Wollongong City Council

Wollongong Retail and Business Centres Strategy

March 2023

wollongong
city of innovation

Acknowledgement of Country

We acknowledge the Traditional Custodians of the land on which our city is built, Dharawal Country. We recognise and appreciate their deep connection to this land, waters and the greater community. We pay respect to Elders past, present and those emerging and extend our respect to all Aboriginal and Torres Strait Islander people who call this city home. We recognise Aboriginal and Torres Strait Islander people as the first people to live in the area. We acknowledge the legacy of Aboriginal people in the Illawarra, who have always made efficient use of the abundance of natural resources, and who established many of the paths and places on which we travel and meet. We respect their living cultures and recognise the positive contribution their voices, traditions and histories make to our city, towns and villages.

Project and report	Date	Issue
Draft Wollongong Retail and Business Centres Strategy	August 2022	Endorsed by Council for public exhibition (12 September 2022)
Wollongong Retail and Business Centres Strategy	March 2023	Adopted by Council (20 March 2023)

Contents

Executive Summary

'Retail and Business Centres' refers to the central business districts of villages, towns, major towns and the Wollongong City Centre. Generally speaking, these Centres have a business zoning e.g. B1, B2, B3 and B4, and include a mix of uses including commercial, residential, public recreation and social infrastructure.

Planning and development in Wollongong's Centres is currently regulated through a range of Statutory and Non-Statutory planning policies.

Key to the planning controls governing development in Centres is the Centres Hierarchy, outlined in the Local Strategic Planning Statement, and further elaborated on in the DCP Chapter B4 Development in Business Zones. The Centres hierarchy has been in place since the introduction of the Wollongong DCP 2009.

Council completed a comprehensive LGA review of Wollongong's Centres in 2004 (Hill PDA). Individual Centre studies have been prepared for Thirroul (2006), Warrawong (2013), Figtree (2013), Unanderra (2013), Corrimal (2015), Dapto (2017), Port Kembla (2018), Helensburgh (2020), and the Wollongong City Centre (2020).

The objective of the Wollongong Retail and Business Centres Strategy (the Strategy) is for Council to gain an understanding of the current and future retail, commercial and urban service needs of the LGA, in order to appropriately deliver more sustainable local employment opportunities, economic productivity and convenient access to services for an increasing and evolving population.

Key Findings

Centres are largely performing in line with the current Retail and Business Hierarchy.

Wollongong's Centres have sufficient retail supply to meet current demand. Our Centres have a generous amount of feasible supply to allow retail businesses to grow in response to increased demand, far exceeding what is needed to meet the 2041 forecast.

The delivery of planned Centres in West Dapto is critical to ensure the proper functionality of the urban release area.

Expectations for development outcomes for West Dapto Centre sites, including land use mix and built form, could be more clearly communicated through the Neighbourhood Planning process.

Centre zoning boundaries do not always reflect the functional boundaries of our Centres. There is a need to protect existing supply in some locations where it is located on land zoned residential on the fringe of Centres. There is also a need to reduce business zoning in some Centres where the requirement for ground floor commercial and retail uses is spread too far to be sustained by current or future demand.

Centres can play a role in the delivery of medium density housing. The Strategy has identified which Centres have excess supply that could be absorbed through an increase in residential population within the Centre catchment.

Online trading continues to grow. Centres play an important role in offering consumers a physical context for the experience of goods and services.

The results of the *Shape Your Town* survey showed that 'a mix of uses' was the community's most valued attribute of a Centre.

Night-time economies are becoming an increasingly important component of Centre offers. Centres with successful night-time economies are supported by high quality public spaces, including public space activation and events programs and appropriate infrastructure.

Multi-modal accessibility is key to Centre success. Whilst most of Wollongong's Centres are easily accessible by car, public transport access to our Centres continues to be a challenge. The network of town and village Centres in our established suburbs means that our community has reasonable access by walking to daily convenience needs from most areas. The western outskirts of suburbs south of Wollongong City Centre are an exception. The planned town and village Centres of West Dapto will all need to offer supermarket and/or grocery store offers in order to achieve optimal walkable accessibility (800m).

Wollongong City Centre is our highest order Centre, and much of the high-quality office space needed to deliver on our jobs target is expected to be accommodated within it. To attract these jobs to Wollongong City Centre requires a work precinct with a distinctly commercial sense of address and strong networking opportunities amongst allied businesses. The City Centre has strong retail demand but suffers from dispersed retail activity due to the large size of the commercial and mixed use zones.

Recommendations

The role of our Centres is clear

1. Update the retail and business Centre hierarchy and definitions to reflect the contemporary role and function of Wollongong's Centres and guide their growth
2. Review and update planning documents to ensure consistency with the updated hierarchy

Our Centres are a good fit for our community

3. Tighten Centre boundaries to create resilient and active Centres
4. Prevent the oversupply of retail floorspace
5. Protect existing required supply
6. Explore opportunities to increase residential density

Our new Centres in West Dapto are well planned

7. Encourage the development of planned Centres in West Dapto
8. Limit oversupply of retail floorspace in Centres surrounding West Dapto
9. Communicate clear expectations for Centre development outcomes

Our Centres are active and vibrant

10. Complement online trading with exceptional physical retail offerings
11. Facilitate an appropriate range of land use options to increase activity within, and patronage of, Centres
12. Update active frontage planning controls to improve street presentation
13. Facilitate an evening economy in our Towns, Major Regional Centres and City Centre that is right for our community
14. Facilitate the activation of the road reserve for outdoor dining
15. Incorporate public art to create places which are distinctive, and which reflect local identity

Our Centres are accessible and support transport mode shift

16. Provide clear direction on the role and function of streets in our Centres
17. Provide clear parking controls and public parking facilities that are in line with sustainable community needs
18. Plan for walkable Centres
19. Support cycling to Centres

Our City Centre is a thriving commercial precinct

20. Deprioritise residential development in the Commercial Core
21. Tighten and focus the retail core
22. Facilitate diverse land use outcomes and leverage the City's assets

The Strategy proposes to implement these recommendations through a range planned projects. The findings of the Strategy will be used to inform the scope and objectives of these projects as they progress.

1 Introduction

Our City, Town and Village Centres are the physical places we meet to do business, shop, and build community. In addition to businesses and shops, Centres also contain other uses such as housing, licensed clubs, tourism accommodation, parks and community facilities.

In a contemporary context, business, shopping and social interaction is now much bigger than these places alone, extending into the virtual and digital world of online shopping, remote working and social media. Despite this, in the context of growing populations, COVID-19 and the need to mitigate and adapt to climate change, our Centres have never been so important to our liveability and wellbeing, productivity and adaptability.

Wollongong has just under 60 Centres, ranging in size from our Wollongong City Centre, down to small villages. These Centres are distributed between Helensburgh in the north to Windang in the south. We also have new Centres that are planned for but not yet built, to service growing populations in urban release areas within West Dapto and Tallawarra in the south.

In addition, there are also around 12 bulky goods sales areas on the fringes of our Centres, such as the King Street Warrawong Precinct. Lastly there are 3 business parks, in Coniston, Port Kembla and Yallah (planned).

Centres generally occur on land zoned for business uses. The Wollongong LEP 2009 currently includes the Business Zones set out in Table 1.

Retail and business functions also occur on land not zoned business. In some Centres, shops operate on land zoned residential that sit outside the existing business zones. Conversely, in some cases land zoned business is being used for purely residential purposes, because of historic development activity; previous planning permissibility and/or lack of a market drive to deliver business outcomes in these locations.

Each of our Centres has its own unique character, role, feel and value for the local community. And each Centre has a role to play in the wider network.

Table 1- Wollongong LEP Business Zones

Zone	Name	Intent and Role
B1	Neighbourhood Centre	Provide for small-scale retail, business and community uses serving people who live or work in the surrounding neighbourhood.
B2	Local Centre	Provide for retail, business, entertainment and community uses serving people who live in, work in and visit the local area, encouraging employment opportunities in accessible locations.
B3	Commercial Core	Provide a wide range of retail, business, office, entertainment, community and other suitable land uses that serve the needs of the local and wider community, encouraging appropriate employment opportunities in accessible locations.
B4	Mixed Use	Provide a mixture of uses, integrating business, office, residential, retail and other development in accessible locations.
B6	Enterprise Corridor	Promote businesses along main roads and encourage a mix of compatible uses, provide a range of employment uses (including business, office, retail and light industrial) and maintain the economic strength of centres by limiting retailing activity
B7	Business Park	Provide a range of office and light industrial uses, encourage employment opportunities, while enabling other land uses that provide facilities or services to meet the day to day needs of workers in the area.

1.1 Purpose of the Strategy

We all want our Centres to be successful thriving places for people to meet, connect, shop, work and live. We know how critically important these places are to both the liveability and economic health of our Local Government Area (LGA.)

There are many factors that contribute to the success of our Centres, and many inputs have a role to play to support that goal –infrastructure, place-making and activation, economic development, urban greening and more.

This Retail and Business Centres Strategy focuses on how our planning controls can support successful centres and facilitate an appropriate mix and quality of development. It is an opportunity to check in to:

- Gather feedback from our community and industry on the performance and value of our Centres;
- Explore current trends impacting centres and the retail industry;
- Gain accurate information about the current supply of retail and business uses in our centres, and where there is room to grow;
- Evaluate the performance of our centres against place specific criteria
- Consider the current and future role and function of centres in light of forecast demand, trends and aspirations; and
- Explore opportunities to improve planning outcomes including development capacity and permitted uses.

