6	2	1	1	2	23	1	**36**
Chittaway Bay	6	2	2	0	1	19	1	**31**
Gorokan	1	0	0	0	0	1	10	**12**
Killarney Vale	3	2	0	3	2	10	0	**20**
Lake Haven	6	2	10	4	2	6	5	**35**
San Remo	2	0	0	0	3	26	1	**32**
Summerland Point	4	0	0	1	16	27	2	**50**
The Entrance	16	0	0	2	0	6	7	**31**
Toukley	2	0	1	0	2	7	4	**16**
Tuggerah	30	4	12	8	1	3	2	**60**
Watanobbi	8	2	1	1	0	13	0	**25**
Wyong	9	0	1	1	2	22	1	**36**
TOTAL	**97**	**14**	**30**	**25**	**32**	**165**	**37**	**400**

Table 4 – Origin and Destination for "Top-up" Food and Grocery Shopping

Suburb (Origin of Households)	Count	Shopping Centre (Destination)																																	TOTAL
		Bateau Bay	Budgewoi	Campbells	Charmhaven	Chittaway Bay	Chresthaven Road	Local Corner Store	Doesnt Buy	Erina	Toukley Fruit Shop	General Store	Gosford	Gwandalan	IGA	Kanwal	Killarney Vale	Lake Haven	Lisarow	Long Jetty	Mannering Park	Norah Head	Not Stated	Other	Other Outside Wyong LGA	Ourimbah	San Remo	Service Station	Summerland Point	The Entrance	Toukley	Tuggerah	Watanobbi	Wyong	Cresthaven	
Bateau Bay	20	85%	-	-	5%	-	-	-	-	5%	-	-	-	-	-	-	5%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	100%
Berkeley Vale	20	15%	-	-	-	50%	-	10%	5%	-	-	-	-	-	-	-	10%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	10%	-	-	-	100%
Blue Bay	10	10%	-	-	-	-	-	-	-	10%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	80%	-	-	-	-	-	100%
Blue Haven	15	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	7%	93%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	100%
Budgewoi	15	-	93%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	7%	-	-	-	-	-	-	-	100%
Buff Point	10	-	80%	-	-	-	-	20%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	100%
Canton Beach	15	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	7%	-	-	-	-	-	-	-	93%	-	-	-	-	100%
Caves Beach	15	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	27%	-	73%	-	-	-	-	-	-	-	-	-	-	100%
Charmhaven	15	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	87%	-	-	-	-	13%	-	-	-	-	-	-	-	-	-	-	-	-	100%
Chittaway Bay	15	-	-	-	-	87%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	7%	-	-	-	-	-	-	7%	-	-	-	-	-	100%
Gorokan	15	-	-	20%	-	-	-	7%	-	-	-	-	-	-	-	-	-	60%	-	-	-	-	-	-	-	-	-	-	-	-	13%	-	-	-	-	100%
Gwandalan	30	-	-	-	-	-	-	13%	-	-	-	3%	-	23%	-	-	-	3%	-	-	-	-	-	-	-	-	-	-	53%	-	-	3%	-	-	-	100%
Halekulani	10	-	90%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	10%	-	-	100%
Hamlyn Terrace	20	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	70%	-	-	-	-	25%	-	-	-	-	-	-	-	5%	-	-	-	-	100%
