

- ☐ For your information
- ☐ For review
- ☐ For approval
- ☐ For further consideration
- ☐ As agreed
- ☐ Your comments please
- ☐ Please sign
- ☐ Please return
- ☐ Thankyou

WITH COMPLIMENTS

Attention: Graham Pascoe

re: Planning Proposal for
corner Fivree Boulevard and
Pacific Highway, Wadaiha

Please find enclosed 3 hard
copies as detailed in email
dated 7 February 2013

Regards Mawian Higgins

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TOWN PLANNING
AND URBAN DESIGN

PERTH
SYDNEY



TOWN PLANNING
AND URBAN DESIGN

PLANNING PROPOSAL

Proposed Site Specific Rezoning to allow Retail Development

**Corner Pacific Highway and Figtree
Boulevard, Wadalba**

for Fabcot Pty Ltd

September 2012

PROJECT NO: 213.054

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DOCUMENT REVIEW SHEET

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TABLE OF CONTENTS

EXECUTIVE SUMMARY	III
1. INTRODUCTION	1
2. THE SITE	2
2.1 LOCAL AND REGIONAL CONTEXT	2
2.2 SITE DESCRIPTION	2
2.3 SURROUNDING DEVELOPMENT	3
3. CURRENT AND DRAFT LEP PROVISIONS.....	6
3.1 WYONG LOCAL ENVIRONMENTAL PLAN 1991	6
3.2 DRAFT WYONG LOCAL ENVIRONMENTAL PLAN 2012	8
4. OBJECTIVES OR INTENDED OUTCOMES	9
5. EXPLANATION OF PROVISIONS.....	11
5.1 AMEND WYONG LOCAL ENVIRONMENTAL PLAN 1991 ZONING MAP AND DELETE CLAUSE 59.....	11
5.2 VARIATION TO CLAUSE 59 OF WYONG LOCAL ENVIRONMENTAL PLAN 1991	11
5.3 AMEND DRAFT WYONG LOCAL ENVIRONMENTAL PLAN 2012 ZONING MAP	12
6. JUSTIFICATION	13
7. MAPPING	27
7.1 AMENDMENT TO ZONING MAP	27
8. COMMUNITY CONSULTATION.....	28
9. CONCLUSION.....	29

APPENDICES

Appendix A: Site Survey

Appendix B: Traffic Report

Appendix C: Economic Impact Assessment and Review

Appendix D: Summary Consistency with SEPPs

Appendix E: S117 Directions Compliance Summary

Appendix F: Evaluation Criteria under Draft Centres Policy

Appendix G: Qualitative Research Report

Appendix H: Proposed LEP Maps

FIGURES

Figure 1: Location Context

Figure 2: Site Location

Figure 3: Extract from the North Wyong Shire Structure Plan

Figure 4: Proposed amendment to the Wyong LEP 1991 Zoning Map

Figure 5: Proposed amendment to the Draft Wyong LEP 2012 Zoning Map

PHOTOGRAPHS

Photograph 1: View along northern boundary of site from Figtree Boulevard to the east – Note earth mound and plant cover to left of view.

Photograph 2: View across site from north-west corner at Figtree Boulevard to south-east boundary with school.

Photograph 3: View of "The Dam Hotel" diagonally opposite site to north-west.

Photograph 4: View of "Wyong Golf Driving Range" opposite site to north of Pacific Highway.

Photograph 5: View of vacant land for sale - to west of site.

Photograph 6: View of Coles development at the corner of Figtree Boulevard and Orchid Way.

Photograph 7: View of group homes under construction by ADHC.

Photograph 8: View of entrance to Wadalba Community School at intersection of Orchid Way with Edward Stinson Avenue.

Photograph 9: View of townhouse development is residential area to south.

Photograph 10: View of Figtree Boulevard towards the intersection with the Pacific Highway.

EXECUTIVE SUMMARY

Fabcot Pty Ltd is submitting this Planning Proposal to Wyong Shire Council seeking an amendment to Wyong Local Environmental Plan (LEP) 1991 (current environmental planning instrument) to rezone land to 3(a) Business Centre Zone and remove restrictions under the WLEP which affect the land at the corner of the Pacific Highway and Figtree Boulevard, Wadalba being Lot 195 in DP 1006789 to enable retail development with a total value of investment exceeding \$14 million. This Planning Proposal has been prepared by The Planning Group NSW Pty Ltd in accordance with the requirements of Section 55 of the *Environmental Planning and Assessment Act 1979 (EP&A Act)* and associated guidelines prepared by the Department of Planning.

The Site and Locality

The site is located on the south-east corner of the intersection of the Pacific Highway and Figtree Boulevard, Wadalba. It comprises an allotment legally described as Lot 195 in DP 1006789. The land is relatively flat/level and is largely cleared, there are trees scattered across the site.

Current and Draft Zoning and Development Standards

The current zoning of the site is 2(e) Urban release Area Zone under WLEP 1991 which permits "general store" as a form of retailing while prohibiting large scale retail establishments and service stations.

The provisions of Clause 59 of the WLEP 1991 enables certain forms of retail development on land in the 2(e) zone and located within Wadalba. However, as there is an existing supermarket in Wadalba, a further supermarket is not permitted, as per Clause 59(1)(b) of the WLEP.

The recently exhibited Draft WLEP 2012 proposes to rezone the subject site R2 Low Density Residential. The zone permits neighbourhood shops, where the retail floor area of the neighbourhood shop is restricted to 125m² and prohibits service stations. Fabcot also seeks to zone the land B2 Local Centre under the future Wyong Local Environmental Plan 2012 which permits retail premises and service stations.

Objectives and Intended Outcomes of the Planning Proposal

The objective of this Planning Proposal is to seek amendment of the existing planning controls under the WLEP to enable a second full-line supermarket and provision of a petrol filling station facility to be permitted development, and subsequently enable Woolworths to construct a new retail facility in Wadalba Village.

Explanation of Provisions Proposed

The planning proposal is for an amendment to the Wyong LEP 1991 to rezone the land to 3(a) Business Centre Zone and amend Clause 59(1)(b), where it limits the number of local shopping centres within Wadalba, so as not to apply to Wadalba and the subject site.

It also proposes to amend the Draft Wyong LEP 2012 by rezoning the land from R2 Low Density Residential to B2 Local Centre.

Justification for the Proposal

The planning proposal is justified in the following respects:

- It is consistent with the Central Coast Regional Strategy and the North Wyong Shire Structure Plan, October 2012, where Wadalba is identified as a 'Village' Centre and is to provide for a group of shops and services for daily shopping needs.
- Contributes to the housing and employment targets set in the Central Coast Regional Strategy and North Wyong Shire Structure Plan that are set as minimums.
- Enabling a broader planning outcome and bring about a centre in Wadalba that provides for an appropriate level of competition in the "market".
- Better utilisation of government investment in the locality including road and public transport infrastructure.
- Accommodate for the estimated population increase of 100,000 people and associated housing in the region.
- Accommodate for the expected 45,000 new jobs required in the region.
- Reducing the need for local residents to commute outside of the region for work.
- Create an appropriate land use mix in the locality to encourage integrated land use and transport planning.

Consultation with Stakeholders

It is anticipated that the Department of Planning and Wyong Shire Council will conduct community consultation in accordance with the relevant provisions of the EP&A Act and Regulation which includes newspaper advertisement, public exhibition at Council offices and on Council's website, and notification letters to adjoining property owners.

In this instance it is considered that the planning proposal type is 'low' impact requiring a 14 day notification.

The landowner has been in consultation with Council regarding the rezoning of the subject site and the removal of the limiting clause in the LEP for approximately 10 years. During this time a Qualitative Research Report was undertaken in 2009 gauging the community's views regarding the proposal.

1. INTRODUCTION

This Planning Proposal is submitted to Wyong Shire Council of behalf of Fabcot Pty Ltd as the applicant, who is seeking an amendment to the zoning and to remove restrictions under the WLEP which affect the land at the corner of the Pacific Highway and Figtree Boulevard, Wadalba being Lot 195 in DP 1006789. The proposed changes will enable a retail development in the form of a supermarket, a specialty shop and a service station.

This Planning Proposal has been prepared in accordance with Section 55 of the *Environmental Planning and Assessment Act 1979 (EP&A Act)* and the associated guidelines 'A guide to preparing local environmental plans and 'A guide to preparing planning proposals' prepared by the Department of Planning and dated October 2012 which require the following matters to be addressed:

- Objectives or intended outcomes of the proposal;
- Explanation of provisions to be in the amendment to Wyong LEP 1991;
- Justification for the proposal in terms of;
 - Need for the planning proposal;
 - Relationship to strategic planning framework;
 - Environmental, social and economic impact;
 - State and Commonwealth interests;
- Relevant maps showing the subject site, current land use zone and the proposed alternative zone; and
- Community consultation proposed to be undertaken.

This Planning Proposal has been prepared in order to demonstrate the strategic merit of the proposed LEP proceeding to a Gateway determination. In accordance with the guidelines, it is considered that sufficient supporting documentation and specialist studies, including an Economic Impact Assessment and Traffic Assessment, have been provided and that any further studies are considered unnecessary at this stage. However, it is acknowledged that further information may be required post the Gateway stage.

Accordingly, Council is requested to forward this planning proposal to the Minister or his delegate for a Gateway determination under Section 56 of the EP&A Act.

2. THE SITE

2.1 LOCAL AND REGIONAL CONTEXT

The site is located at the corner of the Pacific Highway and Figtree Boulevard, Wadalba Village. This location is depicted in **Figure 1**. Wadalba is located on the Central Coast of NSW within the Local Government Area (LGA) of Wyong Shire, and is located approximately 7km or 10 minutes from Wyong town centre.

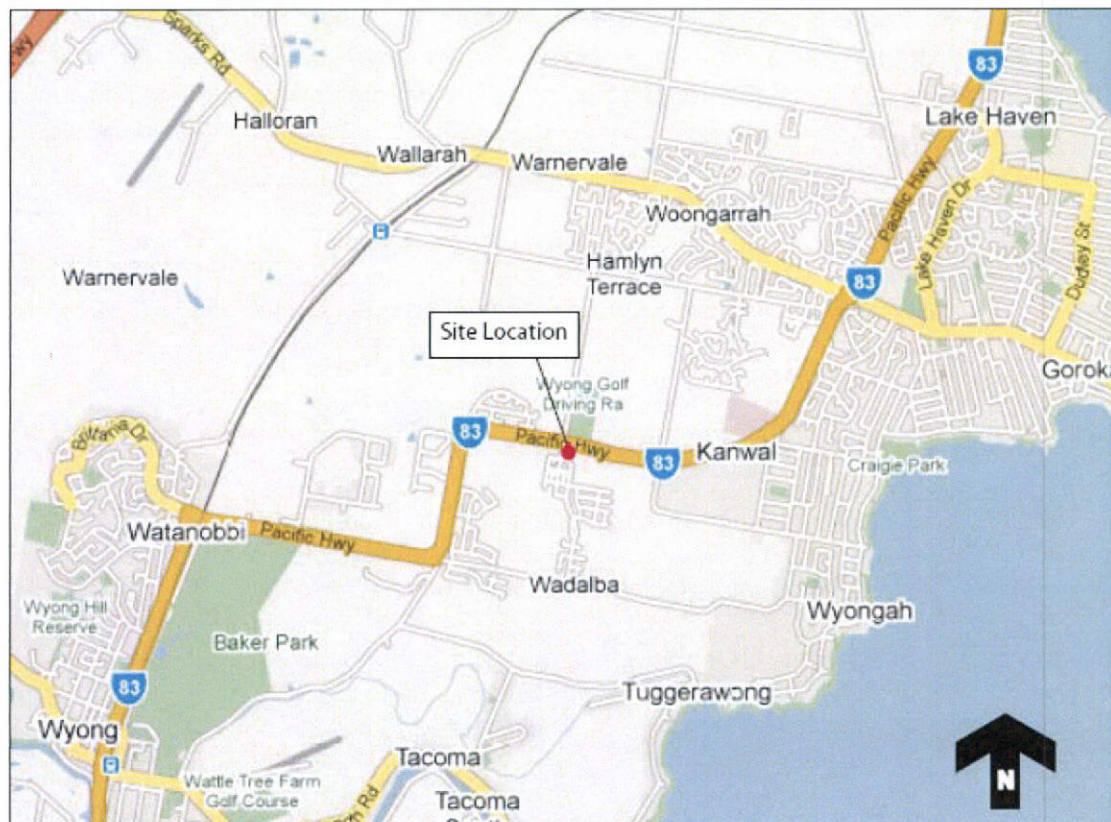


Figure 1: Location Context

Not To Scale

Source: Google Maps (subject site identified by red dot)

2.2 SITE DESCRIPTION

The site is located on the south-east corner of the intersection of the Pacific Highway and Figtree Boulevard, Wadalba (see **Figure 2**). The site has a legal description of Lot 195 in DP 1006789. Refer to survey of site at **Appendix A**. The land is relatively flat/level and is largely cleared, there are trees scattered across the site (some dead and/or in poor health).

The subject site is partly obscured from view when travelling along the Pacific Highway due to an earth mound which acts as a sound barrier and provides grass cover and shrubs running along the northern boundary adjacent to the Pacific Highway frontage. An open stormwater drainage channel runs along the southern boundary adjacent to Orchid Way.



Photograph 1: View along northern boundary of site from Figtree Boulevard to the east – Note earth mound and plant cover to left of view.



Photograph 2: View across site from north-west corner at Figtree Boulevard to south-east boundary with school.

2.3 SURROUNDING DEVELOPMENT

The land immediately surrounding the site has been developed for a variety of non-residential uses.

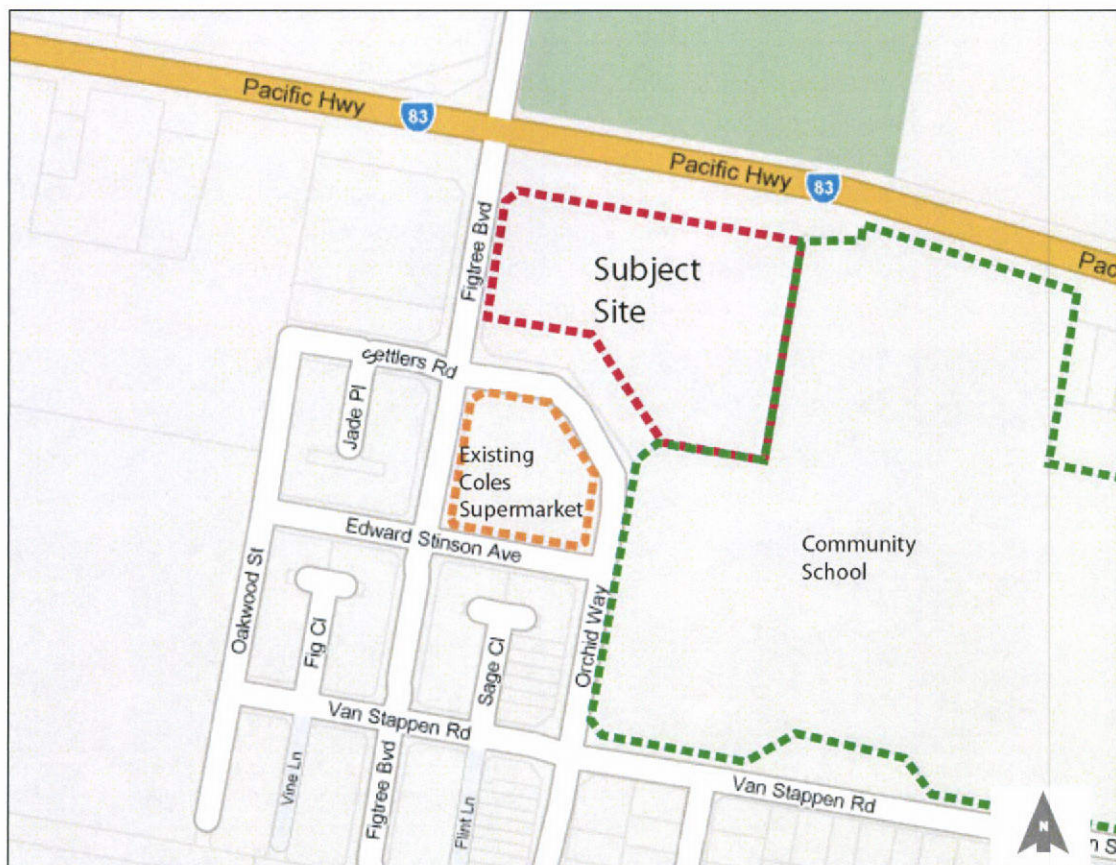


Figure 2: Site Location *Not to Scale*

Source: maps.google (amended by TPG NSW) (Subject Site outlined in red)

The land on the north-west corner of the Pacific Highway and Minnesota Road has been developed for the purposes of The Dam Hotel, an establishment which has formed part of the locality for over 30 years.

The land on the north-east corner of the Pacific Highway and Minnesota Road has been developed for the purposes of the Wyong Golf Driving Range.



Photograph 3: View of "The Dam Hotel" diagonally opposite site to north-west.



Photograph 4: View of "Wyong Golf Driving Range" opposite site to north of Pacific Highway.

To the immediate west of the subject site the land at the south-west corner of Figtree Boulevard and the Pacific Highway is currently vacant and has been on the market for sale for a significant period of time.

The land to the immediate south of the subject site bounded by Figtree Boulevard, Orchid Way and Edward Stinson Avenue has been developed for the purposes of a 1,500 square metre Coles supermarket with associated at-grade parking area. The loading dock to this retail development is visible directly from Orchid Way.



Photograph 5: View of vacant land for sale - to west of site.



Photograph 6: View of Coles development at the corner of Figtree Boulevard and Orchid Way.

The land to the west opposite the Coles site on Figtree Boulevard is currently under development for the purposes of a group home for the NSW Department of Aging Disability and Home Care (DADHC).

The land to the south-east of the subject site, along the common boundary, has been developed for the purposes of the Wadalba Community School.



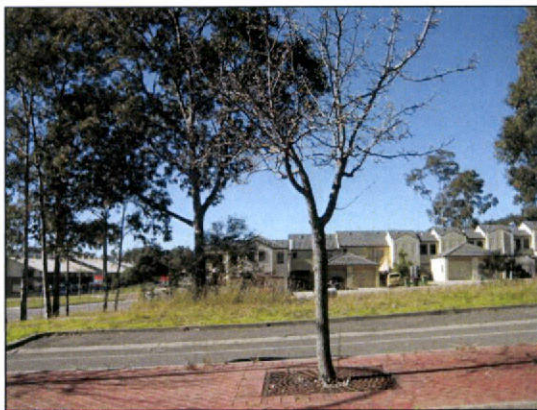
Photograph 7: View of group homes under construction by ADHC.



Photograph 8: View of entrance to Wadalba Community School at intersection of Orchid Way with Edward Stinson Avenue.

The land further south of Edward Stinson Avenue is currently under construction for shops. And the land further to the south and south-east of the vacant land and school has been developed for residential purposes containing small lot housing, detached houses and medium density townhouses.

It is noted that the land to the west of Figtree Boulevard to Oakwood Street is largely vacant and has yet to be developed.



Photograph 9: View of townhouse development is residential area to south.



Photograph 10: View of Figtree Boulevard towards the intersection with the Pacific Highway.

3. CURRENT AND DRAFT LEP PROVISIONS

3.1 WYONG LOCAL ENVIRONMENTAL PLAN 1991

Zoning

The Wyong Local Environmental Plan (WLEP) 1991 is the principal Environmental Planning Instrument applying to the subject land.

The land is currently within Zone No 2(e) (Urban Release Area Zone) under the provisions of the WLEP.

Permissibility

The provisions of Clause 10 regarding the 2(e) (Urban Release Area Zone) of the WLEP states in part:

Zone No 2 (e) (Urban Release Area Zone)

1 Objectives of zone

The objectives are:

- (a) *to cater for a range of housing types appropriate to a greenfield urban release area and not exceeding a height of 2 storeys, and*
- (b) *to provide for other uses which:*
 - (i) *are compatible with the residential environment and afford services to residents at a local level, and*
 - (ii) *are unlikely to adversely affect residential amenity or place demands on services beyond the level reasonably required for residential uses, and*
- (c) *to provide home-based employment where such will not:*
 - (i) *involve exposure to view from any public place of any unsightly matter, or any raw material, equipment, machinery, product or stored finished goods, or*
 - (ii) *have a material adverse impact on residents, and*
- (d) *to ensure development includes appropriate water sensitive urban design.*

2 Without development consent

Home occupations.

3 Only with development consent

*Advertisements; agriculture; boarding houses; bushfire hazard reduction; child care centres; communications facilities; community facilities; detached dual occupancies; drainage; dual occupancy buildings; dwelling-houses; education establishments; exhibition homes; flood mitigation works; **general stores**; group homes; home businesses; hospitals; housing for older persons or people with a disability; motels; nutrient control facilities; palliative day care centres; places of worship; recreation areas; residential flat buildings; tourist accommodation; transitional group homes; utility installations.*

4 Prohibited

Any purpose other than a purpose included in item 2 or 3 of the matter relating to this zone.

The 2(e) zone permits “general store” as a form of retailing under the WLEP, based on the following definition:

general store means a shop which sells a variety of small consumer goods.



The WLEP separately defines the following forms of development each of which are not listed as permissible forms of development under the 2(e) zone as follows:

large scale retail establishment means a building or place, or part of a building or place, which has a minimum gross floor area of 200m² and is used for retail sales as a single retail outlet by an individual occupant, but does not include such a building or place used for the purposes of:

- (a) a supermarket or other foodstuffs or produce sales (excluding that sold by a restaurant), and
- (b) clothing sales or display (other than clothing essential for sporting activity and sold in conjunction with sporting goods).

and

service station means a building or place used for the fuelling of motor vehicles involving the sale by retail of petrol, oil or other petroleum products whether or not the building or place is also used for any one or more of the following purposes:

- (a) the hiring of trailers,
- (b) the retail selling or the installing of spare parts and accessories for motor vehicles,
- (c) washing and greasing of motor vehicles,
- (d) repairing and servicing of motor vehicles involving the use of hand tools (other than repairing and servicing which involves top overhaul of motors, body building, panel beating or spray painting), and
- (e) the retail selling or hiring of small consumer goods.

and

shop means a building or place used for the purpose of the selling (whether by retail or auction), hiring or displaying for the purpose of selling or hiring of items (whether goods or materials), but does not include a building or place elsewhere specifically defined in this clause, or a building or place used for a purpose elsewhere specifically defined in this clause.

As such, the proposed form of development which includes a large scale retail establishment and service station as defined above, are not permitted. It is noted that an enabling Clause has been included within the WLEP which is discussed below.

Relevant Clause under WLEP

The provisions of Clause 59 of the WLEP enable certain forms of retail development on land in the 2(e) zone and located within Wadalba based on the following:

59 Local shopping centres—Blue Haven, Warnervale East and Wadalba

- (1) The Council must not grant consent for the development of more than one local shopping centre within each of the areas of land within Zone No 2 (e) being at:
 - (a) Blue Haven, generally bounded by the Pacific Highway, Wallarah Creek, McKellar Boulevard and the motorway linking the Sydney-Newcastle Freeway with the Pacific Highway, and
 - (b) Wadalba, as shown on Sheet No 2 of the map marked "Wyong Local Environmental Plan 1991 (Amendment No 2)".
- (2) The Council must not grant consent for the development of more than two local shopping centres on land within Zone No 2 (e) at Warnervale East, as shown on Sheet No 1 of the map marked "Wyong Local Environmental Plan 1991 (Amendment No 2)".
- (3) Notwithstanding any other provision of this plan, a person may, with the consent of the Council, carry out development for the purpose of a local shopping centre on land on which development is restricted by subclause (1) or (2) where:
 - (a) the gross floor area of any building or buildings used for the purposes of a shop does not exceed 1,000 square metres, and
 - (b) the gross floor area of any building or buildings used for the purposes of commercial premises does not exceed 200 square metres.

- (4) *The Council must not grant consent to the carrying out of development for the purposes of any local shopping centre on any such land unless the Council has:*
- (a) *first requested, and considered, a report (provided by the applicant for the consent) assessing retail and commercial demand for the development, and*
 - (b) *considered the appropriateness of the location of the development relative to other development in the urban release area in which it is situated.*

It is noted that a Coles supermarket which is some 1,500 square metres in area, is considered by Council to be the local shopping centre in Wadalba. As there is an existing supermarket (local shopping centre) in Wadalba, a further supermarket (local shopping centre) is not permitted, as per Clause 59(1)(b) of the WLEP.

3.2 DRAFT WYONG LOCAL ENVIRONMENTAL PLAN 2012

The Draft Wyong LEP 2013 (DLEP) received a Section 65 Certificate in late 2012 and commenced exhibition in January 2013. The DLEP proposed zoning for the site is R2 Low Density Residential. The objectives of the R2 zone, including permissible and prohibited uses are as follows (items in red as per the version on exhibition):

Zone R2 Low Density Residential

1 Objectives of zone

- *To provide for the housing needs of the community within a low density residential environment.*
- *To enable other land uses that provide facilities or services to meet the day to day needs of residents.*
- *To maintain and enhance the residential amenity and character of the surrounding area*
- *To provide a residential character commensurate with a low density residential environment.*

2 Permitted without consent

Home-based child care; Home occupations

3 Permitted with consent

Bed and breakfast accommodation; Boarding houses; Boat launching ramps; Boat sheds; Building identification signs; Business identification signs; Car parks; Child care centres; Community facilities; Dual occupancies; Dwelling houses; Education establishments; Emergency services facilities; Environmental facilities; Environmental protection works; Exhibition homes; Exhibition village; Flood mitigation works; Group homes; Health consulting rooms; Home businesses; Home industries; Information and education facilities; Jetties; Neighbourhood shops; Places of public worship; Recreation areas; Respite day care centres; Roads; Secondary dwellings; Semi detached dwellings; Sewage reticulation systems; Shop top housing; Water recycling facilities; Water reticulation systems; Water storage facilities

4 Prohibited

Any development not specified in item 2 or 3

The zone permits neighbourhood shops, where the retail floor area of the neighbourhood shop is restricted to 125m² and prohibits service stations.

This would effectively prohibit a supermarket as is proposed by Fabcot for the land.

4. OBJECTIVES OR INTENDED OUTCOMES

The objectives of this Planning Proposal are to:

- Facilitate a retail premises development in the form of a supermarket and specialty shop, with a service station on land that is suitably located to provide additional retail offerings and services to the surrounding residents and complement the existing retail centre.
- Establish an entry plaza visible from both Figtree Boulevard and Orchid Way street frontages adjacent to each of the retail functions which will provide all weather protection with a canopy over
- Improve pedestrian and vehicle connections to the existing centre by integrating the existing road network and pedestrian pathways into the development and ensuring that heavy vehicle movements will be separated from car movements.
- Enable a broader planning outcome and bring about a centre in Wadalba that provides for an appropriate level of competition in the "market".

The intended outcome of this Planning Proposal is to rezone land and to remove restrictions under the WLEP which affect the land at the corner of the Pacific Highway and Figtree Boulevard, Wadalba being Lot 195 in DP 1006789 to enable retail premises development, specialty shop and service station which is proposed to comprise:

1. a Woolworths supermarket of 3,200 square metres;
2. a petrol filling station;
3. specialty shop of 80 square metres; and
4. at-grade car parking to meet the car parking requirements and access.

The total value of the investment will exceed \$14 million.