The Strategy is informed by a range of State and Council Policies. It supports our community's goals to:

- maintain the unique character of Wollongong,
- support future communities with facilities and spaces,
- attract business investment and support local business,
- provide communities with access to quality local spaces that are safe, clean and inviting
- enable our community to have access to safe, nutritious, affordable and sustainably produced food,
- provide sustainable infrastructure to access key places

The findings of this Strategy will be used to inform the scope and objectives of the following:

- Town Centre Built Form Review
- Wollongong Local Strategic Planning Statement (LSPS) Review
- Wollongong DCP 2009 Chapter B4 Development in Business Zones Review
- Wollongong DCP 2009 Chapter D1 Character Statements Review
- Amendments to the Wollongong LEP 2009
- Wollongong Housing Strategy
- Wollongong Industrial Land Planning Review
- Wollongong City Centre Planning Strategy
- Wollongong Integrated Transport Strategy
- West Dapto Town Centre Development
- Outdoor Dining Guidelines
- Ongoing Planning Proposal review and Neighbourhood planning processes

1.2 Study Area

The Strategy will consider all Retail and Business Centres in the Wollongong LGA (Figure 1). These Centres are listed in Table 2. Retail and Business Centres are generally defined by a Business (B) Land Use Zoning. In some cases, clusters of shops on other types of zoned land (such as residential) have been included, to ensure all areas that are functioning as Centres are included. These are marked in the table with an asterisk *.

Figure 1 - Study Area – Wollongong LGA

Table 2- Current Retail and Business Centres across the Wollongong LGA

Centre Type	Centre Name		
Regional City	Wollongong		
Major Regional Centres	Warrawong	Dapto	
Major Town Centres	Corrimal Figtree	Fairy Meadow Unanderra	
Town Centres	Helensburgh Thirroul Bulli Woonona	Balgownie Port Kembla Windang Berkeley	Cringila Darkes Road (planned) Tallawarra (planned) Bong Bong (planned) Marshall Mount (planned)
Village Centres	Stanwell Park Coledale Austinmer East Woonona Rothery Street, Bellambi East Corrimal Towradgi Tarrawanna	Gwynneville Keiraville Cordeaux Heights* Farmborough Heights Koonawarra Kanahooka Brownsville (Dandaloo) Horsley	Coniston Primbee Wongawilli (planned) Jersey Farm (planned) Huntley (planned) Avondale (planned)
Small Village Centres	Bellambi Lane, Bellambi Berkeley Road, Berkeley Kelly and Nolan Streets, Berkeley Farrell Road, Bulli Kent Road, Dapto Lakelands Drive, Dapto Railway Street, East Corrimal	Cabbage Tree Lane, Fairy Meadow Weringa Avenue, Lake Heights Buena Vista Avenue, Lake Heights St Johns Avenue, Mangerton Farmborough Road, Unanderra	Fowlers (planned) Princes Highway, West Wollongong Thames Street, West Wollongong Crown Street (449-457), Wollongong
Business Parks	Bridge Road, Coniston	Wentworth Street, Port Kembla	Yallah (Planned)
Peripheral Sales Precincts (Bulky Goods)	Woodrow Place, Figtree Flinders Street, Wollongong Keira Street, Wollongong Kembla Street, Wollongong Northcliffe Drive, Kembla Grange	King Street, Kemblawarra /Warrawong Mt Ousley Road, Fairy Meadow Princes Highway, Corrimal Princes Highway, Helensburgh	Princes Highway, Russell Vale Military Road, Port Kembla Yallah (planned) Princes Highway, Dapto Princes Highway, Unanderra
Other	Industrial Zones	SP Zones: Innovation Campus and University of Wollongong Main Campus	

1.3 Method

Wollongong City Council requires an understanding of the current and future retail, commercial and urban service needs of the LGA to appropriately deliver more sustainable local employment opportunities, economic productivity and convenient access to goods and services for an increasing and evolving population. A 20-year horizon from 2021 – 2041 has been selected for the purpose of this Strategy.

To develop this understanding, Council took a combined quantitative and qualitative approach, using a mix of methods to establish a sound evidence base, and make recommendations moving forward. The approach to research and analysis was informed by the questions posed at each stage of the project. These are outlined in Table 3- Approach and methods.

The Strategy was prepared with technical support and input from SGS Economics and Planning (SGS). SGS's work is referenced as 'the SGS Study' throughout this document, and the tasks completed by them marked with an * in the table above. Detailed descriptions of methods used by SGS are contained within the SGS Study.

We acknowledge use of the following data sources:

- ABS Census Data
- id. (community profile, forecast population, social atlas & economy)
- Department of Planning and Environment Population Forecasts
- Transport for NSW (TZP19) forecasts for Wollongong (travel zone level)
- Spendmapp by Geografia
- PSMA Geoscape building data
- Google places data
- Cordell Connect
- ANZIC codes
- Marketinfo data set (modelled off ABS Household expenditure surveys)
- Movement and Place Built Environment Indicators

COVID-19 Pandemic

The Strategy was prepared during the COVID-19 Global Pandemic. Some data was sourced, and community engagement undertaken, when health orders were in place. As such, community and stakeholder engagement were conducted via phone calls and online surveys. Data has been obtained and extended to cover pre-pandemic periods (e.g., prior to April 2020), to illustrate 'normal' conditions. The impacts of COVID-19 on various outcomes (immigration, employment, spending etc) have been illustrated throughout the report.

Although most restrictions and public health orders have been lifted at the time of this Strategy being drafted, the long-term impact of COVID-19, particularly on where people work, how people shop and their appetite to spend time in busy locations remains unknown.

Relationship with the Councils Housing Strategy and the Industrial Lands Review

Council is currently completing several significant LGA-wide land use strategies – this Retail and Business Centres Strategy, the Housing Strategy, and the Industrial Lands Planning Review. These strategies will all make recommendations regarding land availability and capacity for development. They will also all seek to balance the interests of economic growth and employment; greater housing diversity; the provision of adequate public open spaces; and access to public transport modes.

As part of the Strategy, SGS considered retail supply in industrial areas, and capacity for residential intensification in Centres. Conversely, recommendations coming from the Housing and Industrial Lands work will consider the findings and recommendations of this Strategy.

Table 3- Approach and methods

Background and Base Data	
What is our community and how are we projected to grow? What are our priorities as defined by our key planning strategies? What are the key planning documents to be reviewed? What has our community told us about their concerns and aspirations for our Centres?	*Literature review*: of all relevant policies and studies to inform the aims and objectives of the Strategy *Demographic and population forecast analysis*: to understand the current and future population, and inform the retail demand modelling *Engagement with technical staff*: to establish key stakeholders for consultations, and collate current issues across assessment and economic development
Existing Centres Appraisal	
What's the break-down of land uses? What is their capacity to grow within the current planning controls? Is growth currently feasible? What is the community's view? How are the Centres performing?	*Planning data collation*: an audit of current centres including all lots and associated planning controls to inform the existing supply and capacity modelling. Focus on Business zoned land, with some exceptions where relevant. *Floorspace supply audit**: combination of desktop data audit and on ground review *Commercial floorspace supply**: allocation of Gross Floor Area (GFA) by employment numbers at a centre-based level using ANZIC codes *Retail and commercial capacity**: Net yield calculated by subtracting existing floorspace supply from possible yield across available sites. *Feasible capacity**: High, medium and low yield scenarios based on standard development contexts. *Engagement with the community*: to establish a set of prioritised place-based criteria in relation to centres *Multi criteria analysis**: evaluation against place-based criteria, weighted according to community prioritisation. *Accessibility modelling**: walkable catchments modelled in GIS
Forecast Demand	
What's happening with retail more broadly and how will this inform the future of our Centres? How are people living and working? How will that change? What are our priorities for jobs growth, and housing density? Can growth be accommodated? Is it suitable and appropriate?	*Contemporary research review**: to determine relevant trends impacting Wollongong *Planned floorspace**: Cordell Connect search *Potential floorspace (future Centres)**: Strategic planning review and apportionment across retail types *Commercial floorspace demand**: demand units generated through employment forecasts then converted to floorspace. *Retail goods floorspace demand**: demand units generated by resident and worker expenditure; population forecasts applied. *Retail services floorspace demand**: demand units generated through employment forecasts for retail services then converted to retail floorspace across service categories. *Gravity model**: used to reconciled demand and supply,
Growth Scenarios	
How will the role and function of Centres change under future scenarios?	*Gravity model**: used to test various scenarios including aspirational job targets, delays to planned new centres and potential areas for residential intensification.
Draft Recommendations	
What needs to change in the way we define and structure our Centres? What changes are needed to planning controls? Recommendations for changes to the DCP Chapter B4 – Development in Business Zones, Recommendations for changes to the LEP	*Collation and evaluation*: of all previous recommendations from adopted Town and Village Plans, findings from SGS Study, strategic direction of allied LGA wide land use plans and strategies (Housing).

2 Context

2.1 Place

The Wollongong LGA is approximately 714km^2 and is located 85km south of Sydney CBD. The LGA is bound by significant natural landscapes including: the Pacific Ocean; the Royal National Park; the Illawarra Escarpment; and Lake Illawarra. These features are the physical setting for most of our Centres, forming spectacular backdrops which are a key part of their place character.

Wollongong is located on Dharawal Country. Aboriginal people have been caring for Country here for tens of thousands of years, engaging in ceremony, trading and making efficient use of the area's resources. Camps, settlements and meeting places were located on the coast and near waterbodies, places which were rich in fish, crustacea and water birds, where fishing and trading activities occurred. In some locations, like Hill 60 and Red Point these activities developed into industries such as commercial fishing post European settlement.

Europeans began to make their mark on Wollongong in the early 1800s. During this time the landscape began to change dramatically, as timber cutters, grazers, agriculturalists and later dairy farmers began to use the area for its resources. With these industries and agriculture established, Europeans began to settle in the area in the 1820s and 1830s. Wollongong Township was planned in 1834, connecting business, government and community activities to the growing activity in Wollongong Harbour. As the coal industry moved in during the 1840s, villages were established in relationship with the mines, 'pit townships' sprung up, generally in alignment with established traditional Aboriginal travel routes[1]. In many cases, the alignment of our now established roads is based on these traditional routes.

From the 1860's a network of early tramway routes ran from the Escarpment Collieries east to jetties in harbours and ports, to allow for the transportation of raw materials to Sydney. These original railways also influenced future transportation routes. Bellambi village was originally established at the junction of the Illawarra Railway and the South Bulli Colliery tramway lines.