Kanwal	15	-	-	7%	-	-	-	-	-	-	-	-	-	-	-	7%	-	87%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	100%
Killarney Vale	20	40%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	50%	-	-	-	-	-	-	-	-	-	-	-	-	10%	-	-	-	-	-	100%
Lake Haven	15	-	-	-	-	-	-	-	-	-	-	-	-	-	-	7%	-	80%	-	-	-	-	-	-	-	-	-	-	-	-	13%	-	-	-	-	100%
Lake Munmorah	15	-	53%	-	-	-	-	27%	-	-	-	-	-	-	-	-	-	13%	-	-	-	-	-	-	7%	-	-	-	-	-	-	-	-	-	-	100%
Lisarow	10	-	-	-	-	-	-	10%	-	10%	-	-	-	-	-	-	-	-	-	-	-	-	70%	-	-	-	-	10%	-	-	-	-	-	-	-	100%
Long Jetty	20	20%	-	-	5%	-	5%	10%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	5%	5%	-	-	-	15%	-	35%	-	-	-	-	-	100%
Mannering Park	15	-	7%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	27%	-	-	7%	-	47%	-	-	-	-	-	-	-	-	13%	-	-	-	100%
Mardi	15	-	-	-	-	-	-	-	-	-	-	-	-	-	13%	-	-	-	-	-	-	-	7%	-	-	-	-	20%	-	-	-	47%	-	13%	-	100%
Niagara Park	16	-	-	-	-	-	-	-	-	-	-	-	6%	-	-	-	-	-	63%	-	-	-	19%	-	13%	-	-	-	-	-	-	-	-	-	-	100%
Norah Head	15	-	-	-	-	-	-	27%	-	-	-	-	-	-	-	-	-	-	-	-	-	7%	-	-	-	-	-	-	-	-	67%	-	-	-	-	100%
Noraville	15	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	7%	-	-	-	-	-	-	-	93%	-	-	-	-	100%
Ourimbah	15	-	-	-	-	27%	-	13%	7%	-	-	-	-	-	-	-	-	-	13%	-	-	-	7%	-	-	7%	-	7%	-	-	-	20%	-	-	-	100%
San Remo	15	-	-	-	7%	-	-	33%	7%	-	-	-	-	-	-	-	-	7%	-	-	-	-	-	-	-	-	47%	-	-	-	-	-	-	-	-	100%
Shelly Beach	15	60%	-	-	-	-	20%	-	-	-	-	-	-	-	-	-	7%	-	-	7%	-	-	-	-	-	-	-	-	-	7%	-	-	-	-	-	100%
Summerland Point	15	-	-	-	-	-	-	7%	-	-	-	7%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	87%	-	-	-	-	-	-	100%
Swansea	10	-	-	-	-	-	-	10%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	50%	-	40%	-	-	-	-	-	-	-	-	-	-	100%
The Entrance	20	30%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	10%	-	-	-	-	10%	-	50%	-	-	-	-	-	100%
Toukley	20	-	-	-	-	-	-	15%	-	-	25%	-	-	-	-	-	-	10%	-	-	-	-	5%	5%	-	-	-	-	-	-	40%	-	-	-	-	100%
Tuggerah	10	-	-	-	-	-	-	20%	10%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	40%	-	-	-	30%	-	-	-	100%
Wadalba	20	-	-	15%	-	-	-	5%	-	-	-	-	-	-	10%	-	-	20%	-	-	-	-	-	10%	-	-	-	10%	-	-	-	20%	5%	5%	-	100%
Warnervale	20	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	85%	-	-	-	-	5%	-	-	-	-	-	-	-	-	-	-	10%	-	100%
Watanobbi	20	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	5%	30%	-	65%	-	100%
Wyee	10	-	-	-	-	-	-	20%	10%	-	-	-	-	-	-	-	-	-	-	-	-	-	20%	-	20%	-	-	30%	-	-	-	-	-	-	-	100%
Wyong	20	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	75%	25%	100%
Wyongah	13	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	54%	-	-	-	-	38%	-	-	-	-	-	-	-	-	-	-	8%	-	100%

