ADVISORY REPORT
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RETAIL and COMMERCIAL DEVELOPMENT STRATEGY CITY of WAGGA WAGGA

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TABLE of CONTENTS

TABLE of CONTENTS

Page

LIST of TABLES

LIST of FIGURES

EXECUTIVE SUMMARY

Introduction Section 1

This Report has been prepared for Wagga Wagga City Council (Council) by Leyshon Consulting Pty Ltd. The Report presents the results of a review of retail and commercial centre needs for the City of Wagga Wagga (the City) between 2006-21.

Existing Centres Section 2

Wagga Wagga City has a clear hierarchy of centres with the Wagga Wagga CBD at its apex. The City does not have a suburban sub-regional centre. Two sub-regional scale centres are incorporated within the CBD namely Sturt Mall and Wagga Wagga Marketplace.

Apart from its CBD, the City has a number of suburban centres anchored by supermarkets of various sizes.

Bulky goods retailing is found in a number of locations outside the CBD. The largest bulky goods complex in the City is the Wagga Wagga Homemakers Centre.

Demand Analysis Section 3

The primary trade area (PTA) population is estimated to grow from 59,412 persons in 2006 to 68,275 persons in 2021–an increase of +8,863. The secondary trade area (STA) is forecast to experience population decline falling from 48,870 persons in 2006 to 46,250 persons in 2021–or a loss of -2,620 persons.

For analytical purposes the trade area was classified into a series of subdistricts. Those districts projected to experience the greatest population growth during the period 2006-21 are:

- Southern Growth Area ... +3,097 persons
- Boorooma/Estella ... +2,147 persons
- South West Fringe ... +1,469 persons.

Annual available retail spending in the PTA is projected to be $644.5 million in 2021–an increase of +$163.1 million over 2006 levels ($2006). In the STA in 2021 annual available spending is forecast to be $368.3 million–a rise of only +$7.2 million over 2006 levels ($2006).

Annual available bulky goods spending in the trade area is projected to increase from $270.7 million in 2006 to $326.9 million in 2021–an increase of +$56.2 million ($2006).

EXECUTIVE SUMMARY

Demand Analysis Cont'd

Additional floorspace by major merchandise category required for the trade area as a whole during the forecast period is:

- supermarket ... +7,264 sq.m.
- bulky goods ... +15,749 sq.m.
- other retail ... +13,478 sq.m..

Future Centres Strategy Section 4

The projected growth in available retail spending between 2006-21 will support only a relatively modest expansion of existing centres in the City during this time-frame.

Wagga Wagga CBD/CBD North

The Wagga Wagga CBD/CBD North should continue to be promoted as the predominant retail centre both within the City and within the surrounding region. A modest expansion of retail floorspace in the order of 5,000 to 10,000 sq.m. during the forecast period appears appropriate.

The CBD and the CBD North both contain a significant amount of land zoned for commercial purposes. A substantial amount of this land is currently used for surface car parking although very little involves the levying of actual parking charges.

Council could encourage the intensification of land use in the CBD/CBD North through its receptiveness to strategies to increase floorspace ratios (FSRs) on major sites to encourage their redevelopment for retail and commercial purposes.

Neighbourhood Centres

Only modest increases in retail floorspace in existing neighbourhood centres at Tolland, Kooringal, Lake Albert, Ashmont and Turvey Park are envisaged during the forecast time-frame.

Southcity

Southcity has limited potential for future expansion to accommodate a second supermarket as a consequence of the size of the centre's trade area and the competition it faces within that trade area.

EXECUTIVE SUMMARY

Future Centres Strategy Cont'd

Proposed Centres

During the forecast period (2006-21), three new centres will be required within the City.

Although Council has rezoned land in Bourkelands for a small retail centre it likely a more comprehensive neighbourhood centre will be required to service this area. A neighbourhood-scale centre could be developed in the Lloyd/Bourkelands area by 2011 anchored by a 2,500 sq.m. supermarket together with up to 1,000 sq.m. of specialty retailing (eight to 10 shops).

A second new supermarket-anchored centre in the order of 2,800 sq.m. will be required in the Boorooma/Estella area although this will not be viable until sometime between 2016-21.

A third centre at Forest Hill is recommended of around 3,000 sq.m. anchored by a supermarket of up to 2,000 sq.m..

Bulky Goods Retailing

Council has two options basically for the future provision of bulky goods retailing. One is to facilitate "strip-style" bulky goods retailing along parts of the Sturt Highway. The other involves concentrating future bulky goods development on one (or more) sites capable of accommodating a single integrated bulky goods centre.

A location with potential to accommodate a larger integrated bulky goods complex is the area surrounding the intersection of the Sturt Highway and Olympic Way on the western side of the City.

Adopting a strategy which seeks to concentrates bulky goods retailing in one or more locations would require removing the potential for such retailing to be developed in other industrially-zoned areas in Wagga Wagga.

Commercial Floorspace

A new LEP for the City should incorporate provisions to ensure the CBD/CBD North remains the principal location for office-based activities. This could be achieved by limiting the scale of office space permissible in other locations.

EXECUTIVE SUMMARY

Planning Issues Section 5

The Wagga Wagga CBD/CBD North area would be appropriately zoned as B3 Commercial Core under the Template LEP provisions.

Existing suburban centres in the City should be zoned B2 Local Centre. Centres to be zoned B2 would include Kooringal, Southcity and Tolland, Turvey Tops, Lake Albert and Ashmont.

Smaller centres or corner shops with a more restricted catchment (such as the small shop group in Lake Albert Road) would be appropriately zoned as B1 Neighbourhood Centre.

Significant merit appears to exist in Council encapsulating its position concerning the Wagga Wagga retail hierarchy within a specific Development Control Plan.

Public Consultation Section 6

Public comments were received after the Draft Final Report was placed on public exhibition. Responses to these comments are provided in Appendix E to the Report.

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1 INTRODUCTION

1.1 Background

This Report has been prepared for Wagga Wagga City Council (Council) by Leyshon Consulting Pty Ltd. The Report presents the results of a review of retail/business centre needs for the City of Wagga Wagga (the City) during the period 2006-21.

The Report has been prepared in the context of the preparation of a new Local Environmental Plan (LEP) for the City and a Land Use Strategy which will underpin the new LEP. The Land Use Strategy is intended to provide guiding principles with respect to the following:

- promoting sustainable wealth and employment opportunities
- ensuring an adequate supply of business and industrial zoned land
- promoting and developing an identity for Wagga Wagga as a vibrant regional centre
- promoting access and equity in terms of the provision of retail, commercial and other services.

1.2 Study Tasks

This Report details our findings in relation to a number of study tasks undertaken including the following:

- review of the trade area of Wagga Wagga

- preparation of population projections for the Wagga Wagga trade area up to 2021

- preparation of estimates of available retail spending by major merchandise category within the trade area for the period 2006-21

- review of existing business centres in the City with particular reference to tenancy structures, the level of vacancies in centres, and the extent of vacant land

- preparation of estimates of the demand for additional retail floorspace by major merchandise categories within the Wagga Wagga trade area for the period 2006-21

- preparation of estimates of demand for non-retail commercial floorspace in existing business centres in Wagga Wagga for the period 2006-21

- review of the competitive position of existing business centres in the City and identification of options for their future expansion/redevelopment

- examination of the need for any new retail centres in Wagga Wagga during the forecast time-frame particularly in urban release areas on the northern fringe of the City such as Estella and Boorooma

- provision of specific advice to Council on the need for additional land zoned to accommodate bulky goods retailing and the appropriate location of such zonings

- provision of specific advice as to any amendments which need to be made to existing zoning and/or planning policies to facilitate future retail development in the City. This has included the preparation of recommendations concerning the appropriate allocation of zones as set out in the Template LEP for New South Wales to existing centres/precincts in Wagga Wagga.

1.3 Definitions

Throughout this Report reference is made to estimates of available retail spending in general, and to bulky goods spending in particular. APPENDIX A provides a listing of those specific expenditure items included under the estimate of bulky goods spending. It should be noted that bulky goods spending has been subdivided into the three broad categories namely:

- Core
- Ancillary
- Hardware and Related.

Core bulky goods expenditure categories include furniture, floor coverings, white goods and the like. Such goods are routinely found in bulky goods precincts and centres throughout Australia.

Ancillary bulky goods refers to a range of products including automotive accessories, certain homewares and soft furnishings which are frequently found in bulky goods centres and precincts but usually do not constitute core or anchor tenancies in these centres/precincts.

Hardware and Related encompasses a range of expenditure at hardware stores including tools and other hardware products as well as spending on home renovation and improvements. Many such traders are located in bulky goods centres/precincts.

2 EXISTING CENTRES

2.1 Introduction

The purpose of this section of the Report is to review the status of existing retail/business centres in the City. As noted in more detail below, the City has a very clear hierarchy of centres with the Wagga Wagga CBD at its apex. The CBD provides both retail and commercial regional-level services.

The City does not have a suburban sub-regional centre as such. Sub-regional centres in New South Wales are those anchored by a discount department store (DDS) like Target, Big W or Kmart. Some provincial cities in New South Wales contain sub-regional centres apart from their CBDs. Example are Orana Mall in Dubbo, Tamworth Shoppingworld in Tamworth and the Lavington Shopping Centre in North Albury. There are effectively two sub-regional centres within the CBD–namely Sturt Mall and Wagga Wagga Marketplace.

Apart from its CBD, the City has a number of suburban centres anchored by supermarkets of various size. As discussed below, commercial/retail activity in the CBD "extends" into Fitzmaurice Street to the north of the Wollundry Lagoon. This area, hereafter referred to as the CBD North, is a hybrid commercial/retail centre which also functions as a suburban centre serving the needs of the population residing in North Wagga Wagga.

Bulky goods retail activity is also found in a number of locations outside the CBD. The largest bulky goods complex in the City is the Wagga Wagga Homemakers Centre located close to the intersection of the Sturt Highway and Tarcutta Street to the south-east of the CBD.

2.2 Wagga Wagga CBD

An updated floorspace study undertaken by ourselves for the purposes of preparing this Report indicates the Wagga Wagga CBD contains some 109,000 sq.m. of retail floorspace and a further 7,840 sq.m. of bulky goods-type floorspace (TABLE 2.1 refers).

TABLE 2.1
ESTIMATED CENTRE SIZE – EXISTING RETAIL CENTRES, WAGGA WAGGA

Centre ...	Size (Sq.M.)	Major Tenants
CBD		
Wagga Wagga Market Place	19,329	Big W, Woolworths
Sturt Mall	15,013	Kmart, Coles
Other	82,500	Myer
Sub-Total	116,842	
CBD North	**25,979**	**Woolworths**
Suburban Centres		
Tolland Shopping Centre	2,621	Franklins
Kooringal Shopping Centre	4,986	Woolworths
Turvey Tops	4,294	Foodworks
Ashmont Shopping Centre	2,068	IGA
South City Shopping Centre	5,150	Coles
Lake Village Shopping Centre	1,615	Foodworks
Lake Albert Road	583	Friendly Grocer
Total Wagga Wagga	**164,138**	

Note: Includes all retail floorspace.
Sources: Property Council of Australia, NSW/ACT Shopping Centre Directory 2005 and Leyshon Consulting Estimates 2006.

The above estimates relate to gross floor area. The more usual basis of estimating retail floorspace is gross leasable area (GLA). On a GLA basis it is estimated the CBD contains 92,650 sq.m. of retail floorspace and 7,056 sq.m. of bulky goods-type space.

Traditional retail activity in the Wagga Wagga CBD is focussed on Baylis Street. The three major individual retail components found within the CBD are the free-standing Myer department store and the enclosed sub-regional scale centres Sturt Mall and Wagga Wagga Marketplace.

The Myer department store comprises some 10,000 sq.m.. Some uncertainty must attach to the long-term future of this store as Coles sold its Myer business in early 2006. Prior to this date, Coles Myer had been closing department stores in provincial cities with examples being the Myer stores in Tamworth, Bathurst and Nowra. The Bathurst and Tamworth stores were subsequently converted to Target DDSs.

Sturt Mall is located at the corner of Baylis and Forsyth Street in the CBD and contains some 15,013 sq.m. (GLA). The centre is anchored by a Kmart DDS (6,200 sq.m.) and a Coles full-line supermarket (3,775 sq.m.). The most recent reported annual turnover of the centre was $85.7 million ($2005).

Wagga Wagga Marketplace (19,329 sq.m. GLA) is located immediately to the south of Sturt Mall and has an entrance off Baylis Street as well as a frontage to Forsyth Street. The centre is anchored by a Big W DDS (6,443 sq.m.) and a very large Woolworths full-line supermarket (5,011 sq.m.). The centre contains some 60 specialty shops with a very wide representation of national chain specialty retailers. The reported annual turnover of Wagga Wagga Marketplace in 2005 was $118 million ($2005).

Estimates prepared by ourselves indicate the CBD also contains approximately 36,096 sq.m. of non-retail commercial floorspace and a further 7,108 sq.m. occupied by hotels, clubs and the like. Within the

CBD there is a significant representation of Commonwealth and State government departments as well as a wide range of private sector service firms operating in the financial, legal and other related professional services sectors.

2.3 CBD North

The CBD North contains a mixture of retail and commercial businesses focussed on Fitzmaurice Street. In surrounding streets there are a number of important cultural institutions including radio stations, major Catholic and Anglican churches, the Civic Theatre and Riverina Playhouse Theatre and the Central Court complex.

We estimate the CBD North contains some 23,942 sq.m. gross floor area of retail floorspace or approximately 20,350 sq.m. GLA. Compared with the CBD proper, the CBD North has a much less significant representation of bulky goods retailers. We estimate bulky goods uses in the CBD North occupy about 2,038 sq.m. gross floor area or approximately 1,834 sq.m. GLA.

The major retail attractions in the CBD North are a Woolworths supermarket and a six-screen cinema complex. The centre also contains a significant component of non-retail commercial floorspace (33,266 sq.m.) as well as having a number of clubs, hotels and the like (6,725 sq.m.). The CBD North area has an important role as a location for entertainment in the City.

We understand the CBD North commercial area has undergone something of a renaissance within the past five years. This contrasts to the situation in the early 1990s when the centre contained a large number of vacant retail premises.

2.4 Suburban Centres

As previously noted, the City of Wagga Wagga contains a number of suburban centres anchored by supermarkets of various sizes. Two centres are anchored by large national chain supermarkets–namely those at Kooringal (Woolworths) and Glenfield Park (Coles). As discussed below, there are also a number of smaller centres anchored by independent supermarkets.

2.4.1 Kooringal

Kooringal Mall contains some 4,000 sq.m. and is anchored by a Woolworths supermarket (1,950 sq.m.). The Mall also contains a wide range of convenience retail services and is supported by a McDonald's fast food outlet and the Kooringal Hotel. At the time of preparing this Report, Kooringal only had one vacant shop of 70 sq.m..

2.4.2 Southcity

Southcity is a recently constructed centre of 3,900 sq.m. in the suburb of Glenfield anchored by a Coles supermarket of 2,500 sq.m.. At the time of preparing this Report Southcity contained some 500 sq.m. of vacant space or about 12.8% of the centre as a whole. We understand some of the centre's specialty space has never been leased since it opened in late 2004. Other space has become vacant recently such as a green grocery which alone accounts for 200 sq.m. (or 40%) of the overall vacant floorspace. Substantial vacant land exists adjacent to the Southcity centre. We understand that a further expansion of Southcity is being contemplated but is unlikely to occur before 2012.

2.4.3 Lake Albert

Lake Albert is an older-style centre of some 2,300 sq.m.. The centre is anchored by a small Foodworks supermarket which has planning approval to double its size to approximately 2,600 sq.m.. We understand construction of the centre's expansion is imminent.

Adjacent to the centre is a Shell service station, a hotel reception centre and bottle shop. At present, Lake Albert has no vacant premises. Unusually, for this type of centre, Lake Albert contains a haberdashery and shop retailing curtains and fabrics.

2.4.4 Tolland

Tolland is a centre of some 3,000 sq.m. anchored by a Franklins supermarket of 1,800 sq.m.. Adjacent to the centre is a hotel and the centre itself is proximate to Mt Austin high school from which it derives a not insignificant proportion of its sales due to spending by high school students. The centre has no vacancies at present. Tolland appears to have undergone some cosmetic improvements to external signage et cetera within the past few years.