As urban settlement was expanded, and inter-city connections strengthened, in the late 1880s when the Illawarra railway was completed, running between Macdonaldtown in Sydney, to Kiama. The route for the trainline was largely dictated by topography and in most cases sat parallel and at a distance to established travel routes and towns. The Railway also caused tourism to increase and seaside towns and villages such as Austinmer and Thirroul expanded as business boomed. Some townships originally situated along road travel routes such as in Bulli also began to shift towards railway stations, creating competing commercial centres.

As steelmaking was added to Wollongong's industry in the 1920s, new towns were established. Cringila, or 'Steel town' as it was originally known, was released as a subdivision in the same year the steelworks opened, and in 1937 Charles Hippisley opened a mixed business and unofficial post office in Newcastle Street, Cringila, kick-starting the town centre.

In 1913 Port Kembla was connected to Wollongong by rail, providing an important freight function, then a passenger service some years later. As on the existing Illawarra line, the

[1] Department of Environment and Heritage, Early Contact Map

rail stations on the new extension were misaligned from the locations of the town centres, being located instead to service the Port, mining and steelmaking operations. Some of the Town Centres along these routes have experienced times of boom and decline, as residential and worker populations have fluctuated.

Across Wollongong, the combination of the topography, the rail line's alignment, and its combined passenger and freight roles continue to present challenges to the way we plan for our centres.

The most significant period of urban expansion occurred after World War II when successive waves of overseas immigration occurred to meet labour force needs associated with industrial expansion. This saw towns like Port Kembla grow significantly, along with surrounding villages at Lake Heights and Cringila.

In 1949 the County of Cumberland Planning Scheme included the zoning of Helensburgh and noted the area from Sandon Point, Bulli up to Stanwell Tops as land reserved from future planning. Although draft instruments were in place through the 1950s and early 1960s, the whole LGA was not formerly zoned until 1968, through the introduction of the Illawarra Planning Scheme.

Throughout the 1960s and 70s urban growth, including new towns and villages, occurred on the edges of existing urban areas, through greenfield development. As new subdivisions were created portions of this land was reserved for business uses, for the development of neighbourhood shops and local centres.

Since the 2000s, significant growth has been planned for West Dapto and Tallawarra. Planning for this land release includes detailed structure plans which specify the type and distribution of centres to serve the growing population. Even with forward planning to ensure these new communities have good access to services, the delivery of centres in urban release areas is slow, tending to follow population density, rather than being a catalyst for it.

Today, Wollongong's Centres provide a connected network that provides our community with access to goods and services, entertainment, community interaction and employment. Planning for the ongoing success of our Centre network will include addressing the opportunities and challenges that come with the unique place we inhabit, and the legacy of the movement corridors and public transport network we have inherited.

Figure 2 - The layout of Wollongong's centres is strongly influenced by its natural landscape, patterns of industry and the movement networks which connect it to the surrounding areas. These aspects have informed the way people have settled and gathered for thousands of years

2.2 People

Who are we?

The first release of the 2021 Australian Census results provides an updated snapshot of the Wollongong community.

- The average Wollongong resident is aged 39, married and living in a family household.
- The largest service age group in Wollongong was Parents and homebuilders (35 to 49 years old), however the three age groups that increased the most since 2016 were:
    - Seniors (70 to 84 years): +2,902 persons (+14.3%)
    - Young workforce (25 to 34): +2,390 persons (+9.2%)
    - Empty nesters and retirees (60 to 69 years): +2,115 persons (+9.8%)
- 74.9% of residents were born in Australia, and 3.2% identify as Aboriginal and/or Torres Strait Islander.
- 15.8% of Wollongong residents speak a language other than English at home.
- Around one third of Wollongong residents own the dwelling they live in, one third is paying off a mortgage on that home, and the remaining third is renting. More than two thirds of us live in a detached house, and around one fifth live in an apartment.
- 8.6% of Wollongong residents are obtaining a tertiary qualification.
- Wollongong's median household weekly income is $1,637. 23.7% of households earn less than $800 per week, and 22.4% earn more than $3,000.
- 54.6% of households have 2 or more registered vehicles.
- 71.2% of people who live in Wollongong indicated they travel to work in a motor vehicle, 5.5% travelled by train, 2.0% travelled by bus, 3.6% used active transport (such as cycling or walking) and 3.5% worked at home (ABS 2016 Census – note that 2021 Census numbers have not been used due to COVID lockdown impacts).

How are we growing?

In 2021, we had an Estimated Resident Population of 214,657 (ABS 2021 Census).

Since 2016, Wollongong LGA has added an estimated 4,263 residents. The majority of Wollongong's population growth has occurred in the suburb of Wollongong and throughout the West Dapto Urban Release Area. Figtree, Bulli and Corrimal also experienced high growth in comparison with other suburbs.

Since 2016, we have added 5,424 dwellings to our LGA. 32.7% of dwellings are now medium or high density (town houses or apartments), compared to 17% in Regional NSW.

Our population is expected to increase to 270,518 residents by 2041 (Forecast.id), adding an estimated 23,498 new private dwellings.[2]

The suburbs with the greatest projected population change are shown in Table 4, along with their relevant Town Centres. No suburbs show a significant projected negative change.

New housing developed in Wollongong will include a range of housing typologies, across low, medium and high densities. Centres play an important role in increasing our medium and high-density housing stock. The Wollongong City Centre has seen significant growth in apartment development. Fairy Meadow and

[2] Note this forecast has not yet been updated based on the 2021 Census.

Corrimal are also seeing increased apartment development within their Town Centres. Housing development within our urban release area is still largely detached housing and dual occupancies. As identified in the Wollongong Housing Strategy there is an opportunity to increase housing density and include more medium density typologies in and around our planned West Dapto Centres. This would support the demand for retail and other population servicing businesses as these Centres grow.

Table 4- forecast population– key areas

Areas with the highest forecast growth >1000pp 2016 – 2041		
	Suburb	**Centre**
	Wollongong Suburb	Wollongong City Centre
West Dapto Urban Release Area	Kembla Grange	Planned Darkes Rd Town Centre
	Dombarton – Wongawilli – Huntley	Planned Wongawilli and Jersey Farm Village Centres
	Avondale – Cleveland	Planned Huntley and Avondale Village Centres
	Marshall Mount - Haywards Bay - Yallah	Planned Marshall Mount Town Centre
	Horsley	Planned Bong Bong Town Centre
	Corrimal	Corrimal Major Town Centre
	Keiraville – Mount Keira	Keiraville Village Centre
	Dapto - Brownsville	Dapto Major Regional Centre
	Figtree	Figtree Major Town Centre
	Kanahooka	Kanahooka Village Centre
	Bulli	Bulli Town Centre

What jobs exist in Wollongong?

There were an estimated 94,524 jobs located in Wollongong LGA in the year ending June 2021 (NIEIR 2021 and economy.id). This is equivalent to 73,479 full time equivalent (FTE) positions. Retail jobs account for 8.1% of these, offering FTE employment to around 5,960 people. This proportion has remained static since 2016.

There were 14,141 registered businesses in Wollongong in 2021 (economy id). Retail Trade accounted for 6.7% of these businesses (943). There were 46 more retail business in 2021 than recorded in 2016.

Table 5- Wollongong's top Industries by employment

5 largest employers by Industry			
Industry	**People Employed (FTE)**	**Percentage Employed**	**Change 2016 – 2021 (FTE)**
Health Care and Social Assistance	11,468	15.6	+555
Education and Training	9,132	12.4	+985
Construction	7,574	10.3	+525
Manufacturing	6,780	9.2	-534
Retail Trade	5,957	8.1	-15

What do we spend our money on?

In the last year (June 2021- May 2022) Wollongong residents spent $2.565 billion on card and cash transactions inside the LGA (Spendmapp by Geografia 2022). Residents also spent $1.021 billion outside the LGA, and $2.038 billion through online purchases.

The top 5 resident spending categories make up over 70% of the total local resident spend. The greatest volume of spending occurs in Grocery Stores and Supermarkets, and a large portion is spent on other food related spending like dining out and buying specialised foods.

Table 6- Wollongong Local Resident Expenditure

Resident Local Spend across top expenditure categories (2021-2022)		
Expenditure Category	**Resident Local Spend $**	**% Total**
Grocery Stores & Supermarkets	$711.59 M	27.74%
Dining & Entertainment	$379.47 M	14.80%
Transport	$260.37 M	10.15%
Specialised Food Retailing	$253.52 M	9.88%
Specialised & Luxury Goods	$230.39 M	8.98%
Department Stores & Clothing	$201.98 M	7.87%
Professional Services	$193.22 M	7.53%
Bulky Goods	$151.03 M	5.89%

2.3 Policy

The NSW State Government sets high-level strategic priorities through Ministerial directions, plans and policies. Local Governments – such as Wollongong City Council - are responsible for the application of State Plans locally through Local Strategic Planning Statements; LGA wide Land Use strategies (such as this); Town and Village Plans and updates to local planning instruments (Wollongong LEP and DCP). Together this suite of documents helps us to plan for the future.

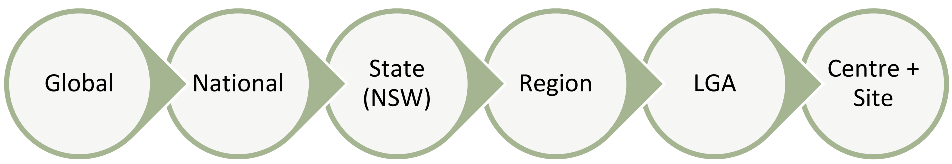

Figure 3 - Relationship between strategic plans

Guiding State Government and Greater Cities Commission strategic plans support a distributed approach to centre planning, to enable our community better access to employment, services and goods using a range of transport options. Walkable access to local centres which offer diverse activities, and are complimented with open space and community facilities, is a key goal. Local Character, heritage values and high-quality public domain design continue to be objectives for centre planning.

State Government led planning reforms have pursued an adaptable and flexible planning approach, allowing for innovative, contemporary retail solutions that match consumer need. This has included transitioning to fewer business/employment zones with broader objectives and permissible land uses, creating complying pathways for a wider range of business and business activities, and increasing allowances for hours of operation and the scale of development.