Table 5 – Origin and Destination for Shopping for Clothing

Suburb (Origin of Households)	Count	Shopping Centre (Destination)														Grand Total
		Bateau Bay	Charlestown	doesnt buy	Erina	Gosford	Lake Haven	NOT STATED	OTHER	Other in Central Coast	Rest of Sydney	The Entrance	Toukley	Tuggerah	Various	
Bateau Bay	20	10%	-	-	50%	-	-	20%	-	-	-	-	-	20%	-	100%
Berkeley Vale	20	5%	-	10%	10%	-	-	-	-	-	-	-	-	75%	-	100%
Blue Bay	10	-	-	-	30%	-	-	20%	-	-	-	-	-	50%	-	100%
Blue Haven	15	-	-	-	-	-	13%	-	-	-	-	-	-	87%	-	100%
Budgewoi	15	-	-	-	7%	-	53%	-	-	-	7%	-	-	33%	-	100%
Buff Point	10	-	-	-	-	-	20%	10%	-	-	-	-	-	70%	-	100%
Canton Beach	15	-	7%	-	-	-	47%	7%	-	-	-	7%	-	33%	-	100%
Caves Beach	15	-	93%	-	-	-	-	-	-	-	-	-	-	7%	-	100%
Charmhaven	15	-	-	-	20%	-	27%	7%	-	-	-	-	-	47%	-	100%
Chittaway Bay	15	-	-	-	7%	-	-	-	-	-	-	-	-	93%	-	100%
Gorokan	15	-	-	-	-	-	33%	-	-	-	-	20%	-	40%	7%	100%
Gwandalan	30	3%	-	7%	3%	3%	33%	3%	-	-	-	-	-	47%	-	100%
Halekulani	10	-	-	-	-	-	100%	-	-	-	-	-	-	-	-	100%
Hamlyn Terrace	20	-	-	-	-	-	60%	-	-	-	-	-	-	40%	-	100%
Kanwal	15	-	-	-	-	-	53%	7%	-	-	-	7%	-	33%	-	100%
Killarney Vale	20	20%	-	-	20%	-	-	-	-	-	-	10%	-	50%	-	100%
Lake Haven	15	-	-	-	-	-	53%	-	-	-	7%	-	-	40%	-	100%
Lake Munmorah	15	-	-	-	-	-	67%	-	-	-	-	-	-	33%	-	100%
Lisarow	10	-	-	-	90%	-	-	-	-	-	-	-	-	10%	-	100%
Long Jetty	20	20%	-	5%	30%	5%	-	-	-	-	-	-	-	40%	-	100%
Mannering Park	15	-	-	-	-	-	47%	13%	-	-	-	-	7%	33%	-	100%
Mardi	15	-	-	13%	7%	-	-	-	-	-	-	-	-	80%	-	100%
Niagara Park	16	-	-	-	56%	6%	-	-	-	13%	-	-	-	25%	-	100%
Norah Head	15	-	-	-	13%	-	20%	-	7%	-	13%	-	-	47%	-	100%
Noraville	15	-	-	-	-	-	47%	-	7%	-	7%	-	-	40%	-	100%
Ourimbah	15	-	-	-	7%	-	-	-	-	-	-	-	-	87%	7%	100%
San Remo	15	-	-	-	-	-	67%	-	-	-	-	-	-	33%	-	100%
Shelly Beach	15	27%	-	-	33%	-	-	-	7%	-	7%	-	-	27%	-	100%
Summerland Point	15	7%	-	-	-	-	33%	7%	-	-	-	-	-	53%	-	100%
Swansea	10	10%	80%	-	-	-	-	10%	-	-	-	-	-	-	-	100%
The Entrance	20	45%	-	-	10%	5%	-	-	5%	-	-	10%	-	25%	-	100%
Toukley	20	-	-	10%	-	-	60%	-	-	-	5%	-	-	25%	-	100%
Tuggerah	10	-	-	20%	-	-	-	-	10%	-	-	-	-	60%	10%	100%
Wadalba	20	-	-	-	-	-	25%	-	5%	-	-	-	5%	55%	10%	100%
Warnervale	20	-	-	-	-	-	35%	10%	-	-	-	-	-	55%	-	100%
Watanobbi	20	-	-	-	-	-	5%	5%	-	-	-	-	-	90%	-	100%
Wyee	10	-	-	-	10%	-	20%	10%	-	-	10%	-	-	50%	-	100%
Wyong	20	-	-	-	5%	-	-	10%	-	5%	-	-	-	80%	-	100%
Wyongah	13	-	-	-	-	-	38%	8%	-	-	-	-	-	54%	-	100%

Table 6 – Origin and Destination for Shopping for Furniture and Electrical Appliances