2.4.5 Turvey Tops

Turvey Tops is a small convenience-based centre of some 1,800 sq.m. anchored by a Foodworks supermarket. The centre primarily provides convenience retail services to residents of the inner southern part of Wagga Wagga city. Turvey Tops has undergone some cosmetic improvement in recent years and the centre contained no vacancies at the time of our survey.

2.4.6 Ashmont

Ashmont is a neighbourhood-scale centre of some 2,200 sq.m. anchored by an IGA supermarket of around 800 sq.m.. The centre provides convenience retail services to residents of the suburb of Ashmont. Ashmont has two vacant shops at present and also exhibits some signs of vandalism. The centre is integrated with the Ashmont hotel which may negatively impact on its perception as a shopping destination. The design of the centre is such that a significant number of shops face an internal courtyard. This style of centre, while popular in the 1970s, has been found to be less successful over time than centre designs where shops face an external car park.

2.5 Bulky Goods

As previously mentioned, Wagga Wagga has one dedicated bulky goods centre namely Homebase. Homebase comprises some 12,000 sq.m. and its major tenants include Harvey Norman, Bunnings, Capt'n Snooze, Fantastic Furniture, Forty Winks, a Sheridan factory outlet shop and Officeworks.

There are a number of bulky goods stores located elsewhere in Wagga Wagga. In general, these outlets are found in scattered locations such as along the Sturt Highway near its intersection with Olympic Way (Barbeques Galore, Betta Electrical and Mitre 10). Other bulky goods-type businesses (like the Dulux Trade Centre and Southside Furniture) have established in the Murray Street industrial area which is located to the west of the CBD proper. There are also a number of bulky goods operators located in Lake Albert Road between the Sturt Highway and Copland Street.

We understand that bulky goods is a permissible use in industrial areas in the City. Consequently, under existing planning controls bulky goods retailing could be established in numerous locations along the Sturt Highway as well as other areas in the City.

2.6 Approved Development

In 2005 Council approved the redevelopment of the Murrumbidgee Mill site to incorporate an hotel, convention centre, supermarket, food outlets and specialty shops. We understand the project involves some 5,948 sq.m. of retail floorspace including a supermarket of 3,000 sq.m..

This approval has not been activated to date.

3 DEMAND ANALYSIS

3.1 Introduction

The purpose of this section of the Report is to estimate the potential growth in demand for retail and related services in the City during the period 2006-21.

In undertaking this assessment, we have reviewed the trade area for the City of Wagga Wagga. The primary trade area (PTA) is constituted by the City of Wagga Wagga itself which includes the Wagga Wagga urban area and part of the surrounding rural area. The secondary trade area (STA) incorporates the balance of Murrumbidgee Statistical Subdivision (SSD) including the Local Government Areas (LGAs) of:

- Tumut
- Gundagai
- Junee
- Coolamon
- Narrandera
- Lockhart
- Cootamundra
- Temora.

3.2 Projected Population Growth

In consultation with Council we have prepared a population projection for the Wagga Wagga trade area for the period 2006-21. In preparing this projection we have had regard to Australian Bureau of Statistics (ABS) 2005 estimates of resident population by Statistical Local Area

(SLA) as well as population forecasts prepared by the New South Wales Department of Planning for LGAs to 2021.

For the Wagga Wagga PTA we have accumulated suburbs into sub-districts. The relevant aggregations are detailed in APPENDIX B to this Report (FIGURE 3.1 refers).

TABLE 3.1 provides our estimate of population growth in the Wagga Wagga trade area between 2006-21. In the PTA, the population is estimated to grow from 59,412 persons in 2006 to 68,275 persons in 2021–an increase of +8,863 persons. In the STA, however, the population is forecast to decrease from 48,870 persons in 2006 to 46,250 persons in 2021–a decline of -2,620 persons. The falling STA population is consistent with the trend of population loss being experienced by many rural LGAs in New South Wales over the past decade.

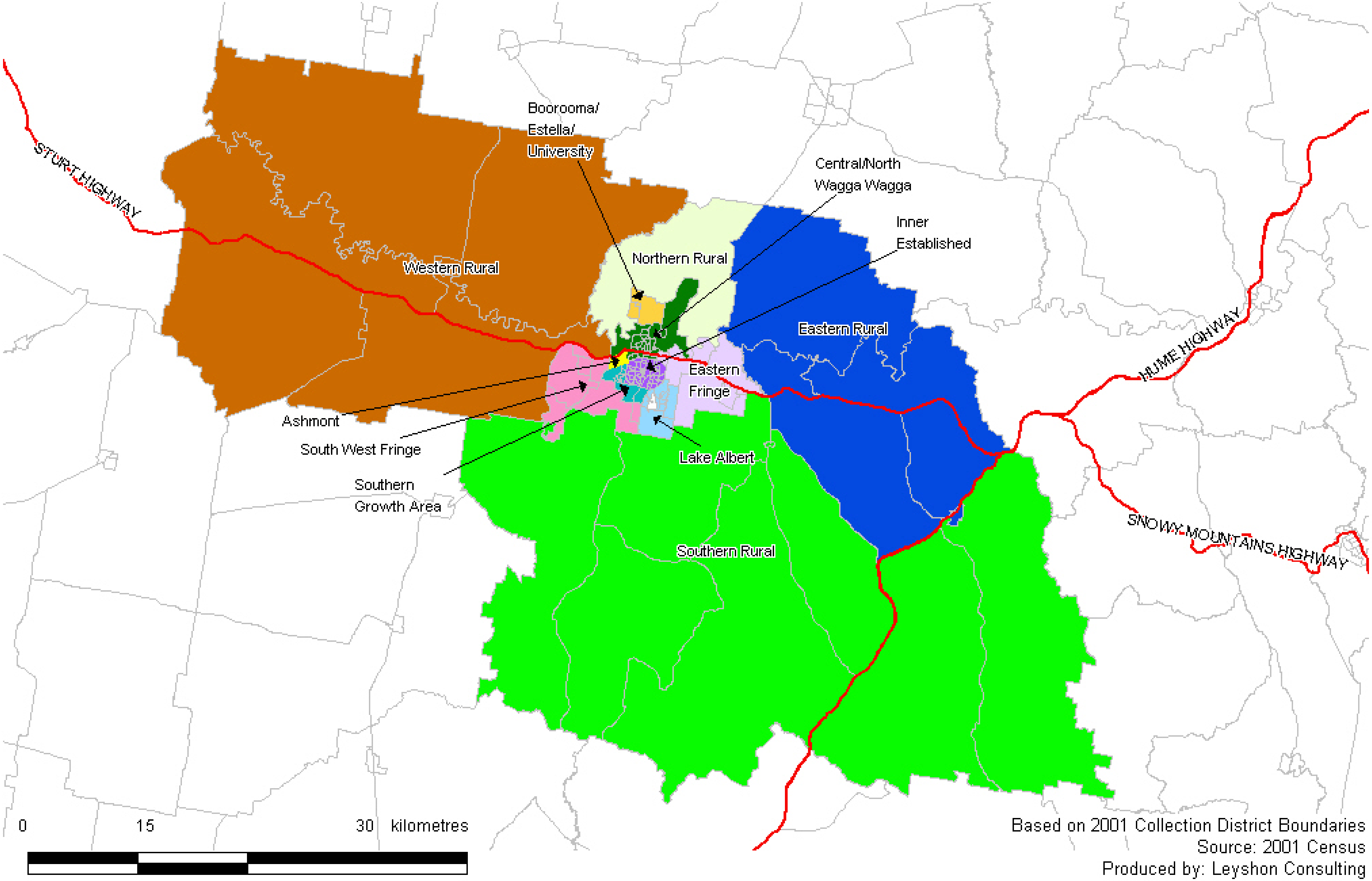
In relation to the PTA, those subdistricts projected to experience the greatest population growth during the period 2006-21 are as follows:

- Southern Growth Area ... +3,097 persons
- Boorooma/Estella ... +2,147 persons
- South West Fringe ... +1,469 persons.

The Southern Growth Area includes the suburbs of Bourkelands, Glenfield and Tatton. The South West Fringe includes the suburbs/localities of Lloyd, Springvale and Kapooka. In relation to this subdistrict the vast majority of growth between 2006-21 will be concentrated in the suburb of Lloyd.

FIG 3.1: Wagga Wagga Sub-Districts

and surrounding areas



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

TABLE 3.1
ESTIMATED POPULATION GROWTH – WAGGA WAGGA TRADE AREA by SUBDISTRICT, 2006-21 (No. Persons)

Year ...	Ashmont	Boorooma/ Estella	Central/ North Wagga Wagga	Eastern Fringe	Eastern Rural	Inner Established	Lake Albert	Northern Rural	South West Fringe	Southern Growth Area	Southern Rural	Western Rural	Wagga Wagga LGA	Wagga Wagga STA	Total
Count 2001	3,992	2,238	9,534	3,154	985	17,550	5,519	394	1,678	6,152	2,380	1,285	54,861	47,331	102,192
2001	4,129	2,315	9,860	3,262	1,019	18,151	5,708	407	1,735	6,363	2,461	1,329	56,739	49,638	106,377
2006	4,146	2,847	9,119	3,136	1,065	19,283	5,732	426	2,450	7,247	2,574	1,387	59,412	48,870	108,282
2011	4,152	3,464	9,146	3,439	1,076	19,312	5,738	437	2,971	8,332	2,603	1,394	62,064	47,890	109,954
2016	4,157	4,256	9,177	3,770	1,087	19,341	5,742	446	3,603	9,577	2,635	1,401	65,192	47,000	112,192
2021	4,157	4,994	9,206	4,096	1,103	19,370	5,742	1,170	3,919	10,344	2,765	1,409	68,275	46,250	114,525
Increase 2006-31	**11**	**2,147**	**87**	**960**	**38**	**87**	**10**	**744**	**1,469**	**3,097**	**191**	**22**	**8,863**	**(2,620)**	**6,243**

Errors due to rounding.
Source: Leyshon Consulting Pty Ltd Estimates, September 2006.

3.3 Demography

The key demographic attributes of the population residing in the Wagga Wagga trade area at the 2001 Census are detailed in TABLE 3.2.

The demographic characteristics of the Wagga Wagga population vary widely between the sub-areas.

3.3.1 Age Structure

- the Southern Growth area and Ashmont both had much younger populations at the 2001 Census compared with the non-metropolitan New South Wales average (20.4% aged 0-9 years compared with 14.2% in Non-Metropolitan New South Wales and 15.1% in Wagga Wagga LGA).
- Boorooma/Estella and the South West Fringe both had much greater proportions of persons aged 20-29 years (26.7% and 21.4%) than Non-Metropolitan New South Wales (10.3%) and 15.2%in Wagga Wagga LGA. These areas also had much lower proportions of persons aged 60+ years (5.7% in Boorooma/Estella and 7.5% in South West Fringe compared with 20.7% in Non-Metropolitan New South Wales and14.8% in Wagga Wagga LGA).

3.3.2 Household Structure

- in 2001 the proportion of traditional family households (that is, couples with dependent children) ranged from a low of 20.9% of all households in Central/North Wagga Wagga to a high of 54.0% in the South West Fringe. This compares to an average of 30.6% being traditional family in nature in Non-Metropolitan New South Wales and 33.6% in Wagga Wagga LGA.

TABLE 3.2:
SUMMARY of SELECTED DEMOGRAPHIC DATA – WAGGA WAGGA TRADE AREA and NON-METROPOLITAN NEW SOUTH WALES – 2001 (% Population)

Category ...	Ashmont	Boorooma/ Estella	Central/ North Wagga Wagga	Eastern Fringe	Eastern Rural	Inner Established	Lake Albert	Northern Rural	South West Fringe	Southern Growth Area	Southern Rural	Western Rural	Wagga Wagga LGA	Wagga Wagga STA	Non-Metropolitan New South Wales
Count	3,992	2,238	9,534	3,154	985	17,550	5,519	394	1,678	6,152	2,380	1,285	54,845	47,331	1,638,197
Age Structure															
0-9 years	20.4	14.0	11.0	14.9	16.7	14.7	14.4	14.1	8.7	20.4	15.8	20.1	15.1	15.1	14.2
10-19	15.7	26.8	12.9	19.8	14.2	17.5	19.9	17.9	28.8	14.4	14.0	16.7	17.1	14.5	14.9
20-29	16.1	26.7	19.6	18.8	6.6	13.1	10.0	10.2	21.4	16.7	8.2	8.9	15.2	10.0	10.3
30-39	13.5	13.8	13.8	16.7	13.5	12.7	12.2	12.0	11.0	16.8	14.9	12.9	13.6	13.3	13.0
40-49	11.4	8.4	13.3	12.4	17.2	13.5	18.3	21.2	14.9	13.0	17.3	15.5	13.9	14.5	14.6
50-59	9.1	4.6	10.2	7.6	11.0	11.2	13.5	11.3	7.7	7.4	15.0	10.4	10.3	12.2	12.3
60+	13.8	5.7	19.2	9.8	20.8	17.3	11.7	13.3	7.5	11.3	14.8	15.6	14.8	20.4	20.7
Household Structure															
Couples & Children	28.4	46.0	20.9	40.5	41.6	29.8	45.2	38.1	54.0	45.3	42.1	47.8	33.6	33.3	30.6
Couples Only	19.5	29.9	22.7	25.6	32.2	24.5	29.4	28.8	31.0	26.6	31.9	29.2	25.1	28.4	28.9
Single Parents	22.2	6.9	9.0	9.2	8.8	15.2	10.6	10.8	4.3	8.4	8.3	7.4	12.1	9.6	11.4
Other	1.9	0.7	1.6	0.7	0.0	1.2	0.5	4.3	0.8	0.8	0.7	0.0	1.3	0.9	1.0
Total Family	72.0	83.5	54.2	76.0	82.6	70.7	85.7	82.0	90.1	81.1	83.0	84.4	72.1	72.2	71.9
Non-Family Households															
Lone Person	24.1	13.8	36.0	21.5	15.3	25.3	12.5	18.0	7.4	15.6	15.5	14.9	23.5	25.9	25.3
Group	3.9	2.7	9.8	2.5	2.1	4.0	1.8	0.0	2.5	3.3	1.5	0.7	4.5	1.9	2.8
Total Non-Family	28.0	16.5	45.8	24.0	17.4	29.3	14.3	18.0	9.9	18.9	17.0	15.6	27.9	27.8	28.1

TABLE 3.2:
SUMMARY of SELECTED DEMOGRAPHIC DATA – WAGGA WAGGA TRADE AREA and NON-METROPOLITAN NEW SOUTH WALES – 2001 (% Population)

Category ...	Ashmont	Boorooma/ Estella	Central/ North Wagga Wagga	Eastern Fringe	Eastern Rural	Inner Established	Lake Albert	Northern Rural	South West Fringe	Southern Growth Area	Southern Rural	Western Rural	Wagga Wagga LGA	Wagga Wagga STA	Non-Metropolitan New South Wales
Average Household Size (persons/dwelling)	**2.60**	**3.00**	**2.17**	**2.74**	**2.89**	**2.54**	**2.96**	**2.68**	**3.11**	**2.88**	**2.71**	**3.00**	**2.60**	**2.55**	**2.50**
Occupational Structure															
Managers & Administrators	2.6	5.4	8.0	5.7	24.2	5.5	7.1	18.7	5.2	6.4	32.6	41.3	8.8	18.8	12.4
Professionals	8.9	18.7	21.6	11.3	10.8	16.0	19.2	16.4	16.8	14.6	11.6	9.6	16.4	10.7	14.2
Associate Professionals	8.2	9.7	11.9	7.4	10.2	12.1	13.4	21.0	9.3	12.8	8.3	7.9	11.3	9.4	11.2
Tradespersons & Related	17.1	11.8	12.1	34.4	11.8	13.6	13`	7.0	44.3	14.8	10.6	9.6	16.0	12.8	13.1
Advanced Clerical/Sales/Service	1.9	3.2	2.5	2.7	3.6	3.5	3.9	6.5	2.6	3.7	3.2	1.4	3.0	2.8	3.4
Intermediate Clerical/Sales/Service	19.8	17.0	16.2	12.5	12.4	17.7	16.4	10.3	7.5	19.2	10.2	8.3	16.0	12.3	14.5
Intermediate Production & Transport	11.6	6.6	6.9	7.2	4.6	8.1	6.6	8.4	4.4	7.7	6.3	7.1	7.3	10.3	8.5
Elementary Clerical/ Sales/Service	13.3	15.5	10.8	8.6	6.0	12.5	12.1	6.1	4.9	12.2	6.7	6.3	11.0	7.1	9.3
Labourers and Related	14.1	11.1	8.2	8.4	12.4	9.4	7.1	2.8	3.5	7.5	8.9	8.5	8.6	13.7	11.3
Inadequately Described	1.0	0.6	0.3	1.0	1.8	0.7	0.2	1.4	0.8	0.4	0.5	0.0	0.6	0.6	0.7