Wollongong City Council has clearly articulated its intent for our retail and business centres through our key documents and plans. This intent builds on the State Government objectives for a diverse and accessible Centre network and emphasises our community's value of our unique setting and the character and function of individual places.

Key Council documents acknowledge the need to balance increased housing growth and diversity, with the priority for employment generating and population serving businesses in our centres. Local character and congestion concerns are acknowledged as key tensions where dwelling growth is occurring within centres.

Social infrastructure and public domain provision, improvement and activation are clear priorities across a range of strategic documents and operational activities. The role of our libraries, community centres and local parks in our towns and villages is critical to ensuring diverse and active Centres.

Active and public transport are key areas to develop and improve. Car dominance, particularly in relation to logistics, drive-thru food and drink premises, and click and collect functions is an area to be carefully managed to ensure pedestrian priority is maintained.

Lastly, the delivery of new Centres in our Urban Release Areas is key to ensuring adequate provision of retail services and goods to our communities of the future. There is opportunity to improve the process involved in the delivery of these centres, to ensure the best outcomes for our community.

The table in Appendix 1 explores a range of Strategic Policies in detail and highlights the relevant implications for this Strategy. Core Planning Documents including the Codes SEPP, the Wollongong LEP 2009 and the Wollongong DCP 2009 are discussed in more detail in section *3.1 Planning Framework*.

3 Planning for Centres

Centres are complex places. A strong and clear planning framework helps articulate and facilitate the community's visions for place. Planning decisions are informed by research, engagement, technical analysis, design, and testing. Where required, Council partners with leading practitioners in urban design, community consultation and economics to inform our policies and plans.

Planning policies are reviewed and updated in response to a range of complex issues including demographic change, development challenges and opportunities, environmental management, and in order to improve the amenity of our built and natural places and spaces.

A range of activities can inform changes to planning policy for Centres, from LGA-wide strategic studies like this one, down to detailed, site specific masterplans.

3.1 Planning Framework

The core planning framework includes State Environmental Planning Policy (SEPP), the Local Environmental Plan (LEP), and the Development Control Plan (DCP). Key aspects of these plans relevant to development in centres are outlined below:

State Environmental Planning Policy (Exempt and Complying Development Codes) 2008

Development standards for exempt and complying development including:

- Outdoor dining and Mobile Food Vending
- Signage
- Change of Use
- Shop fronts and awnings
- Alternations and additions within Business Zones

The Wollongong Local Environmental Plan 2009 (LEP)

- *Objectives*: these include encouraging economic and business development to increase employment opportunities and improving the quality of life and the social well-being and amenity of residents, business operators, workers and visitors.
- *Land Use Table*: Business Zones B1 – B7 describe the majority of the objectives relevant to, and land uses permitted in Centres.
- *Part 5 Miscellaneous provisions: 5.4 Controls relating to miscellaneous permissible uses* includes a range of controls which limit the scale of certain uses including neighbourhood shops, neighbourhood supermarkets and Artisan food and drink premises.
- *Part 6 Urban Release Areas: 6.2 Development Control Plan* outlines measures to accommodate and control appropriate neighbourhood commercial and retail uses in urban release areas.
- *Part 7 Local Provisions: 5.4 Certain land within business zones* encourages activation in centres by prohibiting residential uses on the ground floor of buildings in B1, B2, B3 and B4 zones and requires an entrance and window to face the street. 7*.19 Active Street Frontages* applies similar requirements to land mapped on the *Active Street Frontages Map*.
- *Part 8 Local Provisions – Wollongong City Centre: 8.7 Shops in Zone B4 Mixed Use* limits the size of shops in the B4 zone to 400sqm, to maintain the B3 zone as the principal retail area.

The Wollongong Development Control Plan 2009 (DCP)

The Wollongong DCP provides a framework for the development of land across the Wollongong LGA. The DCP is a set of Council policies that explain how developments are to be designed to meet the conditions of the LEP and State-wide rules. The purpose of the DCP is to outline built form controls to guide development that are specific to a land use; locality or planning context.

Amendments are made to the DCP on a chapter-by-chapter basis. The Chapters most relevant to development in centres include:

- *B4 Development in Business Zones*: provides objectives, strategies and detailed planning controls for retail, office premises, business premises developments, bulky goods premises and other developments and contains Council's adopted retail hierarchy strategy for both existing and planned retail and business centres within the Wollongong City LGA
- *C1 Advertising Signage and Structures*: supplements the provisions of SEPP Industry & Employment and outlines Council's requirements for advertising signage and structures
- *C12 Outdoor Restaurant and Footpath Trading (Street Vending) Activities*: provides objectives and performance criteria for outdoor restaurants and outdoor trading activities on or over public road reserve areas including footpaths, malls and other public domain areas
- *C15 Retail Markets*: outlines Council's general requirements for the proposed establishment and operation of a retail market upon any land within Wollongong Local Government Area
- *D1 Character Statements*: identifies the existing character and desired future character for each particular suburb, often with reference to the town centre.
- *D12 Thirroul Village Centre*: a locality-based plan which seeks to strengthen the role of the centre as an economic and cultural hub through enhancing the existing character of Thirroul
- *D13 Wollongong City Centre*: a locality-based plan which provides the site specific planning requirements for development within the Wollongong City Centre precinct
- *D16 West Dapto Urban Release Area*: provides structure and guidance for the future development of the West Dapto Urban Release Area based on the West Dapto Vision 2018 and West Dapto Structure Plan

Supporting Policies

Supporting the key planning documents are the following policies:

- *Wollongong CBD Night Time Economy (NTE) Policy:* seeks to provides clarity regarding appropriate locations and hours of operation for businesses seeking to trade at night in the Wollongong CBD.
- *Outdoor Dining Council Policy*: encourages the establishment of Outdoor Dining wherever feasible and appropriate throughout the Local Government Area
- *Design and fit-out guide for food businesses*: provides guidance to operators, architects, designers, builders, equipment manufacturers and other professionals associated with the design and construction of food premises

3.2 Retail and Business Centres Hierarchy

Key to the planning controls governing development in Centres is the Wollongong Centres Hierarchy, outlined in the Local Strategic Planning Statement, and further elaborated on in the DCP Chapter B4.

In a planning context, we understand our Centres as existing within a hierarchy. Each Centre has a different role and function in respect to providing key services to a particular catchment or market. This tiered hierarchal system exists because "*higher order functions benefit from critical mass and colocation of activities and patronage whilst many so called 'lower order' functions are not necessarily less important but need to be accessed more readily and so therefore must disperse across the urban/regional landscape. They too benefit to some degree from colocation (hence still being in centres), but not to the extent of those activities found in the higher order centres*"[3].

Wollongong City Centre is our **Regional City** and sits at the top of the hierarchy. Regional cities have the largest commercial component of any location in the Region and provide a full range of higher-order services, including hospitals and tertiary education services.

Major Regional Centres like Warrawong and Dapto, vary in size, location and mix of activities. They enable access to key services and facilities that offer a range of goods, services and jobs. Our **Major Town Centres** provide for the major weekly shopping and convenience retail needs for several surrounding suburbs. As we scale down through the **Town, Village** and **Small Village Centres** these places tend to cater for more localized populations.

All that being said, how people use these Centres does not just follow a simple catchment logic. People will use one or many different Centres and for many different reasons.

Understanding and classifying the centres in the hierarchy allows us to manage development in those centres in an orderly way. The defined function of the centre links to appropriate objectives, land use zoning and permissibility and built form controls.

The Retail Centres of Wollongong are listed in the following diagram. Note that this reflects the current retail hierarchy, to be reviewed as part of this Strategy.

Wollongong DCP Chapter B4: Development in Business Zones includes criteria and descriptions for centres at each level of the hierarchy. These are summarised in

[3] SGS Study *Paper 1 Appendix A: Centre Hierarchy Definitions*, 2022

Table 7.

The current hierarchy and definitions have not been updated for some time. An update to the Centres hierarchy should ensure that any gaps or inconsistencies are resolved, and that the functions and commodities described are reflective of the current aspirations for and activities present in our Centres. Consideration should also be given to the classification of each Centre, and whether this is reflective of the Centre's actual size and function.