Suburb (Origin of Households)	Count	Shopping Centre (Destination)																
		Bateau Bay	Doesn't Buy	Erina	Gosford & West Gosford	Lake Haven	Lake Macquarie LGA	Lisarow	Newcastle and Cessnock	Not Stated	Other	Rest of Sydney	The Entrance	Toukley	Tuggerah	Wyong	Various	TOTAL
Bateau Bay	20	-	-	35%	-	-	-	-	5%	35%	-	-	-	-	25%	-	-	100%
Berkeley Vale	20	-	10%	30%	-	-	-	-	-	-	-	-	-	-	60%	-	-	100%
Blue Bay	10	-	-	30%	-	-	-	-	-	50%	-	-	10%	-	10%	-	-	100%
Blue Haven	15	-	-	33%	27%	13%	-	-	-	-	-	-	-	-	27%	-	-	100%
Budgewoi	15	-	-	20%	-	33%	7%	-	-	-	-	-	-	7%	33%	-	-	100%
Buff Point	10	-	-	20%	-	10%	-	-	-	10%	-	10%	-	-	50%	-	-	100%
Canton Beach	15	-	-	7%	-	7%	-	-	-	33%	-	-	-	13%	40%	-	-	100%
Caves Beach	15	-	-	-	-	-	87%	-	7%	-	-	-	-	7%	-	-	-	100%
Charmhaven	15	-	-	27%	-	13%	-	-	-	13%	-	-	-	-	47%	-	-	100%
Chittaway Bay	15	-	-	13%	-	-	-	-	-	-	-	-	-	-	87%	-	-	100%
Gorokan	15	-	-	-	-	20%	-	-	-	-	-	-	13%	-	53%	7%	7%	100%
Gwandalan	30	3%	7%	10%	-	27%	7%	-	-	7%	-	-	-	-	40%	-	-	100%
Halekulani	10	-	-	10%	-	30%	-	-	-	-	-	-	10%	10%	40%	-	-	100%
Hamlyn Terrace	20	-	-	20%	10%	-	-	-	-	5%	-	-	-	5%	55%	5%	-	100%
Kanwal	15	-	-	20%	-	20%	-	-	-	13%	-	-	-	7%	40%	-	-	100%
Killarney Vale	20	15%	-	20%	-	-	-	-	-	15%	-	-	5%	-	45%	-	-	100%
Lake Haven	15	-	-	-	-	7%	-	-	-	7%	-	-	-	7%	80%	-	-	100%
Lake Munmorah	15	-	-	20%	-	27%	7%	-	7%	7%	-	-	-	7%	27%	-	-	100%
Lisarow	10	-	-	90%	-	-	-	-	-	-	-	-	-	-	10%	-	-	100%
Long Jetty	20	-	-	40%	5%	5%	-	-	-	-	-	-	15%	-	35%	-	-	100%
Mannering Park	15	-	-	-	-	7%	13%	-	-	-	-	-	-	7%	60%	13%	-	100%
Mardi	15	-	13%	13%	-	-	-	-	-	-	-	-	-	-	73%	-	-	100%
Niagara Park	16	-	-	75%	6%	-	-	6%	-	6%	-	-	-	-	6%	-	-	100%
Norah Head	15	-	-	13%	-	13%	-	-	-	-	7%	13%	-	-	47%	-	7%	100%
Noraville	15	-	-	33%	7%	-	-	-	-	7%	7%	-	7%	7%	33%	-	-	100%
Ourimbah	15	-	-	53%	-	-	-	-	-	-	-	-	7%	-	33%	-	7%	100%
San Remo	15	-	7%	40%	7%	7%	7%	-	-	-	7%	-	-	-	27%	-	-	100%
Shelly Beach	15	7%	-	47%	-	-	-	-	-	7%	-	-	13%	-	27%	-	-	100%
Summerland Point	15	7%	-	-	-	27%	-	-	-	7%	-	-	-	-	60%	-	-	100%
Swansea	10	10%	-	-	10%	-	70%	-	-	10%	-	-	-	-	-	-	-	100%
The Entrance	20	35%	-	10%	5%	-	-	-	-	-	-	-	20%	-	25%	-	5%	100%
Toukley	20	-	20%	5%	-	5%	-	-	-	5%	-	-	-	20%	40%	-	5%	100%
Tuggerah	10	-	40%	-	-	-	-	-	-	-	10%	-	-	-	50%	-	-	100%
Wadalba	20	-	-	35%	-	-	-	-	-	5%	-	-	-	-	55%	5%	-	100%
Warnervale	20	-	-	20%	5%	20%	10%	-	-	20%	-	5%	-	5%	15%	-	-	100%
Watanobbi	20	-	-	10%	-	-	-	-	-	35%	-	-	-	-	55%	-	-	100%
Wyee	10	-	-	20%	-	10%	10%	-	-	10%	-	-	-	-	50%	-	-	100%
Wyong	20	-	-	30%	-	-	-	-	-	10%	-	-	-	-	60%	-	-	100%
Wyongah	13	-	-	38%	-	15%	-	-	-	23%	-	-	-	-	15%	8%	-	100%