TABLE 3.2:
SUMMARY of SELECTED DEMOGRAPHIC DATA – WAGGA WAGGA TRADE AREA and NON-METROPOLITAN NEW SOUTH WALES – 2001 (% Population)

Category ...	Ashmont	Boorooma/ Estella	Central/ North Wagga Wagga	Eastern Fringe	Eastern Rural	Inner Established	Lake Albert	Northern Rural	South West Fringe	Southern Growth Area	Southern Rural	Western Rural	Wagga Wagga LGA	Wagga Wagga STA	Non-Metropolitan New South Wales
Not Stated	1.5	0.4	1.5	0.8	2.2	0.9	1.0	1.4	0.7	0.7	1.0	0.0	1.0	1.5	1.4
Unemployment Rate	**14.3**	**12.8**	**8.2**	**4.2**	**4.1**	**9.3**	**4.0**	**5.4**	**3.2**	**3.7**	**4.7**	**3.3**	**7.2**	**6.7**	**9.0**
Annual Household Income															
Nil/Negative	0.9	0.0	1.1	0.4	2.3	0.6	0.4	0.0	0.0	0.0	1.6	1.9	0.7	0.9	0.8
$0-$10,384	7.3	1.6	7.2	4.0	2.7	5.8	1.6	4.5	0.0	2.0	6.1	0.9	4.9	5.9	5.8
$10,385-$15,584	13.3	3.0	13.3	7.7	7.4	10.8	4.0	9.8	2.3	4.9	4.7	3.1	9.3	11.7	11.2
$15,585-$20,784	15.0	5.6	10.6	7.1	10.3	11.8	6.1	0.0	5.6	5.9	8.5	10.9	9.9	13.1	13.6
$20,785-$25,948	9.9	5.8	9.0	8.1	9.0	9.6	6.9	4.5	3.0	6.2	6.1	12.2	8.4	9.8	10.8
$25,950-$31,148	8.1	6.5	6.0	7.6	6.3	7.1	5.4	4.5	3.0	5.3	6.9	8.4	6.6	6.7	7.0
$31,149-$36,348	8.4	8.4	6.7	8.6	6.6	7.0	6.6	4.5	3.8	6.1	10.8	8.4	7.1	8.2	8.1
$36,349-$41,548	6.2	4.4	5.8	6.7	4.7	6.0	4.9	8.0	6.4	6.7	9.0	3.8	6.1	5.9	5.6
$41,549-$51,948	11.0	16.3	10.3	14.0	6.6	10.3	10.0	9.8	12.8	14.4	10.6	8.8	11.1	10.9	10.1
$51,949-$62,348	7.5	9.8	9.0	10.2	9.0	9.2	11.2	17.8	9.0	12.1	9.0	9.7	9.6	8.1	7.9
$62,349-$77,948	5.8	15.8	7.3	11.6	12.5	8.9	13.8	11.6	14.3	15.7	10.8	10.9	10.2	7.6	7.3
$77,949-$103,948	4.4	16.5	8.7	9.4	11.7	8.2	16.8	8.9	19.5	14.5	8.2	13.1	10.1	7.1	7.3
Above $103,948	2.2	6.3	5.0	4.6	10.9	4.7	12.3	16.1	20.3	6.2	7.7	7.8	6.1	4.1	4.5
Average Household Income ($2001)	**$35,304**	**$56,432**	**$42,123**	**$47,077**	**$52,691**	**$42,759**	**$60,855**	**$60,404**	**$71,686**	**$55,114**	**$48,051**	**$51,236**	**$46,758**	**$40,494**	**$40,681**

Source: ABS Census 2001.

- the proportion of single parent family households was highest in Ashmont (22.2%) and compared to 11.4% in Non-Metropolitan New South Wales and 12.1% in Wagga Wagga LGA.

- the proportion of lone-person households ranged from 7.4% in the South West Fringe to 36.0% in Central/North Wagga Wagga. Lone person households comprised 25.3% of all households in Non-Metropolitan New South Wales in 2001 and 23.5% in Wagga Wagga LGA.

- the South West Fringe had the highest average household size of 3.11 persons per dwelling in 2001 while Central/North Wagga Wagga had the lowest average household size of 2.17 persons per dwelling. These figures compare to 2.50 persons per dwelling in Non-Metropolitan New South Wales in 2001 and 2.60 persons per dwelling in Wagga Wagga LGA.

3.3.3 Occupational Structure

- the lowest proportion of upper-white collar workers (that is, managers, administrators and professionals) at the 2001 Census was in Ashmont (11.5% of all occupations). This compared to 26.7% of workers in Non-Metropolitan New South Wales being so classified and 25.2% in Wagga Wagga LGA.

- the South West Fringe (44.3%) and Eastern Fringe (34.4%) both had high proportions of tradespersons and related workers in 2001 compared to Non-Metropolitan NSW (13.1%) and 16.0% in Wagga Wagga LGA.

3.3.4 Unemployment Rate

- Ashmont had a very high unemployment rate (14.3%) at the 2001 Census. This compared to an average unemployment rate of to 9.0% in Non-Metropolitan New South Wales and 7.2% in Wagga Wagga LGA at that time.

- Boorooma/Estella also had a high level unemployment (12.8%) in 2001 while the South West Fringe had the lowest unemployment of just 3.2%.

3.3.5 Income

- average household income levels at the 2001 Census ranged from some -13% below the Non-Metropolitan New South Wales average ($40,681) in Ashmont ($35,304) to +76.2% above in the South West Fringe ($71,686) ($2001).

3.4 Available Spending

Data from various sources has been combined to generate estimates of available retail spending by PTA subdistrict and for the STA. The data sources utilised in this analysis are as follows:

- information on household and personal income levels derived from the 2001 Census
- 2003-04 ABS Household Expenditure Survey (HES)
- ABS retail trade data, 2001-06.

Estimates have been prepared of average annual per capita retail spending levels. These vary substantially within the PTA. The lowest level is in the suburb of Ashmont ($6,886 per capita per annum) and the highest is in the Northern Rural Sub-District $9,508 per capita per annum).

Estimates of total available retail spending in the trade area between 2006-21 are provided in TABLES 3.3 to 3.6 inclusive while the change in available spending between 2006-21 is summarised in TABLE 3.7. As indicated in TABLE 3.3, in 2006 annual available retail spending is estimated at some $481.4 million per annum in the PTA and $361.1 million per annum in the STA ($2006).

By 2021, annual available retail spending in the PTA is estimated to have risen to $644.5 million–an increase of +$163.1 million over 2006 levels. Total available annual retail spending in the STA in 2021 is estimated at $368.3 million–an increase of only +$7.2 million over 2006 levels.

The subdistricts within the PTA which will experience the greatest growth in available retail spending are directly correlated with those areas which will experience the most significant population growth during the period 2006-21 namely:

- Southern Growth Area ... +$39.1 million
- Boorooma/Estella ... +$23.8 million
- South West Fringe ... +$18.4 million.

Specific estimates of the growth in bulky goods-type spending during the period 2006-21 also have been prepared. These are detailed in APPENDIX C.

In summary, during the period 2006-21 total available bulky goods spending in the trade area is projected to increase from $270.7 million per annum in 2006 ($2006) to $326.9 million per annum in 2021–an increase of +$56.2 million per annum.

TABLE 3.3
ESTIMATED AVAILABLE RETAIL SPENDING – WAGGA WAGGA LGA by SUBDISTRICT, 2006 ($2006; $ Million per annum)

Factor ...	Ashmont	Boorooma/ Estella	Central/ North Wagga Wagga	Eastern Fringe	Eastern Rural	Inner Established	Lake Albert	Northern Rural	South West Fringe	Southern Growth Area	Southern Rural	Western Rural	Wagga Wagga LGA	Wagga Wagga STA
Population Count (No. Persons)	4,146	2,847	9,120	3,136	1,065	19,283	5,732	426	2,450	7,247	2,574	1,387	59,413	48,870
Average Annual Per Capita Retail Spending	$6,886	$8,049	$9,038	$7,749	$7,941	$7,828	$8,348	$9,508	$8,762	$8,211	$7,994	$7,443	$8,102	7389.0
Total Available Retail Spending ($ Mil. per annum)	$28.5	$22.9	$82.4	$24.3	$8.5	$150.9	$47.9	$4.1	$21.5	$59.5	$20.6	$10.3	$481.4	$361.1
Spending by Category														
Food/Groceries	$8.7	$6.7	$24.4	$7.3	$2.5	$44.7	$13.3	$1.4	$5.8	$17.0	$6.1	$3.0	$140.9	$107.1
Food Out	$2.9	$2.5	$9.1	$2.7	$0.9	$16.8	$5.3	$0.4	$2.5	$6.5	$2.3	$1.1	$53.0	$40.1
Alcohol (Off Licence)	$1.1	$0.8	$3.2	$0.9	$0.3	$5.8	$1.7	$0.1	$0.8	$2.2	$0.8	$0.4	$18.1	$14.0
Tobacco	$1.1	$0.7	$3.1	$0.9	$0.3	$5.6	$1.4	$0.1	$0.6	$1.9	$0.7	$0.3	$16.7	$13.4
Clothing & Accessories	$2.6	$2.4	$7.9	$2.4	$0.9	$14.5	$5.4	$0.4	$2.5	$6.4	$2.1	$1.1	$48.6	$34.6
Household Furnishings & Equipment	$4.0	$3.1	$11.8	$3.4	$1.2	$21.6	$6.4	$0.5	$2.9	$8.1	$2.9	$1.3	$67.2	$51.7
Household Non-Durables	$1.1	$0.8	$2.8	$0.8	$0.3	$5.2	$1.6	$0.1	$0.7	$2.0	$0.7	$0.4	$16.5	$12.4
Medical Pharmacy	$0.9	$0.7	$2.5	$0.7	$0.2	$4.5	$1.6	$0.1	$0.7	$1.9	$0.6	$0.3	$14.7	$10.8
Vehicle Accessories	$0.6	$0.5	$1.8	$0.5	$0.2	$3.3	$1.0	$0.1	$0.4	$1.3	$0.4	$0.2	$10.3	$7.8
Recreation	$3.6	$3.1	$10.2	$3.1	$1.1	$18.6	$6.7	$0.6	$3.0	$8.0	$2.6	$1.4	$62.0	$44.5
Personal Care	$1.2	$1.0	$3.5	$1.0	$0.4	$6.4	$2.2	$0.2	$1.0	$2.6	$0.9	$0.5	$20.9	$15.3

TABLE 3.3
ESTIMATED AVAILABLE RETAIL SPENDING – WAGGA WAGGA LGA by SUBDISTRICT, 2006 ($2006; $ Million per annum)

Factor ...	Ashmont	Boorooma/ Estella	Central/ North Wagga Wagga	Eastern Fringe	Eastern Rural	Inner Established	Lake Albert	Northern Rural	South West Fringe	Southern Growth Area	Southern Rural	Western Rural	Wagga Wagga LGA	Wagga Wagga STA
Miscellaneous Goods & Services	$0.7	$0.6	$2.1	$0.6	$0.2	$3.9	$1.3	$0.1	$0.6	$1.6	$0.5	$0.3	$12.5	$9.4
Total Available Retail Spending	$28.5	$22.9	$82.4	$24.3	$8.5	$150.9	$47.9	$4.1	$21.5	$59.5	$20.6	$10.3	$481.4	$361.1
Available Supermarket Spending	**$9.1**	**$7.3**	**$26.4**	**$7.8**	**$2.7**	**$48.3**	**$15.3**	**$1.3**	**$6.9**	**$19.0**	**$6.6**	**$3.3**	**$154.0**	**$115.6**

Errors due to rounding.
Source: Leyshon Consulting Pty Ltd Estimates, September 2006.

TABLE 3.4
ESTIMATED AVAILABLE RETAIL SPENDING – WAGGA WAGGA LGA by SUBDISTRICT, 2011 ($2006; $ Million per annum)

Factor ...	As hmont	Boorooma/ Estella	Central /North Wagga Wagga	Eastern Fringe	Eastern Rural	Inner Established	Lake Albert	Northern Rural	South West Fringe	Southern Growth Area	Southern Rural	Western Rural	Wagga Wagga LGA	Wagga Wagga STA
Population Count (No. Persons)	4,152	3,464	9,146	3,439	1,076	19,312	5,738	437	2,971	8,332	2,603	1,394	62,064	47,890
Average Annual Per Capita Retail Spending	$7,238	$8,460	$9,499	$8,145	$8,347	$8,227	$8,773	$9,994	$9,209	$8,630	$8,402	$7,823	$8,521	7576.0
Total Available Retail Spending ($ Mil. per annum)	$30.1	$29.3	$86.9	$28.0	$9.0	$158.9	$50.3	$4.4	$27.4	$71.9	$21.9	$10.9	$529.0	$362.8
Spending by Category														
Food/Groceries	$9.4	$8.4	$25.8	$8.2	$2.7	$47.3	$13.9	$1.2	$7.5	$20.5	$6.4	$3.2	$154.5	$107.6
Food Out	$3.0	$3.2	$9.6	$3.1	$1.0	$17.6	$5.5	$0.5	$3.2	$8.0	$2.4	$1.2	$58.3	$40.3
Alcohol (Off Licence)	$1.1	$1.1	$3.4	$1.1	$0.3	$6.1	$1.8	$0.2	$1.0	$2.6	$0.8	$0.4	$19.9	$14.0
Tobacco	$1.2	$0.9	$3.2	$1.0	$0.3	$5.9	$1.5	$0.1	$0.7	$2.3	$0.8	$0.4	$18.3	$13.5
Clothing & Accessories	$2.7	$3.1	$8.3	$2.8	$0.9	$15.2	$5.7	$0.5	$3.1	$7.7	$2.2	$1.1	$53.3	$34.8
Household Furnishings & Equipment	$4.2	$4.0	$12.4	$3.9	$1.2	$22.7	$6.7	$0.6	$3.7	$9.8	$3.1	$1.5	$73.8	$51.9
Household Non-Durables	$1.1	$1.0	$3.0	$1.0	$0.3	$5.5	$1.7	$0.1	$0.9	$2.4	$0.7	$0.4	$18.1	$12.5
Medical Pharmacy	$0.9	$0.9	$2.6	$0.9	$0.3	$4.8	$1.7	$0.1	$0.9	$2.3	$0.7	$0.3	$16.4	$10.9
Vehicle Accessories	$0.6	$0.6	$1.9	$0.6	$0.2	$3.4	$1.1	$0.1	$0.6	$1.5	$0.5	$0.2	$11.3	$7.8
Recreation	$3.8	$3.9	$10.7	$3.6	$1.2	$19.6	$7.1	$0.6	$3.8	$9.7	$2.8	$1.4	$68.2	$44.7
Personal Care	$1.3	$1.3	$3.7	$1.2	$0.4	$6.7	$2.3	$0.2	$1.3	$3.2	$0.9	$0.5	$23.0	$15.4

TABLE 3.4
ESTIMATED AVAILABLE RETAIL SPENDING – WAGGA WAGGA LGA by SUBDISTRICT, 2011 ($2006; $ Million per annum)

Factor …	As hmont	Boorooma/ Estella	Central /North Wagga Wagga	Eastern Fringe	Eastern Rural	Inner Established	Lake Albert	Northern Rural	South West Fringe	Southern Growth Area	Southern Rural	Western Rural	Wagga Wagga LGA	Wagga Wagga STA
Miscellaneous Goods & Services	$0.8	$0.9	$2.3	$0.6	$0.2	$4.1	$1.3	$0.2	$0.7	$1.9	$0.6	$0.3	$13.9	$9.4
Total Available Retail Spending	$30.1	$29.3	$ 86.9	$28.0	$9.0	$158.9	$50.3	$4.4	$27.4	$71.9	$21.9	$10.9	$529.0	$362.8
Available Supermarket Spending	**$9.6**	**$9.4**	**$27.8**	**$9.0**	**$2.9**	**$50.8**	**$16.1**	**$1.4**	**$8.8**	**$23.0**	**$7.0**	**$3.5**	**$169.3**	**$116.1**

Errors due to rounding.
Source: Leyshon Consulting Pty Ltd Estimates, September 2006.