It is envisaged that this proposal will result in an overall net community benefit. Details on how the proposal meets the Net Community Benefit Test is dealt with in the report prepared by Location IQ which can be found at **Appendix C**, which states in part:

It is the conclusion of this report that a substantial net community benefit will result from the development of the proposed Wadalba Woolworths. Offsetting the trading impacts on some existing retailers, there are very substantial positive impacts including the following:

- *Significant improvement in the range of retail facilities that will be available to residents, particularly in terms of full-line supermarket retailing. The main trade area is currently not served by a full-line supermarket (i.e. greater than 2,500 sq.m), meaning residents have to travel a round trip of some 10 km to the nearest full-line facility. Currently, residents of the region have little choice in terms of supermarkets and the addition of the proposed Wadalba Woolworths supermarket will likely improve choice and also allow for price competition.*
- *Residents of the region should be provided with a wider range of affordable and conveniently located retail specialty shops within close proximity to their homes.*

- *The creation of additional employment which will result from the project, both during the construction period, and more importantly, on an ongoing basis once the development is completed and operational. In total, some 432 jobs are likely to be provided both directly and indirectly as a result of the proposed Wadalba Woolworths. This includes a number of youth employment opportunities with retail developments generally employing a large number of younger staff.*
- *The reduction in travel time and petrol cost savings for the main trade area population to frequent retail facilities located beyond the main trade area.*

It is concluded that the combination of the substantial positive economic impacts serve to more than offset the trading impacts that could be anticipated for a small number of the existing retail stores, particularly supermarkets, in the region. Further, the impacts would not threaten the viability of any of these retailers or centres or limit the future development of planned/proposed centres.

5. EXPLANATION OF PROVISIONS

5.1 AMEND WYONG LOCAL ENVIRONMENTAL PLAN 1991 ZONING MAP AND DELETE CLAUSE 59

It is proposed to amend the WLEP 1991 Zoning Map for the site from 2(e) Urban Release Zone to 3(a) Business Centre Zone and delete Clause 59 from WLEP 1991.

5.2 VARIATION TO CLAUSE 59 OF WYONG LOCAL ENVIRONMENTAL PLAN 1991

As the provisions of Clause 59, specifically Clause 59(1)(b), place a limitation of the number of local shopping centres within Wadalba, it is requested that the provisions of Clause 59(1)(b) be amended so as not to apply to Wadalba, as follows with strike - through:

59 Local shopping centres—Blue Haven, Warnervale East and Wadalba

- (1) The Council must not grant consent for the development of more than one local shopping centre within each of the areas of land within Zone No 2 (e) being at:
 - (a) Blue Haven, generally bounded by the Pacific Highway, Wallarah Creek, McKellar Boulevard and the motorway linking the Sydney-Newcastle Freeway with the Pacific Highway, and
 - (b) ~~Wadalba, as shown on Sheet No 2 of the map marked "Wyong Local Environmental Plan 1991 (Amendment No 2)".~~
- (2) The Council must not grant consent for the development of more than two local shopping centres on land within Zone No 2 (e) at Warnervale East, as shown on Sheet No 1 of the map marked "Wyong Local Environmental Plan 1991 (Amendment No 2)".
- (3) ~~Notwithstanding any other provision of this plan, a person may, with the consent of the Council, carry out development for the purpose of a local shopping centre on land on which development is restricted by subclause (1) or (2) where:~~
 - (a) ~~the gross floor area of any building or buildings used for the purposes of a shop does not exceed 1,000 square metres, and~~
 - (b) ~~the gross floor area of any building or buildings used for the purposes of commercial premises does not exceed 200 square metres.~~
- (4) The Council must not grant consent to the carrying out of development for the purposes of any local shopping centre on any such land unless the Council has:
 - (a) first requested, and considered, a report (provided by the applicant for the consent) assessing retail and commercial demand for the development, and
 - (b) considered the appropriateness of the location of the development relative to other development in the urban release area in which it is situated.

If the change proposed to Clause 59 is not acceptable to Council, in the alternate a site specific provision in relation to Lot 195 in DP 1006789, could be inserted in Schedule 2 "Development for certain additional purposes" under Wyong Local Environmental Plan 1991, to indicate that these allotments of land are not subject to the provisions of Clause 59.

5.3 AMEND DRAFT WYONG LOCAL ENVIRONMENTAL PLAN 2012 ZONING MAP

It is proposed to amend the Draft WLEP 2012 Zoning Map for the site from R2 Low Density Residential to B2 Local Centre.

6. JUSTIFICATION

SECTION A NEED FOR THE PLANNING PROPOSAL

1. *Is the planning proposal a result of any strategic study or report?*

North Wyong Shire Structure Plan, October 2012

The North Wyong Shire Structure Plan identifies where and when development is planned to occur and ensures that sufficient land exists to meet regional housing and employment targets, as a minimum. The Structure Plan objectives were developed from the Central Coast Regional Strategy with the relevant objectives being:

- Identify sufficient land for regional Greenfield housing and employment targets to be met, as a minimum.
- Provide greater certainty for the community, local government, industry groups and commerce on the location of future development and conservation areas.
- Identify opportunities for new and expanded employment nodes which support existing employment area and/or which have good access to transport infrastructure.
- Concentrate new development in areas that allow for efficient infrastructure servicing.

Wadalba is identified in the Structure Plan as a "Village", as shown in the figure below, and is expected to provide for a group of shops and services for daily shopping, as defined in the Sydney Metropolitan Strategy.

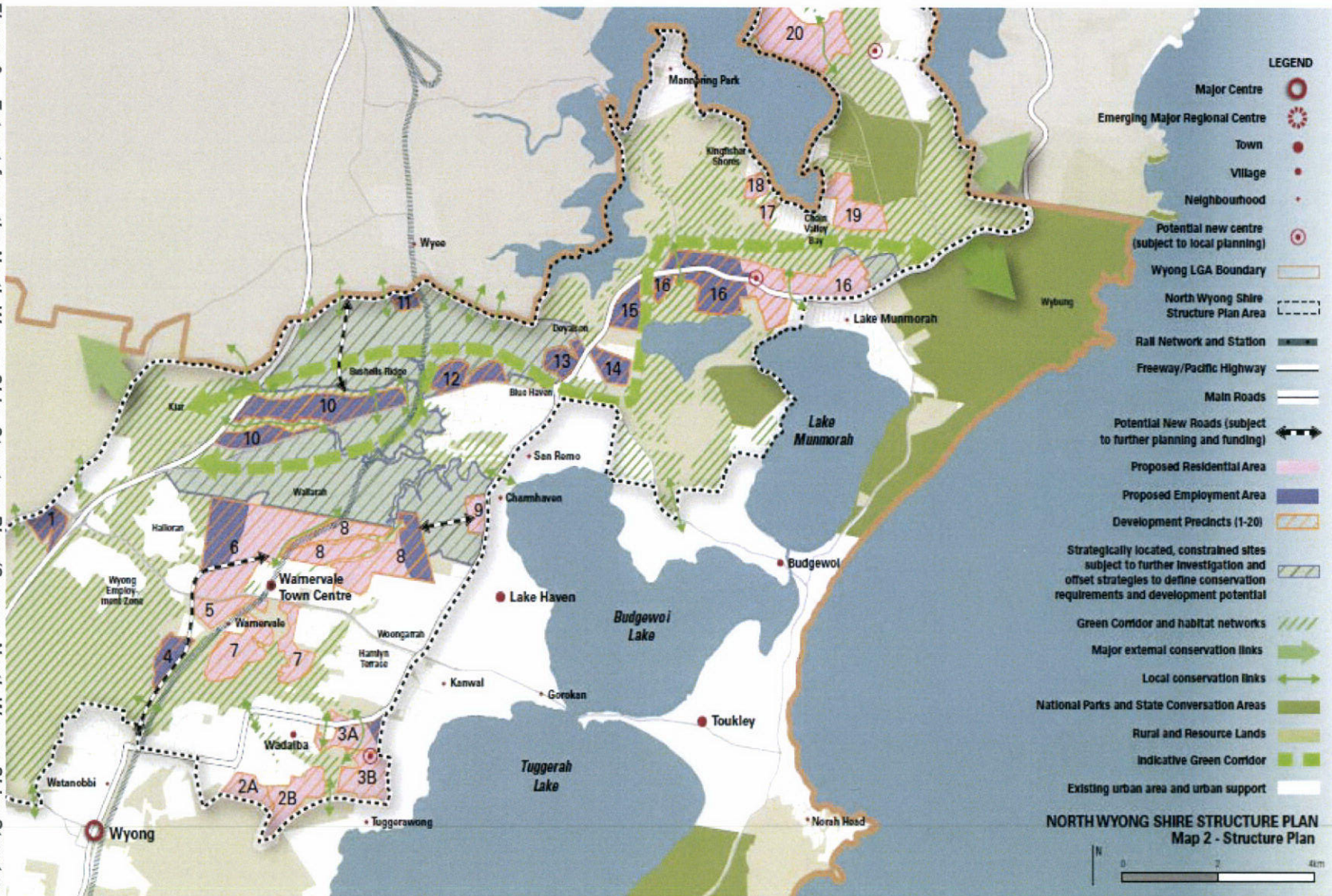


Figure 3 – Extract from the North Wyong Shire Structure Plan (Source: North Wyong Shire Structure Plan, October 2012)

Wyong Retail Centres Strategy Review

Woolworths in discussions with Council have been advised that the Council has commenced a process to review the appropriateness of varying the Wyong Retail Centres Strategy Review as part of converting the existing WLEP into a comprehensive local environmental plan under the standard instrument, which cannot include clauses such as Clause 59 but rather needs to move towards an FSR Map and Height of Buildings Map for centres such as Wadalba Village. While the outcomes of that review are yet to be made public, Woolworths understood that Council has taken a general view to remove restrictions in the WLEP as they exist today in relation to provisions such as limiting one supermarket/local shopping centre to the Wadalba Village.

It is considered that while the review is yet to be made public this PP is not inconsistent with the likely approach to be made public shortly.

Supporting Technical Reports and Studies

It should be noted by Council that this planning proposal is supported by a number of technical reports, as follows:

- i. Traffic Report prepared by Colston Budd Hunt and Kafes – refer to **Appendix B**; and
- ii. Economic Impact Assessment prepared by Location IQ – Refer to **Appendix C**.

The traffic assessment for the proposal demonstrates:

- that the proposal will ensure that pedestrian and vehicle connections to the existing centre and existing pathways will be integrated into the development; heavy vehicle movements can be managed from car movements and not result in unnecessary truck movements; and
- parking can be provided at the appropriate rate.

The Economic Impact Assessment (EIA) demonstrates that the proposed additional supermarket floor space will not negate development proposed for the Wadalba East Village Centre or Warnervale District Town Centre, or unreasonably affect any other existing retailing.

The EIA concludes:

- The development will result in a significant improvement in the range of food and grocery supermarket facilities that will be available to residents, improving choice of location and also allowing for price competition.
- Residents of the region will be provided with a wider range of affordable and conveniently located food and grocery facilities in close proximity to their homes.

- The development will result in reduced travel times and fuel costs for the surrounding population.
- The development will create additional employment, both during the construction period, and more importantly, on an ongoing basis once the project is completed and operational.
- The development will strengthen Wadalba Village as the major food and grocery destination for Wadalba residents, preventing the need to fragment the retail offer.

Competitiveness of the Retail Industry

Council would be aware that the ACCC held an inquiry into the competitiveness of the retail industry in 2008 and advised that planning laws should be revised so as not to hinder competition in the retail market (refer to page 19 of the "Report of the ACCC inquiry into the competitiveness of retail prices for standard groceries" dated July 2008). The following extract summarises the position:

...

The ACCC recognises that zoning and planning policies are designed to preserve public amenity. However, zoning and planning regimes, including existing centres' policies, also act as an artificial barrier to new supermarkets being established with the likely unintended consequence of potentially impacting on competition between supermarkets. In particular, existing centres' policies, combined with the strong preference of existing centre owners to lease space to the major supermarket chains rather than independent supermarkets or new entrants, are likely to lead to a greater concentration of supermarket sites in the hands of Coles and Woolworths. Broadly speaking, little regard is had to competition issues in considering zoning or planning proposals.

...

Recommendation

The ACCC recommends that all appropriate levels of government consider ways in which zoning and planning laws, and decisions in respect of individual planning applications where additional retail space for the purpose of operating a supermarket is contemplated, should have specific regard to the likely impact of the proposal on competition between supermarkets in the area. Particular regard should be had to whether the proposal will facilitate the entry of a supermarket operator not currently trading in the area.

Council would also be aware that Fabcot as the owner of the land sought a rezoning of the subject land in 2003 and a Development Application (DA) for a Woolworths supermarket in 2004 which was amended to 2,000 square metres and 500 square metres of specialty shops. The DA was refused by Council in 2004, and this refusal was subsequently upheld by the NSW Land and Environment Court. In 2009, Fabcot as the owner of the land lodged a Planning Proposal which was returned in the mail without having an opportunity of being considered by the elected Councillors for progress to the Gateway.

It is considered that Council should vary the existing planning controls, so as land for which the controls currently apply can enable a broader planning outcome and bring about a centre in Wadalba that provides for an appropriate level of competition in the "market" and that the planning laws should not be used to restrict competition any longer in Wadalba.

2. *Is the planning proposal the best means of achieving the objectives or intended outcomes, or is there a better way?*

It is expected that dealing with the planning proposal as a spot rezoning to amend the WLEP (along with the associated amendments to Council's DCP 2005), are the best means of achieving the objectives and intended outcomes.

SECTION B RELATIONSHIP TO STRATEGIC PLANNING FRAMEWORK

3. *Is the planning proposal consistent with the objectives and actions contained within the applicable regional or sub-regional strategy (including the Sydney Metropolitan Strategy and exhibited draft strategies)?*

The Central Coast Regional Strategy is the NSW Government's long term land use plan for the region, which covers the Gosford City and Wyong Shire local government areas. The regional strategy contains policies and actions designed to cater for the region's projected housing and employment growth over the period to 2031.

Due to an improved long-term water supply outlook, the region's population is expected to grow by around 100,000 over this period. This improved outlook has been brought about mainly through recent measures such as the adoption of the local Water Plan 2050 and the NSW Government's commitment to build Tillegra Dam.

The strategy outlines how and where future development should occur to appropriately accommodate this growth and to provide sufficient capacity to cater for more than 45,000 new jobs, reducing the need for local residents to commute outside of the region for work.

Under the strategy:

- The majority of new housing will be accommodated within existing urban areas complementing, amongst other things, the plans for the new Warnervale Town Centre and Wyong Employment Zone.
- The region's environment and valuable natural resources will be protected via important initiatives such as preventing urban residential development on all land west of the F3.
- Existing agricultural areas will continue to be strongly protected from inappropriate development.
- Population forecasts will continue to be monitored and growth projections reviewed accordingly, in particular having regard to the region's water supply outlook.
- New infrastructure for the region will be provided in accordance with the State Infrastructure Strategy.

The Central Coast Regional Strategy (CCRS) dated 2008 is the applicable strategy for the locality.

The planning proposal is considered to be consistent with the CCRS, as summarised:

- The CCRS identifies Wadalba as a 'village'. The CCRS definition for a village has been superseded by the Sydney Metropolitan Strategy which states:

A group of shops and services for daily shopping.

The proposal will result in an appropriate mix of retail floor space for the locality.

- *Action 4.21 Councils and the NSW Government are to undertake integrated land use and transport planning to ensure that opportunities to benefit from infrastructure investment*

The site is located on an identified Strategic Bus Corridor with a bus stop located adjacent to the site on the Pacific Highway.

- *Action 5.11 Ensure new retail and commercial development is located in centres. Some local convenience retailing may be required out of centre, however the presence of a convenience shop can initiate a neighbourhood centre, around which activities such as childcare facilities can be located.*

The site is within a nominated "Village" Centre. There are only limited other uses such as a school and another supermarket development in the locality. Providing improved retail options may encourage increased services to establish in Wadalba, ultimately improving the village atmosphere.

4. Is the planning proposal consistent with the local council's Community Strategic Plan, or other local strategic plan?

Leyshon Consulting prepared the Retail Centres Strategy Review – Wyong Shire, September 2007. This review recommended that retail floor space additions in Wadalba should be as follows:

- 1,500m² between 2006-2011 (already realised with the Coles supermarket); and
- 5,000m² between 2011-2016.

It is noted that the review states that these are recommended figures and are indicative only.

Additionally, the review recommends that Wyong DCP 2005: Chapter 81 – Retail Centres be amended to include specific evaluation criteria requiring applicants to demonstrate that:

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

These criteria have been addressed in the economic impact assessment report and the review prepared for this proposal and included at **Appendix C**. The report concludes that the proposed retail premises development, specialty shop and service station are consistent with the criteria; as such it is considered that the proposal is consistent with the Retail Centres Strategy Review.

In addition to this Strategy Review, the proposal has been generally considered against its consistency with DCP 2005: Chapter 49 – Warnervale East and Wadalba North West 2007, and the Master Plan prepared for Wadalba which is included as an appendix to Chapter 49.

Chapter 49 recommends that:

The Wadalba Local Centre is to provide community facilities and shopping to meet the needs of the Wadalba Release Areas. The retail, commercial, leisure and community facilities are to be located along traditional shopping streets. This is to maximise the ability of these facilities to create vitality, visual interest and to provide a strong community focus.

The proposal is considered to be consistent with this.

5. Is the planning proposal consistent with applicable State Environmental Planning Policies (SEPPs)?

There are no existing State Environmental Planning Policies (SEPPs) or known draft policies that would prohibit or restrict the planning proposal. An assessment against relevant SEPPs is provided below:

The proposal is consistent with the relevant State Environmental Planning Policies (SEPPs) as follows:

SEPP (Infrastructure) 2007

The retail premises development, specialty shop and service station resulting from a rezoning may be 'traffic generating' as per this SEPP, as such consultation will be undertaken with the NSW Roads and Traffic Authority to manage any relevant issues.

SEPP 55 (Remediation of Land)

The land has not been used for any urban purposes, but is not considered to be contaminated but rather suitable for a commercial/retail use under the provisions of SEPP 55. The applicant is in the process of obtaining a Phase 1 Investigation which will be submitted to supplement this Planning Proposal when available.

Appendix D provides a summary of consistency with all SEPPs.

Draft Centres Policy

The Draft Centres Policy provides that sound planning outcomes should promote development in 'a network of centres' in order to accommodate 'the broad future pattern of future growth in each region and Council area'.

The view of the Draft Centres Policy is that the commercial make-up and functions of each centre will vary according to their scale and nature and the catchment they serve; whilst a large town centre area may provide a wide range of shopping and commercial activities commensurate with its role in the city/town, a group of local shops/takeaway stores may provide convenience services to a small section of the community in which it is based.



The Draft Centres Policy recommends that:

- the planning system should be flexible enough to enable centres to grow and new centres to form
- the planning system should ensure that the supply of available floor space always accommodates the market demand, to help facilitate new entrants into the market and promote competition and
- retail and commercial development should be well designed to ensure it contributes to the amenity, accessibility, urban context and sustainability of centres.

This proposal can be considered consistent with the Draft Centres Policy as it facilitates the addition of further retail floor space to meet the growing market demand in Wadalba forecast by Leyshon.

6. *Is the planning proposal consistent with applicable Ministerial Directions (s117 directions)?*

The proposal is consistent with all applicable Ministerial Directions. An assessment against the relevant Ministerial Directions under Section 117 of the *Environmental Planning and Assessment Act, 1979* is as follows.

1.1 *Business and Industrial Zones*

The proposal is consistent with this direction as it:

- Will encourage employment growth in a recognised village centre.
- Will not reduce employment related floor space – it will increase employment related floor space.
- Will support the viability of an identified strategic centre.

3.4 *Integrating Land Use and Transport*

The proposal is consistent with this direction as:

- It increases supermarket and retail choice in Wadalba within close proximity to residential areas, therefore encouraging pedestrian transport;
- A bus stop is located adjacent to the site on the Pacific Highway, which is identified as a strategic bus corridor; and
- Consolidates the number of vehicle trips needed as it incorporates a variety of retail uses and choices.

4.2 Mine Subsidence and Unstable Land

Consultation with the Mine Subsidence Board will be undertaken following gateway approval.

5.1 Implementation of Regional Strategies

The proposal is consistent with the Central Coast Regional Strategy is the NSW Government's long term land use plan for the region, which covers the Gosford City and Wyong Shire local government areas. The regional strategy contains policies and actions designed to cater for the region's projected housing and employment growth over the period to 2031.

The site is within a nominated "Village" Centre. Providing improved retail options may encourage increased services to establish in Wadalba, ultimately supporting its role as a Village Centre and improving the village atmosphere.

5.7 Central Coast

The proposal is consistent with this objective as it is consistent with the Central Coast Regional Strategy.

6.3 Site Specific Provisions

The proposal is consistent with this direction as it proposes to rezone the site to an existing zone already applying in the environmental planning instrument that allows that land use without imposing any development standards or requirements in addition to those already contained in that zone.

In addition, in accordance with Section 117 Direction 6.3(5), the planning proposal does not contain or refer to drawings showing details of the development proposal.

Appendix E provides a summary of consistency with all Section 117 Directions.

SECTION C ENVIRONMENTAL, SOCIAL AND ECONOMIC IMPACT

7. Is there any likelihood that critical habitat or threatened species, populations or ecological communities, or their habitats, will be adversely affected as a result of the proposal?

There do not appear to be any critical habitat or threatened species, populations or ecological communities or their habitats on the site. There does not appear to be a need for a Local Environmental Study.

It is considered unlikely that the site will contain critical habitat as it was largely cleared of vegetation with construction of the drainage channel adjoining the site and the earth mound/acoustic barrier along the Pacific Highway frontage.

8. Are there any other likely environmental effects as a result of the planning proposal and how are they proposed to be managed?

No other likely environmental effects are envisaged as a result of the planning proposal.

This planning proposal is not located on land that is affected by any land use planning constraints or subject to natural hazards. The land is not identified as Bushfire Prone Land, nor is it affected by potential Flood inundation or subject to potential landslip. A Section 149 Planning Certificate was obtained to confirm the same.

9. How has the planning proposal adequately addressed any social and economic effects?

The planning proposal will lead to positive social and economic effects.

This planning proposal will achieve an immediate economic stimulus and overall benefit to the community as it will provide much needed shopping and parking facilities in the area as well as generating employment opportunities for local residents, while at the same time providing for choice and competition in the local market. The size of the proposed retail facility will be adequate to meet the local shopping needs of the residents of Wadalba with the provision of a 3,200 square metre supermarket, 80 square metre specialty shop and a petrol filling station.

This planning proposal will enable a retail facility to be located on the site which, when operational, has the potential to generate in excess of 228 jobs. In addition, some 55 direct jobs and 88 indirect jobs during the construction phase. The proposed development has a construction cost estimate in excess of some \$14 million dollars. The employment generating capacity of the development has been specifically considered in the economic impact assessment prepared by Location IQ which can be found at **Appendix C** of this report.

The proposal will have a positive social impact for the Wadalba area. Positive social impacts include the following:

- The site's well positioned location in Wadalba with ready access to the Pacific Highway will ensure that the proposed retail facility will not impact on local roads, residential properties or existing development, and will service the needs of the growing Wadalba residential population while not threatening the existing retail offer in Wadalba or the existing and future retail offer of other nearby centres.
- The site is adjacent to existing and proposed community facilities including the group home and Wadalba Community School. This enables a clustering of services and provides convenient access to a wide range of services.

- The design can accommodate a new bus facility. Pedestrian access to the proposed retail premises development, specialty shop and service station will be designed with clear paths of travel.
- Site design will include capacity to link pedestrian access to the existing bus stop facility at the Pacific Highway frontage of the site, and capacity to link to a cycleway, so as to encourage a range of modes of transport to access the site.
- The development will allow for reduced traffic generation and the potential for shared trips due to the site's proximity/access to the Pacific Highway which includes existing road, cycle and bus networks.
- New and vibrant streetscape presentations to each street frontage with design elements addressing the major focal point of a pedestrian plaza in the central entry to the retail facility.

There are no known items or places of European or aboriginal cultural heritage. Therefore, it is not envisaged that this planning proposal will have any adverse impacts on such items.

The Draft Centres Policy relevant principles are discussed below demonstrating this.

- **Principle 1** – Retail and commercial activity should be located in centres to ensure the most efficient use of transport and other infrastructure, proximity to labour markets, and to improve the amenity and liveability of those centres.

The rezoning is consistent with this Principle.

- **Principle 2** – the planning system should be flexible enough to enable all centres to grow, and new centres to form.

A restrictive zoning provision, such as Clause 59 of the WLEP 1991 is contrary to this principle, especially considering the forecast population growth for the locality.

- **Principle 4** - The planning system should ensure that the supply of available floor space always accommodates the market demand, to help facilitate new entrants into the market and promote competition.

Competition between businesses is the most effective means of delivering efficient, customer focused goods and services. Greater competition, with more operators in a market, creates incentives for business to seek the most efficient methods of production and produce goods and services that customers want. This should result in greater choice and higher quality and cheaper goods and services for consumers.

A restrictive zoning provision, such as Clause 59 of the WLEP 1991 is contrary to this principle.

- **Principle 5** – The planning system should support a wide range of retail and commercial premises in all centres and should contribute to ensuring a competitive retail and commercial market.

A restrictive zoning provision, such as Clause 59 of the WLEP 1991, is contrary to this principle as it prohibits the opportunity for competition.

Further, the Draft Centres Policy moves away from the earlier 'hierarchy of centres' and now identifies a more flexible 'network of centres' in its 'typology of centres'. Section 3 of the Draft Centres Policy states:

The centre typology has been designed as a descriptive tool to categorise the likely future function of centres, not a prescriptive tool to limit the growth of those or other centres in the future. The categorisation of a centre as a particular typology is not intended to limit the future growth or diversity of that centre.

Refer to **Appendix F** for assessment against Evaluation Criteria provided in NSW Department of Planning Draft Centres Policy, Planning for Retail and Commercial Development.

SECTION D STATE AND COMMONWEALTH INTERESTS

10. Is there adequate public infrastructure for the planning proposal?

Adequate public infrastructure is provided for the planning proposal:

- The site has a central location in Wadalba with ready access to the Pacific Highway;
- The site is adjacent to existing community facilities such as the Wadalba Community School and group home. This enables a clustering of services and provides convenient access to a wide range of services;
- The site includes the provision of parking facilities to meet the demand of the proposed retail facility;
- New and accessible public amenities/toilet facilities are included in the design of the proposed retail facility;
- Additional demand on community services will be addressed through Council's Section 94 Plan which apply to the land.

11. What are the views of State and Commonwealth public authorities consulted in accordance with the gateway determination?

State and Commonwealth public authorities will be consulted following the outcomes of the gateway determination. Consultation will be carried out in accordance with Section 57 of the *EP&A Act*.

7. MAPPING

7.1 AMENDMENT TO ZONING MAP

It is proposed to amend the Wyong LEP 1991 to rezone the land to 3(a) Business Centre Zone and amend the Draft Wyong LEP 2012 by rezoning the land from R2 Low Density Residential to B2 Local Centre as shown in the following figures.



Figure 4 – Proposed amendment to the Wyong LEP 1991 Zoning Map

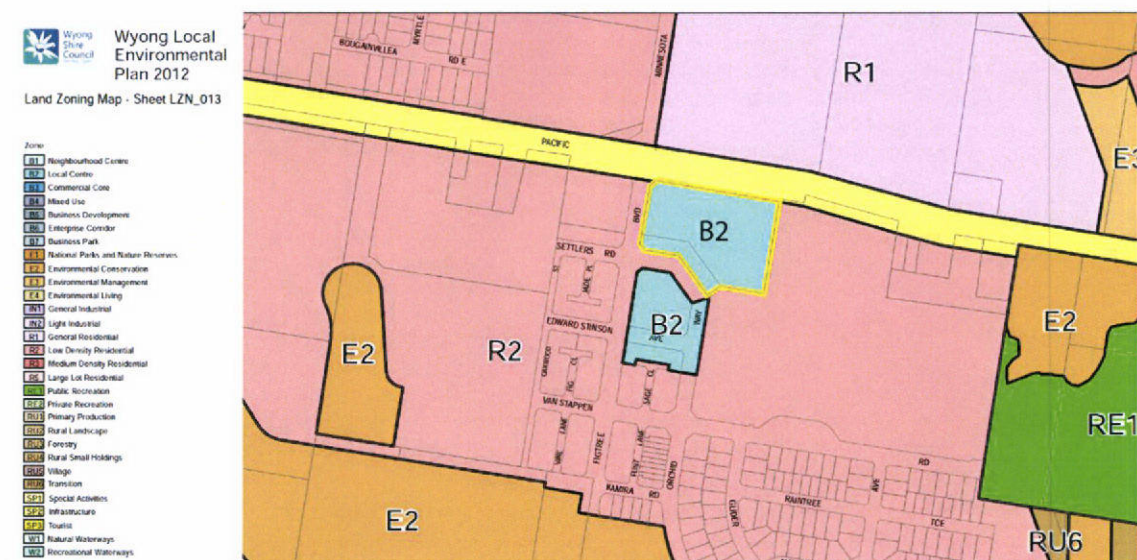


Figure 5 – Proposed amendment to the Draft Wyong LEP 2012 Zoning Map

The proposed maps can be found at **Appendix H**.