APPENDIX C

APPENDIX C:

Estimated Available Retail Spending - Wyong Social Planning Districts 2006-2031 ($2005)

2006	Northern Lakes	San Remo	Gorokan	Toukley	Warnervale/ Wadalba	Ourimbah-Rural South	Wyong	The Entrance	Rural West	Southern Lakes	Total Wyong
Population	14,579	19,724	19,452	9,708	12,278	4,879	14,648	26,713	2,397	26,008	150,388
Average Spending ($2005)	7,247	7,119	7,376	7,827	7,777	8,084	7,475	7,986	8,405	7,217	7,522
Total Retail Spend ($m) ($2005)	105.6	140.4	143.5	76.0	95.5	39.4	109.5	213.3	20.1	187.7	1,131.1
Spending by Category											
Food/Groceries	32.4	43.0	44.0	23.7	27.5	11.2	32.5	65.4	5.8	54.8	340.2
Food Out	11.0	14.7	15.0	7.7	10.6	4.4	12.2	22.3	2.2	20.8	120.9
Alcohol (Off License)	4.0	5.3	5.4	2.9	3.5	1.4	4.2	8.1	0.7	7.1	42.8
Tobacco	4.1	5.4	5.5	3.0	3.2	1.2	4.1	8.2	0.6	6.6	41.9
Clothing & Accessories	9.7	13.0	13.2	6.9	10.0	4.3	10.5	19.7	2.2	18.8	108.2
Household Furnishings & Equipment	14.9	19.8	20.3	10.7	13.2	5.3	15.7	30.2	2.8	26.4	159.2
Household Non Durables	3.8	5.1	5.2	2.8	3.2	1.3	3.8	7.7	0.7	6.4	40.0
Medical/Pharmacy	3.2	4.2	4.3	2.3	3.0	1.3	3.3	6.4	0.6	5.8	34.4
Vehicle Accessories	2.1	2.9	2.9	1.5	2.0	0.8	2.4	4.3	0.4	4.0	23.4
Recreation	13.2	17.5	17.9	9.5	12.6	5.4	13.5	26.6	2.7	24.0	142.7
Personal Care	4.4	5.9	6.0	3.2	4.2	1.8	4.7	8.9	0.9	8.1	48.0
Miscellaneous Goods & Services	2.7	3.7	3.7	2.0	2.5	1.0	2.9	5.5	0.5	4.9	29.4
Total Retail Spend	105.6	140.4	143.5	76.0	95.5	39.4	109.5	213.3	20.1	187.7	1131.1
Supermarket	33.8	44.9	45.9	24.3	30.6	12.6	35.0	68.3	6.4	60.1	362.0