TABLE 3.5
ESTIMATED AVAILABLE RETAIL SPENDING – WAGGA WAGGA LGA by SUBDISTRICT, 2016 ($2006; $ Million per annum)

Factor ...	As hmont	Boorooma /Estella	Central/ North Wagga Wagga	Eastern Fringe	Eastern Rural	Inner Established	Lake Albert	Northern Rural	South West Fringe	Southern Growth Area	Southern Rural	Western Rural	Wagga Wagga LGA	Wagga Wagga STA
Population Count (No. Persons)	4,157	4,256	9,177	3,770	1,087	19,341	5,742	446	3,603	9,577	2,635	1,401	65,192	47,000
Average Annual Per Capita Retail Spending	$7,607	$8,892	$9,984	$8,560	$8,772	$8,647	$9,221	$10,503	$9,679	$9,070	$8,830	$8,222	$8,963	7767.0
Total Available Retail Spending ($ Mil. per annum)	$31.6	$37.8	$91.6	$32.3	$9.5	$167.2	$52.9	$4.7	$34.9	$86.9	$23.3	$11.5	$584.2	$365.0
Spending by Category														
Food/Groceries	$9.9	$10.8	$27.2	$9.4	$2.7	$49.6	$14.8	$1.3	$9.6	$24.8	$6.8	$3.3	$170.2	$108.2
Food Out	$3.2	$4.2	$10.2	$3.6	$1.1	$18.6	$5.9	$0.5	$4.1	$9.6	$2.6	$1.3	$64.9	$40.5
Alcohol (Off Licence)	$1.2	$1.4	$3.5	$1.2	$0.4	$6.5	$1.9	$0.2	$1.3	$3.2	$0.9	$0.4	$22.1	$14.1
Tobacco	$1.2	$1.2	$3.4	$1.1	$0.3	$6.2	$1.5	$0.1	$0.9	$2.8	$0.8	$0.4	$19.9	$13.5
Clothing & Accessories	$2.9	$4.0	$8.8	$3.2	$1.0	$16.0	$6.0	$0.5	$4.0	$9.3	$2.3	$1.2	$59.2	$35.0
Household Furnishings & Equipment	$4.4	$5.2	$13.1	$4.5	$1.3	$23.9	$7.0	$0.6	$4.7	$11.9	$3.3	$1.6	$81.5	$52.2
Household Non-Durables	$1.2	$1.3	$3.2	$1.1	$0.3	$5.8	$1.8	$0.2	$1.1	$2.9	$0.8	$0.4	$20.1	$12.6
Medical Pharmacy	$1.0	$1.2	$2.7	$1.0	$0.3	$5.0	$1.7	$0.2	$1.1	$2.8	$0.7	$0.4	$18.1	$10.9
Vehicle Accessories	$0.6	$0.8	$2.0	$0.7	$0.2	$3.6	$1.1	$0.1	$0.7	$1.8	$0.5	$0.2	$12.3	$7.9
Recreation	$4.0	$5.1	$11.3	$4.1	$1.3	$20.7	$7.4	$0.6	$4.9	$11.7	$3.0	$1.5	$75.6	$45.1
Personal Care	$1.3	$1.7	$3.9	$1.4	$0.4	$7.1	$2.4	$0.2	$1.6	$3.8	$1.0	$0.5	$25.3	$15.5

TABLE 3.5
ESTIMATED AVAILABLE RETAIL SPENDING – WAGGA WAGGA LGA by SUBDISTRICT, 2016 ($2006; $ Million per annum)

Factor ...	As hmont	Boorooma /Estella	Central/ North Wagga Wagga	Eastern Fringe	Eastern Rural	Inner Established	Lake Albert	Northern Rural	South West Fringe	Southern Growth Area	Southern Rural	Western Rural	Wagga Wagga LGA	Wagga Wagga STA
Miscellaneous Goods & Services	$0.7	$1.0	$2.3	$0.8	$0.2	$4.4	$1.4	$0.1	$0.9	$2.3	$0.6	$0.3	$15.0	$9.5
Total Available Retail Spending	$31.6	$37.8	$91.6	$32.3	$9.5	$167.2	$52.9	$4.7	$34.9	$86.9	$23.3	$11.5	$584.2	$365.0
Available Supermarket Spending	**$10.1**	**$12.1**	**$29.3**	**$10.3**	**$3.1**	**$53.5**	**$16.9**	**$1.5**	**$11.2**	**$27.8**	**$7.4**	**$3.8**	**$187.0**	**$116.8**

Errors due to rounding.
Source: Leyshon Consulting Pty Ltd Estimates, September 2006.

TABLE 3.6
ESTIMATED AVAILABLE RETAIL SPENDING – WAGGA WAGGA LGA by SUBDISTRICT, 2021 ($2006; $ Million per annum)

Factor ...	As hmont	Boorooma /Estella	Central/ North Wagga Wagga	Eastern Fringe	Eastern Rural	Inner Established	Lake Albert	Northern Rural	South West Fringe	Southern Growth Area	Southern Rural	Western Rural	Wagga Wagga LGA	Wagga Wagga STA
Population Count (No. Persons)	4,157	4,994	9,206	4,096	1,103	19,370	5,742	1,170	3,919	10,344	2,765	1,409	68,275	46,250
Average Annual Per Capita Retail Spending	$7,995	$9,345	$10,493	$8,997	$9,220	$9,088	$9,691	$11,039	$10,172	$9,533	$9,281	$8,641	$9,439	7963.0
Total Available Retail Spending ($ Mil. per annum)	$33.2	$46.7	$96.6	$36.9	$10.2	$176.0	$55.6	$12.9	$39.9	$98.6	$25.7	$12.2	$644.5	$368.3
Spending by Category														
Food/Groceries	$10.2	$13.2	$28.7	$10.7	$3.1	$52.1	$15.4	$3.7	$11.1	$28.2	$7.5	$3.5	$187.4	$109.2
Food Out	$3.4	$5.2	$10.7	$4.1	$1.1	$19.5	$6.2	$1.4	$4.6	$10.9	$2.8	$1.3	$71.2	$40.9
Alcohol (Off Licence)	$1.2	$1.7	$3.7	$1.4	$0.4	$6.8	$2.0	$0.5	$1.5	$3.6	$1.0	$0.5	$24.3	$14.2
Tobacco	$1.3	$1.5	$3.6	$1.3	$0.3	$6.5	$1.6	$0.4	$1.1	$3.2	$0.9	$0.4	$22.1	$13.7
Clothing & Accessories	$3.0	$5.0	$9.3	$3.7	$1.1	$16.9	$6.3	$1.4	$4.6	$10.5	$2.6	$1.3	$65.7	$35.3
Household Furnishings & Equipment	$4.7	$6.4	$13.8	$5.2	$1.4	$25.2	$7.4	$1.7	$5.3	$13.5	$3.6	$1.7	$89.9	$52.7
Household Non-Durables	$1.2	$1.6	$3.3	$1.3	$0.3	$6.1	$1.9	$0.4	$1.3	$3.3	$0.9	$0.4	$22.0	$12.7
Medical Pharmacy	$1.0	$1.5	$2.9	$1.1	$0.3	$5.3	$1.8	$0.4	$1.2	$3.1	$0.8	$0.4	$19.8	$11.0
Vehicle Accessories	$0.7	$1.0	$2.1	$0.8	$0.2	$3.8	$1.2	$0.3	$0.8	$2.1	$0.6	$0.3	$13.9	$7.9
Recreation	$4.2	$6.3	$11.9	$4.7	$1.3	$21.7	$7.8	$1.8	$5.5	$13.2	$3.3	$1.6	$83.3	$45.5
Personal Care	$1.4	$2.1	$4.1	$1.6	$0.4	$7.5	$2.5	$0.6	$1.9	$4.4	$1.1	$0.5	$28.1	$15.6

TABLE 3.6
ESTIMATED AVAILABLE RETAIL SPENDING – WAGGA WAGGA LGA by SUBDISTRICT, 2021 ($2006; $ Million per annum)

Factor ...	As hmont	Boorooma /Estella	Central/ North Wagga Wagga	Eastern Fringe	Eastern Rural	Inner Established	Lake Albert	Northern Rural	South West Fringe	Southern Growth Area	Southern Rural	Western Rural	Wagga Wagga LGA	Wagga Wagga STA
Miscellaneous Goods & Services	$0.9	$1.2	$2.5	$1.0	$0.3	$4.6	$1.5	$0.3	$1.0	$2.6	$0.6	$0.3	$16.8	$9.6
Total Available Retail Spending	$33.2	$46.7	$96.6	$36.9	$10.2	$176.0	$55.6	$12.9	$39.9	$98.6	$25.7	$12.2	$644.5	$368.3
Available Supermarket Spending	**$10.6**	**$14.9**	**$30.9**	**$11.8**	**$3.3**	**$56.3**	**$17.8**	**$4.1**	**$12.8**	**$31.6**	**$8.2**	**$3.9**	**$206.2**	**$117.9**

Errors due to rounding.
Source: Leyshon Consulting Pty Ltd Estimates, September 2006.

TABLE 3.7
PROJECTED GROWTH in ESTIMATED AVAILABLE RETAIL SPENDING – WAGGA WAGGA LGA by SUBDISTRICT, 2006-21 ($2006; $ Million per annum)

Factor …	Ashmont	Boorooma/ Estella	Central/ North Wagga Wagga	Eastern Fringe	Eastern Rural	Inner Established	Lake Albert	Northern Rural	South West Fringe	Southern Growth Area	Southern Rural	Western Rural	Wagga Wagga LGA	Wagga Wagga STA
Spending by Category														
Food/Groceries	$1.5	$6.5	$4.3	$3.4	$0.5	$7.4	$2.1	$2.3	$5.3	$11.2	$1.4	$0.5	$46.4	$2.1
Food Out	$0.5	$2.7	$1.6	$1.4	$0.2	$2.7	$0.9	$1.0	$2.1	$4.4	$0.5	$0.2	$18.2	$0.8
Alcohol (Off Licence)	$0.1	$0.9	$0.5	$0.5	$0.1	$1.0	$0.3	$0.4	$0.8	$1.4	$0.2	$0.1	$6.3	$0.3
Tobacco	$0.2	$0.8	$0.5	$0.4	$0.1	$0.9	$0.2	$0.3	$0.5	$1.3	$0.2	$0.1	$5.5	$0.3
Clothing & Accessories	$0.4	$2.6	$1.4	$1.3	$0.2	$2.4	$0.9	$1.0	$2.1	$4.1	$0.5	$0.2	$17.1	$0.7
Household Furnishings & Equipment	$0.7	$3.3	$2.0	$1.8	$0.2	$3.6	$1.0	$1.2	$2.4	$5.4	$0.7	$0.4	$22.7	$1.0
Household Non-Durables	$0.1	$0.8	$0.5	$0.5	$0.1	$0.9	$0.2	$0.3	$0.6	$1.3	$0.2	$0.0	$5.5	$0.2
Medical Pharmacy	$0.1	$0.8	$0.4	$0.4	$0.1	$0.8	$0.3	$0.3	$0.5	$1.2	$0.2	$0.1	$5.2	$0.2
Vehicle Accessories	$0.1	$0.5	$0.3	$0.3	$0.0	$0.5	$0.2	$0.2	$0.4	$0.8	$0.2	$0.1	$3.6	$0.2
Recreation	$0.6	$3.2	$1.7	$1.6	$0.2	$3.1	$1.1	$1.2	$2.5	$5.2	$0.7	$0.2	$21.3	$0.9
Personal Care	$0.2	$1.1	$0.6	$0.6	$0.1	$1.1	$0.3	$0.4	$0.9	$1.8	$0.2	$0.0	$7.3	$0.3
Miscellaneous Goods & Services	$0.2	$0.6	$0.4	$0.4	$0.0	$0.8	$0.2	$0.2	$0.4	$1.0	$0.1	$0.0	$4.3	$0.2
Total Estimated Growth	**$4.7**	**$23.8**	**$14.2**	**$12.6**	**$1.8**	**$25.2**	**$7.7**	**$8.8**	**$18.5**	**$39.1**	**$5.1**	**$1.9**	**$163.4**	**$7.2**
Available Supermarket Spending	**$1.5**	**$7.6**	**$4.5**	**$4.0**	**$0.6**	**$8.0**	**$2.5**	**$2.8**	**$5.9**	**$12.6**	**$1.6**	**$0.6**	**$52.2**	**$2.3**

Errors due to rounding.
Source: Leyshon Consulting Pty Ltd Estimates, September 2006.

3.5 Retail Floorspace Demand

The projected growth in available retail spending discussed above has been converted into estimates of demand for additional retail floorspace in the Wagga Wagga trade area. In undertaking this exercise we have utilised the following retail floorspace productivity (sales) levels namely:

- supermarkets ... $7,500 per sq.m. per annum
- bulky goods ... $3,500 per sq.m. per annum
- other retail ... $4,500 per sq.m. per annum.

It should be noted that these rates are less than those which might apply in major urban areas like Sydney or Melbourne where, due to population density, higher average retail sales often apply. They are, however, considered reasonably representative for a trade area such as Wagga Wagga.

As indicated in APPENDIX D on the basis of the estimated growth in available retail spending between 2006-21, the additional floorspace by major category required during this period for the trade area as a whole is as follows:

- supermarket ... +7,264 sq.m.
- bulky goods ... +15,749 sq.m.
- other retail ... +13,478 sq.m..

In total therefore we estimate that between 2006-21 the trade area as a whole theoretically will require an additional +36,491 sq.m. of retail floorspace. In reality, however, the actual demand within the trade area will be somewhat less than this figure as there will always be some escape spending flowing out of the trade area to larger centres in New South Wales and Victoria as well as those in the ACT. In this regard, we understand anecdotally that residents of Wagga Wagga make periodic visits to both the ACT and the Melbourne metropolitan area for shopping and leisure pursuits.

Even taking into account existing approvals, Lake Albert (+1,000 sq.m.) and The Mill Site (+5,948 sq.m.), considerable potential remains for expansion of retail floorspace in the City between 2006-16. This is particularly so given these two approvals relate in part to demand generated in the period 2001-06.

There are some areas particularly within the PTA where there is already a significant shortfall between the demand for, and supply of, retail floorspace. As noted in TABLE 3.8, there is a significant existing under-supply of retail floorspace in the Southern Growth and South West subdistricts. On a combined basis, these two areas currently would support some 16,731 sq.m. of space in theory. The only retail centre in this area is Southcity (3,900 sq.m.), however.

The Boorooma/Estella area would currently support some 4,731 sq.m. of space but has as yet no retail facilities. By 2021, the Southern Growth and South West subdistricts would support 28,615 sq.m. of space while Boorooma/Estella would support in theory some 9,364 sq.m..

TABLE 3.8
ESTIMATED UNDER-SUPPLY of RETAIL FLOORSPACE – SELECTED SUB-DISTRICTS, WAGGA WAGGA TRADE AREA, 2006 and 2021 (Sq.M.)

Sub-District ...	Existing Supply	Current Demand	Current Undersupply(-)/ Oversupply(+)	Forecast Demand 2021
Southern Growth Area	3,900	12,285	-8,385	20,357
South West Fringe	--	4,446	-4,446	8,258
Boorooma/Estella	--	4,731	-4,731	9,364

Source: Table 3.6.

4 FUTURE CENTRES STRATEGY

4.1 Introduction

The purpose of this Section of the Report is to provide advice to Council on the strategy it should adopt with respect to future changes to existing centres, the development of new centres, the requirement for additional bulky goods retailing and the provision of land for employment purposes.

4.2 Existing Centres

On the basis of the projected growth in available retail spending between 2006-21, only a relatively modest expansion of existing centres in the City is envisaged during this time-frame. This particularly will be the case for suburban centres but also applies to the Wagga Wagga CBD. That said, it should be noted that even in circumstances where there is likely to be a modest growth in available retail spending, existing centres could experience some pressures for change in terms of their retail and commercial components. The principal reason for this is the need to accommodate structural changes in the retail sector and to enable centres to remain competitive with one another.