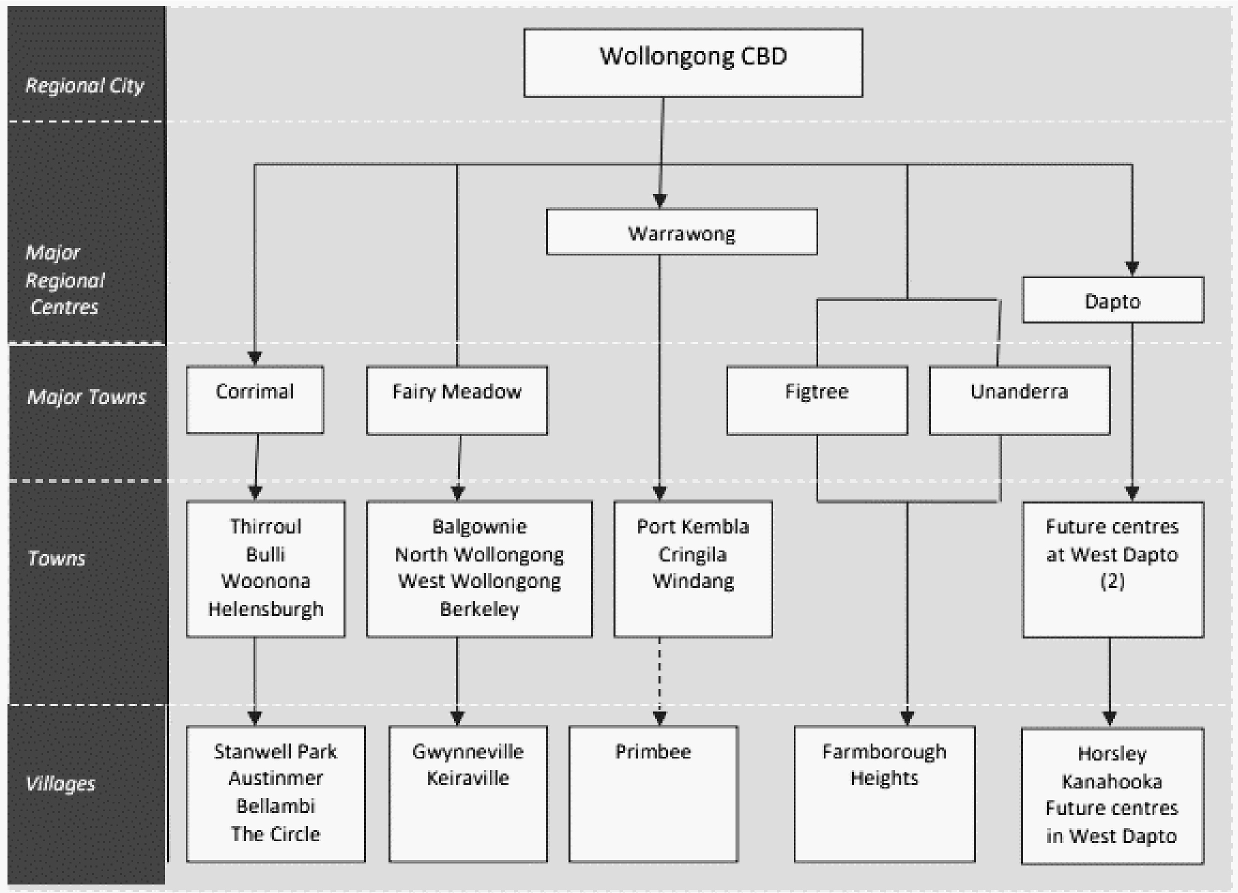

Figure 4 - Wollongong Centres Hierarchy (Source: Wollongong Local Strategic Planning Statement 2020)

Table 7- Current Centres Hierarchy criteria and descriptions

Centres Hierarchy			
Centre type and scale	**Functions**	**Location**	**Commodity types**
Regional City (Regional Centre) Retail floorspace: 110,000m² ~500,000m² total retail, commercial office, civic and entertainment Population catchment: over 200,000	High order government / civic, business, health, education, entertainment, arts and cultural, community functions	Adjacent to major public transport (rail and bus) networks	Generally anchored by department stores, one (1) or two (2) discount department stores, two (2) or more full line supermarkets.
Major Regional Centres (Sub-Regional Centres) Retail floorspace: 40,000-80,000m² Population catchment: up to 100,000	Higher order retail and other business and community functions	On major public transport network	Generally anchored by at least one (1) discount department store (DDS) and at least one (1) or two (2) full line supermarket(s) with higher order retailing and a range of non-retail services including cinemas, community services, commercial office space and professional / specialist services serving the sub-regional population.
Major Town Centres (District Centres) Retail floorspace: 20-40,000m² Population catchment: Up to 50,000	Providing for the major weekly shopping and convenience retail needs of the surrounding population of more than one (1) residential suburb as well as a large range of specialty retail shops and non-retail services	Close to public transport (rail and/or bus) services	Generally anchored by one (1) discount department store, at least one (1) or two (2) medium to full line supermarkets and other specialty retail shops and services including banks, community services, professional offices and medical services.
Town Centres (Local Centres) Retail floorspace: 5,000 – 20,000m² Population catchment: 10,000-20,000 (800 metre - 1 km catchment radius)	Limit provisions to the weekly and daily convenience needs of the surrounding residential catchment.	Close to public transport (bus) services	Generally anchored by a medium to full sized supermarket; May include a fruit and vegetable store, bakery, butcher and a limited range of non-retail services including a pharmacy, hairdresser(s), medical services, video / entertainment hire outlet, dry cleaning, Australia Post etc. Reduce reliance on less healthy prepared or fast-food outlets.
Villages (Neighbourhood Centres) Retail floorspace: 2,000 - 5,000m² (~5- 30 shops) Population catchment: up to 10,000 (~ catchment radius of 600 – 800m)	Limit provisions to provide for the daily convenience needs of the surrounding residential community, especially healthy food and grocery retailing. Provide for walk-in daily shopping requirements.	5 – 10 minute walk between shops and surrounding residential population	Generally served by a small to medium sized supermarket and or mixed business type shop, fruit and vegetable retailers, newsagents, take away restaurant, bakery, butcher and some limited non-retail services including a hairdresser, dry cleaning, video / entertainment hire outlet etc.
Small Villages (Local Convenience Centres) 100 – 2,000m2 700 – 1,000 dwellings (catchment radius of ~ 400 – 500m)	Primarily provide for the daily convenience needs of the surrounding residential population for each suburb.		Generally, includes small supermarket and / or mixed business and possibly a fruit and vegetable store, butcher, bakery etc;

4 Feedback, Analysis and Findings

4.1 Community and Industry Views

To inform the preparation of this Strategy, feedback was sought from key industry representatives and the community. An overview of the purpose of this engagement, questions asked, and feedback received is provided below.

Community

230	23	4.7%	74%	18%
Surveys were completed	Feedback was received for 23 of the LGA's centres	Of respondents live in the LGA but nominated a centre outside it	Of respondents drive to centres	Of respondents walk to centres

Figure 5 – Shape Your Town Survey information

The *Shape Your Town* survey was open for a period of three (3) weeks from 27 October – 17 November 2021 inclusive. The purpose of this survey was to:

- understand which attributes our community values most in a Centre.
- understand what our community likes about the Centre(s) they use.
- understand how the community access Centres
- gain suggestions for how our Centres could be improved from either a utility or experiential perspective.

An overview of the feedback received is provided below. A total of 230 surveys were received with respondents providing Council with feedback on 23 Centres within the LGA, with the most responses received for our larger centres such as Wollongong City Centre (41), Dapto (30), Thirroul (30), Figtree (20), Warrawong (16) and Fairy Meadow (14).

The survey asked respondents to consider 8 criteria and prioritise them in response to the following two questions:

a. What's most important to you when you visit your local shops?

Question a) asked respondents to arrange the criteria in order of importance with 1 being the most important to 8 being the least important. The results shown in the following table are the collated responses, with the top being the most important and the bottom the least important overall.

b. What do you like about your local shops?

Question b) asked respondents to select all criteria that were important to them. The results shown in the following table are the most frequently selected responses, with 1 being the most selected and 8 being the least selected.

Table 8- Ranked responses to the Shape Your Town survey

	Value		**Experience**
Rank	**What's most important to you when you visit your local shops?**	**Responses**	**What do you like about your local shops?**
1	Mix of Uses	167	Major supermarket
2	Comfort and Amenity	145	Easy to access via car
3	Major supermarket	143	Mix of Uses
4	Easy to Park	119	Easy to Park
5	Places to gather	90	Comfort and Amenity
6	Character and quality	88	Walk and Cycle
7	Easy to access via car	78	Places to gather
8	Walk and Cycle	57	Character and quality
9	Public Transport	50	Public Transport

Two observations can be made based on the differences between the responses to question a) and b).

1. Certain attributes that are identified as being the most important to respondents, aren't necessarily available to them when they visit their local centre. So, whilst someone may value something very highly, it may not be present in the location where they regularly shop, and it may not be important enough to cause them to shop elsewhere. Comfort and amenity for example, drops from 2nd most important to 5th most selected as something respondents liked about their local centre.
2. When asked to select all attributes that they liked about their local shops, the top 4 responses related to offer (supermarket and mix of uses) and accessibility (easy to drive to and park). These attributes are fundamental success factors for most existing Centres and are reflective of practical needs relating to accessing daily goods and services.

Respondents were also asked an open response question of "What do you think will improve your local shops?". Responses received have been collated and grouped under five (5) reoccurring themes outlined in Table 8- Ranked responses to the Shape Your Town survey.
The information gathered through the survey provides general insights into what attributes of centres are important to the survey respondents.

A theme that comes through strongly is a desire to shop locally and the importance of attractions such as food and entertainment in creating a vibrant, desirable, and accessible centre. Responses highlight aspects of our city planning that may need diversification, protection and/or improvement such as public transport, building controls and walking connections.

The information from this survey was used by *SGS Economics and Planning* to inform their Multi Criteria Assessment of Centres (section 4.3). The relative importance of different attributes of Centres was used to determine weightings of each criterion to better reflect the importance of certain attributes to the community.[4] The results of the Multi Criteria Analysis were then used as an input into the Gravity Model, which balances supply and demand of retail

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[4] *SGS* Study *Paper 1 Appendix A: Multi Criteria Assessment, 2022*

Figure 6 - Open feedback from the Community

Improvements to Centres – Respondent suggestions	
Theme	**Summary of feedback**
Diversity of offers	A greater variety of offers including specialty stores and boutiques, local traders, supermarkets, restaurants, bars and cafes as well as outdoor dining offers. Having a mix of local and chain offers but ensuring that chain and large format offers are appropriate for a centre. Activate centres by filling empty spaces, improving evening offers and extending outdoor dining.
Traffic conditions	Improvements to parking in the form of more spaces (including accessible and electric charging spaces) that are free and untimed. Existing off-street carparks are perceived as unsafe and in need of renewal. Increased traffic calming measures and move traffic away from town and village centres
Active and public transport choice	Improved public transport offers and prioritise pedestrians and cyclists by way of improved and connected footpaths, safe locations to cross street and designated cycleway networks.
Improvements to amenity	Purposeful landscaping in the form on canopy trees, flowers and community gardens to improve the look and feel of centres. Increased access to multi-purpose public spaces integrated within town centres allowing places to meet, play and socialise and ensuring spaces are safe, clean, smoke free with access public amenities.
Retention of unique character	Retaining a 'village feel' and celebrating the unique character of centres. Upgrades to building facades, working with landlords to fill vacant shops and integrating public art into centres. Development should be suited to a Centre's character, with stronger planning control in place to control outcomes.
Scale and quality of development	Concerns were raised about the over-development of centres and suburbs. Some respondents wanted high-rise apartments to be contained to the Wollongong City Centre. More flexibility in zones to permit a variety of businesses in centres including small scale manufacturing. Development that provides amenity and enhances villages was encouraged.

