5 OTHER ISSUES

5.1 Introduction

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

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

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

5.2 Design Criteria

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

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

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

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

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

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

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

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

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

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

Pedestrian Amenity

- wide sidewalks to provide enough room for friends to walk side by side

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

- provide shelter from summer sun and from rain

- ensure buildings are aligned with the sidewalk to create spatial enclosure and a sense of place.

Improving Pedestrian Safety

- providing large storefronts and upper storey windows which face the street to provide surveillance

- provide on-street parking to create a physical barrier between cars and pedestrians

- aligning building facades so as to minimise the intervening spaces which could provide security problems

- incorporating mixed uses (including residential) into centres to increase pedestrian activity at all hours of the day and night

- providing small kerb radii at corners and reducing the width of roadways to make it easier to walk across streets and to slow vehicles

- providing narrow car lanes to minimise pavement and to slow vehicles.

Improving Architectural Character

- articulate facades and avoid blank facades

- ensure storefronts face the sidewalk

- provide benches and planters or low walls to provide places for shoppers to rest

- ensure doors face the sidewalk.

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

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

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

In relation to examples from the United States, it needs to be recognised that many of these centres are relatively large in size. For instance, St Johns Town Centre in Jacksonville, Florida contains some 90,000 sq.m. of space while The Waterfront in Pittsburgh comprises about 60,000 sq.m.. There is some evidence that it is only developments of this scale which can “afford” the design input necessary to fully articulate and realise an outcome along New Urbanist guidelines.

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

5.3 Evaluation of Development Applications

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

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

- that the application maintains the centre's current role and range of functions
- that there is an appropriate increase in household income levels and expenditure giving rise to a need for additional floorspace
- that the expansion will not adversely affect other retail centres and is not in conflict with the Wyong Shire retail hierarchy

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

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

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

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

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

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

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

- Fabcot principles
- net community benefit principles.

5.3.1 Fabcot Principles

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

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

5.3.2 Net Community Benefit

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

- that a proposal meets an identified community need for a certain type of retailing
- that the project will not lead to unacceptably high negative external effects
- that the project is both economically and environmentally sustainable
- that the range of facilities available to the public will be improved (in net terms)
- whether the proposal is accessible from the catchment by public transport, walking and cycling
- whether the proposal will increase private car use
- whether the proposal has a direct and indirect effect on public infrastructure or leads to costs to the public sector
- whether there are practical alternatives to provide the services proposed; and
- whether (in the case of a rezoning) there are alternative sites within or adjacent an existing centre.