4.2.1 Wagga CBD/CBD North

The Wagga CBD/CBD North should continue to be promoted as the predominant retail centre both within the City and within the surrounding region. In relation to retail floorspace, modest expansion in the order of 5,000 to 10,000 sq.m. during the forecast period appears appropriate.

Much depends, however, on the long-term future of the Myer department store. If Myer's new owners decide to close the store, Council may need to become actively involved in guiding the future use of this landmark property. A desirable option would be the conversion of the store to a Target DDS. This would give the CBD three DDSs and solidify its role in terms of the provision of higher-order retail services within the City and the surrounding region.

An alternative may be the redevelopment of the property to provide a mix of both retail and commercial space.

At present there is a significant amount of land zoned for commercial purposes in both the CBD and the CBD North. An inspection of these two areas indicates a substantial amount of this zoned land is used for surface car parking although very little involves the levying of actual parking charges. This suggests to us these areas have significant potential to accommodate retail and commercial floorspace growth rather than resorting to adding to the stock of appropriately zoned land.

The existence of a substantial amount of surface car parking indicates that in general the demand for land in the CBD/CBD North for retail and commercial purposes is not yet sufficient to lead to a more intense use of existing land. Council could encourage the intensification of land use in the CBD/CBD North through strategies such as Council being receptive to increasing floorspace ratios (FSRs) on major sites to encourage their redevelopment for retail and commercial purposes.

4.3 Neighbourhood Centres

Only modest increases in retail floorspace in existing neighbourhood centres at Tolland, Kooringal, Lake Albert, Ashmont and Turvey Park are envisaged. As previously discussed, the expansion of the existing supermarket at the Lake Albert centre appears to be justified in terms of available retail spending in the centre's catchment. Similarly, the expansion of the existing Woolworths supermarket at Kooringal appears to be an appropriate market response provided issues related to car parking at the centre can be resolved.

Based on the analysis contained in Section 3 of this Report there does not appear to be any indication of a need for additional retail floorspace to be provided at the Ashmont, Turvey Park and Tolland centres.

4.4 Southcity

We understand the original planning intention for the Southcity centre at Glenfield was that it fulfill the role of a district rather than a neighbourhood centre. A decade ago there was even discussion it was an appropriate location for establishing a DDS. Had this occurred it would have elevated the centre in Wagga Wagga's retail hierarchy to perform the role of a sub-regional centre.

In 2000 Leyshon Consulting advised Council it was appropriate for a centre to be developed in Glenfield. We concluded it was unlikely the centre would exceed 5,200 sq.m. in total floorspace, but that it could be anchored by a full-line supermarket. We recommended the centre be located close to the intersection of the Dalman Parkway and Red Hill Road to enable it to serve not only the suburb of Glenfield but also developing suburban areas to the south such as Lloyd.

The Southcity centre was subsequently developed further to the north, however, near the intersection of Dalman Parkway and Pinnaroo Drive. As discussed previously, it comprises some 3,900 sq.m. and contains a number of vacant premises.

Advice provided by Coles suggests that the Coles supermarket draws the majority of its trade from Glenfield, Ashmont and residential areas to the west of Bourke Street. Some sales are also attracted from adjacent areas to the east including Mount Austin, Tolland and Kooringal.

In our opinion Southcity has limited potential for future expansion to accommodate a second supermarket as a consequence of the size of its trade area and the competition it faces within that trade area. We understand there have also been suggestions the centre may be an appropriate location for bulky goods-type retailing. We do not agree with this assessment and consider the centre's location is inappropriate for such retailing given it lacks exposure to passing traffic and is not central as far as the overall City catchment population is concerned.

4.5 Proposed Centres

During the forecast period (2006-21), three new centres will be required within the City as discussed below.

4.5.1 Southern Fringe

One of these should be located on the southern fringe of the City to service the growing suburbs of Lloyd, Bourkelands and the rural areas to the south. A neighbourhood-scale centre could be developed in this area by 2011 anchored by a 2,500 sq.m. supermarket together with up to 1,000 sq.m. of specialty retailing (eight to 10 shops).

A site on Holbrook Road to the south of the existing playing fields in Lloyd might be an appropriate location for such a centre. A site area of between 0.8 and 1.0 hectares would be required.

We understand Council has agreed to an amendment to Wagga Wagga LEP 1985 (Amendment 58) to provide for a 4,500 sq.m. site at the intersection of Bourkelands Drive and Bourke Street to be rezoned to 3 Business. The site could be developed for a convenience retail centre. We do not consider this amendment negates a need for a larger supermarket-anchored centre in the Lloyd/Bourkelands area over the longer term.

4.5.2 Boorooma/Estella

The second new centre will be required in the Boorooma/Estella area. The estimates of retail demand outlined in Section 3 of this Report indicate a supermarket-anchored centre will not be viable in this area until sometime between 2016-21. Given its smaller catchment population, this centre should be in the order of 2,800 sq.m. anchored by a supermarket of around 2,000 sq.m..

Due to its smaller size, such a centre would require a site area of approximately 0.6 to 0.8 hectares. It is possible this centre could be developed in stages so as to provide some level of retail services to what is a relatively isolated residential area within the City.

4.5.3 Forest Hill

Council is considering an application to move the location of a proposed centre in Forest Hill. At present, there is a Council-owned site zoned 3(a) General business which fronts Brunskill Avenue at Forest Hill.

The site has been zoned under various planning instruments since the late 1960s.

The proposal before Council is to relocate the proposed centre slightly to the west of Elizabeth Avenue such that it would have a frontage both to Elizabeth Avenue and the proposed new airport access road. Currently, Elizabeth Avenue is the main access road to the airport.

In our opinion, the proposed site appears appropriate for a new centre. Based on the growth estimates set out in APPENDIX D, we recommend that a centre of around 3,000 sq.m. would be appropriate anchored by a supermarket of up to 2,000 sq.m..

The proposed centre could be developed in stages. Based on population projections, a 2,000 sq.m. supermarket would be viable by 2016. A smaller supermarket of say 1,200 sq.m. should be viable by 2011.

4.6 Bulky Goods Retailing

As indicated in Section 3 of this Report our estimates indicate Wagga Wagga could support an additional +16,068 sq.m. of bulky goods floorspace by 2021. During the forecast time-frame there is also likely to be a continuing rationalisation within the City's bulky goods sector. This could be manifested by bulky goods retailers who are currently located in the CBD/CBD North seeking to relocate to fringe areas particularly to sites along the Sturt Highway.

In relation to future bulky goods development there are essentially two options open to Council: either facilitate "strip style" bulky goods retailing along parts of the Sturt Highway or concentrate future bulky goods development on one (or more) sites capable of accommodating a single integrated bulky goods centre.

Australia-wide there has been a significant expansion of bulky goods retailing over the past decade. Some analysts consider the current bulky goods development cycle has peaked and development in the sector over the next two decades will be at a much lower intensity than witnessed in the recent past. That said, bulky goods retailing will doubtless continue to perform best in locations which enjoy maximum exposure to significant volumes of passing traffic as well as being central to significant catchment populations.

An obvious location to accommodate "strip style" bulky goods retailing in Wagga Wagga are the strips of industrial land which radiate out in an east-west direction from the intersection of Tarcutta Street and the Sturt Highway. This would include the strip of industrial land running west from this intersection (on the other side of the Sturt Highway) which incorporates the site known as "The Mill". It is likely that the configuration of property in this area would preclude large floor area stores (3,000 to 4,000 sq.m.), however, and could involve some problems associated with traffic management.

An alternative location with potential to accommodate a larger integrated bulky goods complex is that surrounding the intersection of the Sturt Highway and Olympic Way on the western side of the City. Adjacent to the intersection is land zoned for industrial purposes but which is not intensively used at present. We also understand that land on the north-west corner of this intersection (currently zoned 6 (a) Recreation) could be a potential candidate site for bulky goods retailing. The primary advantage of this area is that it could provide relatively large sites for development which could accommodate large floorspace users. Large sites in this area also may allow better traffic management solutions than would strip-style development along the Sturt Highway.

The adoption of a strategy which concentrates bulky goods retailing in one or more locations would require removing the potential for bulky goods retailing to be developed in other industrially-zoned areas in Wagga Wagga.

4.7 Commercial Floorspace Demand

Unlike retail floorspace demand, predicting future demand for commercial/office space or other non-retail uses is a far more difficult exercise. This is particularly so in a City such as Wagga Wagga where the demand for office space is influenced by decisions made by both government and the private sector and where the former are subject to influences often quite different to those shaping the decisions of private sector enterprises.

Currently, office/commercial floorspace in the City is concentrated in the CBD (36,096 sq.m.) and in the CBD North (33,266 sq.m.). These estimates exclude space occupied by pubs/taverns and the like. There are much smaller concentrations of commercial space outside the CBD in various locations such as the Murray/Morgan Street industrial area which contains an estimated 4,000 sq.m. of office space.

Discussions held with local leasing agents as part of this study indicate demand for office space in Wagga Wagga has several key characteristics namely:

- demand is as a rule erratic and unpredictable—described as “feast or famine”
- tenants are rent sensitive
- there is little variation in rents with the range being $150-$250 per sq.m per annum.

Given the above factors, the feasibility of office development in Wagga Wagga favours the refurbishment of existing buildings rather than new construction. It is also likely these factors will lead to ongoing pressure from the development community for Council to permit office development outside of the CBD/CBD North. This is likely to occur as developers seek to develop on lower cost fringe CBD or industrial land to meet the rent aspirations of tenants.

In our opinion, a new LEP for the City should incorporate provisions to ensure the CBD/CBD North remains the principal location for office-based activities. This could be achieved by limiting the scale of office space permissible in locations other than the CBD/CBD North.

Council also could underwrite the long-term role of the CBD as the prime commercial centre in Wagga Wagga by pro-actively encouraging new office space development to occur on existing zoned commercial land in the CBD.

In relation to this issue, we understand Council owns certain key sites in the CBD which are currently used for surface car parking. Such sites potentially could be redeveloped for office space purposes with car parking provided below-ground.

5 PLANNING ISSUES

5.1 Approach to Zoning of Centres

Wagga Wagga City's current zoning scheme is comparatively simple as it applies to commercial and industrial property. The zones contained in Wagga Wagga Development Control Plan (DCP) 2005 are:

- 3 (a) General Business
- 3 (b) Neighbourhood Business
- 4 (a) General Industrial
- 4 (b) Light Industry
- 4 (c) Offensive or Hazardous Industry.

Wagga Wagga LEP 1985 incorporates a single "business zone". Wagga Wagga DCP 2005 supports the LEP by providing for the zones nominated above.

The New South Wales state government has mandated that local councils adopt what is known as a "template local environmental plan" which would be common to all councils throughout the state. Furthermore, the government has formulated basic planning controls which must be included in every new LEP. We understand that councils can add to these basic controls but cannot detract from them.

The relatively simple zoning scheme applying in Wagga Wagga at present is to be replaced by a more complex set of zones. In our opinion, many of the latter are more appropriate to densely urbanised areas like Sydney, Newcastle and Wollongong compared with a regional city and its surroundings such as Wagga Wagga.

The proposed commercial and industrial zones are as follows:

- B1 – Neighbourhood Centre
- B2 – Local Centre
- B3 – Commercial Core
- B4 – Mixed-Use
- B5 – Business Development
- B6 – Enterprise Corridor
- B 7 – Business Park.

A Practice Note issued by the Department of Planning in April 2006 (PN06 – 002) provides advice to councils about the objectives for the zones proposed in the Template LEP. Notwithstanding this advice, it is our opinion that councils may encounter some significant problems in allocating the correct zoning to their centres particularly as far as neighbourhood and local centre are concerned. For example, the general purpose of the B1 Neighbourhood Centre zone is said to be to provide small-scale convenience retail premises, business premises and community uses to serve the needs *"of the surrounding area"*. The general purpose of the B2 Local Centre zone is described as *"to provide a range of retail, business, entertainment and community functions that typically serve a wider catchment than a neighbourhood centre"*.

The terms *"surrounding area"* and *"wider catchment"* are not further defined by the Department. Hence it is unclear whether the term "surrounding area" refers to a suburb or an area smaller than a suburb.

In our opinion the Wagga Wagga CBD/CBD North area would be appropriately zoned as B3 Commercial Core under the Template LEP provisions. The existing suburban centres in the City should be zoned B2 Local Centre. Centres to be zoned B2 would include Kooringal, Southcity and Tolland, Turvey Tops, Lake Albert and Ashmont.

Smaller centres or corner shops with a more restricted catchment (such as the small shop group in Lake Albert Road) would be appropriately zoned as B1 Neighbourhood Centre.

5.2 Development Control Plan

We consider there is significant merit in Council encapsulating its position concerning the retail hierarchy in Wagga Wagga in a specific Development Control Plan (DCP).

Such a DCP ultimately could contain the following planning guidelines:

- a description of existing centres
- outline of the role of and relationship between existing centres
- indication of the location and scale of proposed centres
- requirements for applicants regarding economic impact /need assessment
- urban design guidelines.

The advantages of introducing a DCP with respect to centres are primarily that it would provide clear guidance to the private sector about the future development of centres and provide Council with a more soundly-based planning platform in the event of legal dispute with applicants concerning retail development matters.

In our experience, particularly in the context of the somewhat simplistic mandatory provisions in the Template LEP, an LEP cannot fully establish and communicate a given council's objectives with respect to the hierarchy of centres under its control. As noted above, some of objectives for zones under the Template LEP are sufficiently confusing that they are likely to create uncertainty about what types of retail facilities are envisaged by Council in existing and proposed centres within the City. We are aware that this approach has been successfully implemented by Wyong Shire Council and the Gold Coast City Council.

6 PUBLIC CONSULTATION

During the course of this study a discussion was held with Council's Commercial Strategy Advisory Committee concerning the key findings of the study and potential recommendations. The advice of this Committee was taken into account in the preparation of the Draft Report.

A Draft Report prepared by Leyshon Consulting in November 2006 was also placed on public exhibition. Council received comments from a number of parties which have been taken into account in finalising the Report. A response to the issues raised by various parties is provided at APPENDIX E to the Report.