8. COMMUNITY CONSULTATION

It is anticipated that the Department of Planning and Infrastructure and Wyong Shire Council will conduct community consultation in accordance with the relevant provisions of the EP&A Act and Regulation which includes newspaper advertisement, public exhibition at Council offices and on Council's website, and notification letters to adjoining property owners.

In this instance it is considered that the planning proposal type is 'low' impact requiring a 14 day notification. Where a low impact planning proposal is defined in *A guide to preparing local environmental plans* as:

A 'low' impact planning proposal is a planning proposal that, in the opinion of the person making the Gateway determination is:

- *consistent with the pattern of surrounding land use zones and/or land uses*
- *consistent with the strategic planning framework*
- *presents no issues with regard to infrastructure servicing*
- *not a principal LEP*
- *does not reclassify public land.*

The *A guide to preparing local environmental plans* also states:

'The plan making process does not require community consultation to be undertaken prior to a proponent lodging a request with an RPA to prepare a planning proposal. Depending on the nature of the proposal, an RPA may consider that it is appropriate to seek the general views of the community to assist in further defining the intent of the planning proposal prior to submitting it to Gateway. Alternatively, a proponent may consider it best practice to undertake pre-lodgement consultation if the proposal relates to a significant or large site. If this approach is adopted, it is recommended that consultation relate primarily to the underlying proposed amendment to the LEP and that issues associated with the potential future development of the site be given secondary consideration.'

And,

'As noted in A guide to preparing planning proposals, a planning proposal relates to a change in an LEP control. While a variation to a control may be pursued to secure a particular development outcome for a site, that outcome will itself be subject to a separate assessment via the Development Application process. The principal focus of any pre-lodgement consultation should therefore be to seek the community's views on whether the proposed alternate zone or development standard is an appropriate outcome for that particular site. Matters associated with the design of a potential building, a subdivision layout, or other detailed matters are more appropriately addressed via the development assessment process and the public exhibition of any subsequent Development Application'

In this regard, the land owner has been in consultation with Council regarding the rezoning of the subject site and the removal of the limiting clause in the LEP for approximately 10 years. During this time a Qualitative Research Report was undertaken in 2009 by GA Research. The research involved two focus group discussions with residents of Wadalba and surrounds which are in support of the proposed change. The report can be found at **Appendix G**.

9. CONCLUSION

This Planning Proposal has been prepared to request Council remove the existing restrictive controls contained within the Wyong LEP 1991 to enable on the land at the corner of the Pacific Highway and Figtree Boulevard, Wadalba being Lot 195 in DP 1006789 to be developed for a retail development which is proposed to comprise:

1. a Woolworths supermarket in the form of retail premises with a floor space of 3,200 square metres;
2. a petrol filling station;
3. specialty shop with an area of 80 square metres; and
4. at-grade car parking.

It is concluded that this planning proposal is:

- prepared to ensure all matters required to be addressed under the requirements for a planning proposal have been adequately addressed;
- consistent with State Government policies;
- consistent with all Ministerial Directions;
- consistent with a decision already made by council in relation to local planning;
- suitable for the site and will not adversely impact any existing or future centres in Wyong; and
- appropriate as it will bring about a number of net community benefits.

Given the above strategic planning merit, Council is requested to proceed to forward this planning proposal to the Minister or his delegate for a gateway determination under section 56 of the EP&A Act.

APPENDIX A

Site Survey

- NOTE:
1. BEARINGS & DISTANCES ARE BY TITLE ONLY. NO BOUNDARY INVESTIGATION HAS BEEN CARRIED OUT.
 2. RELATIONSHIP OF IMPROVEMENTS TO BOUNDARIES IS DIAGRAMMATIC ONLY. WHERE OPTICIS ARE CRITICAL THEY SHOULD BE CONFIRMED BY FURTHER SURVEY.
 3. CONTOURS SHOWN DEPICT THE TOPOGRAPHY. SPOT LEVELS SHOULD BE TAKEN IN PRECEDENCE TO CONTOURS. CONTOURS DO NOT REPRESENT THE EXACT LEVEL AT ANY POINT.

SERVICES SHOWN HEREON HAVE BEEN LOCATED WHERE POSSIBLE BY FIELD SURVEY. IF NOT ABLE TO BE SO LOCATED SERVICES HAVE BEEN PLOTTED FROM THE RECORDS OF RELEVANT AUTHORITIES WHERE AVAILABLE. PRIOR TO ANY DEMOLITION, EXCAVATION OR CONSTRUCTION ON THE SITE, THE RELEVANT AUTHORITY SHOULD BE CONTACTED FOR POSSIBLE LOCATION OF FURTHER UNDERGROUND SERVICES AND DETAILED LOCATIONS OF ALL SERVICES.

LEGEND

- Surveyman
- General drainage
- Waterman
- Water hydrant
- Water stop valve
- Telephone line
- Telephone P.O. / Mailbox
- Coastguard
- Electricity power pole
- Electricity overhead cables
- Electricity underground cables
- Bench mark
- Tree (Spread, trunk diameter)

701

D. P. 1001935

ORIGIN OF LEVELS: - SSM 121784
R.L. 11.365(AHD)

REV NO.	ISSUED	REMARKS	DATE
1	ISSUED		27.7.03
2			24.9
AUTHORITANTS			

CLIENT:

WOOLWORTHS LIMITED
PO BOX 470
QWB POST SHOP
STONEY NSW 1230



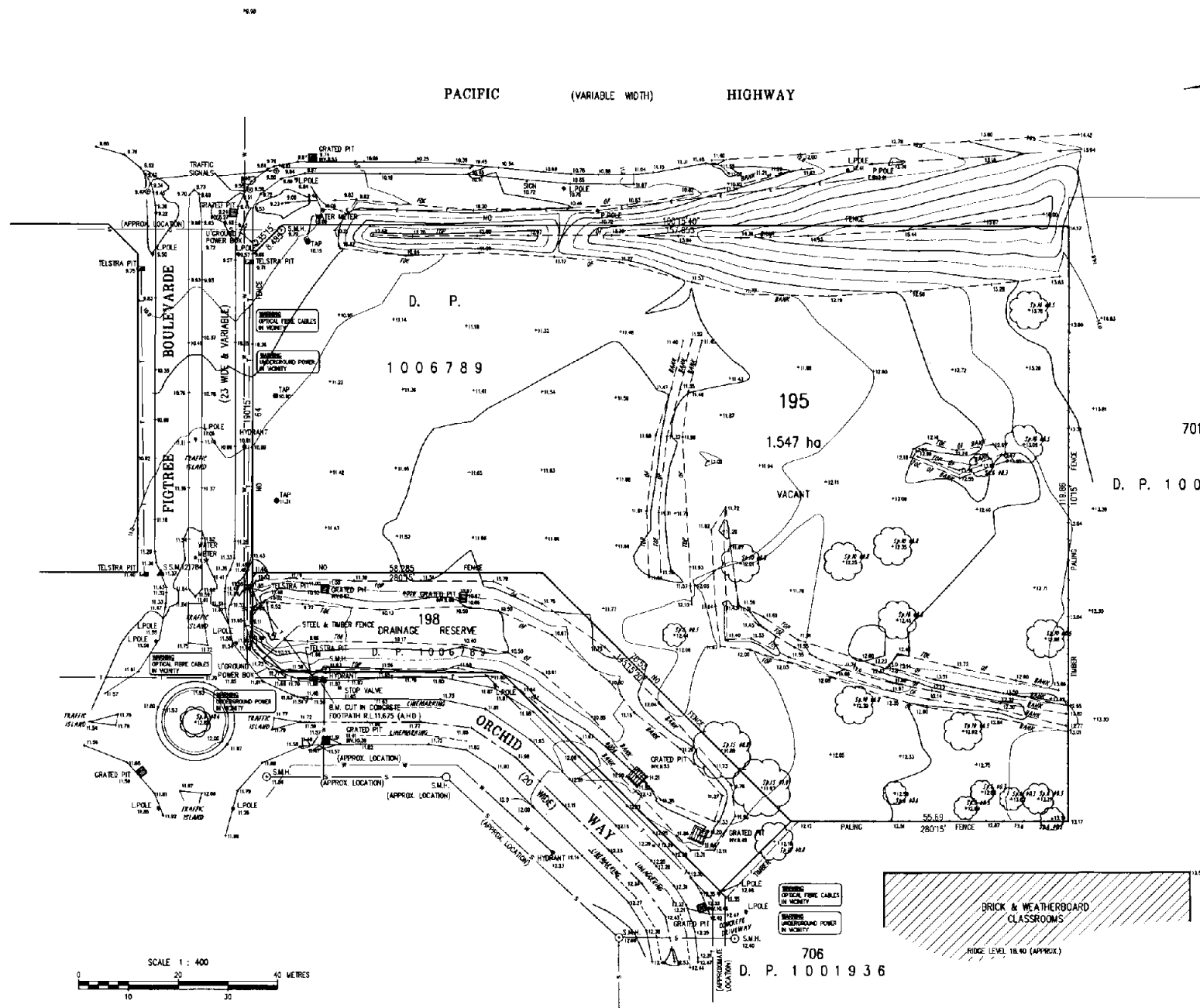
CNP RELIANCE DRIVE
AME COLONY CLOSE
TUGGERAH NSW 2259
Phone: (02) 4351 2333
Fax: (02) 4352 1559
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TUGGERAH NSW 2259
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www.tinsurvey.com.au

DRAWING TITLE

DETAIL SURVEY PLAN FOR
DEVELOPMENT APPLICATION
PURPOSES OVER LOT 195 IN
D.P. 1006789,
ORCHID WAY, WADALBA.

DATE: 27.7.2003	DRAWN: AHD
SURVEY: A.D.	Y BOOK: A01/71-72
DRAWN: J.N.	APPROVED: M.N.
CHECKED: R.P.	CAD FILE: 19155A01A
SCALE: 1:400 @ A1	No. in SET: 1

REGISTERED SURVEYOR	DATE	PROJECT NUMBER	DRAWING NO.	REVISION
		19155	A01	A



APPENDIX B

Traffic report

FABCOT PTY LTD

TRAFFIC REPORT FOR PROPOSED
SUPERMARKET AND PETROL FILLING
STATION AT WADALBA

SEPTEMBER 2012

COLSTON BUDD HUNT & KAFES PTY LTD
ACN 002 334 296
Level 18 Tower A
Zenith Centre
821 Pacific Highway
CHATSWOOD NSW 2067

Telephone: (02) 9411 2411
Facsimile: (02) 9411 2422
Email: cbhk@cbhk.com.au

REF: 8813

TABLE OF CONTENTS

1. INTRODUCTION1

2. EXISTING CONDITIONS2

3. IMPLICATIONS OF PROPOSED DEVELOPMENT10

I. INTRODUCTION

- I.1 Colston Budd Hunt & Kafes Pty Ltd has been commissioned by Fabcot Pty Ltd to assess the traffic and parking implications of the proposed rezoning for a supermarket and petrol filling station at Wadalba. The site is located on the south-eastern corner of the intersection of the Pacific Highway and Figtree Boulevard, as shown on Figure 1.
- I.2 The site is located within the Wadalba north-west urban release area which forms part of Wyong Development Control Plan 49 (DCP 49). The DCP was modified and adopted by Council in 2008.
- I.3 The proposed development will comprise a supermarket of some 3,200m², specialty retail of some 80m² and a pad site for a future petrol filling station.
- I.4 The traffic and parking implications of the proposed development have been assessed through the following chapters:-
- Chapter 2 - describing the existing conditions; and
 - Chapter 3 - assessing the implications of the proposed development.
-
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2. EXISTING CONDITIONS

- 2.1. The site of the proposed development is located on the south-eastern corner of the intersection of the Pacific Highway and Figtree Boulevard, as shown on Figure 1. The site has frontage onto the Pacific Highway, Figtree Boulevard and Orchid Way.
- 2.2. The site forms part of the Wadalba north-west urban release area and is the subject of Wyong DCP 49. In association with DCP 49, land-use in the vicinity of the site will be primarily residential with a number of large residential subdivisions currently completed and under construction in the area. Roads in the vicinity of the site have been constructed including the signalised intersection of the Pacific Highway/Figtree Boulevard and the extension of Orchid Way from Figtree Boulevard and Johns Road. A supermarket is located on the south eastern corner of the intersection of Figtree Boulevard/Orchid Way and Wadalba Community School is located adjacent to the southern boundary of the site.

Road Network

- 2.3. The road network in the vicinity of the site includes the Pacific Highway, Figtree Boulevard, Minnesota Road, Orchid Way and Van Stappen Road. The Pacific Highway is adjacent to the northern boundary of the site and generally provides an east-west undivided carriageway past the site, with one traffic lane in each direction with sealed shoulders, clear of intersections. The intersection of the Pacific Highway and Figtree Boulevard is controlled by traffic signals, incorporating a divided carriageway for the Pacific Highway, with two through traffic lanes and a bike lane in each direction. Additional storage lanes are
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provided at the intersection for left and right turning vehicles. Clear of intersections, Pacific Highway provides a two-lane undivided road.

- 2.4. Figtree Boulevard is adjacent to the western boundary of the site and provides one of several access points to the Wadalba urban release area. Figtree Boulevard will ultimately extend between the Pacific Highway to the north and Johns Road to the south. Figtree Boulevard generally provides a divided carriageway with one traffic lane and a bike lane in each direction, clear of intersections. On-street parking is provided within kerbside parking bays. Between the Pacific Highway and Orchid Way, Figtree Boulevard provides two traffic lanes each way.
- 2.5. Minnesota Road is north of the site and provides a north-south traffic route between the Pacific Highway and Sparks Road. Minnesota Road forms a fourth leg onto the signalised intersection of the Pacific Highway and Figtree Boulevard. It provides an undivided two-way carriageway with one traffic lane in each direction, clear of intersections.
- 2.6. Orchid Way is adjacent to the southern boundary of the site and provides a north-south connection between Figtree Boulevard and Johns Road. It provides access to adjacent residential development and to staff parking for the adjacent Wadalba Community School. Orchid Way generally provides one traffic lane and a bike lane in each direction clear of intersections. Kerbside parking is permitted clear of intersections and the intersection of Figtree Boulevard and Orchid Way is controlled by a roundabout.
- 2.7. Van Stappen Road is located to the south and provides an east-west traffic route through the northern part of the Wadalba urban release area. It provides the main access to the Wadalba Community School and provides an undivided
-
-

carriageway with one traffic lane and one parking lane in each direction, clear of intersections.

- 2.8. Edward Stinson Avenue is located to the south and provides an east-west link between Figtree Boulevarde and Orchid Way. It provides an undivided two-way carriageway with one traffic lane in each direction, clear of intersections. It provides access to retail development.

Traffic Flows

- 2.9. In order to gauge traffic conditions in the vicinity of the site, traffic counts were undertaken during the Friday afternoon and Saturday midday peak period at the following intersections:-

- Pacific Highway/Figtree Boulevarde/Minnesota Road;
- Figtree Boulevarde/Orchid Way;
- Figtree Boulevarde/Edward Stinson Avenue;
- Orchid Way/Edward Stinson Avenue; and
- Orchid Way/Van Stappen Road.

- 2.10. The results of the traffic counts are shown on Figures 2 and 3, and summarised in Table 2.1.
-
-

Table 2.1: Existing Peak Hour Two-Way (Sum of Both Directions) Traffic Flows

Road/Location	Friday Afternoon (Vehicles/Hour)	Saturday Midday (Vehicles/Hour)
Pacific Highway		
- east of Figtree Boulevarde	1,575	1,560
- west of Figtree Boulevarde	1,815	1,735
Figtree Boulevarde		
- south of Pacific Highway	455	300
- south of Orchid Way	305	200
- south of Edward Stinson Ave	105	80
Minnesota Road		
- north of Pacific Highway	635	465
Orchid Way		
- east of Figtree Boulevarde	135	95
- south of Edward Stinson Ave	170	145
- south of Van Stappen Road	160	90
Van Stappen Road		
- east of Orchid Way	115	125
- west of Orchid Way	65	40

2.11. The traffic counts found the following:-

- The Pacific Highway carried traffic flows of some 1,550 to 1,800 vehicles per hour two-way during the Friday afternoon and Saturday midday peak periods;
- Figtree Boulevarde carried some 200 to 450 vehicles per hour two-way north of Orchid Way. South of Orchid Way, traffic flows were lower with some 80 to 100 vehicles per hour two-way during the peak periods;
- Traffic flows on Minnesota Road were some 460 to 640 vehicles per hour two-way during the peak periods;

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- Traffic flows on Orchid Way were some 90 to 170 vehicles per hour two-way during the peak periods;
 - Van Stappen Road carried some 115 to 125 vehicles per hour two-way east of Orchid Way. West of Orchid Way, traffic flows were lower at some 40 to 65 vehicles per hour two-way during the Friday afternoon and Saturday midday peak periods.

Intersection Operations

- 2.12. The capacity of the road network is generally determined by the ability of its intersections to cater for peak period traffic flows. The operation of the surveyed intersection in the vicinity of the site has been analysed using the SIDRA program. SIDRA is designed to analyse signal controlled intersections, roundabouts and priority intersections.
- 2.13. The program simulates the operation of intersections to provide a number of performance measures. The most useful measure provided is average delay per vehicle expressed in seconds per vehicle. Based on average delay per vehicle, SIDRA estimates the following levels of service (LOS):-
- For traffic signals, the average delay per vehicle in seconds is calculated as $\text{delay}/(\text{all vehicles})$, for roundabouts the average delay per vehicle in seconds is selected for the movement with the highest average delay per vehicle, equivalent to the following LOS:-

0 to 14	=	"A"	Good
15 to 28	=	"B"	Good with minimal delays and spare capacity
29 to 42	=	"C"	Satisfactory with spare capacity
43 to 56	=	"D"	Satisfactory but operating near capacity
57 to 70	=	"E"	At capacity and incidents will cause excessive delays. Roundabouts require other control mode
>70	=	"F"	Unsatisfactory and requires additional capacity

- For give way and stop signs, the average delay per vehicle in seconds is selected from the movement with the highest average delay per vehicle, equivalent to following LOS:-

0 to 14	=	"A"	Good
15 to 28	=	"B"	Acceptable delays and spare capacity
29 to 42	=	"C"	Satisfactory but accident study required
43 to 56	=	"D"	Near capacity and accident study required
57 to 70	=	"E"	At capacity and requires other control mode
>70	=	"F"	Unsatisfactory and requires other control mode

- 2.14. It should be noted that for roundabouts, give way and stop signs, in some circumstances, simply examining the highest individual average delay can be misleading. The size of the movement with the highest average delay per vehicle should also be taken into account. Thus, for example, an intersection where all movements are operating at a level of service A, except one which is at level of service E, may not necessarily define the intersection level of service as E if that movement is very small. That is, longer delays to a small number of vehicles may not justify upgrading an intersection unless a safety issue was also involved.
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- 2.15. The SIDRA analysis found that the signalised intersection of the Pacific Highway/Figtree Boulevard/Minnesota Road is operating with average delays of less than 35 seconds per vehicle during the Friday afternoon and Saturday midday peak period. This represents level of service C, which is a satisfactory level of intersection operation.
- 2.16. The roundabout controlled intersection of Figtree Boulevard and Orchid Way is operating at a level of service A/B. Average delays, for the movement with the highest average delay, are less than 15 seconds per vehicle during peak periods. This is a good level of intersection operation.
- 2.17. The unsignalised intersection of Figtree Boulevard and Edward Stinson Avenue is operating with average delays, for the movement with the highest average delay, of less than 15 seconds per vehicle during peak periods. This represents a level of service A/B, which is a good level of service.
- 2.18. The unsignalised intersections of Orchid Way/Edward Stinson Avenue and Orchid Way/Van Stappen Road are operating with average delays for all movements of less than 15 seconds per vehicle during peak periods. This represents a level of service A/B, a good level of service.

Public Transport

- 2.19. Public transport services in the area are provided by Busways. Local bus services in the vicinity of the site generally operate along the Pacific Highway and Figtree Boulevard/Orchid Way, linking the site to surrounding areas including Lake Haven, Warnervale, Hamlyn Terrace, Wyong and Tuggerah. Bus stops are located on the Pacific Highway adjacent to the subject site.
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- 2.20. Bus route 78 provides a regular Monday to Saturday service operating between Lake Haven and Tuggerah via Warnervale and Wyong. Bus routes 79 and 80 operate between Lake Haven and Wyong/Tuggerah. Bus routes 93 and 94 operate from Toukley and Budgewoi respectively with links to Wyong/Tuggerah.
- 2.21. Local bus services also link the site to train services operating through Warnervale, Wyong and Tuggerah Railway Stations. These train stations are on the Newcastle and Central Coast Railway Line (Newcastle to Central). There are some 35 to 50 services through Wyong Railway Station in each direction per day.
- 2.22. The site is therefore accessible by public transport services.
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3. IMPLICATIONS OF PROPOSED DEVELOPMENT

3.1. It is proposed to rezone the site for a supermarket of some 3,200m², specialty retail of some 80m² and a pad site for a future petrol filling station. Car parking will be provided within an at-grade car park with access via combined entry and exit driveways onto Figtree Boulevard and Orchid Way.

3.2. The implication of the proposed rezoning are assessed through the following sections:-

- public transport
- parking provision;
- access, internal circulation and servicing;
- traffic effects; and
- summary.

Public Transport

3.3. The proposed development is located close to existing bus services. These services operate along the Pacific Highway and provide links to surrounding areas. In association with DCP 49 and the ongoing development of the Wadalba urban release area, bus services will be extended into an overall public transport network through the developing residential area.

3.4. Bus stops are located on the Pacific Highway east of Figtree Boulevard, adjacent to the subject site. In accordance with DCP 49 additional bus stops will be provided at strategic locations along the local bus route corridors through Wadalba.

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- 3.5. The proposed development will increase employment and retail densities close to existing and proposed bus services. The proposed development will therefore strengthen the demand for public transport services in the area.
- 3.6. The proposed development is therefore consistent with government objectives and the planning principles of:-
- improving accessibility to employment and services by walking, cycling and public transport;
 - improving the choice of transport and reducing dependence solely on cars for travel purposes;
 - moderating growth in the demand for travel and the distances travelled, especially by car; and
 - supporting the efficient and viable operation of public transport services.
- 3.7. The proposed development and the expanding residential area in the vicinity of the site would result in opportunities for future additional bus services and bus routes to be developed.

Parking Provision

- 3.8. Wyong Shire Council's Development Control Plan No.61 (Car Parking), indicates the following parking rates for the proposed development:-
- Supermarkets and Shopping Centres (500m² to 10,000m²)
 - 6.1 spaces per 100m² GLFA;
-
-

□ Service Stations with Convenience Stores

- six spaces per work bay; plus
- one space per 20m²GFA for convenience store.

3.9. The proposed development will provide a supermarket of some 3,200m², specialty retail of some 80m² and a pad site for a future petrol filling station. The proposed petrol filling station could provide a convenience store of some 120m² and will not provide for the servicing of cars on-site. Based on the above parking rates, the required parking provision for the proposed development would be some 206 spaces, comprising 200 spaces for the supermarket and specialty retail and 6 spaces for the petrol filling station.

3.10. The proposed development will provide car parking in accordance with Council's requirement. Appropriate disabled and bicycle parking will be provided. The proposed parking provision is therefore considered appropriate.

Access, Internal Circulation and Servicing

3.11. Access to the site is proposed via combined entry and exit driveways onto Figtree Boulevard and Orchid Way. The access driveway onto Figtree Boulevard will be approximately 70 metres south of the Pacific Highway and due to the divided carriageway, will restrict movements to and from the site to left in and left out. The proposed access driveway will provide access to on-site customer parking and loading dock facilities in the north eastern corner of the site.

3.12. Access to and from Orchid Way will be provided via a combined entry and exit driveway located some 70 metres east of Figtree Boulevard. There are good sight distances along Figtree Boulevard and Orchid Way at the proposed access locations. The driveway arrangements will be provided in accordance with the

Australian Standard for Parking Facilities Part 1: Off-street car parking (AS2890.1-2004) and Part 2: Off-street commercial vehicle facilities (AS2890.2-2002).

- 3.13. Parking will be provided within an at-grade car park. Spaces will be 5.4 metres long by 2.6 metres wide with circulation aisles a minimum of 6.6 metres wide. Spaces with adjacent obstructions will be 0.3 metres wider. Disabled spaces will be 2.4 metres wide with adjacent 2.4 metre wide shared zones. All circulation aisles will be two-way. These dimensions are considered appropriate, being in accordance with AS2890.1:2004 and AS2890.6-2009.
- 3.14. Bicycle parking will be provided in accordance with Council's requirements. A suitable area for bicycles will be made available adjacent to the supermarket building.
- 3.15. Loading docks will be provided at the rear of the supermarket. The docks will be designed to cater for large service vehicles, including articulated vehicles. Service vehicles will access the loading docks from Orchid Way and will enter and leave the site in a forward direction. The service vehicle manoeuvring area and loading docks will be separated from the customer parking areas.
- 3.16. Access to the petrol filling station will be provided to and from Figtree Boulevard. A separate entry driveway will be provided to the petrol station at the northern end of the site. Vehicles exiting the petrol station will use the proposed car park access driveway located on the southern side of the petrol station pad site. These access driveways will be designed to cater for petrol tankers. Petrol tankers will make use of the roundabout at the intersection of Figtree Boulevard and Orchid Way to access the highway.
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Traffic Effects

- 3.17. The road network and planning of the Wadalba urban release area, in accordance with the Wyong LEP and DCP 49, has taken into account the traffic implications of the surrounding development, including the provision of a neighbourhood shopping centre.
- 3.18. The traffic generated by the proposed development will have its largest effects during the Friday afternoon and Saturday midday peak periods. Based on the Roads and Maritime Service's guidelines, the proposed supermarket and specialty shops will generate some 450 to 500 vehicles per hour two-way (sum of inbound and outbound) during the Friday afternoon and Saturday midday peak periods.
- 3.19. A proportion of traffic generated by the development will be passing trade, which are vehicles that are already in the existing traffic stream passing the centre. For centre less than 10,000m² the RTA's "Guide to Traffic Generating Developments" suggests that up to 25% of customers are likely to be passing trade. Hence the additional traffic generation would be some 330 to 370 vehicles per hour two-way during peak periods.
- 3.20. The petrol filling station is likely to generate some 80 to 100 customers per hour at peak times. The majority of these trips (some 70%) would be passing trade, with some accessing the filling station on leaving the supermarket and the balance diverted from the Pacific Highway.
- 3.21. Existing peak hour traffic flows plus the additional traffic generated by the proposed development are shown on Figures 2 and 3, and summarised in Table 3.1.
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Table 3.1: Existing Peak Hour Two-Way (Sum of Both Directions) Traffic Flows Plus Development Traffic

Road/Location	Friday Afternoon (Vehicles/Hour)		Saturday Midday (Vehicles/Hour)	
	Existing	Plus Development	Existing	Plus Development
Pacific Highway				
- east of Figtree Boulevard	1,575	+100	1,560	+100
- west of Figtree Boulevard	1,815	+100	1,735	+100
Figtree Boulevard				
- south of Pacific Highway	455	+480	300	+480
- south of Orchid Way	305	-	200	-
- south of Edward Stinson Ave	105	-	80	-
Minnesota Road				
- north of Pacific Highway	635	+80	465	+80
Orchid Way				
- east of Figtree Boulevard	135	+120	95	+120
- south of Edward Stinson Ave	170	+120	145	+120
- south of Van Stappen Road	160	+100	90	+100
Van Stappen Road				
- east of Orchid Way	115	+20	125	+20
- west of Orchid Way	65	-	40	-

- 3.22. Table 3.1 shows that with the proposed development, traffic increases on Figtree Boulevard, from where access to the development is proposed, would be some 480 vehicles per hour two-way (inbound plus outbound) during the Friday afternoon and Saturday midday peak periods, in the section between the Pacific Highway and Orchid Way. Peak period traffic flows in Figtree Boulevard south of Orchid Way will be unchanged as a result of the proposed development.
- 3.23. Increases along the Pacific Highway and Orchid Way east of Figtree Boulevard, during the same peak hour periods, would be lower at some 100 to 120 vehicles

per hour two-way. Traffic increases on Minnesota Road north of the Pacific Highway would be some 80 vehicles per hour two-way during peak periods.