2011	Northern Lakes	San Remo	Gorokan	Toukley	Warnervale/ Wadalba	Ourimbah-Rural South	Wyong	The Entrance	Rural West	Southern Lakes	Total Wyong
Population	14576	19865	19497	10581	20650	5199	16974	29850	2444	26453	166,090
Average Spending ($2005)	7,616	7,482	7,752	8,226	8,173	8,496	7,856	8,394	8,833	7,585	7,929
Total Retail Spend ($m) ($2005)	111.0	148.6	151.1	87.0	168.8	44.2	133.4	250.6	21.6	200.6	1,316.9
Spending by Category											
Food/Groceries	34.0	45.6	46.3	27.1	48.6	12.5	39.5	76.8	6.2	58.6	395.3
Food Out	11.6	15.5	15.8	8.8	18.7	4.9	14.8	26.2	2.4	22.3	141.0
Alcohol (Off License)	4.2	5.6	5.7	3.3	6.3	1.6	5.2	9.5	0.8	7.6	49.8
Tobacco	4.3	5.7	5.8	3.4	5.6	1.4	4.9	9.7	0.7	7.0	48.5
Clothing & Accessories	10.2	13.7	13.9	7.9	17.6	4.8	12.8	23.1	2.3	20.1	126.5
Household Furnishings & Equipment	15.7	21.0	21.4	12.2	23.3	6.0	19.1	35.4	2.9	28.2	185.2
Household Non Durables	4.0	5.4	5.4	3.2	5.7	1.5	4.6	9.0	0.7	6.9	46.4
Medical/Pharmacy	3.3	4.5	4.6	2.6	5.3	1.4	4.0	7.6	0.7	6.2	40.1
Vehicle Accessories	2.3	3.0	3.1	1.7	3.6	0.9	2.9	5.1	0.5	4.3	27.3
Recreation	13.8	18.5	18.8	10.9	22.3	6.0	16.5	31.2	2.9	25.6	166.5
Personal Care	4.7	6.2	6.3	3.6	7.4	2.0	5.7	10.5	1.0	8.7	56.0
Miscellaneous Goods & Services	2.9	3.9	3.9	2.3	4.4	1.2	3.5	6.5	0.6	5.2	34.3
Total Retail Spend	111.0	148.6	151.1	87.0	168.8	44.2	133.4	250.6	21.6	200.6	1316.9
Supermarket	35.5	47.6	48.4	27.9	54.0	14.1	42.7	80.2	6.9	64.2	421.4

Source: Leyshon Consulting Estimates 2006

APPENDIX C:

Estimated Available Retail Spending - Wyong Social Planning Districts 2006-2031 ($2005)

2016	Northern Lakes	San Remo	Gorokan	Toukley	Warnervale/ Wadalba	Ourimbah- Rural South	Wyong	The Entrance	Rural West	Southern Lakes	Total Wyong
Population	14958	19743	19644	11664	27131	5472	18830	32707	2519	26737	179,405
Average Spending ($2005)	8,005	7,864	8,148	8,646	8,590	8,930	8,257	8,822	9,284	7,972	8,352
Total Retail Spend ($m) ($2005)	119.7	155.3	160.1	100.8	233.1	48.9	155.5	288.5	23.4	213.1	1,498.4
Spending by Category											
Food/Groceries	36.7	47.6	49.1	31.4	67.1	13.9	46.1	88.5	6.7	62.3	449.2
Food Out	12.5	16.2	16.7	10.2	25.8	5.4	17.3	30.2	2.6	23.6	160.6
Alcohol (Off License)	4.5	5.9	6.1	3.8	8.7	1.8	6.0	10.9	0.9	8.1	56.6
Tobacco	4.6	6.0	6.2	4.0	7.7	1.5	5.8	11.1	0.7	7.5	55.0
Clothing & Accessories	11.0	14.3	14.8	9.1	24.4	5.3	14.9	26.6	2.5	21.4	144.3
Household Furnishings & Equipment	16.9	21.9	22.6	14.2	32.1	6.6	22.2	40.8	3.2	29.9	210.6
Household Non Durables	4.3	5.6	5.8	3.7	7.9	1.6	5.4	10.4	0.8	7.3	52.8
Medical/Pharmacy	3.6	4.7	4.8	3.1	7.3	1.6	4.7	8.7	0.7	6.5	45.7
Vehicle Accessories	2.4	3.2	3.3	2.0	5.0	1.0	3.4	5.9	0.5	4.6	31.1
Recreation	14.9	19.3	19.9	12.6	30.8	6.7	19.2	35.9	3.1	27.2	189.7
Personal Care	5.0	6.5	6.7	4.2	10.2	2.2	6.6	12.1	1.0	9.2	63.7
Miscellaneous Goods & Services	3.1	4.0	4.2	2.6	6.1	1.3	4.0	7.5	0.6	5.6	39.0
Total Retail Spend	119.7	155.3	160.1	100.8	233.1	48.9	155.5	288.5	23.4	213.1	1498.4
Supermarket	38.3	49.7	51.2	32.3	74.6	15.6	49.8	92.3	7.5	68.2	479.5