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APPENDIX A

BULKY GOODS EXPENDITURE CATEGORIES

(by ABS Household Expenditure Survey [HES] Category)

CORE

Furniture and floor coverings *(0701)*
Household appliances *(0703)*
Audio-visual equipment and parts *(110101)*

ANCILLARY

Blankets, household linen and household furnishings *(0702)*
Glassware, tableware, cutlery and household utensils *(0704)*
Home computer equipment (including pre-packaged software) *(110102)*
Camping equipment *(1101051001)*
Motor vehicle parts and accessories purchased separately *(100105)*

HARDWARE

Lawnmowers (including electric) *(0705010101)*
Gardening tools *(0705010201)*
Other hand and power tools *(0705010301)*
Tools and other household durables nec *(0705019999)*
Nails, screws and other fasteners *(0801010101)*
Trees, shrubs and plants *(0801010601)*
Other gardening products *(0801010701)*
Swimming pool chemicals *(0801010801)*
Household non-durables nec *(0801019999)*

HOME RENOVATION/IMPROVEMENT

Repairs and maintenance (materials only) *(010106)*

CAPITAL HOUSING COSTS

Additions and extensions *(16010103)*
Internal renovations *(16010104)*
Insulation *(16010105)*
Outside building *(16010107)*
Other outside improvements *(16010109)*

APPENDIX B

Sub-District	Suburbs/Localities included
Western Rural	Belfrayden Brookdale Bulgary Collingullie Currawananna Currawarna Downside Euberta Galore The Gap Yarragundry
Southern Rural	Big Springs Book Book Burrandana Carabost Gelston Park Gregadoo Humula Kyeamba Ladysmith Mangoplah Maxwell Oberne Creek Pulletop Rowan Uranquinty
Eastern Rural	Alfredtown Borambula Oura Tarcutta
Northern Rural	Bomen Brucedale Eunonoreenya Gobbagombalin Hillgrove
Boorooma/Estella/University	Boorooma Charles Sturt University Estella
Central/North Wagga Wagga	Cartwrights Hill North Wagga Wagga Wagga Wagga
Eastern Fringe	East Wagga Wagga Forest Hill Gumly Gumly
Lake Albert	Lake Albert
Ashmont	Ashmont
Inner Established	Kooringal Mount Austin Tolland Turvey Park
Southern Growth Area	Bourkelands Glenfield Park Tatton
South West Fringe	Kapooka Lloyd San Isidore Springvale

2006 Projected Bulky Goods Spend - Wagga Wagga LGA by area

	Ashmont	Boorooma/ Estella/ CSU	Central/ North Wagga Wagga	Eastern Fringe	Eastern Rural	Inner Established	Lake Albert	Northern Rural	South West Fringe	Southern Growth Area	Southern Rural	Western Rural	Wagga Wagga LGA	Wagga Wagga STA (balance of Central Murrumbidgee SSD)	TOTAL WAGGA WAGGA LGA + STA
Population 2006	4,146	2,847	9,119	3,136	1,065	19,283	5,732	426	2,450	7,247	2,574	1,387	59,413	48,870	108,283
Average Spending ($2006)	6,886	8,049	9,038	7,749	7,941	7,828	8,348	9,508	8,762	8,211	7,994	7,443	8,102	7,389	7,780
Total Retail Spend ($m) ($2006)	28.6	22.9	82.4	24.3	8.5	150.9	47.8	4.1	21.5	59.5	20.6	10.3	481.4	361.1	842.5
Spending by Category															
Core Bulky Goods															
0701 Furniture and floor coverings	1.6	1.3	4.9	1.4	0.5	8.9	2.6	0.2	1.2	3.3	1.2	0.6	27.7	21.4	49.0
0703 Household appliances	1.0	0.7	2.9	0.8	0.3	5.3	1.5	0.1	0.6	1.9	0.7	0.3	16.2	12.7	29.0
110101 Audio-visual equipment and parts	0.7	0.6	1.9	0.6	0.2	3.5	1.5	0.1	0.6	1.7	0.5	0.3	12.3	8.4	20.7
TOTAL CORE BULKY GOODS	*3.3*	*2.7*	*9.7*	*2.8*	*1.0*	*17.8*	*5.5*	*0.5*	*2.4*	*6.9*	*2.4*	*1.2*	*56.2*	*42.5*	*98.7*
Ancillary Bulky Goods															
0702 Blankets, household linen and household furnishings	0.5	0.4	1.3	0.4	0.1	2.4	0.8	0.1	0.4	1.0	0.3	0.2	8.0	5.8	13.8
0704 Glassware, tableware, cutlery and household utensils	0.2	0.2	0.7	0.2	0.1	1.3	0.6	0.0	0.2	0.6	0.2	0.1	4.5	3.1	7.6
110102 Home computer equipment (including pre-packaged software)	0.4	0.3	1.2	0.3	0.1	2.1	0.7	0.1	0.3	0.9	0.3	0.1	6.9	5.1	12.0
1101051001 Camping equipment	0.0	0.0	0.1	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.5	0.4	0.9
100105 Motor vehicle parts and accessories purchased separately	0.6	0.5	1.8	0.5	0.2	3.3	1.0	0.1	0.4	1.3	0.4	0.2	10.2	7.8	18.0
TOTAL ANCILLARY BULKY GOODS	*1.7*	*1.5*	*5.1*	*1.5*	*0.5*	*9.3*	*3.1*	*0.3*	*1.5*	*3.8*	*1.3*	*0.7*	*30.2*	*22.2*	*52.4*
Hardware															
0705010101 Lawnmowers (including electric)	0.1	0.1	0.5	0.1	0.0	0.8	0.1	0.0	0.0	0.2	0.1	0.0	2.0	2.0	4.0
0705010201 Gardening tools	0.1	0.1	0.2	0.1	0.0	0.4	0.1	0.0	0.0	0.1	0.1	0.0	1.2	1.0	2.2
0705010301 Other hand and power tools	0.2	0.1	0.5	0.1	0.1	0.9	0.3	0.0	0.1	0.4	0.1	0.1	3.0	2.2	5.1
0705019999 Tools and other household durables nec	0.2	0.1	0.5	0.1	0.0	0.9	0.3	0.0	0.1	0.3	0.1	0.1	2.9	2.2	5.1
0801010101 Nails, screws and other fasteners	0.0	0.0	0.1	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.3	0.7
0801010601 Trees, shrubs and plants	0.1	0.1	0.4	0.1	0.0	0.7	0.2	0.0	0.1	0.3	0.1	0.1	2.3	1.7	4.0
0801010701 Other gardening products	0.1	0.1	0.3	0.1	0.0	0.5	0.2	0.0	0.1	0.2	0.1	0.0	1.8	1.3	3.0
0801010801 Swimming pool chemicals	0.0	0.0	0.1	0.0	0.0	0.1	0.0	0.0	0.0	0.1	0.0	0.0	0.4	0.3	0.7
0801019999 Household non-durables nec	0.2	0.2	0.6	0.2	0.1	1.1	0.3	0.0	0.1	0.4	0.1	0.1	3.3	2.5	5.9
TOTAL HARDWARE	*1.1*	*0.8*	*3.1*	*0.9*	*0.3*	*5.6*	*1.6*	*0.1*	*0.7*	*2.1*	*0.7*	*0.4*	*17.3*	*13.5*	*30.8*
Home Renovations/Improvement															
010106 Repairs and maintenance (materials only)	0.6	0.5	1.7	0.5	0.2	3.2	0.9	0.1	0.4	1.2	0.4	0.2	9.9	7.6	17.5
Capital Housing Costs: 16010103 Additions and extensions	0.9	0.8	3.3	0.9	0.3	6.0	1.7	0.1	0.8	2.2	0.8	0.4	18.2	14.3	32.5
Capital Housing Costs: 16010104 Internal renovations	0.9	0.7	2.3	0.7	0.3	4.2	1.6	0.1	0.9	1.8	0.6	0.3	14.4	10.1	24.5
Capital Housing Costs: 16010105 Insulation	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.2	0.4
Capital Housing Costs: 16010107 Outside building	0.2	0.2	0.4	0.2	0.1	0.8	0.5	0.0	0.2	0.5	0.1	0.1	3.2	1.9	5.1
Capital Housing Costs: 16010109 Other outside improvements	0.3	0.3	1.0	0.3	0.1	1.8	0.6	0.0	0.3	0.7	0.2	0.1	5.7	4.2	10.0
TOTAL HOME RENOVATIONS/IMPROVEMENT	*2.8*	*2.5*	*8.7*	*2.6*	*0.9*	*16.0*	*5.3*	*0.4*	*2.6*	*6.5*	*2.2*	*1.1*	*51.6*	*38.3*	*89.9*
Total Bulky Goods	**8.9**	**7.4**	**26.6**	**7.8**	**2.7**	**48.7**	**15.5**	**1.3**	**7.2**	**19.2**	**6.6**	**3.3**	**155.3**	**116.5**	**271.8**

2011 Projected Bulky Goods Spend - Wagga Wagga LGA by area

	Ashmont	Boorooma/ Estella/ CSU	Central/ North Wagga	Eastern Fringe	Eastern Rural	Inner Established	Lake Albert	Northern Rural	South West Fringe	Southern Growth Area	Southern Rural	Western Rural	Wagga Wagga LGA	Wagga Wagga STA (balance of Central Murrumbidgee SSD)	TOTAL WAGGA WAGGA LGA + STA
Population 2011	4,152	3,464	9,146	3,439	1,076	19,312	5,738	437	2,971	8,332	2,603	1,394	62,063	47,890	109,953
Average Spending ($2006)	7,238	8,460	9,499	8,145	8,347	8,227	8,773	9,994	9,209	8,630	8,402	7,823	8,521	7,576	8,109
Total Retail Spend ($m) ($2006)	30.1	29.3	86.9	28.0	9.0	158.9	50.3	4.4	27.4	71.9	21.9	10.9	528.9	362.8	891.7
Spending by Category															
Core Bulky Goods															
0701 Furniture and floor coverings	1.7	1.6	5.1	1.6	0.5	9.4	2.7	0.2	1.5	4.0	1.3	0.6	30.4	21.5	51.8
0703 Household appliances	1.1	0.9	3.1	1.0	0.3	5.6	1.5	0.1	0.8	2.3	0.7	0.4	17.8	12.8	30.6
110101 Audio-visual equipment and parts	0.7	0.8	2.0	0.7	0.2	3.7	1.6	0.1	0.8	2.0	0.6	0.3	13.5	8.4	22.0
TOTAL CORE BULKY GOODS	*3.5*	*3.4*	*10.2*	*3.3*	*1.0*	*18.7*	*5.8*	*0.5*	*3.1*	*8.4*	*2.6*	*1.3*	*61.7*	*42.7*	*104.4*
Ancillary Bulky Goods															
0702 Blankets, household linen and household furnishings	0.5	0.5	1.4	0.5	0.1	2.6	0.9	0.1	0.5	1.2	0.4	0.2	8.8	5.9	14.6
0704 Glassware, tableware, cutlery and household utensils	0.3	0.3	0.7	0.3	0.1	1.4	0.6	0.0	0.3	0.7	0.2	0.1	5.0	3.1	8.1
110102 Home computer equipment (including pre-packaged software)	0.4	0.4	1.2	0.4	0.1	2.2	0.7	0.1	0.4	1.0	0.3	0.2	7.6	5.1	12.7
1101051001 Camping equipment	0.0	0.0	0.1	0.0	0.0	0.2	0.0	0.0	0.0	0.1	0.0	0.0	0.5	0.4	1.0
100105 Motor vehicle parts and accessories purchased separately	0.6	0.6	1.9	0.6	0.2	3.4	1.1	0.1	0.6	1.5	0.5	0.2	11.2	7.8	19.1
TOTAL ANCILLARY BULKY GOODS	*1.8*	*1.9*	*5.4*	*1.7*	*0.6*	*9.8*	*3.3*	*0.3*	*1.9*	*4.6*	*1.4*	*0.7*	*33.2*	*22.3*	*55.5*
Hardware															
0705010101 Lawnmowers (including electric)	0.1	0.1	0.5	0.1	0.0	0.9	0.1	0.0	0.0	0.2	0.1	0.0	2.2	2.0	4.2
0705010201 Gardening tools	0.1	0.1	0.2	0.1	0.0	0.4	0.1	0.0	0.1	0.2	0.1	0.0	1.3	1.0	2.3
0705010301 Other hand and power tools	0.2	0.2	0.5	0.2	0.1	1.0	0.3	0.0	0.2	0.4	0.1	0.1	3.2	2.2	5.4
0705019999 Tools and other household durables nec	0.2	0.2	0.5	0.2	0.1	1.0	0.3	0.0	0.1	0.4	0.1	0.1	3.2	2.2	5.4
0801010101 Nails, screws and other fasteners	0.0	0.0	0.1	0.0	0.0	0.1	0.0	0.0	0.0	0.1	0.0	0.0	0.4	0.3	0.8
0801010601 Trees, shrubs and plants	0.1	0.1	0.4	0.1	0.0	0.7	0.3	0.0	0.1	0.4	0.1	0.1	2.6	1.7	4.2
0801010701 Other gardening products	0.1	0.1	0.3	0.1	0.0	0.6	0.2	0.0	0.1	0.3	0.1	0.0	1.9	1.3	3.2
0801010801 Swimming pool chemicals	0.0	0.0	0.1	0.0	0.0	0.1	0.0	0.0	0.0	0.1	0.0	0.0	0.5	0.3	0.8
0801019999 Household non-durables nec	0.2	0.2	0.6	0.2	0.1	1.1	0.3	0.0	0.2	0.5	0.2	0.1	3.6	2.6	6.2
TOTAL HARDWARE	*1.1*	*1.0*	*3.2*	*1.0*	*0.3*	*5.9*	*1.7*	*0.1*	*0.9*	*2.5*	*0.8*	*0.4*	*19.0*	*13.5*	*32.5*
Home Renovations/Improvement															
010106 Repairs and maintenance (materials only)	0.6	0.6	1.8	0.6	0.2	3.4	1.0	0.1	0.5	1.4	0.5	0.2	10.8	7.7	18.5
Capital Housing Costs: 16010103 Additions and extensions	0.9	1.1	3.4	1.1	0.3	6.3	1.8	0.2	1.0	2.6	0.8	0.4	20.0	14.3	34.3
Capital Housing Costs: 16010104 Internal renovations	0.9	0.9	2.4	0.8	0.3	4.5	1.6	0.1	1.1	2.2	0.6	0.3	15.9	10.2	26.0
Capital Housing Costs: 16010105 Insulation	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.2	0.4
Capital Housing Costs: 16010107 Outside building	0.2	0.2	0.4	0.2	0.1	0.8	0.5	0.0	0.3	0.6	0.1	0.1	3.6	1.9	5.5
Capital Housing Costs: 16010109 Other outside improvements	0.3	0.4	1.0	0.3	0.1	1.9	0.6	0.1	0.4	0.9	0.3	0.1	6.3	4.2	10.5
TOTAL HOME RENOVATIONS/IMPROVEMENT	*3.0*	*3.2*	*9.2*	*3.0*	*1.0*	*16.8*	*5.5*	*0.5*	*3.3*	*7.8*	*2.3*	*1.2*	*56.8*	*38.4*	*95.3*
Total Bulky Goods	**9.4**	**9.5**	**28.0**	**9.0**	**2.9**	**51.2**	**16.3**	**1.4**	**9.1**	**23.2**	**7.1**	**3.5**	**170.7**	**117.0**	**287.7**