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

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

6 RECOMMENDATIONS

6.1 Retail Hierarchy

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

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

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

6.2 Terminology

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

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

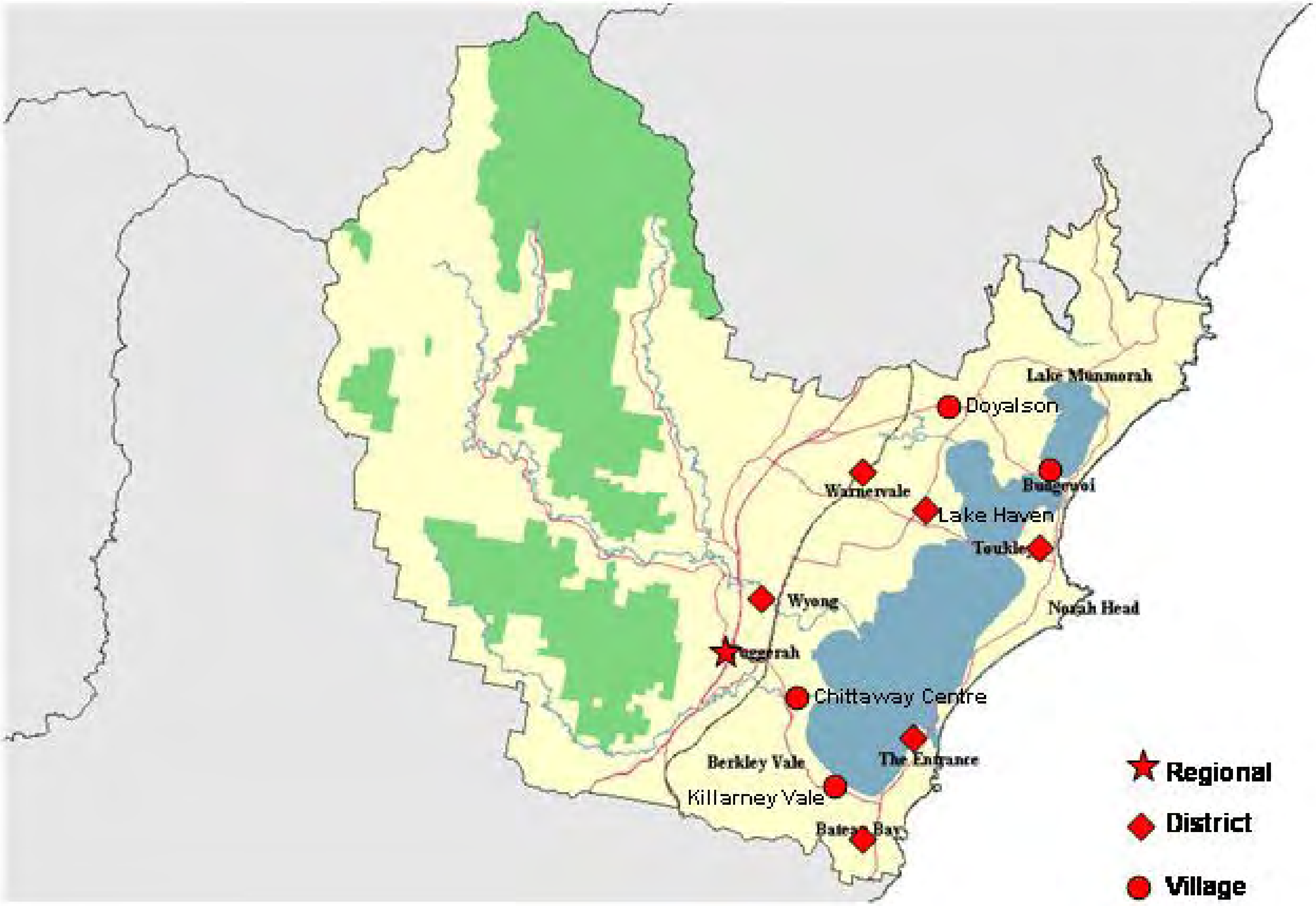

FIG 6.1: Existing Retail Hierarchy

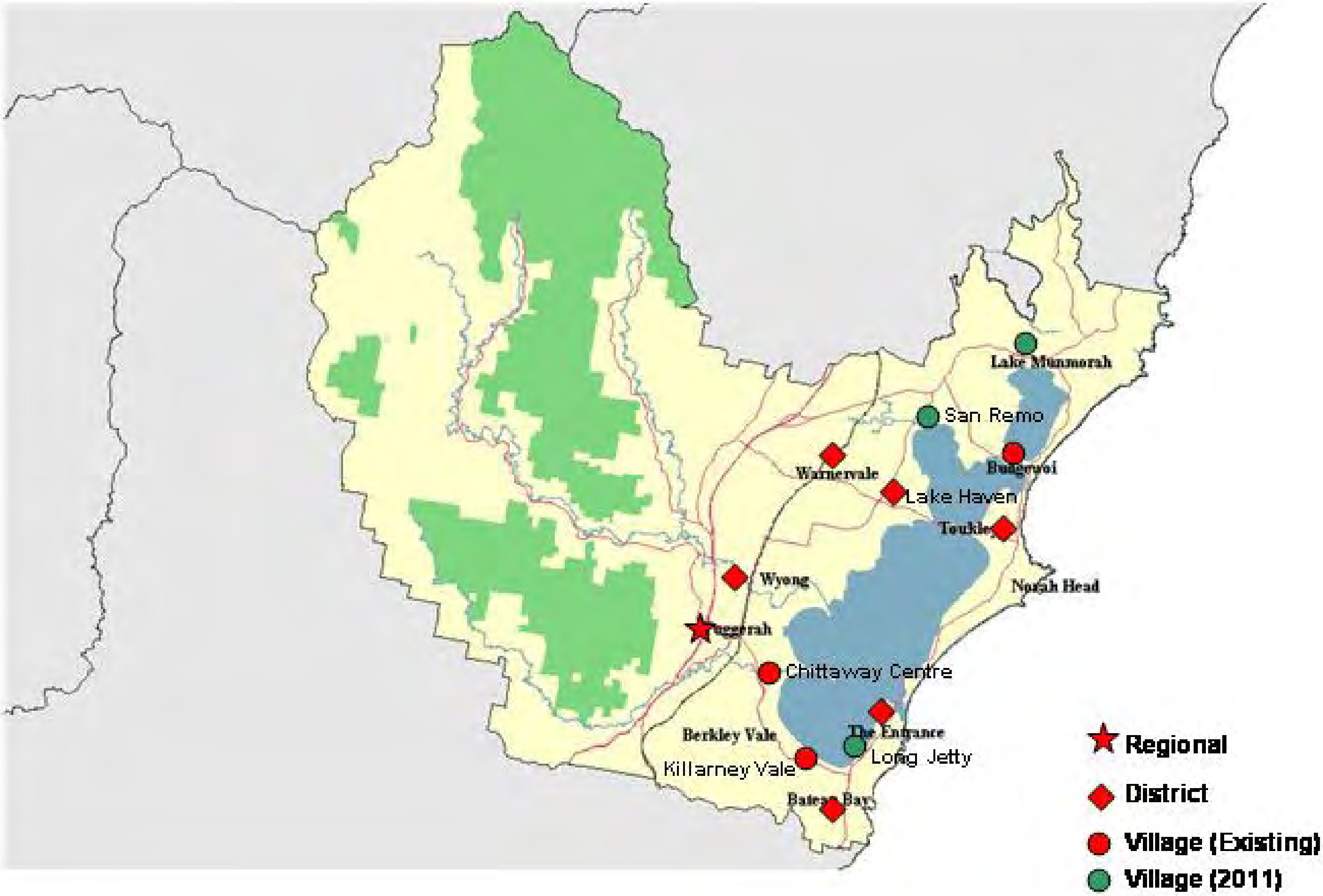

FIG 6.2: Proposed Retail Hierarchy - 2011

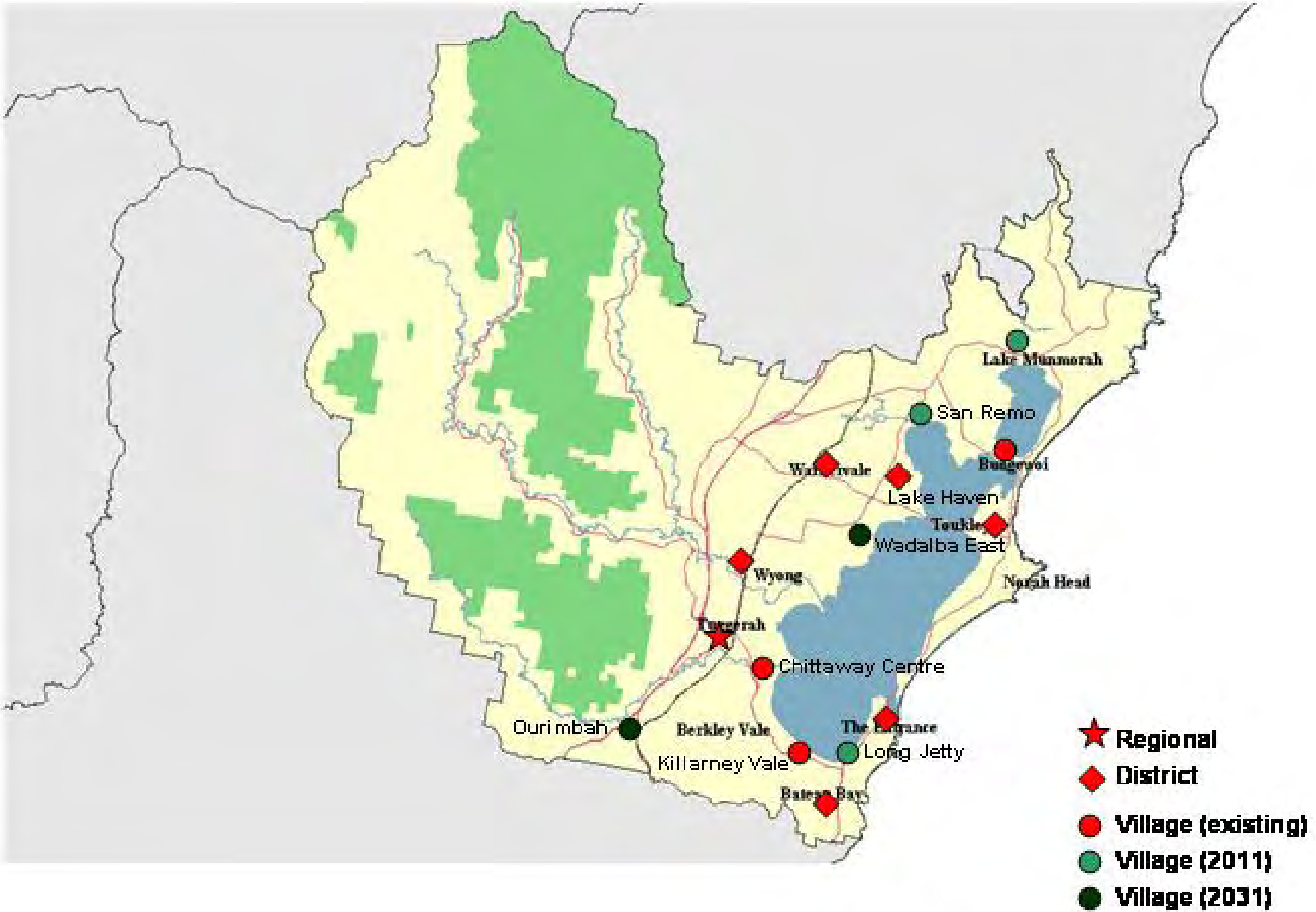

FIG 6.3: Proposed Retail Hierarchy - 2031

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

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

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

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

Village Centres

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

Neighbourhood Centres

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

District Centres

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

Regional Centre

Westfield Tuggerah.

Regional Centre Support

Tuggerah Straight and Tuggerah SupaCenta.

6.3 Centre Size and Timing

TABLE 6.1 summarises the **recommended** size of existing and proposed retail centres in Wyong Shire and the approximate timing for the introduction of the latter between 2006-31. The **recommended** retail floorspace additions to centres can be summarised as follows:

2006-11

- Warnervale Stage 1 ... 15,000 sq.m.
- San Remo Village ... 5,500 sq.m.
- Budgewoi expansion ... 2,500 sq.m.
- Lake Munmorah Village ... 5,000 sq.m.
- Wadalba Village Neighbourhood ... 1,600 sq.m.
- Lake Haven Bulky Goods ... 20,000 sq.m.
- The Entrance expansion ... 8,000 sq.m.
- Bay Village bulky goods ... 5,000 sq.m.

2011-16

- Wadalba East expansion ... 5,000 sq.m.
- Westfield Tuggerah expansion ... 15,000 sq.m.
- Tuggerah bulky goods ... 5,000 sq.m.