Figure 7 – Shape your Town Survey signage in place

Industry

In July 2021, *SGS Economics and Planning* led targeted conversations with key local industry stakeholders including major developers, local agents, land and business owners, and industry representatives. The focus on this feedback was to assist in defining the implications of trends and drivers (section 4.2) on Wollongong LGA.

The key objectives of the engagement were to:

- Understand the local economic conditions that are driving investment and business location in the LGA,
- Gain market insight into development patterns across the LGA's centres, including development patterns that may be unique or nuanced to specific submarkets, and
- Have an appreciation of related activities that are already taking place or may take place in the future across Council and other allied organisations such as local chambers of commerce.

Table 9 provides a summary of the industry engagement feedback categorised as themes.

Table 9- Industry feedback

Theme	Summary of feedback
Supermarkets and food-retailing	• Major supermarket chains are exploring options for smaller format supermarkets within the LGAs suburbs. • Major Supermarkets are monitoring growth in West Dapto and watching COVID impacts. • Exploration for sites and then negotiations with landowners are important to the process of finding the right locations for potential supermarkets/stores.
Wollongong CBD	• The opinion remains that the Crown Street Mall lacks activation to attract people to visit. The cost of having and holding land in the CBD is a barrier (rates, levies etc). • Wollongong CBD is diversifying from a retail-based CBD to include residents, experience-based retail (cafes and small bars) and tech and shared services sectors. • Retail will need to meet the needs of CBD residents (these residents will have higher incomes than other residents LGA wide) and of workers in the CBD. • Commercial agents raised intrinsic conflicts between residential and commercial uses, with premium companies wanting pure commercial buildings and residential outcompeting all other land uses. As such, there was support for quarantined precincts for commercial only development through a review of CBD planning controls. • The mixed-use developments have not been successful, with many commercial vacancies at ground. • There has been an approx. 70% uplift in A-grade office stock in Wollongong but the Wollongong office market is still largely unknown to Sydney based commercial real estate agents. • Due to COVID-19 Office markets are changing and CBDs are getting quieter with many people working from home. This results in a lack of foot traffic in the CBD, which is problematic for retail businesses. Migration from cities to regional locations poses an opportunity for Wollongong to activate the Centre. • Support for increased night-time economy to support and foster activity in place making such as updates on planning certificates and extension of licences allowing 2am trading.
Resurgence in manufacturing and Industry	• Many businesses are moving from the CBD to the growth centres of Wollongong where rent is cheaper, building footprints are larger and parking is available. • There has been a rise in enquiries for industrial lands particularly around Port Kembla. Many of these are in energy resources such as gas and hydrogen, which could bring significant jobs creation extending beyond those uses to their supply chains. • Some stakeholders believed that some industrial land may be better suited as residential such as in Kembla Grange.
Jobs in West Dapto	• Council to consider the role of future West Dapto centres and what local employment opportunities are there beyond retail to provide self-sufficiency and job choice.
Diversifying economy	• The Wollongong economy has been undergoing a process of diversification, moving from a manufacturing to a service led economy. While there are still some manufacturing jobs located within Wollongong LGA, this industry no longer dominates the employment market. This trend has been driven by businesses and residents relocating from Sydney to Wollongong.

4.2 Trends and Influences

The distribution, role and function of centres across Australia is shaped by a range of factors. This section explores the most influential and applicable key trends that are affecting the business and retail economy broadly and the implications of these trends on the Wollongong LGA specifically, both now and into the future.

The evolution of our Centres

The role and evolution of Wollongong's retail and business centres has changed since the formation of our post-colonial townships in the 19th century. We moved from walkable, local commercial high streets providing all your daily needs and founded to support core industries such as mining and the steelworks, to the rise of shopping malls formed around large corporations and supported by mass production and improvements to freight. These large shopping centres were a new land use, built form and centre offer in themselves, catering to private car ownership and a desire for the convenience of a one-stop-shop. These shopping centres competed with the traditional high-streets and drew activity from the streets and public spaces inside.

For much of Australia's history, retail trading was heavily restricted, with night-time and weekend trading limited. In recent decades, as part of a broader push towards economic deregulation, retail trading hours have been increased, with retailers and service providers now able to generate activity outside of 'standard' business hours.

The emergence of personal smart phones and online retailing has disrupted the role and function of both the high street and shopping mall forms. Online shopping offers both diversity and convenience, key indicators for retail success.

As our population grows and diversifies, consumer values have shifted with a desire to return to small businesses, seek experiences and shop sustainably and locally. This has seen some small businesses and creatives shift into older high-street building stock and a resurgence of the traditional high-streets and centres. Online shopping remains a strong economy, and rather than trying to compete, most Centre businesses now recognise the need to have a complementary online and physical presence

Today, decentralised working, online shopping and social media has changed our traditional behaviours. Where we spend our time and our priorities and spending habits are not what they were when our Centres were developed. As we continue to evolve our existing Centres, and deliver new Centres in our Urban Release Areas, it is important that we recognize these contemporary behaviours and priorities and plan accordingly.

Figure 8 -The evolution of Centre typologies and retail trends

Impact of COVID-19 Pandemic

The COVID-19 global pandemic commenced in early 2020 and resulted in Governments, including the NSW Government, sending communities and economies into lockdowns with an aim to reduce the spread of the virus. As we continue to deal with the COVID-19 pandemic, it is challenging to predict what its long-term impact will be on specific communities, economies, and Centres. However, the SGS Study referenced a paper by Florida et.al.[5] which identifies three main forces that have the potential to lead to the long-lasting transformation of cities:

- **Social Scarring**: Fears which result in people avoiding crowded spaces or changing how they interact with others. This behaviour influences where people live, work and spend time.
- **Forced experiment for employment, shopping, resident choice and commuting:** The restrictions enforced by health orders have provided conditions for a forced and radically different experiment including remote online working, learning and shopping. Social interactions have been largely limited to social media and digital platforms. It remains to be seen whether these online alternatives will permanently alter and/or replace traditional interactions as face-to-face communication becomes more practical
- **Need to secure the urban built environment against this and future health and climate risks:** Social distancing creates the immediate need for different configurations of indoor and outdoor spaces. Some of these changes will likely be maintained whether for public health benefits, or because people simply prefer them. In the long term this pandemic will prompt architects, designers, and planners to more seriously consider permanent interventions that respond to future pandemics and climate risks.

The impact of COVID-19 is further outlined throughout this section.

Population Change

Overall, population growth remains the greatest driver for retail growth in centres, particularly supermarkets. As population growth (driven largely by immigration) is the demand driver for retail facilities the decrease in population growth during COVID-19 has caused delays in growth and financial pressure.

Although we saw a decrease in international migration during COVID-19, we saw a shift in internal migration patterns to some regional areas. This is driven by a change in value proposition in favour of higher-amenity, lower-cost regional centres supported by the option for people to choose to work from home and avoid a commute to inner Sydney.

Online Retailing

Online retailing is a form of electronic commerce which allows consumers to directly buy goods or services from a seller over the Internet, rather than in-person, using a web browser or a mobile app. People shop online to save time, locate the best price and shop at a time convenient to them.

The rise of online retail is not a new trend and has been impacting on Australia's retail sector for over a decade. The market share of online

[5] R.Florida, A.Rodriguez-Pose, M.Storper (2020) Cities in a Post COVID world

retail has grown by approximately 0.75% per annum.

COVID-19 saw a faster shift to online retail than projected and this trend to shop online is assumed to remain strong, especially for people who cannot easily access a Centre with diverse offers. During COVID lockdown periods in 2020, this share spiked to 11.1%. Although this share has dropped back, it has not adjusted to pre-COVID levels, suggesting an increased share could become permanent.

Online retailing has the potential to cover all retailing categories but impacts some categories more than others. Merchandise, specialty stores, apparel and department stores have all experienced a shift away from in-store purchasing.

As part of their scenario testing, SGS explored how an acceleration in online retailing would impact Centres in Wollongong. The results showed that specialty retailing and therefore the City Centre and large major-regional Centres like Warrawong and Dapto(which tend to have department stores) were the most impacted. Town Centres were least affected, given they principally tend to service customer's daily food needs.

Retail services (gyms, health care, childcare etc) are not expected to be significantly impacted by an increase to online spending.

Initially the retail industry perceived online shopping as a direct threat to bricks and mortar stores. Today, businesses are expanding to service models with both online and in-person retailing. This has opened up new ways for people to shop, including 'Click & Collect'.

For Centres to be attractive to consumers and maintain physical activation, they will need to perform well across a range of factors. These are outlined in Table 10.

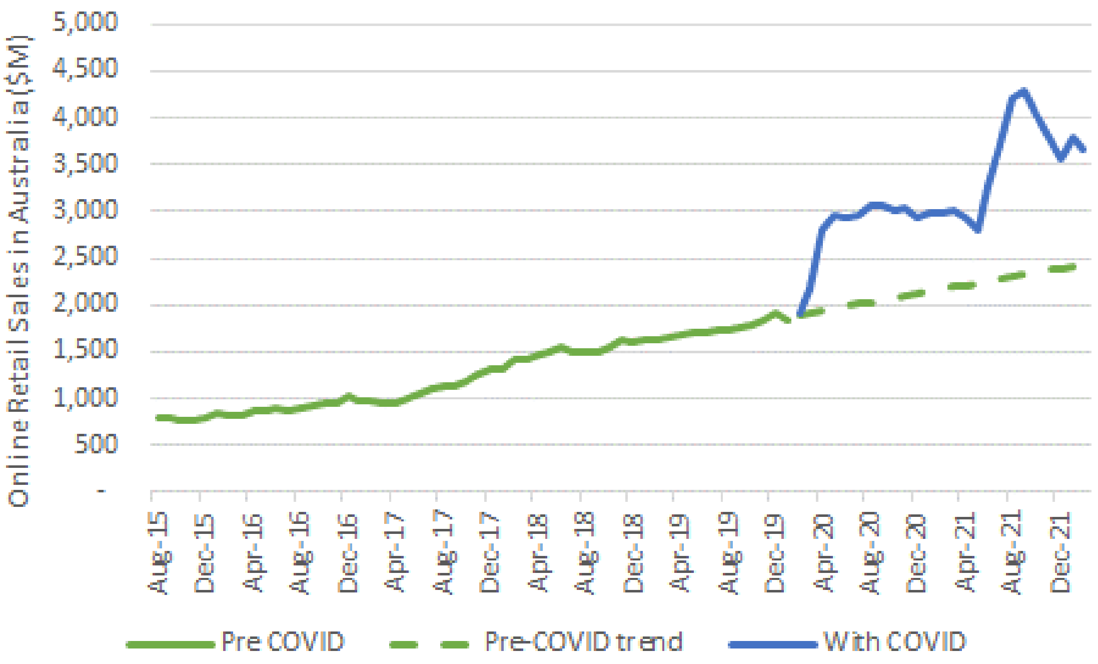

Figure 9 - Growth of Online Retail, Australia. Source: Source: ABS 8501.0 Retail Trade (Source - SGS Study)