2016 Projected Bulky Goods Spend - Wagga Wagga LGA by area

	Ashmont	Boorooma/ Estella/ CSU	Central/ North Wagga Wagga	Eastern Fringe	Eastern Rural	Inner Established	Lake Albert	Northern Rural	South West Fringe	Southern Growth Area	Southern Rural	Western Rural	Wagga Wagga LGA	Wagga Wagga STA (balance of Central Murrumbidgee SSD)	TOTAL WAGGA WAGGA LGA + STA
Population 2016	4,157	4,256	9,177	3,770	1,087	19,341	5,742	446	3,603	9,577	2,635	1,401	65,192	47,000	112,192
Average Spending ($2006)	7,607	8,892	9,984	8,560	8,772	8,647	9,221	10,503	9,679	9,070	8,830	8,222	8,963	7,767	8,462
Total Retail Spend ($m) ($2006)	31.6	37.8	91.6	32.3	9.5	167.2	52.9	4.7	34.9	86.9	23.3	11.5	584.3	365.0	949.3
Spending by Category															
Core Bulky Goods															
0701 Furniture and floor coverings	1.8	2.1	5.4	1.9	0.5	9.9	2.9	0.3	1.9	4.9	1.3	0.7	33.5	21.6	55.1
0703 Household appliances	1.1	1.2	3.2	1.1	0.3	5.9	1.6	0.1	1.0	2.8	0.8	0.4	19.6	12.9	32.5
110101 Audio-visual equipment and parts	0.7	1.1	2.1	0.8	0.3	3.9	1.6	0.1	1.0	2.4	0.6	0.3	15.0	8.5	23.5
TOTAL CORE BULKY GOODS	*3.7*	*4.4*	*10.8*	*3.8*	*1.1*	*19.7*	*6.1*	*0.5*	*3.9*	*10.1*	*2.7*	*1.3*	*68.1*	*42.9*	*111.1*
Ancillary Bulky Goods															
0702 Blankets, household linen and household furnishings	0.5	0.6	1.5	0.5	0.2	2.7	0.9	0.1	0.7	1.5	0.4	0.2	9.7	5.9	15.6
0704 Glassware, tableware, cutlery and household utensils	0.3	0.4	0.8	0.3	0.1	1.4	0.6	0.1	0.4	0.9	0.2	0.1	5.6	3.1	8.7
110102 Home computer equipment (including pre-packaged software)	0.4	0.6	1.3	0.5	0.1	2.4	0.8	0.1	0.6	1.3	0.3	0.2	8.4	5.1	13.6
1101051001 Camping equipment	0.0	0.0	0.1	0.0	0.0	0.2	0.0	0.0	0.0	0.1	0.0	0.0	0.6	0.4	1.0
100105 Motor vehicle parts and accessories purchased separately	0.6	0.8	2.0	0.7	0.2	3.6	1.1	0.1	0.7	1.8	0.5	0.2	12.4	7.9	20.3
TOTAL ANCILLARY BULKY GOODS	*1.9*	*2.4*	*5.6*	*2.0*	*0.6*	*10.3*	*3.4*	*0.3*	*2.4*	*5.5*	*1.5*	*0.7*	*36.7*	*22.5*	*59.2*
Hardware															
0705010101 Lawnmowers (including electric)	0.1	0.1	0.5	0.1	0.0	0.9	0.1	0.0	0.0	0.3	0.1	0.0	2.4	2.0	4.4
0705010201 Gardening tools	0.1	0.1	0.2	0.1	0.0	0.4	0.1	0.0	0.1	0.2	0.1	0.0	1.5	1.0	2.4
0705010301 Other hand and power tools	0.2	0.2	0.6	0.2	0.1	1.0	0.3	0.0	0.2	0.5	0.1	0.1	3.6	2.2	5.8
0705019999 Tools and other household durables nec	0.2	0.2	0.6	0.2	0.1	1.0	0.3	0.0	0.2	0.5	0.1	0.1	3.5	2.2	5.7
0801010101 Nails, screws and other fasteners	0.0	0.0	0.1	0.0	0.0	0.1	0.0	0.0	0.0	0.1	0.0	0.0	0.5	0.3	0.8
0801010601 Trees, shrubs and plants	0.2	0.2	0.4	0.2	0.0	0.8	0.3	0.0	0.2	0.4	0.1	0.1	2.8	1.7	4.5
0801010701 Other gardening products	0.1	0.1	0.3	0.1	0.0	0.6	0.2	0.0	0.1	0.3	0.1	0.0	2.2	1.3	3.4
0801010801 Swimming pool chemicals	0.0	0.0	0.1	0.0	0.0	0.1	0.1	0.0	0.0	0.1	0.0	0.0	0.5	0.3	0.8
0801019999 Household non-durables nec	0.2	0.3	0.6	0.2	0.1	1.2	0.3	0.0	0.2	0.6	0.2	0.1	4.0	2.6	6.6
TOTAL HARDWARE	*1.2*	*1.3*	*3.4*	*1.2*	*0.3*	*6.2*	*1.7*	*0.2*	*1.1*	*3.0*	*0.8*	*0.4*	*20.9*	*13.6*	*34.5*
Home Renovations/Improvement															
010106 Repairs and maintenance (materials only)	0.7	0.8	1.9	0.7	0.2	3.5	1.0	0.1	0.6	1.7	0.5	0.2	11.9	7.7	19.6
Capital Housing Costs: 16010103 Additions and extensions	1.0	1.4	3.6	1.2	0.4	6.6	1.9	0.2	1.3	3.2	0.9	0.4	22.1	14.4	36.5
Capital Housing Costs: 16010104 Internal renovations	1.0	1.2	2.6	0.9	0.3	4.7	1.7	0.1	1.4	2.7	0.7	0.3	17.6	10.2	27.8
Capital Housing Costs: 16010105 Insulation	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.2	0.4
Capital Housing Costs: 16010107 Outside building	0.2	0.3	0.5	0.2	0.1	0.9	0.6	0.0	0.3	0.7	0.2	0.1	4.0	1.9	5.9
Capital Housing Costs: 16010109 Other outside improvements	0.3	0.5	1.1	0.4	0.1	2.0	0.7	0.1	0.5	1.1	0.3	0.1	7.0	4.3	11.3
TOTAL HOME RENOVATIONS/IMPROVEMENT	*3.1*	*4.1*	*9.7*	*3.5*	*1.0*	*17.7*	*5.8*	*0.5*	*4.2*	*9.4*	*2.5*	*1.2*	*62.9*	*38.7*	*101.6*
Total Bulky Goods	**9.9**	**12.2**	**29.5**	**10.4**	**3.1**	**53.9**	**17.1**	**1.5**	**11.7**	**28.1**	**7.5**	**3.7**	**188.6**	**117.7**	**306.4**

2021 Projected Bulky Goods Spend - Wagga Wagga LGA by area

	Ashmont	Boorooma/ Estella/ CSU	Central/ North Wagga Wagga	Eastern Fringe	Eastern Rural	Inner Established	Lake Albert	Northern Rural	South West Fringe	Southern Growth Area	Southern Rural	Western Rural	Wagga Wagga LGA	Wagga Wagga STA (balance of Central Murrumbidgee SSD)	TOTAL WAGGA WAGGA LGA + STA
Population 2021	4,157	4,994	9,206	4,096	1,103	19,370	5,742	1,170	3,919	10,344	2,765	1,409	68,275	46,250	114,525
Average Spending ($2006)	7,995	9,345	10,493	8,997	9,220	9,088	9,691	11,039	10,172	9,533	9,281	8,641	9,439	7,963	8,843
Total Retail Spend ($m) ($2006)	33.2	46.7	96.6	36.8	10.2	176.0	55.6	12.9	39.9	98.6	25.7	12.2	644.4	368.3	1,012.7
Spending by Category															
Core Bulky Goods															
0701 Furniture and floor coverings	1.9	2.6	5.7	2.1	0.6	10.4	3.0	0.7	2.2	5.5	1.5	0.7	36.9	21.8	58.7
0703 Household appliances	1.2	1.5	3.4	1.3	0.3	6.2	1.7	0.4	1.2	3.2	0.9	0.4	21.6	13.0	34.6
110101 Audio-visual equipment and parts	0.8	1.3	2.2	0.9	0.3	4.1	1.7	0.4	1.1	2.8	0.6	0.3	16.6	8.6	25.2
TOTAL CORE BULKY GOODS	*3.9*	*5.4*	*11.4*	*4.3*	*1.2*	*20.7*	*6.4*	*1.5*	*4.5*	*11.5*	*3.0*	*1.4*	*75.1*	*43.3*	*118.4*
Ancillary Bulky Goods															
0702 Blankets, household linen and household furnishings	0.5	0.8	1.6	0.6	0.2	2.8	1.0	0.2	0.8	1.7	0.4	0.2	10.7	6.0	16.7
0704 Glassware, tableware, cutlery and household utensils	0.3	0.5	0.8	0.3	0.1	1.5	0.6	0.1	0.5	1.0	0.2	0.1	6.2	3.2	9.3
110102 Home computer equipment (including pre-packaged software)	0.5	0.7	1.4	0.5	0.1	2.5	0.8	0.2	0.6	1.4	0.4	0.2	9.3	5.2	14.5
1101051001 Camping equipment	0.0	0.0	0.1	0.0	0.0	0.2	0.0	0.0	0.0	0.1	0.0	0.0	0.6	0.5	1.1
100105 Motor vehicle parts and accessories purchased separately	0.7	1.0	2.1	0.8	0.2	3.8	1.2	0.3	0.8	2.1	0.6	0.3	13.7	7.9	21.6
TOTAL ANCILLARY BULKY GOODS	*2.0*	*3.0*	*6.0*	*2.3*	*0.6*	*10.8*	*3.6*	*0.8*	*2.7*	*6.3*	*1.6*	*0.8*	*40.5*	*22.7*	*63.2*
Hardware															
0705010101 Lawnmowers (including electric)	0.1	0.1	0.5	0.2	0.0	1.0	0.1	0.0	0.0	0.3	0.1	0.0	2.6	2.0	4.6
0705010201 Gardening tools	0.1	0.1	0.3	0.1	0.0	0.5	0.1	0.0	0.1	0.2	0.1	0.0	1.6	1.0	2.6
0705010301 Other hand and power tools	0.2	0.3	0.6	0.2	0.1	1.1	0.4	0.1	0.2	0.6	0.2	0.1	4.0	2.2	6.2
0705019999 Tools and other household durables nec	0.2	0.3	0.6	0.2	0.1	1.1	0.3	0.1	0.2	0.6	0.2	0.1	3.8	2.3	6.1
0801010101 Nails, screws and other fasteners	0.0	0.0	0.1	0.0	0.0	0.2	0.0	0.0	0.0	0.1	0.0	0.0	0.5	0.3	0.9
0801010601 Trees, shrubs and plants	0.2	0.2	0.4	0.2	0.0	0.8	0.3	0.1	0.2	0.5	0.1	0.1	3.1	1.7	4.8
0801010701 Other gardening products	0.1	0.2	0.3	0.1	0.0	0.6	0.2	0.0	0.2	0.4	0.1	0.0	2.4	1.3	3.7
0801010801 Swimming pool chemicals	0.0	0.0	0.1	0.0	0.0	0.2	0.1	0.0	0.0	0.1	0.0	0.0	0.6	0.3	0.9
0801019999 Household non-durables nec	0.2	0.3	0.7	0.3	0.1	1.2	0.4	0.1	0.2	0.7	0.2	0.1	4.4	2.6	7.0
TOTAL HARDWARE	*1.2*	*1.6*	*3.6*	*1.3*	*0.4*	*6.6*	*1.8*	*0.4*	*1.3*	*3.4*	*0.9*	*0.4*	*23.0*	*13.7*	*36.8*
Home Renovations/Improvement															
010106 Repairs and maintenance (materials only)	0.7	0.9	2.0	0.8	0.2	3.7	1.1	0.3	0.7	2.0	0.5	0.2	13.1	7.8	20.9
Capital Housing Costs: 16010103 Additions and extensions	1.0	1.7	3.8	1.4	0.4	6.9	1.9	0.5	1.5	3.6	1.0	0.5	24.3	14.5	38.8
Capital Housing Costs: 16010104 Internal renovations	1.0	1.4	2.7	1.1	0.3	4.9	1.8	0.4	1.6	3.0	0.7	0.4	19.5	10.3	29.8
Capital Housing Costs: 16010105 Insulation	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.2	0.5
Capital Housing Costs: 16010107 Outside building	0.2	0.4	0.5	0.2	0.1	0.9	0.6	0.1	0.4	0.8	0.2	0.1	4.5	1.9	6.4
Capital Housing Costs: 16010109 Other outside improvements	0.4	0.6	1.1	0.4	0.1	2.1	0.7	0.2	0.6	1.2	0.3	0.1	7.7	4.3	12.0
TOTAL HOME RENOVATIONS/IMPROVEMENT	*3.3*	*5.1*	*10.2*	*3.9*	*1.1*	*18.7*	*6.1*	*1.4*	*4.9*	*10.7*	*2.7*	*1.3*	*69.4*	*39.0*	*108.4*
Total Bulky Goods	**10.4**	**15.1**	**31.2**	**11.9**	**3.3**	**56.8**	**18.0**	**4.2**	**13.3**	**31.8**	**8.3**	**3.9**	**208.1**	**118.8**	**326.9**

ESTIMATED GROWTH in AVAILABLE BULKY GOODS TYPE SPENDING - Wagga Wagga, 2006-21 ($2006; $Mil. per annum)

Year	Ashmont	Boorooma/ Estella/ CSU	Central/ North Wagga Wagga	Eastern Fringe	Eastern Rural	Inner Established	Lake Albert	Northern Rural	South West Fringe	Southern Growth Area	Southern Rural	Western Rural	Wagga Wagga LGA	Wagga Wagga STA (balance of Central Murrumbidgee SSD)	TOTAL WAGGA WAGGA LGA + STA
2006	$ 8.9	$ 7.4	$ 26.6	$ 7.8	$ 2.7	$ 48.7	$ 15.5	$ 1.3	$ 7.2	$ 19.2	$ 6.6	$ 3.3	$ 155.3	$ 116.5	$ 271.8
2011	$ 9.4	$ 9.5	$ 28.0	$ 9.0	$ 2.9	$ 51.2	$ 16.3	$ 1.4	$ 9.1	$ 23.2	$ 7.1	$ 3.5	$ 170.7	$ 117.0	$ 287.7
2016	$ 9.9	$ 12.2	$ 29.5	$ 10.4	$ 3.1	$ 53.9	$ 17.1	$ 1.5	$ 11.7	$ 28.1	$ 7.5	$ 3.7	$ 188.6	$ 117.7	$ 306.4
2021	$ 10.4	$ 15.1	$ 31.2	$ 11.9	$ 3.3	$ 56.8	$ 18.0	$ 4.2	$ 13.3	$ 31.8	$ 8.3	$ 3.9	$ 208.1	$ 118.8	$ 326.9
Growth 2006-21	$ 1.5	$ 7.7	$ 4.6	$ 4.0	$ 0.6	$ 8.1	$ 2.5	$ 2.9	$ 6.1	$ 12.6	$ 1.6	$ 0.6	$ 52.8	$ 2.3	$ 55.1

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

APPENDIX D

2006 Retail Floorspace Estimates - Wagga Wagga LGA by area

	Ashmont	Boorooma/ Estella/ CSU	Central/ North Wagga Wagga	Eastern Fringe	Eastern Rural	Inner Established	Lake Albert	Northern Rural	South West Fringe	Southern Growth Area	Southern Rural	Western Rural	Wagga Wagga LGA	Wagga Wagga STA (balance of Central Murrumbidgee SSD)	TOTAL WAGGA WAGGA LGA + STA
Population	4,146	2,847	9,119	3,136	1,065	19,283	5,732	426	2,450	7,247	2,574	1,387	59,413	48,870	108,283
Average Spending ($2006)	6,886	8,049	9,038	7,749	7,941	7,828	8,348	9,508	8,762	8,211	7,994	7,443	8,102	7,389	7,780
Total Retail Spend ($m) ($2006)	28.6	22.9	82.4	24.3	8.5	150.9	47.8	4.1	21.5	59.5	20.6	10.3	481.4	361.1	842.5
Supermarket Spend ($m) ($2006)	9.1	7.3	26.4	7.8	2.7	48.3	15.3	1.3	6.9	19.0	6.6	3.3	154.0	115.6	269.6
Bulky Goods Spend ($m) ($2006)	8.9	7.4	26.6	7.8	2.7	48.7	15.5	1.3	7.2	19.2	6.6	3.3	155.3	116.5	271.8
General Retail Spend ($m) ($2006)	10.5	8.2	29.5	8.7	3.0	54.0	17.1	1.4	7.4	21.2	7.4	3.7	172.0	129.1	301.1
Total Supermarket Floorspace (sq.m.)	1,218	978	3,517	1,037	361	6,440	2,042	173	916	2,539	878	441	20,539	15,407	35,946
Total Bulky Goods Floorspace (sq.m.)	2,546	2,115	7,595	2,241	781	13,909	4,420	374	2,050	5,492	1,897	953	44,371	33,274	77,645
Total General Retail Floorspace (sq.m.)	2,334	1,818	6,547	1,930	671	11,991	3,793	321	1,650	4,721	1,634	819	38,230	28,687	66,917

2011 Retail Floorspace Estimates - Wagga Wagga LGA by area

	Ashmont	Boorooma/ Estella/ CSU	Central/ North Wagga Wagga	Eastern Fringe	Eastern Rural	Inner Established	Lake Albert	Northern Rural	South West Fringe	Southern Growth Area	Southern Rural	Western Rural	Wagga Wagga LGA	Wagga Wagga STA (balance of Central Murrumbidgee SSD)	TOTAL WAGGA WAGGA LGA + STA
Population	4,152	3,464	9,146	3,439	1,076	19,312	5,738	437	2,971	8,332	2,603	1,394	62,063	47,890	109,953
Average Spending ($2006)	7,238	8,460	9,499	8,145	8,347	8,227	8,773	9,994	9,209	8,630	8,402	7,823	8,521	7,576	8,109
Total Retail Spend ($m) ($2006)	30.1	29.3	86.9	28.0	9.0	158.9	50.3	4.4	27.4	71.9	21.9	10.9	528.9	362.8	891.7
Supermarket Spend ($m) ($2006)	9.6	9.4	27.8	9.0	2.9	50.8	16.1	1.4	8.8	23.0	7.0	3.5	169.2	116.1	285.3
Bulky Goods Spend ($m) ($2006)	9.4	9.5	28.0	9.0	2.9	51.2	16.3	1.4	9.1	23.2	7.1	3.5	170.7	117.0	287.7
General Retail Spend ($m) ($2006)	11.1	10.5	31.1	10.0	3.2	56.8	18.0	1.6	9.5	25.7	7.8	3.9	188.9	129.7	318.6
Total Supermarket Floorspace (sq.m.)	1,282	1,250	3,707	1,195	383	6,779	2,148	186	1,167	3,068	933	465	22,564	15,479	38,044
Total Bulky Goods Floorspace (sq.m.)	2,680	2,704	8,006	2,582	829	14,641	4,650	403	2,612	6,636	2,016	1,006	48,765	33,431	82,195
Total General Retail Floorspace (sq.m.)	2,457	2,325	6,902	2,224	713	12,622	3,990	346	2,102	5,705	1,736	865	41,988	28,821	70,809