- 3.24. The intersections previously analysed in Chapter 2 have been re-analysed using the SIDRA program for the additional development traffic shown on Figures 2 and 3.
- 3.25. The SIDRA analysis found that the signalised intersection of the Pacific Highway and Figtree Boulevarde would operate with average delays of less than 40 seconds per vehicle during the Friday afternoon and Saturday midday peak periods. This represents a level of service C, which is a satisfactory level of intersection operation.
- 3.26. The roundabout controlled intersection of Figtree Boulevarde and Orchid Way will operate at level of service B or better. Average delays, for the movement with the highest average delay, will be less than 20 seconds per vehicle during peak periods. This represents a good level of intersection operation.
- 3.27. The SIDRA analysis found the remaining intersections in the vicinity of the site, including Figtree Boulevarde/Edward Stinson Avenue, Orchid Way/Edward Stinson Avenue and Orchid Way/Van Stappen Road, with the additional development traffic, would continue to operate at level of service A/B with similar average delays per vehicle, as today. This represents a good level of intersection operation.
- 3.28. Therefore, the road network within the Wadalba urban release area, including the signalised intersection of the Pacific Highway and Figtree Boulevarde, will be able to cater for the additional traffic from the proposed development.
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Summary

3.29. In summary, the main points relating to the implications of the proposed development are as follows:-

- i) the proposed development will include a supermarket of some 3,200m², specialty retail of some 80m² and a pad site for a future petrol filling station;
- ii) the proposed development will strengthen the demand for public transport;
- iii) the proposed parking provision is considered appropriate;
- iv) access arrangements and internal circulation will be provided in accordance with Australian Standards AS2890.1-2004, AS2890.6-2009 and AS2890.2-2002;
- v) servicing arrangements are considered appropriate; and
- vi) the surrounding road network will be able to cater for the additional traffic from the proposed development.



APPENDIX C

Economic Impact Assessment

LOCATION

Wadalba, Central Coast

Economic Impact Assessment

Prepared for Fabcot Pty Ltd

16th January 2013



TABLE OF CONTENTS

INTRODUCTION	1
EXECUTIVE SUMMARY	2
1 SITE LOCATION AND PROPOSED DEVELOPMENT	6
1.1 Regional and Local Context	6
1.2 Proposed Development	10
2 TRADE AREA ANALYSIS	12
2.1 Trade Area Definition	12
2.2 Main Trade Area Population	14
2.3 Socio-economic Profile	20
2.4 Main Trade Area Retail Spending	23
3 COMPETITIVE ENVIRONMENT	25
3.1 Main Trade Area Retailers	25
3.2 Regional Shopping Centres	27
3.3 Sub-regional Shopping Centres	28
3.4 Supermarket Based Shopping Centres	30
3.5 Proposed Developments	31
3.6 Retail Centres Strategy Review	33
3.7 Summary	37
4 ASSESSMENT OF POTENTIAL FOR RETAIL FACILITIES	38
4.1 Sales Overview	38
4.2 Supermarket Sales Potential	38
4.3 Total Centre Sales Potential	43
4.4 Sales Impacts	44
4.5 Employment and Consumer Impacts	47
5 NEED AND DEMAND FOR SUPERMARKET FLOORSPACE	51
5.1 Study Area Definition	51
5.2 Supermarket Demand	53
6 NEEDS ANALYSIS	57
6.1 Population and Supermarket Demand	57
6.2 Consumer Trends	59
6.3 Supply of Retail Facilities	60
6.4 Impacts on Existing Retailers	60
6.5 Location	61
6.6 Net Community Benefits	61

INTRODUCTION

This report presents an independent assessment for the demand for a proposed supermarket based centre at Wadalba on the Central Coast of New South Wales. The report also considers the likely economic impacts that would result from the proposed development, which will include a Woolworths supermarket of 3,200 sq.m and one specialty shop. The proposal is referred to as Wadalba Woolworths throughout the remainder of this report.

The report is structured and presented in **six (6) sections** as follows:

- **Section 1** details the location of the Wadalba Woolworths site and discusses the context of the site within the Central Coast region. The proposed development scheme is also reviewed.
- **Section 2** examines the trade area which is relevant to the proposal, including current and projected population and retail spending levels.
- **Section 3** provides an overview of the retail structure within the surrounding region.
- **Section 4** outlines our assessment of the sales potential for the retail component of the proposed Wadalba Woolworths development and then presents an economic impact assessment. Likely trading impacts on other retailers throughout the surrounding region are considered, as are the employment and other economic impacts, both positive and negative, of the proposal.
- **Section 5** reviews the need and demand for supermarket floorspace in the wider North Wyong region, with a particular emphasis on the potential for the planned Warnervale Town Centre.
- **Section 6** outlines the key findings of the analysis.

EXECUTIVE SUMMARY

The key points of this report, regarding the demand and market scope for the proposed Wadalba Woolworths development, include:

- i. The proposed Wadalba Woolworths development is situated on the south-eastern corner of the Pacific Highway and Figtree Boulevard in Wadalba, directly north of the existing Coles supermarket. Wadalba is located on the Central Coast of New South Wales, approximately 25 km north of Gosford and 90 km north of Sydney.
- ii. The site is centrally located to community facilities, including the Wadalba Community School and Juniors at Wadalba childcare centre.
- iii. The proposed development is planned to incorporate 3,280 sq.m of floorspace, anchored by a full-line Woolworths supermarket of 3,200 sq.m as well as one specialty shop of 80 sq.m. A petrol station will also be included on a pad site.
- iv. In total, some 200 car spaces would be provided, which equates to a provision of 6.1 spaces per 100 sq.m of floorspace, above the average typically provided at supermarket based shopping centres of around 5 car spaces per 100 sq.m. An additional 6 car spaces will be provided to serve the petrol station.
- v. The proposed development would located be adjacent to the existing Coles supermarket and would promote easy pedestrian flows between the two components. Together the two supermarkets would serve the daily and weekly food and grocery needs of the existing and future population.
- vi. The Wadalba Woolworths main trade area population is currently estimated at 11,560 and is projected to increase to 19,110 persons by 2026. The area forms part of a major residential growth corridor within the North Wyong area, with an additional 2,300 new dwellings (approximately 7,000 persons) planned within the Wadalba area over the next 15 - 20 years. Further growth is also planned to the immediate north of Wadalba, within the Warnervale area.

- vii. The main trade area includes a high proportion of Australian born families. It is important to provide a range of convenience facilities within close proximity to family homes, including choice of location for their food and grocery shopping. Price competition for food and grocery items is very important for traditional families household, who are generally struggling to cope with the rising cost of living currently occurring within the Australian market.
- viii. The only major provision of retail floorspace provided within the main trade area is situated within the Wadalba Village Centre, where the major component is a Coles supermarket of around 1,500 sq.m. This is smaller than a typical full-line supermarket of around 2,500 sq.m and significantly smaller than a major full-line supermarket of around 3,000 sq.m or larger. As such, residents do not have convenient access to a full range of food and grocery items in close proximity to their homes. The nearest major full-line supermarkets are provided a round trip of at least 10 km away at Lake Haven Shopping Centre.
- ix. In Australia, there is one major full-line supermarket of around 3,000 sq.m provided for every 8,000 – 9,000 persons. On this basis, the main trade area population would support a larger supermarket offer than the existing Coles supermarket of 1,500 sq.m.
- x. Analysis provided within this report indicates demand already exist for a major full-line supermarket of 3,200 sq.m, with demand for supermarket floorspace within the lower North Wyong area already exceeding supply by 4,700 sq.m.
- xi. The projected impacts on other retailers throughout the surrounding area likely to result from the Wadalba Woolworths development will not threaten the viability or continued operation of any facilities. The proposed development will primarily serve the local existing and future population.
- xii. It is important to note that any impact is only likely to be experienced by surrounding facilities in the short-term, with all retailers likely to benefit from strong market growth throughout the area.

- xiii. The Wadalba Woolworths development will create further employment, both during the construction period and, more importantly, on an ongoing basis once the development is complete and operational. In total, some 432 jobs are likely to be provided both directly and indirectly as a result of the proposed Wadalba Woolworths. A number of youth employment opportunities will be created with retail developments generally employing a large number of younger staff.
- xiv. Most importantly, the proposed Wadalba Woolworths will be located within the same precinct as existing retail floorspace within Wadalba. This would prevent the fragmentation of the retail offer within the Wadalba area and allows retail floorspace to be provided in one easily accessible, highly identifiable location. This would strengthen the precinct as the major food and grocery destination for main trade area residents.
- xv. The key points to note regarding the proposed Wadalba Woolworths development include:
- The development will result in a significant improvement in the range of food and grocery supermarket facilities that will be available to residents, improving choice of location and also allowing for price competition.
 - Residents of the region will be provided with a wider range of affordable and conveniently located food and grocery facilities in close proximity to their homes.
 - The development will result in reduced travel times and fuel costs for the surrounding population.
 - The development will create additional employment, both during the construction period, and more importantly, on an ongoing basis once the project is completed and operational.

- The development will strengthen Wadalba Village as the major food and grocery destination for Wadalba residents, preventing the need to fragment the retail offer.

xvi. It is concluded that the combination of the substantial positive economic impacts from the proposal, serve to more than offset the trading impacts that could be anticipated for a small number of the existing retail stores in the region, particularly the high performing supermarkets. Further, the impacts would not threaten the viability of any of these retailers or centres.

1 SITE LOCATION AND PROPOSED DEVELOPMENT

This section of the report reviews the regional and local context of the proposed Wadalba Woolworths development and provides an overview of the composition of the proposed development scheme.

1.1 Regional and Local Context

- i. Wadalba is located on the Central Coast of New South Wales, approximately 25 km north of Gosford and 90 km north of Sydney (refer Map 1.1).
- ii. Wadalba is centrally located within the Wyong Local Government Area (LGA) and forms part of a large Greenfield residential development corridor at the northern extent of the Central Coast. The location of the suburb, along the Pacific Highway, makes it easily accessible from both the north and south via the Sydney-Newcastle Freeway (F3).
- iii. The proposed Wadalba Woolworths will be situated on the south-east corner of the Pacific Highway and Figtree Boulevard in Wadalba, directly north of the existing Coles supermarket. The Pacific Highway is the major arterial road throughout Wadalba, connecting residents through to the southern Central Coast and Sydney in the south and to Newcastle in the north.
- iv. Map 1.2 illustrates the local context of the Wadalba Woolworths site. Aside from the adjoining Coles supermarket, other key facilities in the immediate surrounding area include:
 - A provision of specialty shops, including a medical centre, are currently under construction by the owners of the Coles building, directly opposite the Coles supermarket.
 - The Wadalba Community School adjoins the site to the south-east.
 - Juniors at Wadalba childcare centre is located along Sage Close in Wadalba, around 200 metres to the south of the site.

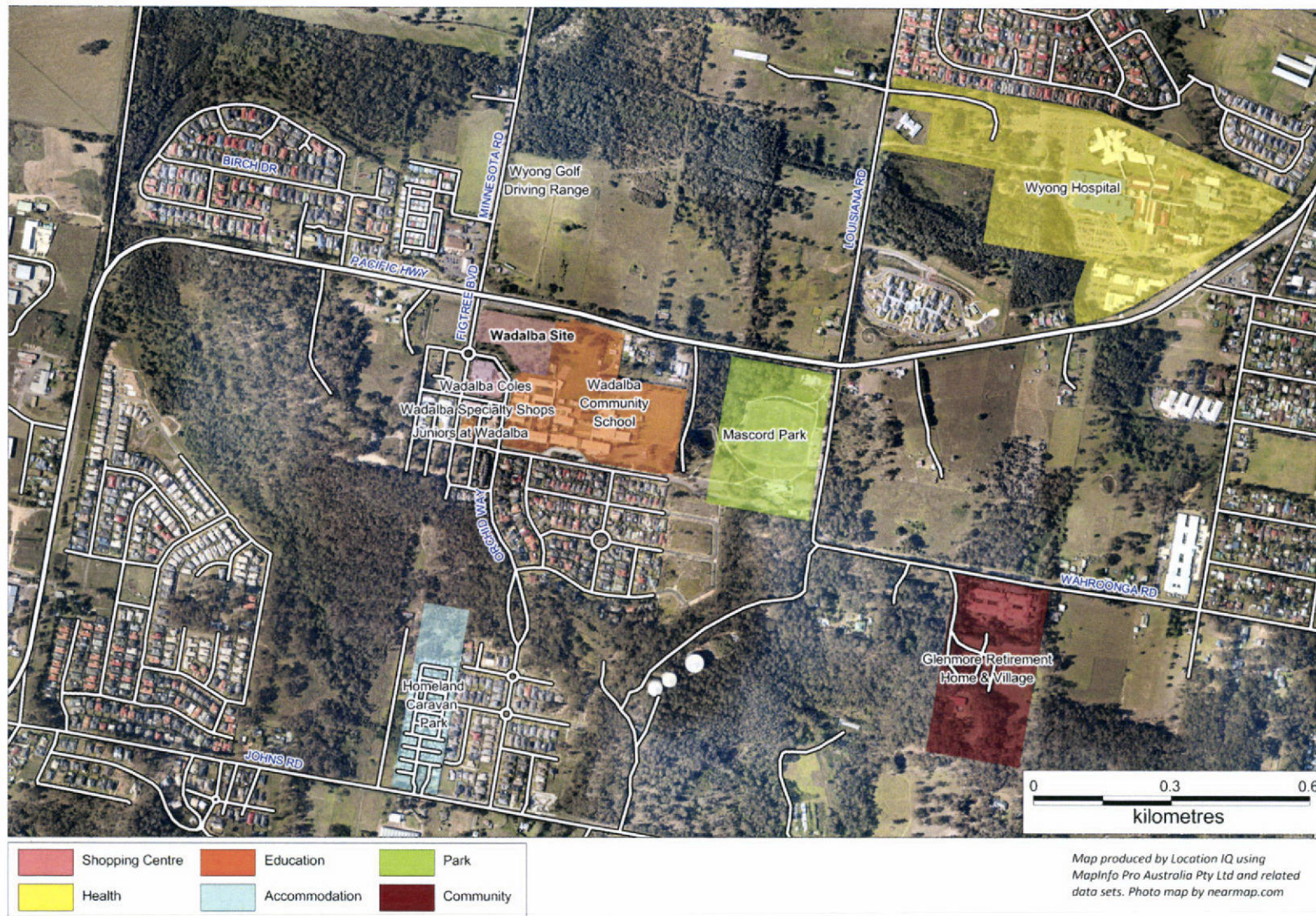
- Mascrod Park is located on the south-west corner of the Pacific Highway and Louisiana Road, directly east of the Wadalba Community School.
 - The Wyong Golf Driving Range is located to the north of the Pacific Highway, at the Minnesota Road intersection.
 - Homeland Caravan Park is located along Johns Road, some 1.3 km to the south of the site.
 - The Dam Hotel, with an adjoining Bottlemart, is situated opposite the site, on the northern side of the Pacific Highway.
- v. Aside from the existing Coles supermarket of 1,500 sq.m that is located directly south of the site, the nearest major retail facilities are located at Lake Haven Shopping Centre, some 5 km to the north-east. Lake Haven Shopping Centre is anchored by a Kmart discount department store, as well as Woolworths and Coles supermarkets. Additionally, a new Town Centre development, known as Warnervale Town Centre, is planned some 2 km to the north of the site. The Town Centre is proposed to contain a Big W discount department store and Woolworths and Aldi supermarkets.
- vi. Overall, the proposed Wadalba Woolworths would occupy a high profile location and have excellent exposure to passing traffic along the Pacific Highway. In addition, the co-location of the proposed Woolworths with the existing Coles supermarket (which will soon include a provision of specialty shops) and Wadalba Community School would make the new centre highly identifiable for local residents. It would also allow retailing within Wadalba to be consolidated at one easily accessible location.

MAP 1.1 – WADALBA REGIONAL CONTEXT



Map produced by Location IQ using MapInfo Pro Australia Pty Ltd and related data sets.

MAP 1.2 – WADALBA WOOLWORTHS LOCAL CONTEXT



1.2 Proposed Development

- i. Fabcot Pty Ltd are proposing rezoning the Wadalba Woolworths site to allow for the development of a convenience shopping centre, anchored by a Woolworths supermarket and one specialty shop.
- ii. The proposed composition of the development is outlined in Table 1.1 with key points including:
 - In total, the proposed centre would contain 3,280 sq.m of floorspace.
 - A Woolworths supermarket of 3,200 sq.m (including liquor) would be the major anchor tenant, accounting for 97.6% of total floorspace.
 - One specialty shop of 80 sq.m would be provided.
 - A petrol station of 80 sq.m is also planned as part of the overall development.
- iii. Overall, the total size of the development is 3,360 sq.m.

TABLE 1.1 – WADALBA WOOLWORTHS PROPOSED COMPOSITION

	GLA (sq.m)	% of Centre
<u>Majors</u>		
Supermarket	<u>3,200</u>	<u>97.6%</u>
Total Majors	3,200	97.6%
Specialty Shops	80	2.4%
Total Centre	3,280	100.0%
External - Petrol Station	80	
Total Property	3,360	
Source: Fabcot Pty Ltd		LOCATION

- iv. The proposed Wadalba Woolworths development would offer a high degree of customer amenity and convenience by way of its accessible location and simple design over one level.

- v. An adequate provision of at-grade car parking would be provided, easily accessible via Figtree Boulevard and Orchid Way. In total, some 200 car spaces are planned, which equates to a provision of 6.1 spaces per 100 sq.m of floorspace. This is well above the average typically provided at supermarket based shopping centres of around 5 car spaces per 100 sq.m. An additional six car spaces will be provided to serve the petrol station.
- vi. The proposed development would be located adjacent to the existing Coles supermarket and would promote easy pedestrian flows between the two components. Together the two supermarkets would serve the daily and weekly food and grocery needs of the existing and future population.

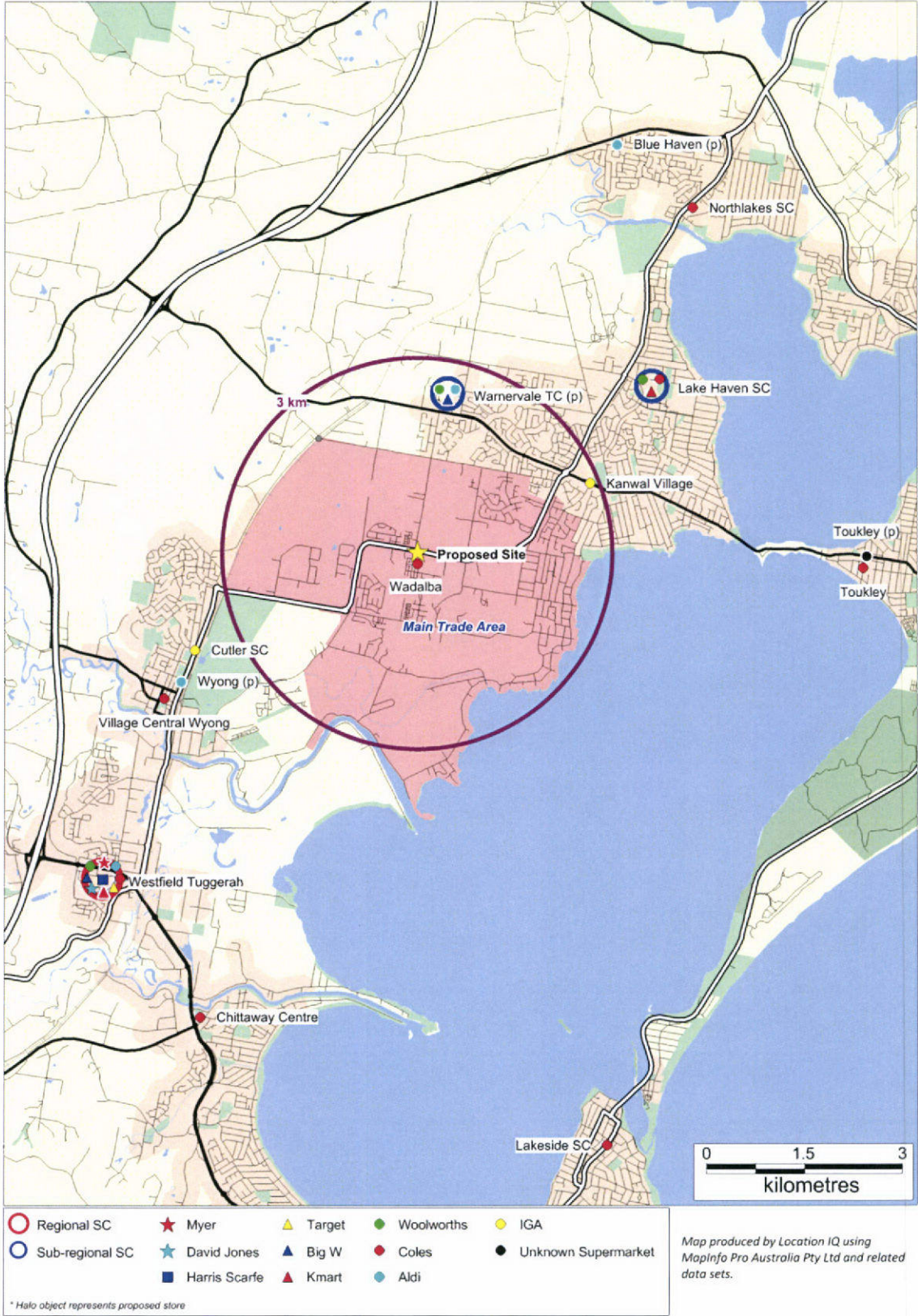
2 TRADE AREA ANALYSIS

This section of the report outlines the trade area likely to be served by the proposed Wadalba Woolworths development including the current and projected population and retail spending levels. An overview of the socio-economic profile of the trade area population is also provided.

2.1 Trade Area Definition

- i. The trade area for the proposed Wadalba Woolworths development has been defined taking into account the following key considerations:
 - The scale and composition of the proposed development which will be based on a supermarket as the anchor tenant.
 - The provision of retail facilities throughout the region.
 - Regional and local accessibility.
 - The pattern of urban development.
 - Significant physical barriers.
- ii. Map 2.1 illustrates the defined main trade area for the Wadalba Woolworths development. The main trade area is bounded by Warnervale Road to the north, by the alignment of the railway line to the west and by Tuggerah Lake to the east and south. The main trade area includes the suburbs of Wadalba, Kanwal, Wyongah, Tuggerawong, Tacoma and Rocky Point, as well as the southern portion of Hamlyn Terrace.
- iii. The convenience offer planned for the proposed Wadalba Woolworths (including a supermarket) means that the centre would mainly serve residents within 2 - 3 km of the site.

MAP 2.1 – WADALBA WOOLWORTHS MAIN TRADE AREA



2.2 Main Trade Area Population

- i. Table 2.1 details the current and projected population levels by sector for the Wadalba Woolworths main trade area. This information is sourced from the following:
 - The 2006 and 2011 Census of Population and Housing undertaken by the Australian Bureau of Statistics (ABS).
 - New dwelling approvals statistics sourced from the ABS over the period from 2006/07 to 2010/11. Table 2.2 summarises the new dwelling approvals activity throughout the main trade area over the last five years, indicating 566 new dwellings have been approved over this period.
 - Population projections prepared by Forecast i.d. for Wyong Council.
 - Investigations by this office into new residential developments in the region.
- ii. At the time of the 2011 Census, the population within the Wadalba Woolworths main trade area was 11,560. Since the 2006 Census the main trade area population has increased by 1,750 persons at a rate of 3.3% per annum. This is significantly higher than the average annual growth rate experienced for Australia as a whole of 1.5%.
- iii. The majority of new Greenfield residential development on the Central Coast is planned to occur in the northern part of the Wyong Local Government Area (LGA). The *Central Coast Regional Strategy 2008* identifies that this area will have the capacity to accommodate around 17,000 new dwellings and 12,150 – 17,100 new employment opportunities.
- iv. The latest information detailing the planned residential development of the North Wyong area is provided within the *North Wyong Shire Structure Plan*, released by the New South Wales Government Department of Planning and Infrastructure in October 2012. Figure 2.1, taken from the Structure Plan, illustrates the planned area of development throughout the North Wyong area.

- v. As shown, there are four key precincts identified as “Proposed Residential Area” located entirely within the Wadalba Woolworths main trade area, namely 2A and 2B (Wadalba South) and 3A and 3B (Wadalba East). Table 2.3 details the estimated dwelling yield for each of the defined precincts. In total, the precincts are estimated to accommodate around 2,300 new dwellings. Assuming three persons per dwelling, development of these precincts is likely to add approximately 7,000 new residents to the immediate Wadalba area (i.e. area immediately surrounding the proposed Wadalba Woolworths site).
- vi. The Structure Plan projects that all planned residential precincts within Wadalba (i.e. 2A, 2B, 3A and 3B) are expected to be rezoned over the next 15 years. This indicates that the population within the immediate Wadalba area is planned increase by more than three times the current population of 2,700 persons to nearly 10,000 residents over the next 15 - 20 years.
- vii. In addition to the four precincts situated immediately around the Wadalba site, the southern portion of Precinct 7 (Warnervale South East) also falls within the defined Wadalba Woolworths main trade area. This precinct is projected to have a development yield of around 1,470 dwellings, equating to an additional 4,400 persons over the medium term (i.e. 15 year period). Whilst in the future these residents are likely to associate strongly with retail facilities at the planned Warnervale Town Centre, it is likely that the Wadalba Village Centre will serve these residents over the short to medium term (i.e. period to 2017/18).
- viii. Based on the information outlined above, and assuming a high proportion of the identified Proposed Residential Areas (illustrated on Figure 2.1) are developed over the next 20 years, the population within the defined Wadalba Woolworths main trade area is projected to increase by 7,550 to 19,110 by 2026. This represents an average annual growth rate of around 3.0% - 3.5%, which is above the Australian average of around 1.5% per annum for the same period.