2021	Northern Lakes	San Remo	Gorokan	Toukley	Warnervale/ Wadalba	Ourimbah- Rural South	Wyong	The Entrance	Rural West	Southern Lakes	Total Wyong
Population	15809	20147	19913	12669	34701	5744	20139	34877	2620	27024	193,643
Average Spending ($2005)	8,413	8,265	8,563	9,087	9,029	9,385	8,678	9,272	9,758	8,379	8,792
Total Retail Spend ($m) ($2005)	133.0	166.5	170.5	115.1	313.3	53.9	174.8	323.4	25.6	226.4	1,702.5
Spending by Category											
Food/Groceries	40.8	51.0	52.3	35.9	90.2	15.3	51.8	99.1	7.3	66.1	509.8
Food Out	13.9	17.4	17.8	11.7	34.7	6.0	19.4	33.8	2.8	25.1	182.7
Alcohol (Off License)	5.0	6.3	6.5	4.3	11.6	2.0	6.8	12.3	0.9	8.6	64.3
Tobacco	5.1	6.4	6.6	4.5	10.4	1.7	6.5	12.5	0.8	7.9	62.3
Clothing & Accessories	12.3	15.4	15.7	10.4	32.8	5.9	16.7	29.8	2.7	22.7	164.4
Household Furnishings & Equipment	18.8	23.5	24.1	16.2	43.2	7.3	25.0	45.7	3.5	31.8	239.1
Household Non Durables	4.8	6.0	6.1	4.2	10.6	1.8	6.0	11.7	0.9	7.7	59.9
Medical/Pharmacy	4.0	5.0	5.1	3.5	9.8	1.7	5.2	9.7	0.8	6.9	52.0
Vehicle Accessories	2.7	3.4	3.5	2.3	6.7	1.1	3.8	6.6	0.5	4.9	35.4
Recreation	16.6	20.7	21.2	14.4	41.4	7.4	21.6	40.3	3.4	28.9	215.8
Personal Care	5.6	7.0	7.1	4.8	13.7	2.4	7.4	13.5	1.1	9.8	72.5
Miscellaneous Goods & Services	3.5	4.3	4.4	3.0	8.2	1.4	4.5	8.4	0.7	5.9	44.3
Total Retail Spend	133.0	166.5	170.5	115.1	313.3	53.9	174.8	323.4	25.6	226.4	1702.5
Supermarket	42.6	53.3	54.6	36.8	100.3	17.3	55.9	103.5	8.2	72.5	544.8

Source: Leyshon Consulting Estimates 2006

APPENDIX C:

Estimated Available Retail Spending - Wyong Social Planning Districts 2006-2031 ($2005)