2016-21

- Lake Haven expansion ... 5,000 sq.m.
- Warnervale Stage 2 ... 10,000 sq.m.
- Warnervale bulky goods ... 8,000 sq.m.
- Long Jetty expansion ... 5,000 sq.m.

2021-26

- Toukley expansion ... 5,000 sq.m.
- Lake Munmorah expansion ... 5,000 sq.m.
- Westfield Tuggerah expansion ... 17,000 sq.m.
- Tuggerah bulky goods ... 5,000 sq.m.
- Wyong expansion ... 5,000 sq.m.
- Ourimbah ... 5,000 sq.m..

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

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

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

6.4 Office Space Development

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

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

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

6.5 Evaluation Criteria

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

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

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

Centre ...	Existing	2011	2016	2021	2026	2031	Total 2031	Increase 2006-31
		— Floorspace Increase (Sq.M.) —						
Northern Wyong								
District Centres								
Lake Haven	32,196	-	0	5,000	-	-	37,196	5,000
Toukley	15,902	-	-	-	5,000	-	20,902	5,000
Warnervale (Proposed)	-	15,000	-	10,000	-	-	25,000	25,000
Total District	48,098	15,000	-	15, 000	5,000	-	83,098	35,000
Village Centres								
Budgewoi	5,000	2,500	-	-	-	-	7,500	2,500
San Remo (Proposed)	-	5,500	-	-	-	-	5,500	5,500
Lake Munmorah (Proposed)	-	5,000	-	-	5,000	-	10,000	10,000
Wadalba East (Proposed)			5,000	-	-	-	5,000	5,000
Total Village	5,000	13,000	5,000	-	5,000	-	28,000	23,000
Other								
Bulky Goods	-	20,000	-	8,000	-	-	28,000	28,000
Sub-Total Northern Wyong	53,098	48,000	5,000	23, 000	10,000	-	139,098	86,000
Southern Wyong								
Regional Centre								
Westfield Tuggerah	81,416	-	15,000	-	17,000	-	113,416	32,000
Other Bulky	40,000	-	5,000	-	5,000	-	50,000	10,000
Total Regional/ Other Bulky	121,416	-	20,000	-	22,000	-	163,416	42,000
District Centres								
Bateau Bay	30,046	-	-	-	-	-	30,046	0
Bateau Bay Bulky Goods	-	5,000	-	-	-	-	5,000	5,000
The Entrance	19,800	8,000	-	-		-	27,800	8,000
Wyong	11,899	-	-	-	5,000	-	16,899	5,000
Total District	61,745	13,000	-	-	5,000	-	79,745	18,000
Village Centres								
Chittaway Bay	4,650	-	-	-	-	-	4,650	0
Killarney Vale	2,000	-	-	-	-	-	2,000	0
Long Jetty	3,800	-	-	5,000	-	-	8,800	5,000
Ourimbah	-	-	-	5,000	-	-	5,000	5,000
Total Village	10,450	-	-	10, 000	-	-	20,450	10,000
Sub-Total Southern Wyong	193,611	13,000	20,000	10, 000	27,000	-	263,611	70,000
Total Wyong	246,709	61,000	25,000	33, 000	37,000	-	402,709	156,000

Source: Leyshon Consulting Estimates, June 2006.

6.6 Design Issues

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

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

✤✤✤✤✤

APPENDIX A

Direction No.17 – Integrating Land Use and Transport

Objective

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

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

Where this direction applies

This direction applies to all councils.

When this direction applies

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

What a council must do if this direction applies

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

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

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

APPENDIX B

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

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

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

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

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

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

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

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

Table 5 – Origin and Destination for Shopping for Clothing

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

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

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

APPENDIX C

APPENDIX C:

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

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

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

Source: Leyshon Consulting Estimates 2006

APPENDIX C:

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

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

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

Source: Leyshon Consulting Estimates 2006

APPENDIX C:

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

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

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

Source: Leyshon Consulting Estimates 2006