TABLE 2.1 – WADALBA WOOLWORTHS MAIN TRADE AREA POPULATION, 2006 - 2026

Trade Area Sector	Estimated Resident Population		2013	Forecast Population		
	2006	2011		2016	2021	2026
Main Trade Area	9,810	11,560	12,260	13,610	16,110	19,110
Average Annual Change (No.)						
		2006-2011	2011-2013	2013-2016	2016-2021	2021-2026
Main Trade Area		350	350	450	500	600
Average Annual Change (%)						
		2006-2011	2011-2013	2013-2016	2016-2021	2021-2026
Main Trade Area		3.3%	3.0%	3.5%	3.4%	3.5%
<i>Australian Average</i>		1.5%	1.5%	1.4%	1.3%	1.2%
<i>All figures as at June</i> <i>All figures are based on 2011 SA1 boundary definition with the exception of 2006 which is based on 2006 CCD boundary definition. 2006 and 2011 ERP is calculated using 2011 enumeration factor.</i> <i>Sources : ABS; forecast .id</i>						

LOCATION

TABLE 2.2 – WADALBA WOOLWORTHS MTA NEW DWELLING APPROVALS, 2007 – 2011

Sector	Main Trade Area
<u>New Houses</u>	
2006/07	85
2007/08	117
2008/09	68
2009/10	133
2010/11	85
Total New Houses	488
Average	98
<u>Other Dwellings</u>	
2006/07	26
2007/08	30
2008/09	12
2009/10	8
2010/11	2
Total Other Dwellings	78
Average	16
<u>Total Dwellings</u>	
2006/07	111
2007/08	147
2008/09	80
2009/10	141
2010/11	87
Total Dwellings	566
Average	113
Source: ABS	

LOCATION

FIGURE 2.1 – NORTH WYONG STRUCTURE PLAN

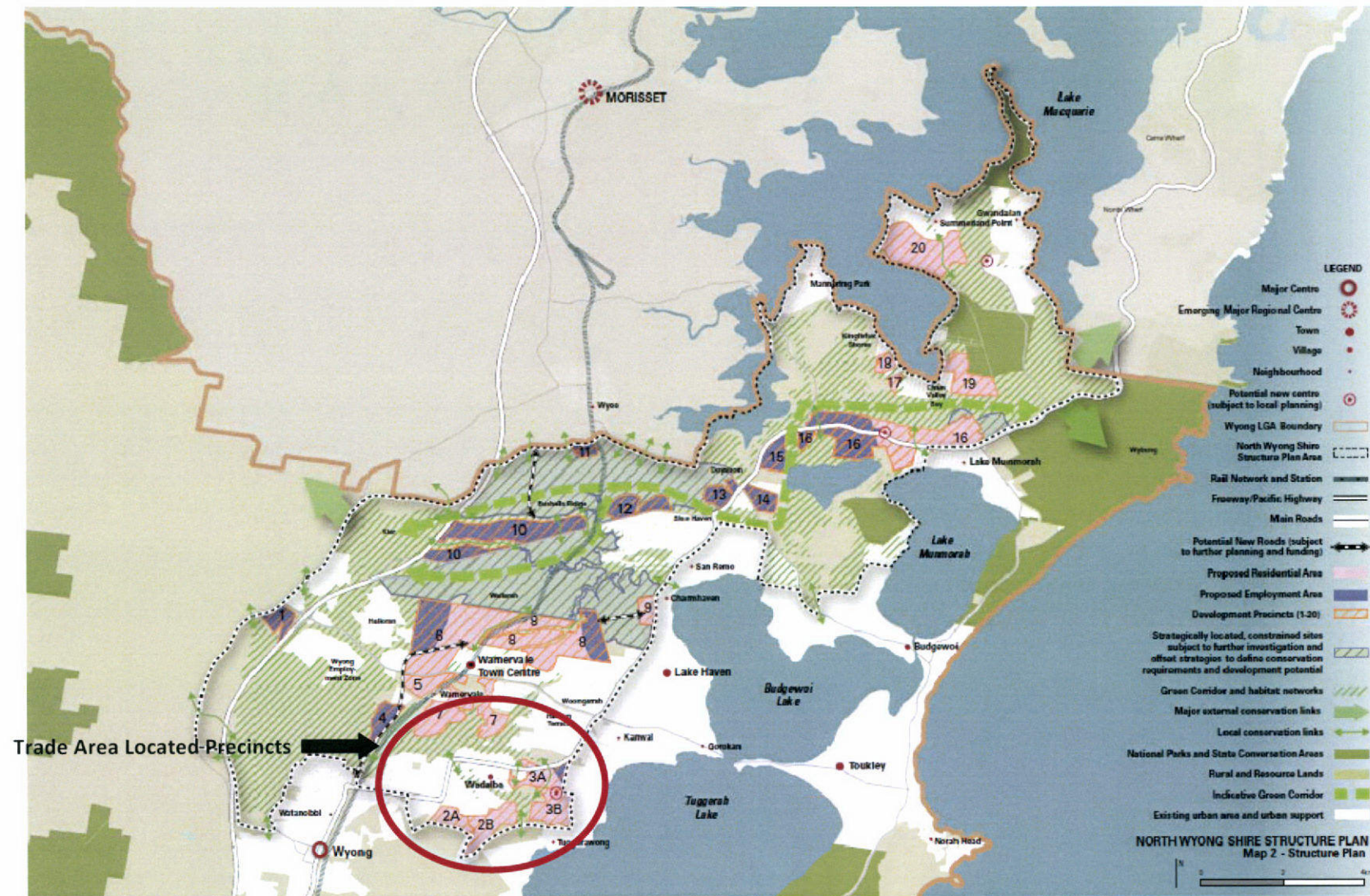


TABLE 2.3 – NORTH WYONG SHIRE STRUCTURE PLAN - ESTIMATED DEVELOPMENT YIELD

Precinct Number	Area Name	Gross Area (ha)	Developable Area* (ha)	Est. Dwellings (ha)	Est. Population**
2A	Wadalba South	32	22	336	1,008
2B	Wadalba South	67	47	704	2,112
3A	Wadalba East	57	40	551	1,653
3B	Wadalba East	<u>69</u>	<u>48</u>	<u>725</u>	<u>2,175</u>
Total Wadalba Area		225	157	2,316	6,948
* Based on an estimate that 70% of each development precinct will be available for development. ** Assumes 3 persons per dwelling. Source: North Wyong Shire Structure Plan, October 2012					

2.3 Socio-economic Profile

- i. Table 2.4 summarises the socio-economic profile of the Wadalba Woolworths main trade area population compared with the Australian benchmarks. This information is based on the 2011 Census of Population and Housing.
- ii. Key points to note include:
 - Residents earn lower than average incomes on a per capita and average household basis.
 - Residents of the main trade area are slightly older than the Australian benchmark, with an average age of 38.1 years (as compared to the benchmark of 37.9 years).
 - Home ownership is higher than average throughout the main trade area.
 - The main trade area population is predominately Australian born.
 - Nearly 50% of main trade area residents reside in households consisting of couples with dependent children (i.e. traditional families). This can be compared to the average of 45.3%.
- iii. Table 2.5 shows a comparison between the 2006 Census of Population and Housing and the most recent 2011 Census. As shown, incomes throughout the main trade area have grown at a much faster rate than the Australian benchmark. Additionally, the number of traditional family households (i.e. couples with dependent children) residing within the area has also increased at a greater rate, indicating the growing popularity of the Wadalba area with traditional family households.
- iv. Overall, the main trade area is characterised by a growing Australian born, family market. It is important to provide a range of convenience facilities within close proximity to family homes, including choice of location for their food and grocery shopping. Price competition for food and grocery items is very important for traditional families household, who are generally struggling to cope with the rising cost of living.

TABLE 2.4 – MAIN TRADE AREA SOCIO-ECONOMIC PROFILE, 2011 CENSUS

Characteristics	Main Trade Area	Aust Average
Income Levels		
Average Per Capita Income	\$27,785	\$34,201
Per Capita Income Variation	-18.8%	n.a.
Average Household Income	\$77,386	\$87,928
Household Income Variation	-12.0%	n.a.
Average Household Size	2.8	2.6
Age Distribution (% of Pop'n)		
Aged 0-14	22.5%	19.3%
Aged 15-19	7.6%	6.5%
Aged 20-29	10.0%	13.8%
Aged 30-39	12.7%	13.8%
Aged 40-49	13.9%	14.2%
Aged 50-59	11.5%	12.8%
Aged 60+	21.9%	19.6%
Average Age	38.1	37.9
Housing Status (% of H'holds)		
Owner/Purchaser	75.5%	69.3%
Renter	24.5%	30.7%
Birthplace (% of Pop'n)		
Australian Born	87.1%	73.9%
Overseas Born	12.9%	26.1%
• Asia	1.8%	7.6%
• Europe	6.9%	9.4%
• Other	4.2%	9.1%
Family Type (% of Pop'n)		
Couple with dep't children	49.9%	45.3%
Couple with non-dep't child.	6.9%	7.7%
Couple without children	19.2%	23.0%
Single with dep't child.	10.9%	9.2%
Single with non-dep't child.	4.0%	3.5%
Other family	0.7%	1.1%
Lone person	8.4%	10.2%
Sources : ABS Census of Population and Housing 2011		LOCATION

TABLE 2.5 – MAIN TRADE AREA 2006 AND 2011 CENSUS COMPARISON

Characteristics	Wadalba Woolworths MTA			Australian Benchmark		
	2006	2011	Change (%)	2006	2011	Change (%)
Income Levels						
Average Per Capita Income	\$21,361	\$27,785	30.1%	\$27,267	\$34,201	25.4%
Average Household Income	\$57,157	\$77,386	35.4%	\$69,814	\$87,928	25.9%
Age						
Average Age	37.2	38.1	2.2%	37.3	37.9	1.4%
Birthplace (% of Pop'n)						
Australian Born	87.4%	87.1%	-0.3%	75.4%	73.9%	-1.4%
Overseas Born	12.6%	12.9%	0.3%	24.6%	26.1%	1.4%
Household Size & Structure						
Average Household Size	2.7	2.8	4.1%	2.6	2.6	0.4%
Couple with dep't children	47.9%	49.9%	2.0%	46.0%	45.3%	-0.7%
Housing Status (% of H'holds)						
Owner/Purchaser	76.3%	75.5%	-0.7%	70.8%	69.3%	-1.4%
Renter	23.7%	24.5%	0.7%	29.2%	30.7%	1.4%
Sources : ABS Census of Population and Housing 2006 & 2011				LOCATION		

2.4 Main Trade Area Retail Spending

- i. The estimated retail expenditure capacity of the Wadalba Woolworths main trade area population is based on information sourced from MDS Market Data Systems. MDS utilises a detailed micro-simulation model of household expenditure behaviour for all residents of Australia.
- ii. The MDS model takes into account information from a wide variety of sources, including the regular ABS Household Expenditure Survey, National Accounts Data, Census Data and other information.
- iii. In New South Wales, Queensland and Victoria, the MarketInfo 2010 estimates of retail spending that are prepared independently by MDS are commonly used by all parties in Economic Impact Assessments.
- iv. Table 2.6 outlines the retail expenditure levels generated by the Wadalba Woolworths main trade area population. The total retail expenditure level of the main trade area population is currently estimated at \$126.9 million. This level is projected to increase at an average annual rate of around 4.2% to \$226.3 million by 2026. All figures presented in this report are in constant 2012 dollars and include GST.
- v. The projected growth rate of the retail spending market of 4.2% per annum for the Wadalba Woolworths main trade area takes into account the following:
 - Real growth in retail spending per capita of 0.5% annually for food retail and 1.0% for non-food retail over the period to 2026. This is in keeping with the typical trends generally evident throughout New South Wales and Australia over long-term periods.
 - Main trade area population growth of around 3.4% per annum.
- vi. Table 2.6 also presents a breakdown of retail spending by key commodity group, indicating the largest spending market is food and liquor at \$60.1 million, representing 47.3% of the total retail spending market.

TABLE 2.6 – MTA RETAIL EXPENDITURE BY KEY COMMODITY GROUP, 2012 - 2026

Y/E June	Food & Liquor	Food Catering	Apparel	H'hold Goods	Leisure	General Retail	Retail Services	Total
2012	60.1	15.1	11.9	21.9	6.3	8.5	3.3	126.9
2013	62.2	15.8	12.3	22.7	6.5	8.8	3.4	131.7
2014	64.5	16.4	12.9	23.7	6.8	9.2	3.5	137.1
2015	67.1	17.2	13.4	24.8	7.1	9.6	3.7	143.0
2016	69.9	18.0	14.1	25.9	7.4	10.1	3.9	149.2
2017	72.7	18.8	14.7	27.1	7.8	10.5	4.0	155.6
2018	75.5	19.6	15.4	28.3	8.1	11.0	4.2	162.2
2019	78.5	20.5	16.0	29.6	8.5	11.5	4.4	169.0
2020	81.6	21.4	16.8	30.9	8.9	12.0	4.6	176.2
2021	84.8	22.4	17.5	32.3	9.3	12.6	4.8	183.6
2022	88.2	23.4	18.3	33.7	9.7	13.1	5.0	191.4
2023	91.7	24.4	19.1	35.2	10.1	13.7	5.3	199.6
2024	95.4	25.5	20.0	36.8	10.6	14.3	5.5	208.1
2025	99.2	26.7	20.9	38.5	11.0	15.0	5.8	217.0
2026	103.1	27.9	21.8	40.2	11.5	15.6	6.0	226.3
Expenditure Growth								
2012-2015	7.1	2.0	1.6	2.9	0.8	1.1	0.4	16.1
2015-2017	5.5	1.6	1.3	2.3	0.7	0.9	0.3	12.6
2017-2021	12.2	3.6	2.8	5.2	1.5	2.0	0.8	28.0
2021-2026	18.3	5.5	4.3	8.0	2.3	3.1	1.2	42.7
2012-2026	43.1	12.7	10.0	18.4	5.3	7.1	2.7	99.3
Average Annual Growth Rate								
2012-2015	3.8%	4.3%	4.3%	4.3%	4.3%	4.3%	4.3%	4.1%
2015-2017	4.0%	4.6%	4.6%	4.6%	4.6%	4.6%	4.6%	4.3%
2017-2021	3.9%	4.5%	4.5%	4.5%	4.5%	4.5%	4.5%	4.2%
2021-2026	4.0%	4.5%	4.5%	4.5%	4.5%	4.5%	4.5%	4.3%
2012-2026	3.9%	4.5%	4.5%	4.5%	4.5%	4.5%	4.5%	4.2%
*Constant 2011/12 dollars & including GST						LOCATION		
Source : Marketinfo								

3 COMPETITIVE ENVIRONMENT

This section of the report reviews the competitive retail environment within which the proposed Wadalba Woolworths would operate in order to assist in the assessment of likely trading impacts that the proposed development would have on other retailers.

Retail facilities within the Wadalba Woolworths main trade area are currently limited, with the largest retail provision provided within the area immediately surrounding the proposed site (i.e. the existing Coles supermarket in the Wadalba Village Centre).

Retail facilities beyond the main trade area generally form a typical retail hierarchy, including:

- Westfield Tuggerah regional shopping centre.
- A sub-regional shopping centre, namely Lake Haven Shopping Centre.
- A number of supermarket based centres to serve the local surrounding population.

The previous Map 2.1 highlights the key competitive facilities provided throughout the main trade area. Table 3.1 provides a summary of the existing competitive retail facilities.

3.1 Main Trade Area Retailers

- i. There is currently only a very limited provision of retail floorspace provided within the Wadalba Woolworths main trade area.
- ii. The only major retail provision is provided within the Wadalba Village Centre (location of proposed site). Currently, the major component of the Wadalba Village Centre is a free-standing Coles supermarket of around 1,500 sq.m. The supermarket is provided with a provision of at-grade car parking, which is accessible off Edward Stinson Avenue.

TABLE 3.1 – EXISTING COMPETITIVE RETAIL FACILITIES

Centre	Shopfront GLA (sq.m)	Anchor Tenants	Dist. From Wadalba (km)
Regional Shopping Centres			
<u>Tuggerah</u>			9.2
• Westfield Tuggerah	82,900	David Jones (13,198), Big W (7,060), Target (7,169), Woolworths (5,100), Coles (3,570), Aldi (1,357), HS Home	
• Supa Centa Tuggerah	21,800	Bunnings, Spotlight	
Sub-regional Shopping Centres			
<u>Lake Haven</u>	63,300		5.1
• Lake Haven SC	41,500	Kmart (7,985), Woolworths (4,265), Coles (4,244)	
• Lake Haven Home Megacentre	21,800	Bunnings, Harvey Norman	
Supermarket Based Shopping Centres			
Wadalba	1,600	Coles (1,500)	-
Kanwal Village	2,300	IGA (700)	3.3
<u>Wyang</u>	17,600		5.5
• Village Central Wyong	6,100	Coles (2,800)	
• Cutler SC	1,500	IGA (700)	
• Remainder	10,000		
Northlakes SC	4,800	Coles (3,500)	7.6
Toukley	21,500	Coles (2,708), Aldi (1,580)	7.9
Chittaway Centre	4,400	Coles (1,639)	11.0
Source : Australian Shopping Centre Council Database - March 2012, Big Guns 2012, Little Guns 2012			

LOCATION

iii. At only 1,500 sq.m, the existing Coles supermarket is generally small by modern standards. A supermarket of at least 2,500 sq.m is generally required to complete a full weekly food and grocery shop.

iv. The Coles development is currently in the process of being expanded to include provision of specialty shops directly opposite the Coles supermarket, on the southern side of off Edward Stinson Avenue. The development is being constructed over two buildings, separated by a pedestrian access path. The first building will contain approximately 725 sq.m of floorspace and include a medical centre, pharmacy and two retail shops. The second building will result in the addition of 748 sq.m of floorspace across six specialty shops. Overall, the development will encompass around 1,473 sq.m of floorspace.

- v. The addition of a full-line supermarket (i.e. supermarket greater than 2,500 sq.m) to the Wadalba Village Centre will help support this new provision of specialty floorspace by generating further activity within the Village Centre.
- vi. Aside from the stand-alone Coles, the only other retail facility provided within the surrounding area is a Bottlemart liquor store, attached to the Dam Hotel on the northern side of the Pacific Highway opposite the Wadalba Village Centre.

3.2 Regional Shopping Centres

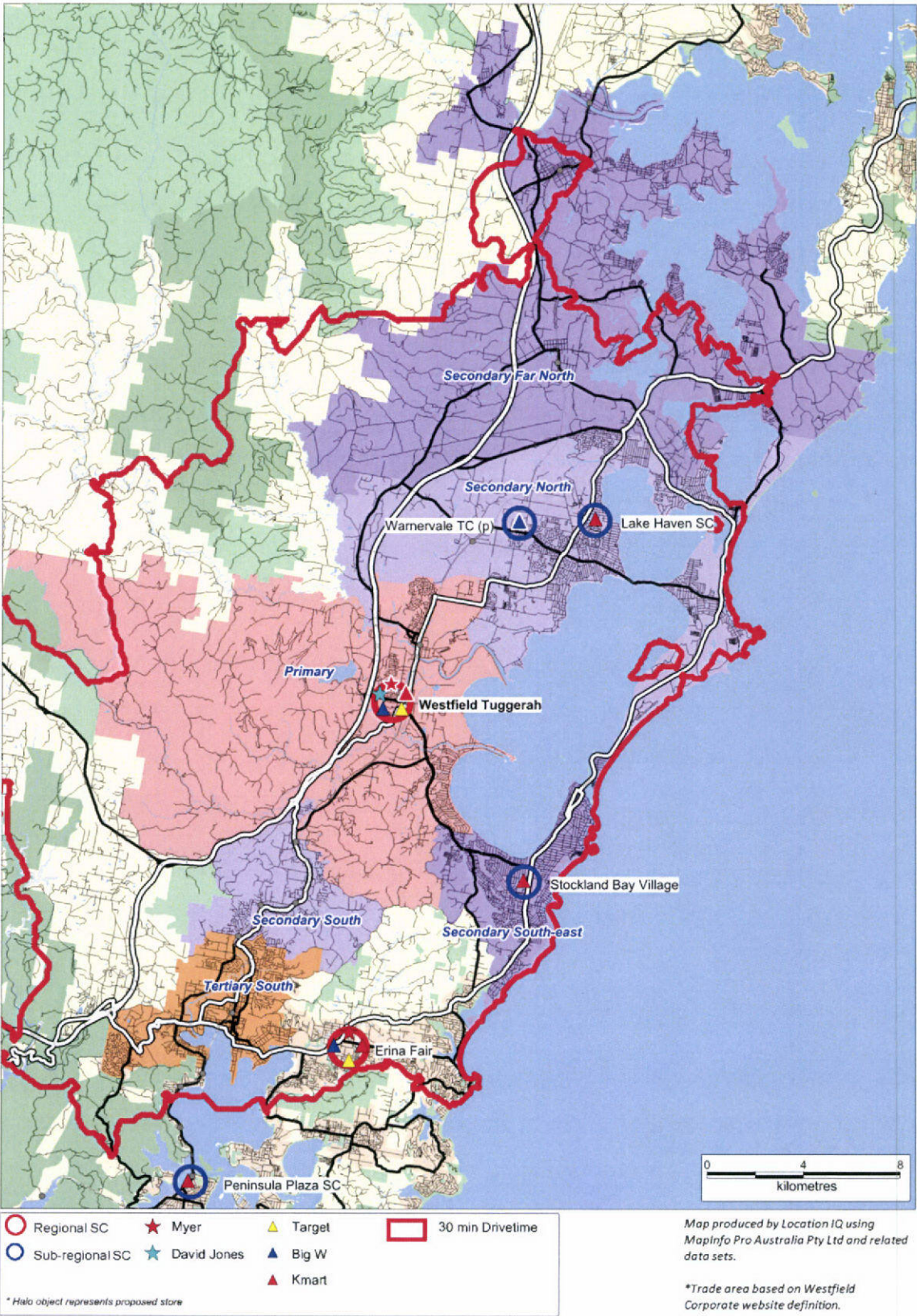
- i. Westfield Tuggerah is situated around 9.2 km to the south of the proposed Wadalba Woolworths site and is the major regional shopping centre serving residents of the northern Central Coast area, including the Wyong Shire.
- ii. Westfield Tuggerah has an extensive retail offer that is based on a David Jones department store, Big W and Target discount department stores and Woolworths, Coles and Aldi supermarkets. Westfield Tuggerah also includes a large provision of both retail and non-retail specialty tenants. In total, the centre encompasses around 82,900 sq.m of retail floorspace and achieves retail sales in the order of \$469 million (*Shopping Centre News - Big Guns 2012*).
- iii. A development application for the expansion of Westfield Tuggerah has been approved by Wyong Council. This expansion would increase the size of the centre by some 16,544 sq.m and include the addition of a Kmart discount department store and a wider provision of mini-major and specialty floorspace. This development is of limited relevance to the Wadalba Woolworths proposal as it would mainly result in the addition of non-food floorspace and would not compete with the convenience, primarily food offer proposed by the Wadalba Woolworths development. There is also a possibility of a Myer department store being added in a later stage of development at this centre.
- iv. Map 3.1 illustrates the extensive trade area served by Westfield Tuggerah. The Westfield Tuggerah trade area population is around 225,000 who generate in the order of \$2.5 billion in retail spending.

- v. Westfield Tuggerah would serve a substantially different role in the retail hierarchy to the proposed Wadalba Woolworths which will be a convenience centre for the local Wadalba population. Westfield Tuggerah is a major regional centre, providing a wide range of retail and non-food goods.

3.3 Sub-regional Shopping Centres

- i. Lake Haven Shopping Centre is a single level centre based on a Kmart discount department store and Woolworths and Coles supermarkets, in addition to some 115 specialty shops. This very successful centre is achieving sales in the order of \$259 million (*Shopping Centre News – Little Guns 2012* publication). The overall size of this centre and the food and non-food offer in combination means that it would attract customers from the wider region of the northern part of the Central Coast.
- ii. The Woolworths and Coles supermarkets at Lake Haven Shopping Centre are 4,265 sq.m and 4,244 sq.m in size, respectively. Both of these supermarkets are larger than the Woolworths of 3,200 sq.m proposed at Wadalba and, on inspection, are recording very strong sales levels.
- iii. Lake Haven Shopping Centre is the closest location for the Wadalba Woolworths main trade area residents to undertake a Woolworths shop. However, this centre is a round trip of some 10 km, which is not convenient for main trade area residents. It is important to provide a range of facilities in a convenient location to residents including a choice of supermarkets which will also encourage price competition for the benefit of local residents.
- iv. Adjacent to Lake Haven Shopping Centre is the Lake Haven MegaCentre. This large bulky goods centre is based on key national tenants including Bunnings and Harvey Norman. The co-location of this centre adds to the size of the retail offer in this precinct and acts as an additional customer attractor.

MAP 3.1 – WESTFIELD TUGGERAH TOTAL TRADE AREA



3.4 Supermarket Based Shopping Centres

- i. Beyond the main trade area, the nearest supermarkets are located at Wyong, San Remo and Toukley. Details on each of these is as follows:

- A small convenience shopping precinct (namely Kanwal Village) is provided at Kanwal, approximately 3.3 km to the north-east of the site. This open-air centre includes a small IGA supermarket of around 700 sq.m, 10 specialty shops (including a large Amcal pharmacy) and a medical centre.
- The Wyong Town Centre is situated around 5.7 km to the south-west of Wadalba and is generally provided on the western side of the Pacific Highway. At 6,100 sq.m, the largest enclosed retail component in the precinct is Village Central Wyong, which is a two level centre anchored by a Coles supermarket of 2,800 sq.m. This centre also includes around 23 specialty shops and a provision of both upper level and underground car parking.

Outside of this enclosed centre, the majority of retail within the Wyong Town Centre is situated along the Pacific Highway, where a range of primarily convenience and food catering tenants are provided.

Also provided within Wyong is the Cutler Shopping Centre, a small internally located convenience centre situated along Cutler Drive. The centre contains a small IGA supermarket of 700 sq.m as well as eight specialty shops. Given the internalised nature of the site, the centre would primarily serve the top shopping needs of the immediate surrounding population only.

- Residents of San Remo are served by Northlakes Shopping Centre, a Coles supermarket anchored centre that is located 7.6 km to the north-east of the proposed site. The Coles supermarket at the centre is 3,500 sq.m in size and is the largest supermarket outside of the major regional and sub-regional centres (i.e. Westfield Tuggerah and Lake Haven Shopping Centre) within the North Wyong area.

- The popular tourist town of Toukley, approximately 7.9 km to the east of the proposed site, contains around 21,500 sq.m of floorspace and is served by free-standing Coles (2,700 sq.m) and Aldi (1,580 sq.m) supermarkets that are supported by a large provision of specialty shops, primarily focused along Main Road.
- ii. Remaining retail facilities within the broader region are generally located more than 10 km (20 km round trip) from the proposed site and as such are unlikely to compete with the proposed Wadalba Woolworths development to any significant degree.

3.5 Proposed Developments

- i. Table 3.2 details the major retail developments that are currently planned or underway within the surrounding North Wyong region.
- ii. The Warnervale Town Centre is the largest development planned to occur within the North Wyong area. The Town Centre will be located in block bounded by Hakone Road to the North, Hiawatha Road to the east and Sparks Road to the south. The centre will be located to the east of the significant Wyong Employment Zone, which is projected to have a capacity for some 6,000 workers.
- iii. The New South Wales Department of Planning are currently assessing a development application for the traditional retail component of the Town Centre, which is planned encompass around 28,500 sq.m of floorspace and include a Big W discount department store and Woolworths and Aldi supermarkets. Discussions with the New South Wales Department of Planning indicate that the centre is currently expected to open by Christmas 2016. For the purposes of this report, the first full-year of trading for the development is projected to be 2017/18.