2026	Northern Lakes	San Remo	Gorokan	Toukley	Warnervale/ Wadalba	Ourimbah-Rural South	Wyong	The Entrance	Rural West	Southern Lakes	Total Wyong
Population	15881	22690	20372	13865	40460	5964	21778	36812	2752	27257	207,831
Average Spending ($2005)	8,842	8,687	9,000	9,551	9,489	9,864	9,121	9,745	10,255	8,806	9,246
Total Retail Spend ($m) ($2005)	140.4	197.1	183.3	132.4	383.9	58.8	198.6	358.7	28.2	240.0	1,921.7
Spending by Category											
Food/Groceries	43.1	60.4	56.2	41.3	110.5	16.7	58.9	110.0	8.1	70.1	575.2
Food Out	14.7	20.6	19.2	13.4	42.6	6.5	22.0	37.5	3.1	26.6	206.2
Alcohol (Off License)	5.3	7.5	7.0	5.0	14.3	2.1	7.7	13.6	1.0	9.1	72.5
Tobacco	5.4	7.6	7.1	5.2	12.7	1.8	7.4	13.8	0.9	8.4	70.3
Clothing & Accessories	13.0	18.2	16.9	12.0	40.1	6.4	19.0	33.1	3.0	24.0	185.8
Household Furnishings & Equipment	19.8	27.9	25.9	18.6	52.9	8.0	28.4	50.7	3.9	33.7	269.8
Household Non Durables	5.1	7.1	6.6	4.9	13.0	2.0	6.8	12.9	1.0	8.2	67.6
Medical/Pharmacy	4.2	5.9	5.5	4.0	12.1	1.9	5.9	10.8	0.9	7.4	58.7
Vehicle Accessories	2.9	4.0	3.7	2.6	8.2	1.2	4.3	7.3	0.6	5.1	40.0
Recreation	17.5	24.5	22.8	16.5	50.7	8.0	24.5	44.7	3.8	30.7	243.8
Personal Care	5.9	8.3	7.7	5.5	16.8	2.6	8.4	15.0	1.2	10.4	81.8
Miscellaneous Goods & Services	3.7	5.1	4.8	3.4	10.0	1.5	5.2	9.3	0.7	6.3	50.0
Total Retail Spend	140.4	197.1	183.3	132.4	383.9	58.8	198.6	358.7	28.2	240.0	1921.7
Supermarket	44.9	63.1	58.7	42.4	122.9	18.8	63.6	114.8	9.0	76.8	614.9

2031	Northern Lakes	San Remo	Gorokan	Toukley	Warnervale/ Wadalba	Ourimbah-Rural South	Wyong	The Entrance	Rural West	Southern Lakes	Total Wyong
Population	15958	24473	20890	15048	45631	6143	23506	37849	2882	27762	220,141
Average Spending ($2005)	9,293	9,130	9,459	10,038	9,973	10,367	9,586	10,242	10,779	9,255	9,722
Total Retail Spend ($m) ($2005)	148.3	223.4	197.6	151.0	455.1	63.7	225.3	387.6	31.1	256.9	2,140.1
Spending by Category											
Food/Groceries	45.5	68.5	60.6	47.1	131.0	18.1	66.8	118.8	8.9	75.1	640.2
Food Out	15.5	23.4	20.7	15.3	50.5	7.1	25.0	40.5	3.4	28.5	229.8
Alcohol (Off License)	5.6	8.5	7.5	5.7	16.9	2.3	8.7	14.7	1.1	9.7	80.8
Tobacco	5.7	8.6	7.6	5.9	15.0	2.0	8.4	14.9	1.0	9.0	78.2
Clothing & Accessories	13.7	20.6	18.2	13.7	47.6	6.9	21.6	35.8	3.3	25.7	207.1
Household Furnishings & Equipment	21.0	31.6	27.9	21.2	62.8	8.6	32.2	54.8	4.2	36.1	300.4
Household Non Durables	5.3	8.1	7.1	5.6	15.5	2.1	7.8	14.0	1.1	8.8	75.3
Medical/Pharmacy	4.5	6.7	6.0	4.6	14.3	2.0	6.7	11.7	1.0	7.9	65.4
Vehicle Accessories	3.0	4.5	4.0	3.0	9.7	1.4	4.9	7.9	0.7	5.5	44.5
Recreation	18.5	27.8	24.6	18.9	60.1	8.7	27.8	48.3	4.2	32.8	271.6
Personal Care	6.2	9.4	8.3	6.3	19.9	2.8	9.6	16.2	1.4	11.1	91.2
Miscellaneous Goods & Services	3.9	5.8	5.1	3.9	11.9	1.7	5.9	10.1	0.8	6.7	55.7
Total Retail Spend	148.3	223.4	197.6	151.0	455.1	63.7	225.3	387.6	31.1	256.9	2140.1
Supermarket	47.5	71.5	63.2	48.3	145.6	20.4	72.1	124.0	9.9	82.2	684.8

Source: Leyshon Consulting Estimates 2006