Table 10- Maintaining physical activation in Centres (source – SGS Study)

Key elements for physical stores	How planning can optimise centres on those indicators
Visual presentation	Encourage investment that refreshes shopfronts, prevent floorspace oversupply which can lead to vacancies. Where existing assets complement place character, planning should seek to enhance these features (e.g. heritage, natural amenity).
Physical access	Ensure adequate traffic and pedestrian movement strategies are in place across the centre
Encouraging footfall	Have strong anchors in strategic locations. Make use of major infrastructure such as new railway stations and natural assets such as parks, riverfront and foreshores.
Enticing vibe	Manage the aesthetic element of centres across infrastructure, tenancies and design. Work with businesses on street presentation.

The growth of online retailing has had implications on many industries, including freight and logistics. Over a quarter of online customers are willing to pay for same-day delivery. This has placed pressure on 'last mile' logistics, which is the most important and most expensive leg the of the delivery process. Traffic congestion, geographical distance, and customer expectations, require distribution Centres to be in areas close to residential populations. Centres are ideal logistical locations, however, prices in and around Centres are high and the impact of 24/7 operations and vehicle dominance on urban amenity needs to be considered in detail to ensure Centres retain pedestrian priority.

Retail Types

Over the past 20 years, the retail sectors growth has slowed across Australia, with annual growth trending downwards. There are a range of factors that have contributed to this decline:

- Increase in the proportion of income saved
- Long-term low real wage growth
- Record housing prices
- Change in spending priorities e.g., on travel and increasing life costs
- Change in consumer preferences for shopping experiences.

Although COVID-19 has provided significant distortion in this downward trend, it is assumed likely that this trend will resume its long-term trajectory.

Trends across different retail types are explored in this section.

Figure 10 - Quarterly retail expenditure growth in Australia, 1996 to January 2021. Source: SGS Study

Food Retailing

Food-based retailing includes bakeries, bars, cafes, convenience stores, restaurants, liquor stores, grocery stores and supermarkets. Wollongong has over 330 stores in this category.

Traditionally most Centres and high-streets were anchored by a supermarket, clustered with smaller stores that benefited from the supermarket's ability to attract a high volume of sales.

This condition is still in place in contemporary Centres, although Supermarket offers are diversifying to include new chains, changing formats to smaller metro-style stores, offering online shopping and delivery options (click and collect) and tailoring offers to market to individual communities. Non-supermarket food retailers such as bakeries, butchers and delis also play a significant role although are competing more and more with larger supermarkets, which often include these specialised offerings.

Wollongong City Centre may be a candidate for some of these evolving trends, especially metro style supermarkets with specialty food retailing, which are attractive in walkable higher density locations. Public domain improvements such as active and public transport connections across large and small Centres will support the success of these smaller offerings.

Service-based cafes, bars and restaurants have experienced strong growth over the past five years, supported by the rise in alfresco dining and 'eat street' culture. The facilitation of outdoor dining and restaurant-defined retail strips requires a collection of physical and policy settings to be in place. These include generous footpaths, attractive building character, a strong focus on urban amenity (including street trees, provision of furniture and pedestrian/diner safety) as well as supportive policies (late night trade and evening economy).

The distribution of population growth will drive locational decisions around future food retailers, particularly new supermarkets and their supporting retailers. West Dapto is a strong candidate for new clusters of food retailing and it is important to provide land for a variety of sizes and types of these offers. It is important that these offers occur within defined Centre locations, to capitalise on the activation potential and ensure they don't move to out of centre locations which are more affordable but will not provide flow on benefits.

Department and Specialty Stores (non-food)

Wollongong's non-food retail economy includes shopping malls, department stores and other specialty stores such as jewellery, bike and book stores. Wollongong has over 80 stores in this category.

The role and influence of Department and specialty stores has been decreasing for some time due to the competition of online platforms. The trend is expected to continue, along with general merchandise/ apparel sub-sectors that are just not competitive enough versus online platforms.

The exception to this is in high footfall centre locations with a higher level of natural amenity and distinctive character. These places attract consumers using a 'lifestyle' or 'experience' retailing model. Thirroul Town Centre currently performs well in this regard, and Port Kembla has the potential to do so.

Operators of large Shopping Centres that possess a prominent Discount Department Store may need to revisit their economic composition over the next decade towards more of an open and connected street mall that can attract and retain a broader group of businesses.

Bulky Goods

Bulky goods retailing primarily includes of hardware stores, household goods stores, furniture stores and car dealerships. Wollongong has over 160 stores in this category.

The decline experienced by other retail sectors has not impacted bulky goods in the same way. This is due to strong residential population growth and associated construction activity. Areas where population growth and household formation is strong are well suited to support bulky goods retail. In Wollongong this includes areas of West Dapto. These precincts are in addition to the existing network of dispersed peripheral sales areas which support established communities.

Bulky Goods retailers are well suited to locations with convenient car access. Highway locations on the periphery of centres, and car-based centres and shopping malls are common bulky goods precincts. Wollongong, Figtree, Dapto, Warrawong and Kembla Grange have a comparative advantage in this regard.

The most successful precincts are anchored by a large tenant (such as Harvey Norman, Bunnings or MITRE 10) who provide strong visitation that flows on to surrounding businesses.

Bulky goods retail should remain strong as long as these retailers still have access to affordable land in appropriate locations.

The category of ‘Household Goods’ can be delineated into high and low density offers e.g., lounge and dining furniture is often solely found in low-density precincts such as King Street, Warrawong. However, items such as blankets and household linen are split between high- and low-density areas such as within shopping centres in Town Centres.

Traditional town centres can’t compete with the lower floorspace costs and availability of large sites available to bulky goods retailers in peripheral areas, and therefore must leverage human amenity, urban character and hospitality to attract consumers to purchase these products.

Population Serving Industries (non-food)

Population serving retail in Wollongong includes business types such as banks, salons, pharmacies, night clubs and dentists. Wollongong has over 490 businesses in this category.

These services are more experiential, and offer important opportunities for interaction, community, and connection. They require some of the highest levels of face-to-face interaction across the retail economy so are likely to remain as a strong physical presence in our Centres. That being said, they have been highly vulnerable to COVID-19 restriction, which have been a major inhibitor to the growth of the population-serving retail economy in the short term. Retail service industries are forecast to experience high growth in Wollongong, whilst retail goods are expected to decline.

SGS’s scenario testing revealed that by 2041, Wollongong is likely to experience an overall 10.9% vacancy across retail goods businesses, and an 6.2% undersupply of retail services floorspace. Given the floorspace requirements for these two types of activities are similar, it is reasonable to expect that we will see a transition across existing stock, and an overall balancing of over and undersupply.

For Centres with established malls and large department stores, this transition will be more complicated, and we may see more vacancies in these location as retail goods store decline. There is an opportunity to work towards improving the amenity and customer experience of these centres to encourage the transition to service businesses.

Commercial Trends

The Wollongong LGA has a strong commercial office sector that is well positioned to thrive. Most commercial office floorspace is located in the Wollongong City Centre CBD with more localised offers within the other suburban Centres.

The decentralisation of many government and corporate organisations creates a great opportunity for the Wollongong City Centre CBD, because it offers a setting outside of Sydney that still has an agglomeration environment that commercial firms require.

High amenity office precincts with a mix of large organisations and a strong critical mass of small to medium enterprises have an important long-term role to play. These precincts provide opportunities for different firms and services to collaborate. For these precincts to be successful they need critical mass, which is why concentrating to a defined geographic area has great benefits.

This physical critical mass has been disrupted by COVID-19 health orders and subsequent operational adjustments. There is now a tension between the positive benefits of professional service employees working from home and facilitating internal and external collaboration in face-to-face settings. This has implications for the amount of commercial floorspace required, with some newer offices consolidating teams across smaller floorspace areas than originally intended, and sub-leasing excess floorspace to other organisations. The development sector requires an agile approach to adjust to these evolving conditions and should be cautious about making any assumptions about future floorspace requirements that could limit practical operational requirements.

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Residential Development in Business Zones

Over the past ten years Wollongong LGA has seen a large amount of residential development and population moving into apartments in business zoned land, especially in the Wollongong City Centre, B3 Commercial Core and B4 Mixed Use Zones. This housing has diversified housing stock, typically taking the form of a mixed-use building. The Wollongong LEP 2009 defines shop top housing as one or more dwellings located above a ground floor retail premises or business premises. Such development is currently permitted in all business zones including the B1 Neighbourhood Centres, B2 Local Centre, B3 Commercial Core, B4 Mixed Use and B6 Enterprise Corridor zones.

The influx of shop top housing in some Centres has weakened the intent of the zones as employment land, with land locked up under strata title. This restricts future opportunities for employment generating development. Tokenistic ground floor retail/ business has also resulted in many locations remaining vacant, and the relative energy of the retail core weakened.

Conflicts and competition between residential and commercial land uses are evident, particularly within the Wollongong City Centre CBD. Much of the new development in the CBD has been mixed-use, which is not of preference to premium companies looking for high quality office space. There is a need to ensure the right floorspace is being delivered to create high value jobs for the community. This is more likely to occur through the development of separate mixed use and commercial precincts, more so than mixed use buildings.