TABLE 3.2 – PROPOSED COMPETITIVE DEVELOPMENTS

Shopping Centre	Centre Type	Status	Add. Retail GLA (sq.m)	Major Components	Est. First Year
Main Trade Area					
Wadalba SC	Specialty Shops	Under Construction	1,473	Medical & Shops	2012/13
Beyond Trade Area					
Warnervale TC	Sub-regional	DA Submitted	28,506	Big W, Woolworths, Aldi & Shops	2017/18
<u>Westfield Tuggerah</u>					
• DA Approved	Regional	DA Approved	16,544	Kmart, Mini-majors & Shops	2018/19
• Further Planning	Regional	Planning	n.a.	Possibly Myer	n.a.
Aldi Wyong	Supermarket	DA Submitted	1,533	Aldi	2014/15
Toukley Shopping Plaza	Supermarket	DA Approved	0	Fit out of existing box with supermarket	2014/15
Aldi Blue Haven	Supermarket	DA Submitted	1,221	Aldi & Shops	2014/15
Lake Haven Home Megacentre	Bulky	DA Submitted	6,810	Additional Bulky Shops	2014/15
LOCATION					

iv. Other competitive developments include:

- A development application has been submitted for an Aldi supermarket of 1,533 sq.m at Wyong. If approved, the supermarket will occupy a high profile location along the Pacific Highway, at the northern end of the Wyong Town Centre.
- Aldi have also submitted a development application for a supermarket at Blue Haven to the north-west of San Remo. The development is proposed to include an Aldi supermarket of 996 sq.m and three specialty shops.
- A supermarket of 1,310 sq.m has been approved to backfill existing specialty floorspace on the south-east corner of Main Road and Yaralla Road in Toukley. The development application was approved in 2009/10, with construction yet to begin on the development. Discussions with Wyong Council indicate that the development consent will lapse in May 2014. No further extensions will be granted after this time.

3.6 Retail Centres Strategy Review

- i. Leyshon Consulting prepared the *Wyong Shire Retail Centres Strategy Review* for Wyong Shire in September 2007. This study reviews the existing retail network and also makes recommendations on future centres. In relation to the Wadalba Woolworths proposal, key points to note from the Leyshon study include:
 - An additional 146,700 to 156,000 sq.m of retail floorspace will be supportable in the Wyong Shire over the period to 2031.
 - In the Northern Wyong area, which includes Wadalba and surrounds, the additional retail floorspace over the period to 2031 is projected at 89,784 sq.m, including 8,831 sq.m for Village/Neighbourhood Centres.
 - Stage 1 of the Warnervale Town Centre of 15,000 sq.m is recommended over the period 2006 - 11, with Stage 2 of 10,000 sq.m recommended over the period 2016 - 21.

- A new Village Centre of 5,000 sq.m is recommended for a site at Wadalba East (around the Pearce Road and Wahrenonga Road intersection) over the period 2011 - 16.
- ii. As mentioned earlier, discussions with New South Wales Planning indicate that Stage One of the planned Warnervale Town Centre is currently expected to open in Christmas 2016. It is important to note that this timeframe will only be met if there are no complications in the approval or construction process. As such, the population is currently not having their needs met in terms of supermarket floorspace, with this unlikely to change until post 2016.
- iii. In addition, the 'Village Centre' at Wadalba East recommended before 2016 by Leyshon has not advanced. On this basis, there is an overwhelming current and future need and demand for additional supermarket floorspace, more so than that presented in the Leyshon review prepared in 2007.
- iv. The proposed Wadalba Woolworths would represent an opportunity to provide a convenient supermarket offer for the current and growing Wadalba population who currently must travel a round trip of around 10 km to access a major full-line supermarket offer (3,000 sq.m or larger).
- v. As shown on Map 3.2, the proposed Wadalba Woolworths site is situated less than 2 km from the recommended Wadalba East 'Village Centre' location and within 3 km of the planned Warnervale Town Centre.
- vi. Supermarket Centres/Village Centres typically serve catchments in the order of a 2 km radius. Given this, there is significant overlap between the Wadalba Village Centre site (including the existing Coles and proposed Woolworths supermarkets) and the recommended future Wadalba East 'Village Centre.'
- vii. As such, the population in the area surrounding the proposed Wadalba East 'Village Centre' will be conveniently served by the existing Wadalba Village Centre, particularly if the precinct is provided with a major full-line supermarket (i.e. the proposed Wadalba Woolworths). This would prevent the need to fragment the retail

offer within the Wadalba area and allow retail floorspace to be provided in one easily accessible, highly identifiable site.

- viii. The proposed Wadalba Woolworths would serve the Wadalba East catchment and, importantly, reinforce the existing Coles supermarket and future specialty provision as the destination for food and grocery shopping in Wadalba/Wadalba East area. This would enable retail facilities within Wadalba to be consolidated at one easily accessible location, serving the recent and future growth areas planned throughout the Wadalba area.
- ix. Additionally, providing a major full-line supermarket at Wadalba would offer an alternative full-line supermarket destination to the very busy Lake Haven Shopping Centre. The Woolworths and Coles supermarkets at this centre both trade very strongly, reflecting the lack of supermarket floorspace that has been provided for a growing population as well as the popularity of major full-line supermarket facilities within the North Wyong area.
- x. As the Warnervale Town Centre is developed, the significant resident population immediately surrounding this centre would support additional supermarket floorspace, allowing for both the Wadalba Woolworths and the planned Warnervale Town Centre to be supportable. This issue will be explored in further detail in Section 5.

MAP 3.2 – WADALBA AND WADALBA EAST VILLAGE CENTRES



3.7 Summary

- i. The main trade area population is currently served by a small Coles supermarket of 1,500 sq.m at Wadalba. This store is significantly smaller than a major full-line supermarket of at least 3,000 sq.m.
- ii. In order to frequent a major full-line supermarket, residents must travel a round trip of approximately 10 km to Lake Haven Shopping Centre, which is also the location of the nearest Woolworths supermarket. Lake Haven Shopping Centre is a very busy centre, with the two supermarkets trading very strongly.
- iii. It is important that a range of convenience based retail facilities are provided in close proximity to residents' homes. A major full-line Woolworths supermarket of 3,200 sq.m at the proposed site would provide the growing local population with additional choice for their food and grocery needs and will also promote price competition within the local area. Importantly, the supermarket would provide convenience for the growing Wadalba population, who currently have to travel a round trip of 10 km to frequent major full-line supermarket facilities.
- iv. The information provided in the *Wyang Shire Retail Centres Strategy Review* indicates that at least two new retail precincts should be provided to the Wadalba/Warnervale area prior to 2016. It is highly unlikely that either of these sites will be developed over this period. On this basis, there is an overwhelming current and future need and demand for additional supermarket floorspace, more so than that presented in the Leyshon review prepared in 2007.
- v. The addition of a major full-line supermarket to the Wadalba Village Centre would reinforce the precinct as the major destination for food and grocery shopping within the Wadalba area, enabling retail facilities within Wadalba to be consolidated at one easily accessible, highly identifiable location and preventing the fragmentation of the Wadalba retail offer.

4 ASSESSMENT OF POTENTIAL FOR RETAIL FACILITIES

This section of the report considers the sales potential for the retail component of the proposed Wadalba Woolworths, as well as the likely trading and other impacts that can be anticipated following the construction of the proposal.

4.1 Sales Overview

- i. In order to assess the potential economic benefits and impacts that may arise from the development of the proposed Wadalba Woolworths, the sales level which the development is projected to achieve is outlined.
- ii. The sales performance of any particular retail facility, be it an individual store or a collection of stores provided in a shopping centre or precinct, is determined by a combination of the following critical factors:
 - The composition and quality of the facility, including the major trader or traders; the specialty mix; centre layout and configuration; ease of accessibility and parking; and the overall feel of the centre.
 - The size of the available catchment which the facility serves.
 - The locations and strengths of competitive retail facilities.
- iii. The sales potential for the retail component of the proposed Wadalba Woolworths, which would be anchored by a supermarket of 3,200 sq.m and one specialty shop, is now considered taking into account these factors.

4.2 Supermarket Sales Potential

- i. The proposed Wadalba Woolworths will be anchored by a Woolworths supermarket of 3,200 sq.m. Supermarkets generate sales primarily from the food and groceries market, as discussed and measured in Section 2 of this report.

- ii. Table 4.1 details the potential sales for the proposed Woolworths supermarket at Wadalba. The calculations in this Table go through a series of steps, commencing with the available expenditure that is of relevance to supermarkets, namely food and grocery spending; assessing the share of the expenditure which all supermarkets are likely to achieve; and then concluding with the likely sales which trade area supermarkets can expect to generate.
- iii. The assessment detailed in Table 4.1 is based on the experience of many comparable analyses in locations throughout both New South Wales and Australia. Projected sales are detailed for all existing and proposed supermarkets within the main trade area, including a new Woolworths supermarket of 3,200 sq.m at the proposed site as well as the existing Wadalba Coles supermarket of 1,500 sq.m. No other supermarkets are assumed to open in the defined main trade area. Supermarkets are defined as grocery and dry goods stores of at least 500 sq.m. Smaller foodstores (i.e. less than 500 sq.m) are excluded from this analysis.
- iv. The analysis in Table 4.1 is as follows:
 - For the main trade area defined earlier in this report, the total food and grocery spending market is projected at \$52.5 million for the year to June 2012. This market is projected to grow to \$58.7 million by 2015 and further to \$90.2 million by 2026 (in constant 2012 dollar terms).
 - Typically in Australia, approximately 75% of food and grocery expenditure is directed to supermarkets and major foodstores (i.e. grocery stores greater than 500 sq.m), not including small corner stores, convenience stores and milk bars. This ratio does vary from location to location depending on the provision of such facilities and the socio-economic profile of the trade area population.
 - In the defined Wadalba Woolworths main trade area, the proportion of spending to supermarkets is currently estimated at 70% and is projected to increase to 75% with the addition of the proposed Woolworths supermarket at Wadalba.

TABLE 4.1 – SUPERMARKET SALES POTENTIAL

	Financial Year				
	2012	2015	2017	2021	2026
Total Food & Grocery (F&G) Spending					
Main Trade Area	52.5	58.7	63.6	74.2	90.2
F&G Spending to Supermarkets					
Main Trade Area (@ 70% incr. to 75% in 14/15)	36.8	44.0	47.7	55.6	67.7
F&G Spending Retained by TA Smkts					
Main Trade Area (@ 47.5% incr. to 77.5% in 14/15)	17.5	34.1	36.9	40.3	49.1
F&G Sales from Beyond TA (@ 10%)	<u>1.9</u>	<u>3.8</u>	<u>4.1</u>	<u>4.5</u>	<u>5.5</u>
Total F&G Sales for TA Smkts	19.4	37.9	41.0	44.8	54.5
Woolworths Packaged Liquor Sales	<u>0.0</u>	<u>2.0</u>	<u>2.2</u>	<u>2.4</u>	<u>2.9</u>
Total FLG Smkt Sales	19.4	39.9	43.2	47.2	57.4
General Merchandise Sales (@ 6%)	<u>1.2</u>	<u>2.5</u>	<u>2.8</u>	<u>3.0</u>	<u>3.7</u>
Total TA Smkt Sales	20.6	42.5	46.0	50.2	61.0
Smkt Floorspace in TA (sq.m)**	1,500	4,700	4,700	4,700	4,700
Average Trading Level (\$/sq.m)	13,765	9,036	9,779	10,680	12,986
Distribution of TA Smkt Sales					
Wadalba Woolworths	0.0	25.4	27.4	30.0	36.4
Other TA Supermarket(s)**	<u>20.6</u>	<u>17.1</u>	<u>18.5</u>	<u>20.2</u>	<u>24.6</u>
Total TA Smkt Sales	20.6	42.5	46.0	50.2	61.0
*Constant 2011/12 dollars & Including GST					
**The only existing supermarket in trade area as at January 2013 is Coles at Wadalba.					

LOCATION

- The next step in the analysis is to estimate the likely proportion of food and grocery expenditure which can be retained by main trade area supermarkets; specifically the proportion of expenditure that can be retained by the existing and proposed supermarket facilities within the main trade area as compared with the spending directed to supermarkets outside the main trade area at locations such as Lake Haven, Tuggerah, Toukley and San Remo.

- It is estimated that 47.5% of the food and grocery spending directed to supermarkets is retained by the existing Coles supermarket at Wadalba. After the addition of the proposed Woolworths supermarket at Wadalba, the level of retained spending is projected to increase to 77.5%. Retained spending will decrease to 72.5% after the opening of Warnervale Town Centre in 2017/18.
 - This means that 22.5% of main trade area resident supermarket spending, over \$9.9 million, will still escape the trade area to supermarkets at Lake Haven in 2014/15 and, in the future, supermarkets at the Warnervale Town Centre.
 - Additionally, an estimated 10% of total supermarket sales are likely to be attracted from beyond the defined main trade area reflecting the high profile location of the proposed site along the major Pacific Highway.
- v. The steps detailed above generate the annual estimates of food and grocery spending available to supermarkets within the main trade area. On this basis, after the Wadalba Woolworths supermarket development, this figure is projected at \$37.9 million in 2014/15. These projected figures do not include retail inflation, thus the increase shown over this time period reflects real growth.
- vi. Finally, in order to estimate the total likely sales volume available to main trade area supermarkets, additional components of sales other than food and grocery sales is taken into account. The major component of sales other than food and grocery sales that supermarkets typically include are general merchandise/non-food items and liquor. Non-food items typically generate around 6% of total store sales for modern supermarket chains. The liquor component of the proposed supermarket is projected to achieve approximately \$2.0 million in sales. The existing Coles supermarket does not include a liquor component.
- vii. On this basis, the total volume of sales available to main trade area supermarkets is estimated to increase from the current level of around \$20 - \$21 million to \$42.5 million in 2014/15 and further to \$61.0 million in 2025/26 (including the impact from Warnervale Town Centre).

- viii. The existing Coles supermarket at Wadalba is estimated to be recording sales of around \$13,700 per sq.m, which is significantly higher than the average sales level recorded by major supermarkets throughout Australia of around \$8,000 - \$8,500 per sq.m.
- ix. After the addition of the proposed Woolworths supermarket at Wadalba in 2014/15, the average trading level for the supermarkets provided within the main trade area is projected at around \$9,000 per sq.m. Over time, sales for main trade area supermarkets (excluding inflation), would be expected to increase to \$12,986 by 2025/26, well above the comparable Australian average.
- x. At the bottom of Table 4.1, the distribution of sales for the Wadalba Woolworths supermarket as compared with the other supermarkets in the main trade area (in this case, the only other supermarket is the existing Coles supermarket at Wadalba) is detailed. The proposed Wadalba Woolworths supermarket is projected to achieve sales of \$25.4 million in 2014/15 with sales for the Coles at Wadalba (the only other main trade area located supermarket) projected at \$17.1 million.
- xi. Post the addition of the Wadalba Woolworths supermarket, the existing Coles supermarket is still projected to achieve an average sales volume above the Australian average, at over \$11,400 per sq.m. This supermarket would still be viable. Further, the trading levels of all main trade area supermarkets will increase rapidly overtime reflecting population growth.
- xii. In Australia, there is one major supermarket of 3,000 sq.m provided for every 8,000 – 9,000 persons. On this basis, the main trade area population would support at least one major supermarket. Currently, the Coles supermarket at Wadalba is a small format store of 1,500 sq.m. Consequently, significant supermarket spending would be escaping to major full-line supermarkets beyond the main trade area, particularly to the very successful Woolworths and Coles stores at Lake Haven Shopping Centre. There is significant need for additional supermarket floorspace and choice of brands within the Wadalba main trade area.

- xiii. Taking the above into account, there is clearly demand for a major full-line supermarket of 3,200 sq.m at Wadalba in the short term. The addition of a supermarket of this scale would allow main trade area residents to undertake a full weekly shop locally.

4.3 Total Centre Sales Potential

- i. The proposed Wadalba Woolworths will be anchored by a supermarket of 3,200 sq.m (including liquor) as well as specialty floorspace of 80 sq.m.
- ii. Table 4.2 provides a summary of the projected sales by component for the proposed Wadalba Woolworths development. All sales forecasts include GST and are presented in constant 2012 dollar terms (i.e. excluding retail inflation).
- iii. Projected sales for the proposed Wadalba Woolworths development in 2014/15 are \$25.8 million (in constant 2012 dollar terms), with the proposed supermarket achieving sales of \$25.4 million.
- iv. Based on an indicative composition and inspection of existing retail facilities within the North Wyong area, the proposed retail specialty floorspace at the Wadalba Woolworths development is assumed to achieve retail specialty sales of around \$6,000 per sq.m. Based on this trading level, the 80 sq.m of retail specialty floorspace is projected to achieve sales of \$0.5 million (i.e. 80 sq.m of retail specialty shop floorspace multiplied by \$6,000 per sq.m).
- v. The limited specialty offer at the proposed Wadalba Woolworths is assumed to complement the Woolworths supermarket in serving the weekly shopping needs of local residents. This floorspace will also complement the specialty floorspace currently under construction within Wadalba, enhancing the precinct as the major convenience shopping destination. As only a small provision of specialty floorspace is proposed, this is unlikely to impact on other specialty shops in the area.

TABLE 4.2 – PROJECTED CENTRE SALES, 2014/15

Tenant/ Category	GLA (sq.m)	Average Sales	
		(\$'000)	(\$/sq.m)
<u>Majors</u>			
Woolworths Supermarket	<u>3,200</u>	<u>25,353</u>	<u>7,923</u>
Total Majors	3,200	25,353	7,923
Retail Specialties	80	480	6,000
Total Retail Floorspace	3,280	25,833	7,876

**Constant 2011/12 dollars & including GST*

LOCATION

4.4 Sales Impacts

- i. This sub-section of the report outlines the likely sales impacts on competitive retail facilities as a result of the development of the retail component of the proposed Wadalba Woolworths.
- ii. It is important to note that impacts outlined in this report are indicative as it is difficult to precisely project the sales impact of the opening of a new store/centre on existing retail facilities. A number of factors can influence the impact on individual centres/retailers, including but not limited to:
 - Refurbishment/improvements to existing centres.
 - Expansions to existing centres.
 - Loyalty programs of existing retailers.
 - The existing centre mix and how it competes with the proposed development.
- iii. For all these reasons and other similar factors, sales impacts outlined in this report should be used as a broad indication.
- iv. Table 4.3 outlines projected sales impacts from the retail component of the proposed Wadalba Woolworths. The steps involved in assessing the sales and impacts on competitive centres are presented as follows:

- Step 1 - Estimates sales levels for existing centres in the 2012 financial year.
- Step 2 - Projects sales for existing and proposed centres in the 2015 financial year, the assumed first full year of trading for the proposed Wadalba Woolworths development. These projections allow for retail market growth and new retailers/centres. All sales projections in 2014/15 are presented in constant 2012 dollars (i.e. excluding inflation).
- Step 3 - Outlines the change in sales at each centre in 2014/15 as a result of the Wadalba Woolworths development. Again, all sales are expressed in constant 2012 dollars.
- Step 4 - Shows the impact on sales in 2014/15, both in dollar terms and percentage of sales.

TABLE 4.3 – WADALBA WOOLWORTHS PROJECTED CENTRE IMPACTS, 2012 - 2015

	Unit	Estimated 2012	Projected 2015 Pre Dev. Post Dev.		Impact 2015 \$M %	
<i>Wadalba Woolworths</i>	<i>\$M</i>	<i>n.a.</i>	<i>n.a.</i>	<i>25.8</i>	<i>n.a.</i>	<i>n.a.</i>
Within Trade Area						
Wadalba ¹	\$M	21.0	31.0	25.7	-5.3	-17.1%
Beyond Trade Area						
Lake Haven SC	\$M	259.0	277.5	265.0	-12.5	-4.5%
Kanwal Village	\$M	12.0	13.6	12.9	-0.7	-5.0%
Wyong ¹	\$M	91.3	122.5	118.5	-4.0	-3.2%
Westfield Tuggerah	\$M	469.4	515.5	514.2	-1.3	-0.2%

*Constant 2011/12 dollars & including GST

¹ Proposed centres and expansions assumed to be trading for a full year by FY2015

LOCATION

v. The key information outlined in Table 4.3 is summarised as follows:

- The proposed Wadalba Woolworths development is projected to record sales of \$25.8 million in 2014/15.
- Of this total, some \$5.3 million is projected as a result of a redirection of spending from retail facilities in the main trade area (primarily the existing Coles supermarket and provision of specialty shops currently under construction), with

the remainder (\$20.5 million) being a reduction in expenditure from facilities beyond the main trade area. Of this remaining impact, some \$2.1 million is likely to result in small impacts on a range of retail facilities beyond the main trade area that are not currently represented in this analysis.

- As discussed in the previous sub-section, the Coles supermarket at Wadalba would be impacted but future population growth will result in sales increases overtime to levels well above the Australian average. Additionally, the Wadalba precinct is currently being expanded to include 1,473 sq.m of specialty floorspace. This additional specialty floorspace would benefit from the additional customer flows generated by a major full-line Woolworths supermarket and would not be detrimentally impacted by the small provision of specialty floorspace planned (80 sq.m).
- Beyond the defined main trade area, the highest projected impact is likely to fall on Lake Haven Shopping Centre, at \$12.5 million or 4.5%. This impact would largely be on the major full-line Woolworths and Coles supermarkets at this centre, which are both trading very strongly. This level of impact would not threaten the viability of these supermarkets which would still trade at levels well above the Australian average. Total centre sales in 2014/15, allowing for the proposed Wadalba Woolworths, would still be higher than current sales.
- Other smaller supermarket based precincts within the surrounding region, namely the Wyong Town Centre and Kanwal Village, are projected to be impacted less than \$4 million and less than \$1 million, respectively. This level of impact would not threaten the viability of retailers/centres within either of these precincts.
- A small projected impact of around \$1.3 million is likely to fall on Westfield Tuggerah.
- The projected sales impact on centres beyond the main trade area that are not listed in Table 4.3 of \$2.1 million is likely to be spread across a range of centres

and would not impact in the viability of any of these centres. Centres likely to share this impact include, Toukley Town Centre and Northlakes Shopping Centre at San Remo.

- vi. It is important to note, that each of these impacts will be one-off impacts resulting from the opening of the Wadalba Woolworths. Each of these centres are likely to benefit in the future from population growth within the North Wyong area, with the retail spending market within the Wadalba Woolworths main trade area alone projected to increase by \$99.3 million to \$226.3 million over the period to 2026 (excluding inflation). Sales from the proposed Wadalba Woolworths development, at \$25.8 million, would only represent some 26.0% of this projected main trade area spending growth.
- vii. Overall, the proposed Wadalba Woolworths will not impact on the viability or continued operation of any retail facility in the main trade area or the surrounding region. The proposed development will be convenience based and will provide additional choice and competition for one of the major items of the household budget, namely weekly the food and grocery shop.

4.5 Employment and Consumer Impacts

- i. The development of the proposed Wadalba Woolworths will result in a range of important economic benefits which will be of direct benefit to the local community. These key positive employment and consumer impacts will include the following:
 - The provision of a wider range of shopping facilities for local residents, including a major full-line Woolworths supermarket and retail specialty floorspace in a convenient centralised location.
 - The retail component of the development is projected to employ around 165 persons as summarised in Table 4.4. Taking a conservative view and allowing for an estimated 10% of the total increase to be as a result of the reduced employment at existing retail facilities, the net additional jobs are estimated at 148.

- The additional 148 permanent retail employees would earn an average annual wage of around \$28,800 as sourced from the ABS. This represents an additional \$4.3 million in salary and wages for the local economy, directly as a result of the retail component of the proposed development.
- Further jobs would be created from the supplier induced multiplier effects as a result of the retail jobs for the on-going running of the retail component of the proposed Wadalba Woolworths. Jobs created are full-time equivalent jobs, which may include both full-time and part-time positions. In total, some 141 jobs are projected to be created in the broader community, based on ABS Input/Output Multipliers (refer Table 4.5).
- The proposed Wadalba Woolworths will create a substantial number of additional jobs, both for the construction and related industries during the construction phase of the development and for the economy generally once the development is completed.
- The estimated total capital costs for the construction of the development are \$10 million. By using the appropriate ABS Input/Output Multipliers that were last produced in 1996/97 and a deflated estimated total capital cost of construction of \$7.9 million (i.e. in 1996/97 dollars), it is estimated that the construction period of the proposed Wadalba Woolworths development would create some 55 jobs (refer Table 4.6).
- The additional construction jobs (55), will result in a further 88 jobs in the broader community based on ABS Input/Output Multipliers (refer Table 4.6). As a result, in total some 143 jobs are likely to be created both directly and indirectly as a result of the proposed Wadalba Woolworths.
- Retail is a significant employment generator for young people. This will be important for the Wadalba area, which accommodates a large family based population.

- ii. The proposed petrol station at the site would also result in cheaper petrol for residents by way of a convenient location to redeem discount fuel docketts. The Report of the ACCC Inquiry into the price of unleaded petrol, December, 2007, Section 12.1 states in part that:

"AAA submitted the results of ANOP's AAA Survey of Motorists Attitudes 2007, which found that 79 per cent of motorists surveyed have used shopper docketts and 48 per cent of these were regular users. The survey also found that regular use of shopper docketts had increased from 19 per cent in 2003 to 40 per cent in 2005 and 48 per cent in 2007. It also found that consumers who use shopper documents are relatively price conscious."

- iii. The proposed Wadalba Woolworths site would offer a high exposure, easily accessible location for residents of the northern part of the Central Coast to redeem discount fuel docketts.

TABLE 4.4 – ESTIMATED PERMANENT EMPLOYMENT

Type of Use	Estimated Employment Per '000 sq.m	Wadalba Woolworths	
		Change in GLA (sq.m)	Employment (persons)
Supermarket	50	3,200	160
Retail Specialty Shops	60	<u>80</u>	<u>5</u>
Total Centre¹		3,280	165
Net Increase²			148
1. Excludes non-retail components. 2. Net increase includes an allowance for reduced employment levels at impacted centres estimated at 10% of the total increase			

LOCATION

TABLE 4.5 – ESTIMATED EMPLOYMENT IMPACT

Original Stimulus	Direct Employment	Supplier Employment Multiplier Effects	Total
Centre Employment ¹	148	141	289
* Employment totals include both full-time and part-time work 1. Indicates the estimated number of net additional ongoing jobs as a result of the proposed development Source : Australian National Accounts: Input-Output Tables 1996-97			

LOCATION

TABLE 4.6 – ESTIMATED CONSTRUCTION EMPLOYMENT IMPACT

Original Stimulus	Estimated Capital Costs (\$M) ¹	Direct Employment	Supplier Employment Multiplier Effects	Total
Construction of Project	7.9	55	88	143 Job Years ²
* Employment totals include both full-time and part-time work 1. Adjusted by inflation and productivity to 1996/97 Dollars 2. Indicates the estimated number of jobs over the life of the construction project plus ongoing multiplier effects, for the equivalent of one year Source : Australian National Accounts: Input-Output Tables 1996-97				

LOCATION

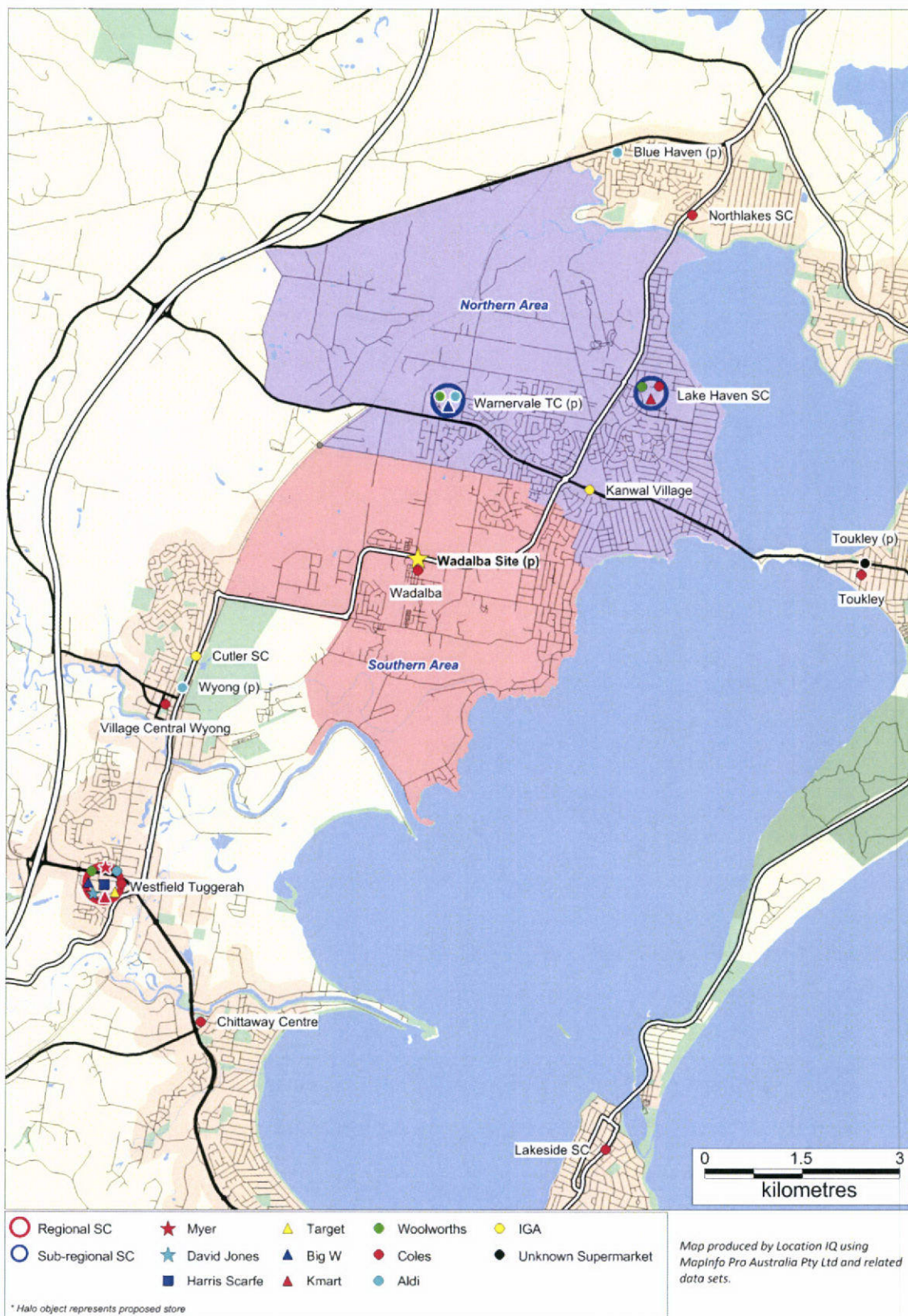
5 NEED AND DEMAND FOR SUPERMARKET FLOORSPEACE

This section reviews the need and demand for additional supermarket floorspace as well as the implications of the proposed Wadalba Woolworths development for the planned Warnervale Town Centre.