2016 Retail Floorspace Estimates - Wagga Wagga LGA by area	Ashmont	Boorooma/ Estella/ CSU	Central/ North Wagga Wagga	Eastern Fringe	Eastern Rural	Inner Established	Lake Albert	Northern Rural	South West Fringe	Southern Growth Area	Southern Rural	Western Rural	Wagga Wagga LGA	Wagga Wagga STA (balance of Central Murrumbidgee SSD)	TOTAL WAGGA WAGGA LGA + STA
Population	4,157	4,256	9,177	3,770	1,087	19,341	5,742	446	3,603	9,577	2,635	1,401	65,192	47,000	112,192
Average Spending ($2006)	7,607	8,892	9,984	8,560	8,772	8,647	9,221	10,503	9,679	9,070	8,830	8,222	8,963	7,767	8,462
Total Retail Spend ($m) ($2006)	31.6	37.8	91.6	32.3	9.5	167.2	52.9	4.7	34.9	86.9	23.3	11.5	584.3	365.0	949.3
Supermarket Spend ($m) ($2006)	10.1	12.1	29.3	10.3	3.1	53.5	16.9	1.5	11.2	27.8	7.4	3.7	187.0	116.8	303.8
Bulky Goods Spend ($m) ($2006)	9.9	12.2	29.5	10.4	3.1	53.9	17.1	1.5	11.7	28.1	7.5	3.7	188.6	117.7	306.4
General Retail Spend ($m) ($2006)	11.6	13.5	32.8	11.5	3.4	59.8	18.9	1.7	12.1	31.0	8.3	4.1	208.7	130.5	339.2
Total Supermarket Floorspace (sq.m.)	1,349	1,615	3,909	1,377	407	7,136	2,259	200	1,488	3,706	993	491	24,930	15,575	40,505
Total Bulky Goods Floorspace (sq.m.)	2,820	3,492	8,443	2,975	880	15,411	4,890	432	3,330	8,016	2,146	1,063	53,897	33,638	87,535
Total General Retail Floorspace (sq.m.)	2,585	3,002	7,278	2,562	757	13,286	4,197	371	2,680	6,892	1,848	914	46,372	29,000	75,372

2021 Retail Floorspace Estimates - Wagga Wagga LGA by area	Ashmont	Boorooma/ Estella/ CSU	Central/ North Wagga Wagga	Eastern Fringe	Eastern Rural	Inner Established	Lake Albert	Northern Rural	South West Fringe	Southern Growth Area	Southern Rural	Western Rural	Wagga Wagga LGA	Wagga Wagga STA (balance of Central Murrumbidgee SSD)	TOTAL WAGGA WAGGA LGA + STA
Population	4,157	4,994	9,206	4,096	1,103	19,370	5,742	1,170	3,919	10,344	2,765	1,409	68,275	46,250	114,525
Average Spending ($2006)	7,995	9,345	10,493	8,997	9,220	9,088	9,691	11,039	10,172	9,533	9,281	8,641	9,439	7,963	8,843
Total Retail Spend ($m) ($2006)	33.2	46.7	96.6	36.8	10.2	176.0	55.6	12.9	39.9	98.6	25.7	12.2	644.4	368.3	1012.7
Supermarket Spend ($m) ($2006)	10.6	14.9	30.9	11.8	3.3	56.3	17.8	4.1	12.8	31.6	8.2	3.9	206.2	117.9	324.1
Bulky Goods Spend ($m) ($2006)	10.4	15.1	31.2	11.9	3.3	56.8	18.0	4.2	13.3	31.8	8.3	3.9	208.1	118.8	326.9
General Retail Spend ($m) ($2006)	12.2	16.7	34.5	13.2	3.6	62.9	19.9	4.6	13.8	35.2	9.2	4.3	230.1	131.7	361.8
Total Supermarket Floorspace (sq.m.)	1,418	1,991	4,122	1,572	434	7,511	2,374	551	1,701	4,207	1,095	519	27,496	15,714	43,210
Total Bulky Goods Floorspace (sq.m.)	2,964	4,307	8,902	3,397	938	16,221	5,140	1,193	3,807	9,100	2,366	1,123	59,457	33,937	93,394
Total General Retail Floorspace (sq.m.)	2,717	3,703	7,674	2,926	807	13,985	4,411	1,025	3,064	7,823	2,038	966	51,137	29,258	80,395

GROWTH 2006-2021 Retail Floorspace Estimates - Wagga Wagga LGA by area	Ashmont	Boorooma/ Estella/ CSU	Central/ North Wagga Wagga	Eastern Fringe	Eastern Rural	Inner Established	Lake Albert	Northern Rural	South West Fringe	Southern Growth Area	Southern Rural	Western Rural	Wagga Wagga LGA	Wagga Wagga STA (balance of Central Murrumbidgee SSD)	TOTAL WAGGA WAGGA LGA + STA
Population	11	2,147	87	960	37	87	10	744	1,469	3,097	191	22	8,863	- 2,620	6,243
Average Spending ($2006)	1,108	1,296	1,455	1,247	1,278	1,260	1,344	1,531	1,410	1,322	1,287	1,198	1,337	574	1,063
Total Retail Spend ($m) ($2006)	4.7	23.8	14.2	12.5	1.7	25.1	7.8	8.9	18.4	39.1	5.1	1.8	163.1	7.2	170.3
Supermarket Spend ($m) ($2006)	1.5	7.6	4.5	4.0	0.5	8.0	2.5	2.8	5.9	12.5	1.6	0.6	52.2	2.3	54.5
Bulky Goods Spend ($m) ($2006)	1.5	7.7	4.6	4.0	0.6	8.1	2.5	2.9	6.1	12.6	1.6	0.6	52.8	2.3	55.1
General Retail Spend ($m) ($2006)	1.7	8.5	5.1	4.5	0.6	9.0	2.8	3.2	6.4	14.0	1.8	0.7	58.1	2.6	60.7
Total Supermarket Floorspace (sq.m.)	200	1,014	605	535	73	1,071	333	378	785	1,668	217	79	6,957	307	7,264
Total Bulky Goods Floorspace (sq.m.)	418	2,192	1,307	1,157	157	2,312	720	819	1,757	3,608	469	171	15,087	662	15,749
Total General Retail Floorspace (sq.m.)	383	1,885	1,127	996	135	1,993	618	703	1,414	3,102	404	147	12,907	571	13,478

APPENDIX E

COMMENTS on PUBLIC SUBMISSIONS RECEIVED FOLLOWING EXHIBITION of DRAFT ADVISORY REPORT

We have reviewed comments provided to Council on the draft report prepared by Leyshon Consulting Pty Ltd (Leyshon report). Three submissions were reviewed made by:

- Damasa Pty Ltd
- MapInfo Dimasi – concerning Southcity Shopping Centre
- Raine and Horne Commercial.

Damasa Submission

An extensive submission was made by Damasa Pty Ltd and principally relates to three matters namely:

- feasibility of developing land in the CBD for commercial and retail uses
- bulky goods retailing
- future of Murray Street precinct.

These issues are discussed in turn below.

Feasibility of CBD Development

Essentially Damasa argue the use of land devoted to surface car parking in the CBD for retail and commercial purposes so as to yield a more intense form of development is not viable. In support of this proposition, Damasa make the following points:

- much of the surface car parking in the CBD/CBD North has been developed as a result of developer contributions and is thus encumbered as far as its redevelopment for commercial purposes is concerned
- feasibility studies suggest the redevelopment of land currently needed for car parking in the CBD is uneconomic
- CBD development takes too long (compared with development on the fringe) and can result in the loss of tenants as far as Wagga Wagga is concerned.

In relation to these comments we make the following response:

- **CBD Car Parking** – where CBD surface car parking has been developed as a consequence of developer contributions we agree such land would either have to be quarantined from further development or could only be developed on the basis that the existing component of public car parking is retained in any redevelopment scheme

- **Feasibility of CBD Development** – we acknowledge the costs of redevelopment in the CBD are likely to result in the need for relatively high commercial rentals compared with those which may apply in fringe locations. A disparity in land values/rents exists between almost all CBDs and surrounding suburban/fringe commercial areas, however. This is usually offset by the benefits CBDs offer in terms of amenity, business aggregation and the like

- it is difficult to comment on the assertion made on page 2 of the Damasa submission that feasibility studies indicate development in the CBD/CBD North would be uneconomic without seeing these studies. We do accept, however, there is likely to be a wide range of businesses in Wagga Wagga who will always seek the lowest cost location possible. We also accept that the development of offices outside the CBD will nearly always produce a lower cost location for businesses than the development of equivalent offices within the CBD

- the corollary of accepting the Damasa argument about office development in fringe or industrial areas is that over time there is likely to be a steady process of relocation of tenants from the CBD to fringe and industrial areas in Wagga Wagga. Such an outcome would be detrimental to the long-term vitality and diversity of the CBD

- **Timing of Development** – Damasa appear to be arguing that development in the CBD of commercial or retail space cannot be undertaken in a timely manner as far as demand for such space is concerned. The implicit assumption is that timely development can be undertaken in areas outside the CBD. They also indicate that *"demand for specific retail/commercial sites is currently banked-up in the CBD with retailers and others prepared to wait for suitable premises to become available at the right rental rather than occupy less suitable premises"*.

  In our opinion, this comment appears to run counter to the comments referred to above that development in the CBD is unviable and the argument that if suitable space is not available retailers and commercial operators will bypass Wagga Wagga in favour of other centres.

Bulky Goods Development

In relation to the recommendations contained in the Leyshon report concerning the future of bulky goods retailing in Wagga Wagga, Damasa make the following points:

- since 2001 they have been accumulating land for a bulky goods centre on Hammond Avenue in east Wagga Wagga and were encouraged to do so by Council

- that the estimate of demand for an additional 16,000 sq.m. of floorspace in Wagga Wagga contained in the Leyshon report is too conservative (they argue it is *"extremely conservative"*)

- that the Leyshon report suggests the total land area currently available for bulky goods outlets be reduced from what is currently available
- they object to the concept of bulky goods being developed near the intersection of Olympic Way and the Sturt Highway.

In relation to these issues we make the following comments:

- **Hammond Avenue** – we are unable to comment on what past negotiations Damasa may have had with Council concerning land at Hammond Avenue and its suitability for bulky goods retailing.

- **Demand for Bulky Goods** – Damasa argue the Leyshon report under-estimates future demand for bulky goods retailing because they have fielded enquiries from two hardware chains each seeking 10,000 sq.m. of floorspace (20,000 sq.m. in total) and an equivalent area of dedicated parking.

  As Council would be aware, there are only two major retail-oriented hardware chains in Australia (Bunnings and Mitre 10) both of which already have stores in Wagga Wagga. Although both of these chains may be interested in developing new and larger premises, it is unlikely there is a demand for a net additional 20,000 sq.m. of hardware store space. Rather an increase of a lesser scale is to be expected having regard to the **existing** floorspace occupied by both chains in Wagga Wagga. Similar comments could be made about the electrical and furniture retailers which are also referred to on page 3 of the Damasa submission.

  The Leyshon report identifies there are two options open to Council to accommodate future bulky goods retail demand – either to continue to permit strip-style bulky goods retailing along parts of the Sturt Highway or concentrate future bulky goods development on one or more sites capable of accommodating an integrated bulky goods centre.

- **Location of Future Bulky Goods Development** – the reference in the Leyshon report to the intersection of Olympic Way and the Sturt Highway was intended to indicate this locality has potential for future bulky goods development having regard to the likely future location of the majority of residential development in Wagga Wagga – namely to the north west and south west of the city.

  In a city the scale of Wagga Wagga we consider it is undesirable to maintain a position that all industrial land in the city should be capable of accommodating bulky goods retailing. In our experience, there is little to indicate that such a “broad brush” policy approach produces efficiencies for bulky goods shoppers, bulky goods retailers or city residents as a whole.

Murray Street Precinct

Damasa comment on the future of the Murray Street precinct. Damasa argue that with Council approval they have been developing various properties in the precinct with the aim of reducing the incidence of industrial premises in this area and replacing them with mixed use, commercial oriented activities. They express concern about the recommendation in the Leyshon report relating to the limiting of office space in this precinct.

In general we agree that the Murray Street precinct should be redeveloped for higher and better uses than industrial activities and that land uses in the precinct should be more sympathetic to the surrounding residential area. There is, however, a real risk that if some limit is not placed on the volume of office-type floorspace the Murray Street precinct it could emerge as a strong low-cost competitor to the CBD and inevitably detract from the vitality of the CBD.

MapInfo Dimasi Submission

MapInfo Dimasi have prepared a submission on behalf of the Riverview Group. We understand Riverview are the owners of the Southcity shopping centre. In summary, MapInfo Dimasi argue the Leyshon report does not give due consideration to the Southcity shopping centre and its future potential for expansion. They also contend the report over-estimates the need for a new centre in the south west fringe of the City.

Future of Southcity

MapInfo Dimasi appear to dispute the view expressed in the Leyshon report that the Southcity shopping centre is not trading strongly. In particular, they argue the level of vacancy in the centre is consistent with it being a new shopping centre and that vacancies will decrease as population and retail demand increases in the surrounding catchment.

In relation to this issue, we note the centre commenced trading in 2004 and it is our understanding it has contained vacancies since its opening. We consider this is consistent with a conclusion that the centre is not trading strongly (apart from its supermarket).

In relation to the expansion of Southcity, MapInfo Dimasi challenge the conclusion contained in the Leyshon report that the centre is not ideally located for future expansion for either traditional retailing or bulky goods retailing. In particular, MapInfo Dimasi refer to the potential for the centre to add a second supermarket such as Woolworths or Aldi or the mooted Coles super store of 5,000 to 6,000 sq.m..

Notwithstanding the arguments advanced by MapInfo Dimasi, it is our view that from a practical perspective, and particularly having regard to the north-south road system in Wagga Wagga, the Southcity centre is not ideally located to service future growth on the southern fringe of the city. Despite substantial growth in population since 2004 the centre still contains vacancies while those centres located on the north-south road system (such as Tolland and Kooringal) appear to be trading strongly.

In our opinion, this further indicates that the location of a new centre after 2011 on Holbrook Road is likely to maximise shopper convenience to a greater extent than would the expansion of Southcity.

Demand for a New Centre

MapInfo Dimasi also comment on the identification of the need for new centres in the north west and south west of Wagga Wagga as contained in the Leyshon report.

Specifically, MapInfo Dimasi challenge the Leyshon report recommendation that an additional supermarket anchored-centre will be required in the southern fringe of the city by 2011. In this regard they argue there are currently less than 2,000 residents located south of Red Hill Road in these two areas and, even given projected population growth, a supermarket of 2,500 sq.m. would not be required before 2021.

The Leyshon report (TABLE 3.3 refers) clearly documents a substantial population resides in the southern and south-western parts of the city – namely 2,450 persons in the South West Fringe Area, 7,247 persons in the Southern Growth Area and 2,574 persons in the Southern Rural Area. Thus a supermarket in this area would be servicing a population far in excess of that referred to by MapInfo Dimasi.

Raine and Horne Submission

We note that a letter from Raine and Horne Commercial Wagga Wagga dated 4 January 2007 claims that the Leyshon report *"ignores the price sensitivity of the bulky goods and office markets"* as well as the *"realistic take-up rates for leasing space and timing for the delivery of space"* over the next fifteen years.

No further information is provided by Raine and Horne to support these assertions and accordingly we are unable to comment further on the views expressed by them.

LIF Pty Ltd

Council received a submission on 22 January 2007 from LIF Pty Ltd – the owners of Sturt Mall.

The submission draws attention to a number of actual or alleged minor errors or typographical mistakes in the draft report. Where appropriate, these errors have been amended in the final report.

LIF draw attention to several issues that can only be addressed by Council not by Leyshon Consulting Pty Ltd. These issues include:

- their view that inadequate consultation occurred with major stakeholders: It should be noted in relation to undertaking the study Leyshon Consulting was involved in public consultation exercises as instructed by Council

- the alleged *"illegal retailing activity"* which is said to occur with Council approval at the Wagga Wagga Showgrounds

- the alleged need for Council to improve its *"lines of communication with major employers and stakeholders"*.