5.1 Study Area Definition

- i. In order to review the need and demand for additional supermarket floorspace in the area surrounding Wadalba at present and in the future, we have defined a region that includes the Wadalba Woolworths main trade area (referred to as the southern area), as well as an area to the north which is defined as the northern area and is limited by the Motorway Link to the north and Warnervale Road to the south. This area encompasses the suburbs of Warnervale, Gorokan, Lake Haven, Charmhaven, Woongarrah and Wallarah.
- ii. The defined northern and southern areas are illustrated on Map 5.1 and represent the area considered to be the primary catchment for the planned Warnervale Town Centre. The combination of the two sectors is referred to as the 'study area' throughout the remainder of this section. In addition to this area, the planned Warnervale Town Centre would also draw from the wider region reflecting the scale and composition of the centre which would be based on a discount department store.
- iii. Lake Haven Shopping Centre and the planned Warnervale Town Centre are sub-regional shopping centres that serve large catchments courtesy of the size and quality of offer at these centres. Taking into account the offer/planned offer of these centres, we believe that in the order of 30% of business for these centres would likely be attracted from beyond the defined study area. As such, the study area supermarket floorspace analysis in the following sub-section is a very conservative assessment and consideration of business generated by residents of the wider area needs to be factored into the analysis.

MAP 5.1 – DEFINED STUDY AREA



5.2 Supermarket Demand

- i. Table 5.1 provides a summary of the current and projected supermarket floorspace demand generated by the study area population. The analysis outlined in the Table is as follows:
 - The current and projected population of the study area is summarised. The current population of 35,280 is projected to increase to 54,140 persons by 2026. This represents average annual growth of 1,350 persons or 3.1% over this period.
 - The supermarket demand is derived by multiplying the study area population by the non-metropolitan Australian average of 380 sq.m of supermarket floorspace per 1,000 persons. This derives a simple demand for supermarket floorspace.
 - The current supply of supermarket floorspace in the study area is detailed, including Coles at Wadalba, IGA at Kanwal Village and Woolworths and Coles supermarkets at Lake Haven Shopping Centre. The proposed Wadalba Woolworths of 3,200 sq.m is also included from 2014/15 (the assumed first full year of trading) and Warnervale Town Centre from 2017/18 (the assumed first full year of trading).
 - The difference between supermarket floorspace demand and supply is indicated. The current under supply of supermarket floorspace required by study area residents is some 2,691 sq.m (i.e. additional spending likely to be attracted from beyond the study area is excluded).
- ii. However, consideration of the draw of Lake Haven Shopping Centre and the planned Warnervale Town Centre also needs to be factored in. We conservatively estimate that these centres would generate around 30% of total sales from beyond the defined study area, generating additional demand for supermarket floorspace.

- iii. The bottom of Table 5.1 summarises the shortfall of supermarket floorspace within the study area allowing for additional demand from beyond the study area. We have taken a conservative view that allows for an additional 15% of supermarket floorspace demand to be generated by residents from beyond the study area. This takes into account the following:
- It is estimated that Lake Haven Shopping Centre and Warnervale Town Centre would attract around 30% of total sales from beyond the study area.
 - Wadalba Coles and the proposed Wadalba Woolworths would attract a lower proportion of business from beyond the study area than the larger sub-regional shopping centres, in the order of 10%.
 - The IGA at Kanwal Village is likely to attract a relatively small proportion of business from beyond the study area, in the order of 5%.
 - Some study area resident supermarket spending would escape to centres beyond the study area including San Remo (Northlakes Shopping Centre), Tuggerah and Toukley.
- iv. As shown, allowing for an additional 15% of supermarket floorspace demand to be generated by residents beyond the study area, indicates that there is currently an undersupply of supermarket floorspace of 4,701 sq.m in 2012 that would increase each year with population growth. This indicates that the proposed Wadalba Woolworths of 3,200 sq.m is already supportable.
- v. After the proposed Wadalba Woolworths opens in 2014/15, there would still be an estimated shortfall of supermarket floorspace of some 2,536 sq.m.
- vi. The supermarket floorspace provision will be slightly oversupplied after the opening of the Warnervale Town Centre (first year 2017/18), which will add a Woolworths of 4,807 sq.m and an Aldi of 1,480 sq.m. A slight over provision of retail floorspace in the initial years typically occurs with new developments, particularly developments of the scale proposed at Warnervale Town Centre (i.e. sub-regional shopping centres

with two supermarkets). Retail developments are generally lumpy by nature, given the costs associated with large scale development, and therefore are generally built larger than required at the time in order to cater for future population growth.

- vii. It is important to note that this slight over supply will only occur in the initial years, with the strong population growth leading to an under supply of supermarket floorspace by 2026 of 3,494 sq.m.
- viii. Taking all of the above into consideration, substantial scope would exist for the supermarkets at both the Woolworths Wadalba development and the planned Warnervale Town Centre.
- ix. Based on the simple metric of one major full-line supermarket of 3,000 sq.m for every 8,000 – 9,000 persons, the northern area could alone support three major full-line supermarkets. This area currently only has two supermarkets, namely Woolworths and Coles at Lake Haven. There is a significant under provision of supermarket floorspace in this growing part of Wyong, as evidenced by the strong trading performance of the major full-line Woolworths and Coles supermarkets at Lake Haven Shopping Centre. Warnervale Town Centre would be ideally located to serve the recent and future population who are currently only served by Lake Haven Shopping Centre.
- x. The proposed Wadalba Woolworths would serve the growth to the south of Warnervale by providing a convenience offer. Warnervale Town Centre would provide a higher order offer than would draw from the immediate area as well as the broader region.

TABLE 5.1 – STUDY AREA SUPERMARKET FLOORSPACE DEMAND AND SUPPLY

Study Area	Estimated Resident Population		Forecast Population	
	2012	2015	2021	2026
Population				
• Northern Area	23,290	24,490	29,230	35,030
• Southern Area	<u>11,990</u>	<u>13,160</u>	<u>16,110</u>	<u>19,110</u>
Total Study Area	35,280	37,650	45,340	54,140
Average Annual Change (no.)		830	1,260	1,760
Average Annual Change (%)		2.2%	3.1%	3.6%
Floorspace Analysis				
Supermarket Floorspace Demand (sq.m) *	13,400	14,300	17,200	20,600
Supermarket Floorspace Supply (sq.m)**				
• Lake Haven Woolworths	4,265	4,265	4,265	4,265
• Lake Haven Coles	4,244	4,244	4,244	4,244
• Wadalba Coles	1,500	1,500	1,500	1,500
• Kanwal Village IGA	700	700	700	700
• Wadalba Woolworths	0	3,200	3,200	3,200
• Woolworths Warnervale TC	0	0	4,807	4,807
• Aldi Warnervale TC	<u>0</u>	<u>0</u>	<u>1,480</u>	<u>1,480</u>
Total Supermarket Floorspace Demand	10,709	13,909	20,196	20,196
Supermarket Floorspace Over/Under Supply (sq.m)	-2,691	-391	2,996	-404
Floorspace Analysis (allowing for 15% from beyond)				
Supermarket Floorspace Demand (sq.m) *	15,410	16,445	19,780	23,690
Supermarket Floorspace Supply (sq.m)**	10,709	13,909	20,196	20,196
Supermarket Floorspace Over/Under Supply (sq.m)	-4,701	-2,536	416	-3,494
* Assumes 380 sq.m per 1,000 persons ** Defined as 500 sq.m or larger				

6 NEEDS ANALYSIS

The final section of this report summarises the key conclusions of the impact analysis for the proposed Wadalba Woolworths.

‘Need’ or ‘Community Need’ in a planning sense is a relative concept that relates to the overall wellbeing of a community. A use is needed, for example, if it would, on balance, improve the services and facilities available in a locality. The reasonable demands and expectations of a community are important, therefore, in assessing need.

A number of important factors that relate to need, particularly economic need, include:

- Population and supermarket demand.
- Consumer trends.
- Supply of retail facilities.
- Impacts on existing retail facilities.
- Location.
- Net community benefits.

6.1 Population and Supermarket Demand

- i. The Wadalba Woolworths main trade area resident population is increasing, with annual population growth of some 500 persons, or 3.4% over the period to 2026. This growing population base will demand and support a greater range of retail facilities, particularly convenience based facilities including supermarkets.
- ii. The addition of a supermarket at the proposed Wadalba Woolworths development will add competition and choice for local residents as well as provide a convenient major full-line supermarket offer. An additional 7,550 residents are projected throughout the defined main trade area over the period to 2026, indicating significant scope for additional supermarket floorspace.

- iii. In Australia, there is one major supermarket of around 3,000 sq.m provided for every 8,000 – 9,000 persons. On this basis, the main trade area population would currently support a larger supermarket offer than the existing Coles supermarket of 1,500 sq.m. After 2021, the main trade area population would support two major full-line supermarkets.
- iv. As discussed on the previous section, demand already exist for a major full-line supermarket of 3,200 sq.m, with demand for supermarket floorspace within the defined North Wyong study area already exceeding supply by 4,701 sq.m.
- v. Further, there are two Coles supermarkets in the immediate surrounding area (i.e. Wadalba and Lake Haven Shopping Centre), as well as Coles supermarkets at San Remo (Northlakes Shopping Centre), Toukley and Wyong (Village Central Wyong). In contrast, there is only one Woolworths supermarket within 9 km of the site at Lake Haven Shopping Centre. Main trade area residents must undertake a round trip of some 10 km to undertake a Woolworths shop. It is important for residents to have a choice of facilities which also promotes price competition.
- vi. Additionally, the provision of the proposed Woolworths petrol outlet will result in improved convenience for Woolworths customers. The outlet will be conveniently located in the car park of the proposed development, with excellent access provided from the Pacific Highway. Consumers would benefit from an additional petrol station which would allow additional price competition for a major weekly expense item.
- vii. Taking the above into account, there is clearly demand for the proposed Woolworths supermarket at Wadalba, which will add to competition and choice for local residents as well as provide a convenient offer. The addition a major full-line supermarket to Wadalba will provide residents with an offer that allows them to undertake a full weekly shop locally.
- viii. Furthermore, the main trade area population, including a less affluent family population, should be provided with affordable, convenient retail facilities in close proximity to their homes.

6.2 Consumer Trends

- i. There is a strong need for convenience shopping facilities and a wider choice of facilities within close proximity to the homes of Wadalba Woolworths main trade area residents. Consumers visit supermarkets, on average, two to three times a week.
- ii. There is currently only one relatively small Coles supermarket of 1,500 sq.m provided within the Wadalba Woolworths main trade area. This is smaller than a typical full-line supermarket of around 2,500 sq.m and significantly smaller than a major full-line supermarket of around 3,000 sq.m or larger. As such, residents do not have convenient access to a range of food and grocery items in close proximity to their homes. The nearest major full-line supermarkets are provided a round trip of at least 10 km away (namely Lake Haven Shopping Centre).
- iii. Over the past five years, there has been an increasing trend towards convenience shopping. This trend has been largely driven by broader social trends that have resulted in consumers becoming more time poor. These social trends include:
 - Longer working hours.
 - An increase in the numbers of women in the labour force.
- iv. Time pressures are ranked at the top of the list of issues that consumers face when undertaking their regular food and grocery shopping.
- v. As a result of the increasing time pressures that consumers face when it comes to food and grocery shopping, there is growing demand for convenience shopping facilities to meet the needs of local residents. The proposed Wadalba Woolworths will be highly convenience focused and cater to the needs of the current and future main trade area population which will be characterised by time poor traditional families.

- vi. The growing population of the main trade area will demand a high level of convenience for major full-line supermarket shopping, particularly given the large number of families, many of whom are likely to have two working parents, residing within the area.

6.3 Supply of Retail Facilities

- i. The development of the proposed Wadalba Woolworths would provide a major full-line supermarket in addition to a provision of retail specialty shops.
- ii. The proposed supermarket offer would cater to the needs of the local population and allow them to undertake a weekly food and grocery shop in close proximity to their homes.
- iii. The nearest major full-line supermarket to the Wadalba site is located a round trip of approximately 10 km away, indicating a clear need for additional supermarket and specialty floorspace due to the current under provision of facilities. The planned Wadalba Woolworths would provide an increased choice for the surrounding population and an alternative to the larger regional and sub-regional shopping centres for the immediate population to undertake their weekly food and grocery shop.

6.4 Impacts on Existing Retailers

- i. The analysis of impacts provided in the previous section of this report shows the projected impacts on other retailers from the development of Wadalba Woolworths will not threaten the viability or continued operation of any centres.
- ii. The impacts for the proposed supermarket based development are only likely to be experienced by other facilities in the short-term, and these centres stand to benefit from substantial market growth after these impacts have been absorbed.

- iii. The addition of the proposed Woolworths supermarket at Wadalba would reinforce the Coles supermarket and 1,473 sq.m of specialty floorspace currently under construction as the major shopping destination for Wadalba residents.

6.5 Location

- i. The proposed Wadalba Woolworths site is situated adjacent to the existing Coles supermarket and has excellent accessibility and exposure to the surrounding population, being located along the major Pacific Highway.
- ii. In addition, the site is centrally located to community facilities, including the Wadalba Community School and Juniors at Wadalba childcare centre.
- iii. The proposed site is located within a key residential growth area, with some 2,300 lots planned to be provided within Wadalba in the future. Wadalba Woolworths would be well positioned to serve the strong population growth projected immediately within the area. It is a reasonable demand and expectation of the community that a full-line supermarket offer providing essential food and grocery items is located in a growing area.
- iv. Most importantly, the proposed Wadalba Woolworths will be located within the same precinct as existing retail floorspace within Wadalba. This would prevent the need to fragment the retail offer within the Wadalba area and allows retail floorspace to be provided in one easily accessible, highly identifiable location, strengthening the precinct as the major food and grocery destination for main trade area residents.

6.6 Net Community Benefits

- i. It is the conclusion of this report that a substantial net community benefit will result from the development of the proposed Wadalba Woolworths. Offsetting the trading impacts on some existing retailers, there are very substantial positive impacts including the following:

- Significant improvement in the range of retail facilities that will be available to residents, particularly in terms of full-line supermarket retailing. The main trade area is currently not served by a full-line supermarket (i.e. greater than 2,500 sq.m), meaning residents have to travel a round trip of some 10 km to the nearest full-line facility. Currently, residents of the region have little choice in terms of supermarkets and the addition of the proposed Wadalba Woolworths supermarket will likely improve choice and also allow for price competition.
 - Residents of the region should be provided with a wider range of affordable and conveniently located retail specialty shops within close proximity to their homes.
 - The creation of additional employment which will result from the project, both during the construction period, and more importantly, on an ongoing basis once the development is completed and operational. In total, some 432 jobs are likely to be provided both directly and indirectly as a result of the proposed Wadalba Woolworths. This includes a number of youth employment opportunities with retail developments generally employing a large number of younger staff.
 - The reduction in travel time and petrol cost savings for the main trade area population to frequent retail facilities located beyond the main trade area.
- ii. It is concluded that the combination of the substantial positive economic impacts serve to more than offset the trading impacts that could be anticipated for a small number of the existing retail stores, particularly supermarkets, in the region. Further, the impacts would not threaten the viability of any of these retailers or centres or limit the future development of planned/proposed centres.

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APPENDIX D

Summary of Consistency with SEPPs

Schedule of Consistency
State Environmental Planning Policies (including relevant Deemed SEPPs)

SEPP	Not Relevant	Justifiably Inconsistent	Consistent
SEPP No. 1 - Development Standards			√
SEPP No. 2 - Minimum Standards for Residential Flat Development	√ - repealed		
SEPP No. 4 - Development without Consent and Miscellaneous Complying Development			√
SEPP No. 5 - Housing for Older People or People with Disability	√ - repealed		
SEPP No. 6 - Number of Storeys in a Building			√
SEPP No. 7 - Port Kembla Coal Loader	√ - repealed Refer ISEPP		
SEPP No. 8 - Surplus Public Land	√ - repealed Refer ISEPP		
SEPP No. 9 - Group Homes	√ - repealed Refer ISEPP		
SEPP No. 10 - Retention of Low-Cost Rental Accommodation			√
SEPP No. 11 - Traffic Generating Developments	√ - repealed Refer ISEPP		
SEPP No. 12 - Public Housing (Dwelling Houses)	√ - repealed		
SEPP No. 13 - Sydney Heliport	√ - repealed		
SEPP No. 14 - Coastal Wetlands			√
SEPP No. 15 - Rural Land Sharing Communities			√
SEPP No. 16 - Tertiary Institutions	√ - repealed Refer ISEPP		
SEPP No. 17 - Design of Building in Certain Business Centres	√ - did not proceed		
SEPP No. 18 - Public Housing	√ - did not proceed		
SEPP No. 19 - Bushland in Urban Areas			√
SEPP No. 20 - Minimum Standards for Residential Flat Development	√ - repealed		
SEPP No. 21 - Caravan Parks (formerly Movable Dwellings)			√
SEPP No. 22 - Shops and Commercial Premises			√
SEPP No. 23	Not allocated		
SEPP No. 24 - State Roads	√ - did not proceed		√
SEPP No. 25 - Residential Allotment Sizes	√ - repealed		
SEPP No. 26 - Littoral Rainforests			√
SEPP No. 27 - Prison Sites	√ - repealed Refer ISEPP		
SEPP No. 28 - Town Houses and Villa Houses	√ - repealed		
SEPP No. 29 - Western Sydney Recreation Area	√		
SEPP No. 30 - Intensive Agriculture			√
SEPP No. 31 - Sydney (Kingsford Smith) Airport	√ - repealed Refer ISEPP		
SEPP No. 32 - Urban Consolidation (Redevelopment of Urban Land)	√		
SEPP No. 33 - Hazardous and Offensive Development			√
SEPP No. 34 - Major Employment Generating Industrial Development	√ - repealed		
SEPP No. 35 - Maintenance Dredging of	√ - repealed		

Schedule of Consistency
State Environmental Planning Policies (including relevant Deemed SEPPs)

SEPP	Not Relevant	Justifiably Inconsistent	Consistent
Tidal Waterways	Refer ISEPP		
SEPP No. 36 - Manufactured Home Estates			√
SEPP No. 37 - Continued Mines and Extractive Industries	√ - repealed		
SEPP No. 38 - Olympic Games and Related Development	√ - repealed		
SEPP No. 39 - Spit Island Bird Habitat	√		
SEPP No. 40 - Sewerage Works	√ - did not proceed		
SEPP No. 41 - Casino/Entertainment Complex	√		
SEPP No. 42 - Multiple Occupancy and Rural Land (Repeal)	√ - repealed		
SEPP No. 43 - New Southern Railway	√ - repealed Refer ISEPP		
SEPP No. 44 - Koala Habitat Protection			√
SEPP No. 45 - Permissibility of Mining	√ - repealed		
SEPP No. 46 - Protection and Management of Native Vegetation	√ - repealed		
SEPP No. 47 - Moore Park Showground	√		
SEPP No. 48 - Major Putrescible Land fill Sites	√ - repealed Refer ISEPP		
SEPP No. 49 - Tourism Accommodation in Private Homes	Draft only		
SEPP No. 50 - Canal Estates	√		
SEPP No. 51 - Eastern Distributor	√ - repealed Refer ISEPP		
SEPP No. 52 - Farm Dams and Other Works in Land and Water Management Plan Areas	√		
SEPP No. 53 - Metropolitan Residential Development	√		
SEPP No. 54 - Northside Storage Tunnel	√ - repealed Refer ISEPP		
SEPP No. 55 - Remediation of Land			√
SEPP No. 56 - Sydney Harbour Foreshores and Tributaries	√		
SEPP No. 57	Not allocated		
SEPP No. 58 – Protecting Sydney's Water Supply	√ - repealed		
SEPP No. 59 - Central Western Sydney Economic and Employment Area	√		
SEPP No. 60 - Exempt and Complying Development			√
SEPP No. 61 - Exempt and Complying Development for White Bay and Glebe Island Ports	√		
SEPP No. 62 - Sustainable Aquaculture	√		
SEPP No. 63 - Major Transport Projects	√ - repealed		
SEPP No. 64 - Advertising and Signage			√
SEPP No. 65 - Design Quality of Residential Flat Development			√
SEPP No. 67 - Macquarie Generation Industrial Development Strategy	√ - repealed Refer ISEPP		
SEPP No. 69 - Major Electricity Supply Projects	√ - repealed Refer ISEPP		
SEPP 70 - Affordable Housing (Revised Schemes)	√		
SEPP No. 71 - Coastal Protection	√		
SEPP No. 72 - Linear Telecommunications	√ - repealed		

Schedule of Consistency
State Environmental Planning Policies (including relevant Deemed SEPPs)

SEPP	Not Relevant	Justifiably Inconsistent	Consistent
Development – Broadband	Refer ISEPP		
SEPP No 73 – Kosciuszko Ski Resorts	√ - repealed		
SEPP No. 74 - Newcastle Port and Employment Lands	√ - repealed		
SEPP (Seniors Living) 2004	√		
SEPP (Building Sustainability Index: BASIX) 2004			√
SEPP (ARTC Rail Infrastructure) 2004	√		
SEPP (Sydney Metropolitan Water Supply) 2004	√		
SEPP (Development on Kurnell Peninsula) 2005	√		
SEPP (Major Development) 2005			√
SEPP (Sydney Region Growth Centres) 2006	√		
SEPP (Mining, Petroleum Production & Extractive Industries) 2007			√
SEPP (Temporary Structures & Places of Public Entertainment) 2007			√
SEPP (Infrastructure) 2007			√
SEPP (Rural Lands) 2008			√
SEPP (Exempt and Complying Development Codes) 2008			√
SEPP (Western Sydney Parklands) 2009	√		



APPENDIX E

S117 Directions Compliance Summary

Schedule of Consistency S117 Ministerial Directions

	<i>NR: Not Relevant</i> <i>C: Consistent</i> <i>JI: Justifiably Inconsistent</i>			
No.	S.117 (2) Directions	NR	C	JI
1.	Employment & Resources			
1.1	Business and Industrial Zones			√
1.2	Rural Zones	√		
1.3	Mining, Petroleum Production and Extractive Industries	√		
1.4	Oyster Aquaculture	√		
2	Environment & Heritage			
2.1	Environmental Protection Zones	√		
2.2	Coastal Protection	√		
2.3	Heritage Conservation		√	
2.4	Recreation Vehicle Areas	√		
3	Housing, Infrastructure and Urban Development			
3.1	Residential Zones		√	
3.2	Caravan Parks and Manufactured Home Estates	√		
3.3	Home Occupations	√		
3.4	Integrating Land Use and Transport		√	
3.5	Development Near Licensed Aerodromes	√		
4	Hazard and Risk			
4.1	Acid Sulfate Soils		√	
4.2	Mine Subsidence and Unstable Land	√		

Schedule of Consistency S117 Ministerial Directions

	<i>NR: Not Relevant</i> <i>C: Consistent</i> <i>JI: Justifiably Inconsistent</i>			
No.	S.117 (2) Directions	NR	C	JI
4.3	Flood Prone Land	√		
4.4	Planning for Bushfire Protection	√		
5	Regional Planning			
5.1	Implementation of Regional Strategies		√	
5.2	Sydney Drinking Water Catchments	√		
5.3	Farmland of State and Regional Significance on the NSW Far North Coast	√		
5.4	Commercial and Retail Development along the Pacific Highway, North Coast	√		
5.5	Development in the vicinity of Ellalong, Paxton and Millfield (Cessnock LGA)	√		
5.6	Sydney to Canberra Corridor	√		
5.7	Central Coast	√		
5.8	Second Sydney Airport: Badgerys Creek	√		
6	Local Plan Making			
6.1	Approval and Referral Requirements	√		
6.2	Reserving Land for Public Purposes	√		
6.3	Site Specific Provisions		√	
7	Metropolitan Planning			
7.1	Implementation of the Metropolitan Strategy		√	



APPENDIX F

Evaluation Criteria under Draft Centres Policy

REVIEW AGAINST DRAFT CENTRES POLICY

The following information is provided to Wyong Shire Council to assist with the assessment of net community benefit. The information is based on the Evaluation Criteria (p25) provided in the NSW Department of Planning *Draft Centres Policy, Planning for Retail and Commercial Development*.

1. Will the LEP be compatible with agreed State and regional strategic direction for development in the area (eg land release, strategic corridors, development within 800m of a transport node)?

Yes – the amendment is compatible with the Review of the Council's Retail Strategy, the Draft North Wyong Structure Plan and Central Coast Regional Strategy.

2. Is the LEP located in a global/regional city, strategic centre or corridor nominated within the Metropolitan Strategy or other regional/sub-regional strategy?

Yes – Wadalba is nominated as a Village under the Central Coast Regional Strategy, where village is defined under the Metropolitan Plan as "a group of shops and services for daily shopping".

3. Is the LEP likely to create a precedent or change expectations of the landowner or other landholders?

No.

4. Have the cumulative effects of other spot rezoning proposals in the locality been considered? What was the outcome of these considerations?

The cumulative effects of all other spot rezoning proposals in this locality have been considered. This proposal is in response to recent housing growth in Wadalba, Council's Retail Strategy review and consideration that housing growth should be supported by additional retail floor space in existing centres with established infrastructure such as Wadalba. It is envisaged that the scale of the Wadalba centre will be sufficient to serve the Wadalba area and provide the appropriate level of competition. This proposal is of a unique scale and nature which ensures that it is not impacted by any of the other spot rezoning proposals in the wider Wyong area.

5. Will the LEP facilitate permanent employment generating activity or result in a loss of employment lands?

The planning proposal will facilitate permanent employment generating activity and will not result in any loss of employment lands. This planning proposal will achieve an immediate economic stimulus and overall benefit to the community as it will provide much needed shopping and parking facilities in the area as well as generating employment opportunities for local residents.

The size of the Wadalba centre will be adequate to meet the local shopping needs of the residents of Wadalba with provision of a 3,200m² supermarket and 80 m² specialty shop along with a service station.

This planning proposal will enable a retail development to be located on the site which, when operational, has the ability to generate in excess of 228 jobs. In addition, some 55 direct jobs and some 88 indirect jobs will be generated during the construction phase. The proposed retail development has a construction cost estimate of greater than \$14 million dollars.

The employment generating capacity of the development has been considered in an economic impact assessment prepared by Duane Location IQ. This is provided at Appendix D to the planning proposal.

6. Will the LEP impact upon the supply of residential land and therefore housing supply and affordability?

No - the site has been set aside by the Wadlaba Master Plan for the purposes of a motel since the early 2000s and will not have any impact on the supply of residential land, housing supply or affordability.

7. Is the existing public infrastructure (roads, rail, utilities) capable of serving the proposed site? Is there good pedestrian and cycling access?

Is public transport available or is there infrastructure capacity to support future public transport?

Existing public infrastructure is capable of serving the proposed site. There is good pedestrian and cycling access for which the proposed development will support.

Public transport is available (note existing bus stop at frontage of site to Pacific Highway) and there is existing infrastructure to support public transport.

8. Will the proposal result in changes to the car distances travelled by customers, employees and suppliers? If so what are the likely impacts in terms of greenhouse gas emissions, operating costs and road safety?

The proposal will not result in changes to the car distances travelled by customers. The site is served by a road system (including a highway) that also serves nearby commercial precincts. As such, the site integrates with existing transport routes.

9. Are there significant Government investments in infrastructure or services in the area whose patronage will be affected by the proposal? If so what is the expected impact.

There are no significant Government investments of infrastructure or services in the area whose patronage will be affected by this proposal.

10. Will the proposal impact on land that the Government has identified a need to protect (eg land with high biodiversity values) or have other environmental impacts? Is the land constrained by factors such as flooding?

The proposal will not impact on land that the Government has identified a need to protect. The land is not constrained by flooding or other factors.

11. Will the LEP be compatible/complementary with surrounding land uses? What is the impact on amenity in the location and wider community? Will the public domain improve?

The development will enable provision of:

- parking facilities to meet the demand of the retail development;
- new and accessible public amenities/toilet facilities; and
- vibrant streetscape presentations to each street frontage (Figtree Boulevard and Orchid Way), with design elements addressing the major focal point being the pedestrian plaza at the central forecourt of the development to mark the entry from the north, west and south into the proposed centre.

The LEP will be compatible with surrounding land uses, it will have a positive impact on the community and there will be dramatic improvements to the public domain.

12. Will the proposal increase choice and competition by increasing the number of retail and commercial premises operating in the area?

Yes.

13. If a stand alone proposal and not a centre, does the proposal have the potential to develop into a centre in the future?

Yes - it is intended that the proposal will develop as part of the Wadalba centre to adequately meet the local shopping needs of the residents of Wadalba. The centre will have provision of two supermarkets existing Coles and proposed Woolworths with a service station.

14. What are the public interest reasons for preparing the draft plan? What are the implications of not proceeding at that time?

The planning proposal will lead to a positive net community benefit. This includes the following benefits:

- The site's central location in Wadalba with ready access to the Pacific Highway will ensure that the proposed centre will service the needs of the growing Wadalba residential population, while not threatening the primacy of the Wyong or other planned centre's in the Wyong LGA.
- This planning proposal will enable a retail centre to be located on the site which, when operational, has the potential to generate in excess of 228 jobs. In addition, some 55 direct jobs and 88 indirect jobs will be generated during the construction phase.
- The proposed centre has a construction cost estimate of in excess of \$14 million dollars. The employment generating capacity of the development has been specifically considered in an economic impact assessment prepared by Duane Location IQ. This is provided as Appendix D to this planning proposal.
- The size of the proposed centre will be adequate to meet the local shopping needs of the residents of Wadalba with provision of an additional supermarket of 3,200m², a specialty shop of 80m² and service station.
- The site is adjacent to existing and proposed community facilities such as the Wadalba Community School and ADHC Group Home. This enables a clustering of services and provides convenient access to a wide range of services.
- The site in Wadalba is located adjacent to the existing shopping facility and hence encourages multi-purpose trips for the local community.

APPENDIX G

Qualitative Research Report



Proposed Woolworths Supermarket in Wadalba
Qualitative Research Report

GAR0909008

October 2009

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Research Objectives

The main aim of the research was to explore local community opinion towards the proposed Woolworths supermarket in Wadalba, including the perceived pros and cons, the level of support and opposition, and the reasons behind this.

Methodology

The research involved two focus group discussions with residents of Wadalba and surrounds, on the evening of October 7, 2009. In total, 19 people participated in the focus groups, including a mix of males and females of different ages, life stages and employment status, with all participants being the main or joint main grocery shopper in the household. Each group was approximately 1.5 hours in duration. The moderators were Sue Vercoe and Jasmine Hoye.

Top-line

Overall there is solid support for the new store, with the key benefits being increased variety, competition and convenience. However, there are significant concerns about the likely impact on traffic in the immediate vicinity and associated safety issues for children from the adjacent school.

Key Findings

Local Area

Participants had generally either lived on the Central Coast all of their lives or were quite new to the area, and they say the local area is growing quickly. The main reason that people are moving there is because it's possible to buy a new family home relatively cheaply.

Development of new infrastructure is not thought to be keeping pace with development, although there is a sense that this will improve. The most significant problem is seen as lack of healthcare access (in terms of the one hospital in the area and lack of bulk-billing GPs and paediatric care) and this is expected to be exacerbated by a growing and ageing population and an increase in young families. Traffic congestion is another key concern but residents say work is slowly being done to improve the roads. Many also talk about increasing vandalism, violence and crime, brought on largely by youth boredom - however some have not observed this and others say that it's common on the Central Coast.

When asked what they would like to see more or less of, a couple of participants spontaneously commented that there is a lack of competition in terms of supermarkets, with others agreeing that the area is dominated by Coles.

There is a sense of an emerging community with some commenting on how neighbours in some areas are all just starting to get to know each other.

In five to ten years time participants expect that the area will have grown significantly. Some comment that it might then be time for them to move to somewhere less congested.

Local Supermarkets

There is a sense that there are enough supermarkets in the area. However, as already noted, quite a few feel there are too many Coles stores and not enough competition and variety. Some also spoke of wanting to support local small businesses.

Locals are very positive about the fact that the Coles opened in Wadalba 18 months to two years ago as it means they no longer have to travel quite as far for their shopping. However, this is by no means the only supermarket that they go to - this is a very price conscious community and most participants actively shop around for the best prices.

Respondents talked about where they go to shop and the table below summarises the main positives and negatives associated with each. The main drivers are prices and specials and variety and convenience, and choice of location is factored into what else has to be achieved on the day. Insufficient parking is a common complaint, along with trolleys that are hard to steer.

Supermarket Used	Positives	Negatives
Coles Wadalba	• Convenient – close to home, and easy to duck in when dropping/picking up kids from school • Easy parking • Not having to be in a shopping centre environment • Prices are reasonable • Don't have to queue for long (although it's gradually getting busier)	• Too small • Lacks variety • Not many specials • Opening hours not long enough • Staff sit out the front smoking – doesn't look good • Kids have to leave their school bags out the front and people trip over them • Best avoided at school pick-up or drop-off time as it's hard to park and busy with school kids and the traffic means it takes a while to get back out onto the Pacific Highway
Coles Lake Haven	• The shopping centre as a whole is not as big as Westfield so easier to get around	• More expensive than Woolworths • Dull and dingy • Nothing on the shelves • Never expanded • Never have all checkouts open • Roof leaks
Woolworths Lake Haven	• Cheaper than Coles • Better layout than Coles • Staff are friendlier than at Coles • Keeps expanding as demand grows • The shopping centre as a whole is not as big as Westfield so easier to get around	• Products not always that fresh

Supermarket Used	Positives	Negatives
Coles Tuggerah (Westfield)	• Sometimes has good specials • A big store with plenty of variety	• Bit far away • Parking can be difficult, especially just after school – and you have to remember to park on the right side of the centre • Long queues • Self-service problems • Gangs on a Thursday night • More expensive than Woolworths
Woolworths Tuggerah (Westfield)	• A big store with plenty of variety • Cheaper than Coles • Good divider trolleys	• Bit far away • Parking can be difficult, especially just after school – and you have to remember to park on the right side of the centre • Long queues • Self-service problems • Gangs on a Thursday night
Aldi Tuggerah (Westfield)	• Cheap • Good specials • Provides extra competition	• Have to pack own purchases • Have to take your own bags • Long queues • Not always open • Limited range
Coles Wyong	• Good parking – underground • Has other shops around it	• Lower roof inside the store • Undesirables hanging around
IGA Kanwal	• Convenient if in the area	• Too small
Coles North Lakes	• New • Big • Lots of variety	• Too cold – “like a fridge”

Quite a few participants said they prefer Woolworths to Coles because they believe the prices are lower and the produce is fresher. They say the Woolworths loyalty card is better than Coles' and that petrol stations that take Woolworths petrol discount vouchers are closer to them than the ones which take Coles vouchers. Other Woolworths advantages are bigger stores, better layout, greater product/brand variety, and staff quality. Many also feel positive about Aldi stores in terms of offering competition, variety and good specials, although this would never become their sole supermarket.

Awareness of Proposed Supermarket in Wadalba

There was no awareness among the group participants that a Woolworths supermarket may be built in Wadalba.

Some said they were aware that new Aldi stores are planned for Wyong and Toukley and a few said they know a new town centre is being planned for Warnervale.

A few older respondents mentioned that a new supermarket, petrol station, kids' playground and pool had been part of the original plans when the Wadalba estate opened around eight years ago and that they had been disappointed that the Coles had taken seven years to appear.

Initial Reaction to Woolworths Wadalba Proposal

While they had previously indicated they did not see the need for more shopping centres in the area, most participants reacted positively when they heard there was a proposal for a new Woolworths in Wadalba.

However, many immediately wanted to know where it would actually be located as they were worried about the impact of increased traffic and the ability of local roads to cope with this. Many had thought it would be on the other side of the Pacific Highway. A few initially thought that it was a bit over the top to have two supermarkets in Wadalba right next to each other but they soon decided they would probably benefit from the competition.

In response to the general concept, the main positives in broad descending order of importance were:

- Increased competition which is expected to lead to better prices and variety
- The convenience of not having to go further afield to shop
- New jobs for the area – perhaps a couple of hundred
- The expectation of additional local community support through sponsorships
- Promotes a sense that Wadalba is growing, which will help attract newcomers and increase local property values

The main negatives in broad descending order of importance were:

- An increase in traffic congestion in what is already thought to be a notorious traffic hotspot
- Safety concerns and accidents arising from the increased traffic, especially for school children and elderly pedestrians if it was to be positioned near the school and/or planned 'group home'. There are also concerns about safety for drivers when turning right out of Figtree Boulevard onto the Pacific Highway
- That the new supermarket will attract louts and more vandalism and violence

The main things the community want to know about the proposed supermarket are: where will it be, when will it be built, how big will it be and what else will be built alongside it (i.e. will it be a stand-alone or have other shops, newsagents, butchers, cafes, and will it have a liquor store).

At this stage of the discussion most were mildly or strongly supportive of the proposal although some said they would remain undecided until they knew exactly where it would be located. One was mildly in opposition because they thought that it was not needed.

Reaction to Information and Concept Plans

After seeing concept plans and reading a fact sheet (see Appendix), most participants were very pleased to see that there would be a petrol station and speciality shops. However, upon seeing the plans, concerns about the increased traffic rose, in terms of both congestion and pedestrian safety. Most did not believe the claim that there would be a minimal impact on traffic, particularly near the school.

The table on the next page summarises the perceived positives and negatives based on all of the information and messages presented to participants, in broad descending order of importance.

Positives	Negatives
• Increased competition to drive down prices • Greater choice – they hope it will be bigger and have a greater range than Coles at Wadalba • The convenience of having a local Woolworths and not having to drive further • The idea of leasing space to specialty stores – preferences were for a newsagent, cafe and bakery ◦ Further increases variety and convenience, making it even more of a one-stop-shop • The petrol station – making it easy to use their Woolworths vouchers • The number of jobs expected was a pleasant surprise and youth apprenticeships appealed (may be a way to help combat local delinquency) • More parking in the area – they say that it will double as a car park for the school – parents will park there at pick-up and drop-off time (the Coles car park is apparently always overflowing at this time) • Potential for local real estate value to rise as Wadalba becomes a more sought after location • The “green store” concept – although this is a given and only one participant said it would probably make them lean towards going there over the Coles	• Concerns about the traffic ◦ Congestion for drivers ◦ Safety for drivers ◦ Safety for pedestrians ◦ Truck movements • Store too big with too many car parking spaces for some – this concern is linked to the amount of traffic expected as most would actually prefer a store that is bigger than the Coles • A fear that there may be an increase in noise, impacting on school students and nearby residents • Concern that the “green store” concept will lead to higher prices • An expectation that the development may attract delinquents to hang out in the car park and thereby lead to increased vandalism • A belief by a few that an additional store is not needed

At the end of the groups, most were still mildly or strong supportive but around a quarter overall were opposed to it because of concerns about traffic – two strongly and two mildly, and a couple had shifted from strong to mild support. Those opposed tended to be women who live in Wadalba and who have children at the school. However, despite their opposition, these women said they would certainly use the new Woolworths shopping centre, some on a daily basis.

Participants had no memory of past rezoning applications for the site and no real awareness of the local Council's planning in relation to retail centres.

Expectations and Desires

There is a resounding expectation that the supermarket will be built, although it isn't expected to be operational for two to three years. With this there is an expectation of increased traffic and increased safety risks both for drivers and pedestrians.

Coles Wadalba is expected to respond to the increased competition by reducing its prices. A few thought it might also expand.

Residents expect the new supermarket will not only provide new jobs but also other benefits to support the local community and attract newcomers to the area, potentially also helping to drive up property values.

When asked what they want to happen (as oppose to expect will happen), most residents generally want the supermarket to proceed. However, there is a strong desire for plans to be re-thought to accommodate and manage the anticipated increased traffic flow. Suggestions included:

- Car park entrances directly from the highway – or truck access at a minimum
- Widening of Figtree Boulevard (e.g. to 2 lanes)
- Right hand arrow for traffic turning right out of Figtree Boulevard onto the Pacific Highway

Some also talked about the frequent flooding of local roads and said this would need to be dealt with.

There is a fear that nothing will be done to address these concerns until there is a serious accident.

A number of participants said they would really like to see a cafe or restaurant as one of the speciality shops to promote the social aspect of the development. There is also a desire that Woolworths have a strategy to stop the car park becoming a 'hangout' for local youth.

Conclusions and Implications

Despite healthy support for the development overall, there is also some opposition that will need to be addressed and managed. This relates primarily to concerns about the anticipated increase in traffic congestion and associated safety risks to both drivers and pedestrians.

There is no sense that the community is organised in any way but some said the most likely source of focussed opposition would be the school P&C committee.

Communications messages should address the following questions:

- **What is the plan?** Where will it be, when will it be built, how big will it be, what other stores are likely to be built alongside it
- **What does it mean for you?** For example - better prices, more variety and choice within and around the store, more convenience - don't have to travel as far for your main grocery shopping or for petrol, possibly a new job
- **What does it mean for the community?** For example - supporting local community groups and individuals through jobs, apprenticeships, sponsorships, which may also attract more new residents and increased local infrastructure, and eventually increased property values
- **Why do we need another supermarket?** Demonstrate the demand and rationale with key facts about the growth in the local area and the need for greater competition to Coles

It will certainly not hurt to include the green store message and although this is not something that is likely to attract customers, it promotes a sense of transparency and goodwill and will help raise awareness of Woolworths' environmental credentials. Residents will need reassurance that the green store approach will not result in increased prices and that indeed, it may help reduce some costs due to cost savings through lower resource use.

APPENDIX

Proposed Woolworths Supermarket in Wadalba - Fact Sheet

Woolworths is considering developing a supermarket on the corner of the Pacific Highway and Figtree Boulevard in Wadalba (as per the images). The site would include:

- A Woolworths supermarket
- Space for 8 to 10 which would be leased and could potentially include a butcher, bakery or newsagent
- A petrol station where discount vouchers can be redeemed
- 250 car spaces

This supermarket would represent an investment of more than \$10 million by Woolworths and is expected to create 450 direct and indirect jobs in the local area, including some apprenticeships for local youth.

Woolworths has evaluated the shopping options in the local area and has noted the undersupply of supermarkets in the immediate area. In particular, it has noted the lack of a full-line stand-alone convenience supermarket. A convenience supermarket is one where customers are able to park directly outside rather than a supermarket contained in a large shopping centre like at Lake Haven. A full-line supermarket is one which contains fresh produce, a deli and a bakery as well as dry goods.

The supermarket would be built as a "green store" in accordance with Woolworths' Corporate Sustainability Strategy. In this strategy, Woolworths is targeting reduction of green house gas emissions by 40% between now and 2015. As part of these efforts, all the materials to be used in construction will be of the latest technology and alternative energy sources will be used where possible.

The site is located off the Pacific Highway and will have minimal traffic impact. It is not expected to lead to an increase in traffic past the Wadalba Community School.

The supermarket would be located adjacent to the Coles at Wadalba. It is expected this may result in increased competition which may drive down prices.

Several years ago Wyong Council refused a Woolworths proposal to rezone the site to make it suitable for a shopping centre development. In 2006, Wyong Council released a Retail Centres Strategy Review, known as the Leyshon Report, which outlined its shopping centre strategy for the area. The Council has not yet approved developments which will enable it to deliver the required space in the indicated time.

Other Woolworths projects in the Wyong area include a \$40 million development in Lake Munmorah (500 direct and indirect jobs) and a \$100 million development of a town centre in Warnervale which is due to open in 2012. In 2007 Woolworths established an \$80 million distribution centre in Wyong (580 direct jobs plus construction jobs).

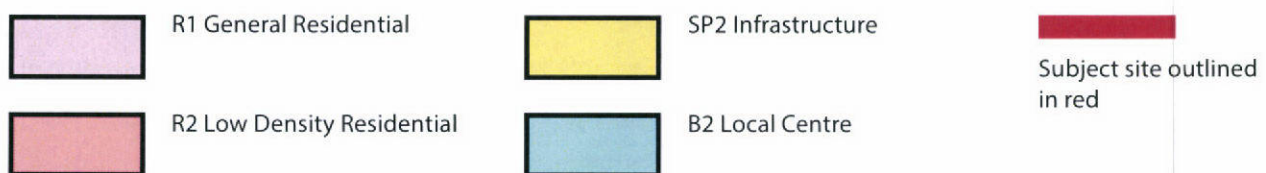
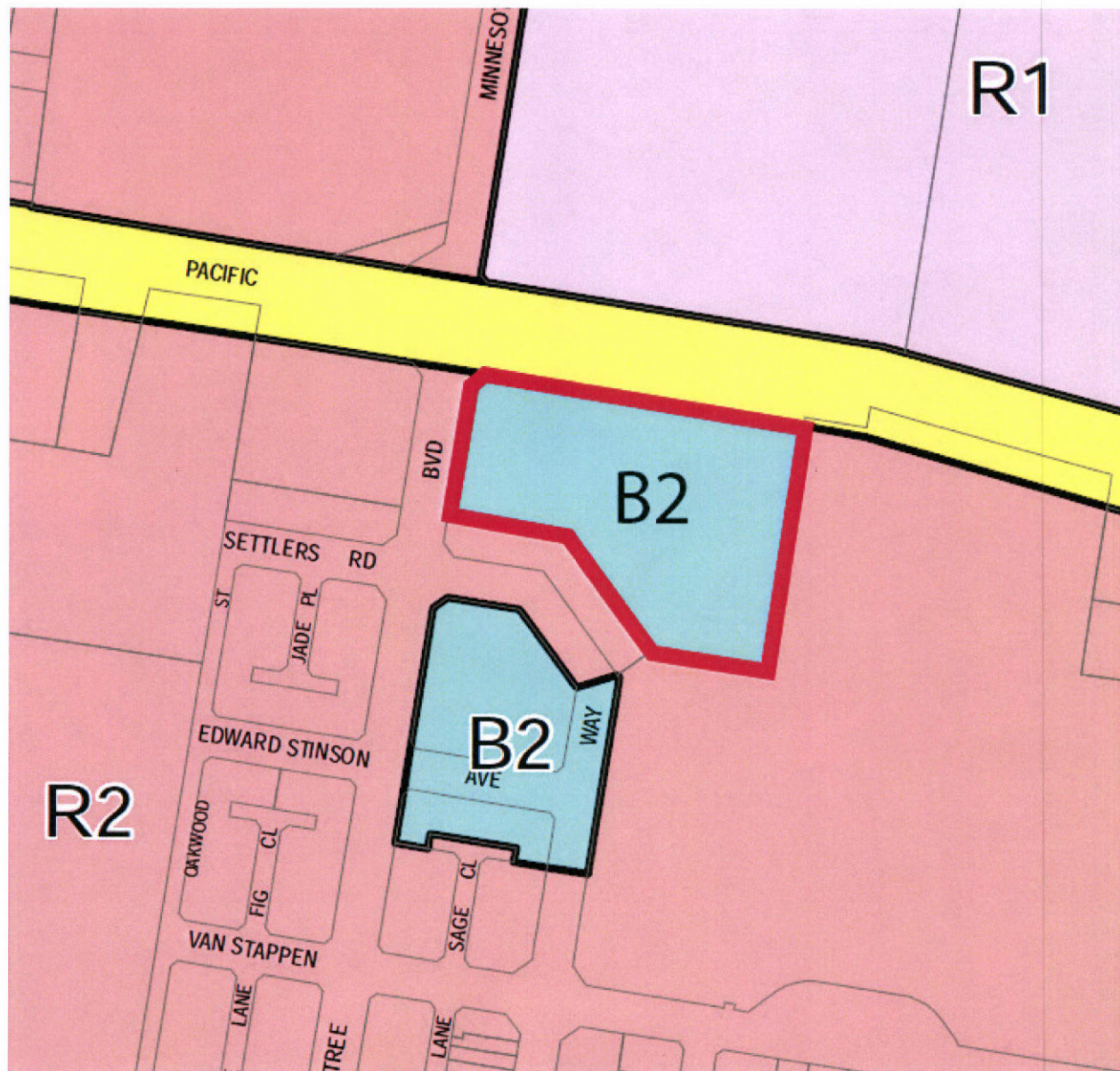
APPENDIX H

Proposed LEP Maps

DRAFT WYONG LOCAL ENVIROMENTAL PLAN 2012

Land Zoning Map Extract

(Amendment No #)



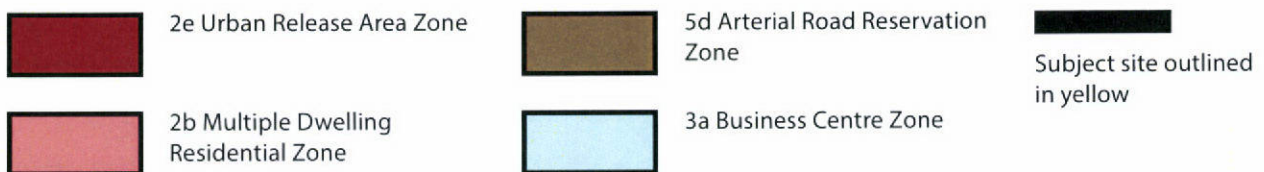
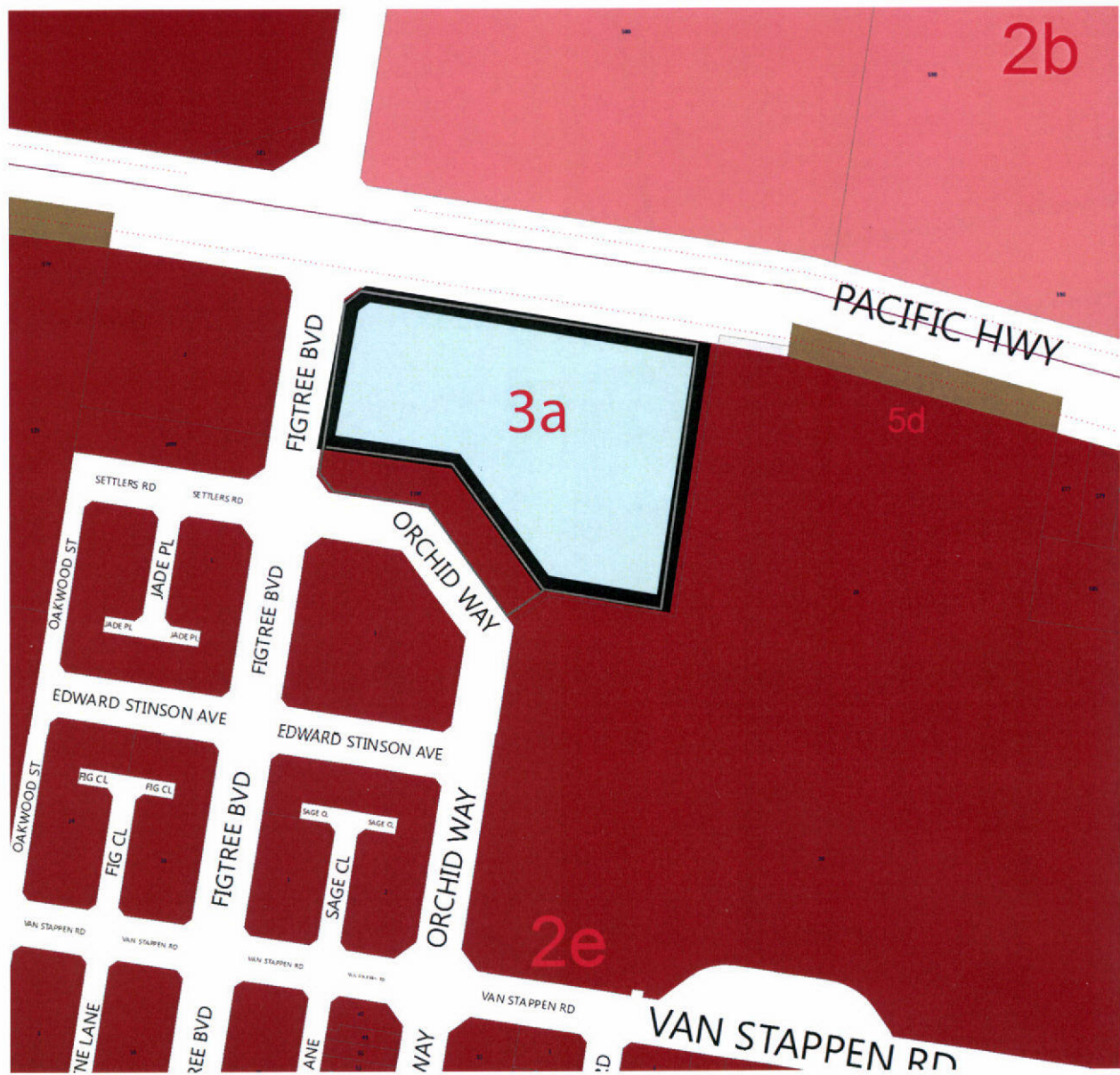
Subject site to be rezoned from the R2 Low Density Residential zone to the B2 Local centre zone

Draft Wyong Local Environmental Plan 2012 Land Zoning Map extract
 Subject site outlined in red
 Source: Wyong Shire Council website

WYONG LOCAL ENVIROMENTAL PLAN 1991

Land Zoning Map Extract

(Amendment No #)



Subject site to be rezoned from 2e Urban Release Area Zone to 3a Business Centre Zone

Wyong Local Environmental Plan 1991 Land Zoning Map extract
 Subject site outlined in black
 Source: Wyong Shire Council website