Summary – Trends

Trends and drivers impacting Wollongong’s centres can best be summarised as:

- **Influence of population growth:** Population growth is the greatest driver of business and centres growth.
- **Retention of centre-appropriate anchors**: For Centres to succeed and thrive, they rely on a cluster of different uses, most often with an anchor (such as supermarkets, food retailing) drawing significant footfall. Recognising and supporting retention of these anchors (e.g., the right floorspace, access, amenity) are key determinants to their success.
- **Importance of accessible centres:** Accessibility is key to Centre success. Wollongong residents' reliance on cars to access centres (over public transport or walking) has resulted in significant parking and vehicle movement within centres. This is detrimental to character and public domain, and inhibits safe and comfortable pedestrian movement. Ensuring the community have access to centres that are activated, walkable and attractive is critical in providing the greatest opportunity for local businesses and centres to thrive and survive in the face of competition from online and out of centre developments.
- **Mix of uses and activities:** Beyond Commercial and Residential, larger centres should contain a mix of activities including office, retail, dining, art and culture, community facilities, entertainment, sport and recreation. This diverse mix will generate an environment that attracts, retains and grows businesses into the future. These uses should extend to cover night-time economies supported by high quality public spaces, including public space activation and events programs and appropriate infrastructure.
- **Quality and experience of the Urban Environment:** Service based retailing that is more experiential, especially in a suburban context, tends to offer important opportunities for interaction, community and connection. Services span from libraries and childcare to hair salons, gyms and coffee shops. We can support these offers through building and public domain improvement, night-time economy initiatives, access, space for outdoor dining and extension of trading hours.
- **Ensuring resilience to pandemics:** The built environment and planning policy settings need to remain flexible to support any distancing restrictions (spaces for dining), to allow for businesses to pivot.
- **Building a critical mass of office businesses**: High amenity office precincts with a strong critical mass of Small to Medium Enterprises (anchored by some larger corporates) have an important long-term role to play to ensure a diverse provision of employment and professional services to the community. Higher order centres, and especially the City Centre, need to have appropriate planning control settings to enable this to occur.
- **Residential development in Centres:** Some Centres are well placed to facilitate medium and high density dwelling development. Conflicts and competition between residential and commercial land uses are evident, particularly within the Wollongong CBD. There is a need to ensure the right floorspace is being delivered to create high value jobs for the community.

4.3 Existing Centres analysis

Retail Floorspace Supply

In Wollongong LGA, retail floorspace is spread across a number of different land use zones. Whilst most retail activity occurs in Centres, our peripheral sales precincts and industrial areas also account for a portion of our overall retail floorspace supply.

In 2021, there was around 348,000m^2 of floorspace in Wollongong LGA devoted to the sale of retail goods. Retail services occupied a smaller area of around190,000m^2.

Retail floorspace can be broadly understood as falling into 5 different categories: food, specialty, population serving, bulky goods, and export oriented[6]. Table 11 illustrates the percentage breakdown of Wollongong's total number of retail 'stores' and their respective floorspace, under these 5 categories.

Table 11- Retail Floorspace categories and distribution (Source: SGS floorspace audit 2021)

5 Economies	Stores	Floorspace
Bulky Goods	18%	28%
Export	9%	14%
Food/Supermarket	37%	29%
Non-food retail	9%	7%
Population Serving	27%	21%

Feasible Capacity

Current planning controls provide significant capacity to respond to a growing demand for retail floorspace. Excluding sites that are relatively unlikely to redevelop and applying a feasibility filter that considers triggers for redevelopment, Wollongong LGA has over 1 million m^2 of additional available floorspace to meet ongoing demand for retail goods and services[7].

Planned Floorspace and Development activity

In 2021 there was over 110,00m^2 of additional retail floorspace planned for development in centres across Wollongong LGA. This included floorspace allocated to our planned centres throughout West Dapto and Tallawarra (17%), and that proposed through development applications in existing centres (83%). Over half of the total planned floorspace is located within the City Centre[8]. This distribution of planned floorspace has a direct relationship with the areas where our population and dwelling numbers are growing and highlights a recognised need for adequate supply in these locations.

Centre Performance

In addition to supply and capacity to grow, there are other factors that contribute to a Centre's role and function in the overall network. These factors are place-specific, and relate to the quality of the built environment, the ease of access and the diversity of activities on offer.

The NSW Public Spaces Charter notes that "*Town centres and retail precincts that are supported with quality public spaces where people can sit, rest and connect with each other are more likely to thrive*"

Table 12 outlines this range of place specific criteria that contribute to thriving centres.

[6] See SGS Study for explanation of retail types
[7] SGS Floorspace Audit 2021
[8] ibid

Table 12- Place based attributes of Centres (Source - SGS Study)

Category	Criteria
Place	1.1 Environmental quality and physical amenity
	1.2 Built form quality
Activity	2.1 Presence of private sector business anchors
	2.2 Presence of public sector and institutional anchors
	2.3 Overall land use mix
	2.4 Presence of entertainment / recreation / community uses
Access	3.1 Major arterial road access
	3.2 Public transport accessibility
	3.3 Active transport and walkability
	3.4 Car parking
Retail composition	4.1 Presence of anchor supermarket
	4.2 Presence of anchor department/discount department store
	4.3 Overall retail mix

Some of the attributes above are more important than others, both to different sectors of the community, and for the success of different types of retail activity. Access by car is an important attribute for areas specialising in the sale of bulky goods, whereas having a mix of retail and other offers is more important to those areas that specialise in food and specialty goods. These place attributes are important considerations in light of the growth of online trade, and the need for physical retail to provide the right combination of attributes and experience to attract trade and visitation.

SGS conducted an evaluation of selected centres against the criteria in Table 12. The scores against particular criteria were then weighted using the community's ranking derived through the *Shape Your Town Centre* survey. These weightings were then modified for hospitality and bulky goods to reflect the particular success factors for those industries. Figure 11below shows how well the selected centres are likely to perform in relation to 3 key retail categories – where 0 is poor and 1 is optimal. These results resonate with the analysis completed through various town and village plans, and reinforce the need to consider our centres holistically, and in light of their desired role and function.

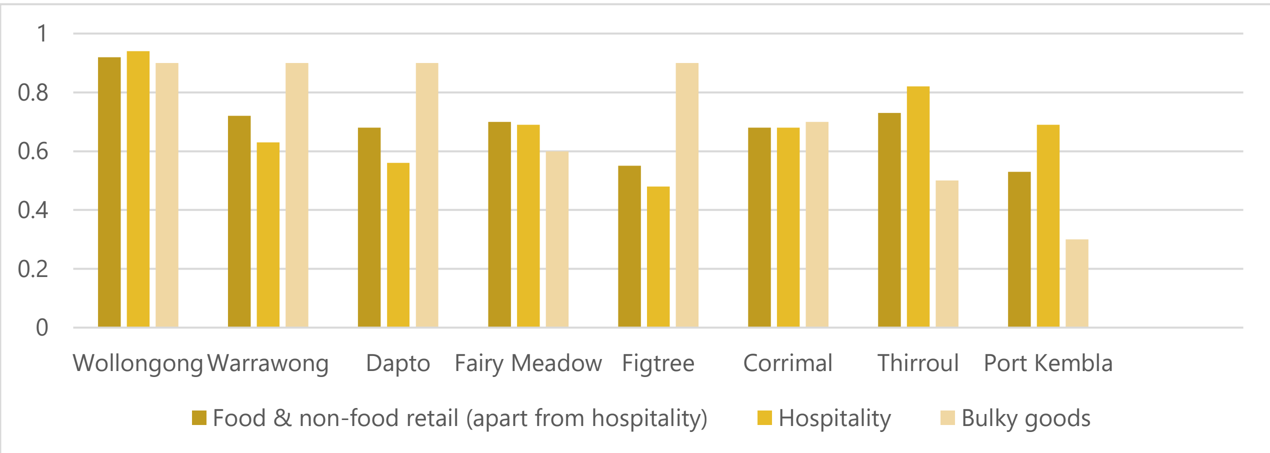


Figure 11 – Potential Centre performance in relation to key retail categories (Source - SGS Multi Criteria Assessment)

Accessibility

Successful and equitable centres must be accessible to function well. People use multiple modes of transport to access centres.

Access by car

The nature of our LGA's geography and the number and network of available Centres means that that the majority of our population can easily access a Centre with a supermarket or grocer by car.

Access by Public Transport

The majority of the Wollongong LGA has a Public Transport Accessibility Level of 1-Low to 3-Medium. For those Centres located along a major road served by bus services, accessibility within the centre and immediate surrounds is generally rated 4 – Medium-High to 5 – High. Within the Wollongong City Centre only, public transport accessibility is rated 6 - Very High.

Figure 12 - Public Transport Accessibility Level Map excerpt (Source: Built Environment Indicators – Public Transport Access and Connection)

Access by walking

An 800m easy walking catchment is considered the aspirational distance that an able resident should be expected to walk to their nearest grocery location. A distance of 1.6km aligns with the '20-minute walkable threshold'.

Despite its relatively large geographic size, Wollongong's network of Centres provides coverage for most residents within a 20-minute walking catchment. There is also good coverage of residential areas within an easy 800m walking catchment of centres. The exceptions are all south of the Wollongong City Centre, generally in the western outskirts and lower escarpment regions. Areas with poorer accessibility include:

- The western outskirts of Figtree
- The western outskirts of West Wollongong
- Farmborough Heights
- Cordeaux Heights, Mount Keira and Mount Pleasant (exacerbated by topography)
- Primbee (could be enhanced with grocery provision in existing B1 zone)
- Kanahooka
- Avondale
- West Dapto – note that accessibility will remain poor for large areas even with the development of the planned centres, unless supermarket/grocery provision is supplied in the smaller village centres.

Spending profiles

Spending profiles give us an insight into how our community is using our centres – both in terms of the volume of spending and the break-down of the spending across different categories. Profiles also allow us to check in on whether spending activity is reflective of the Centre's position in the centre hierarchy (section 3). The following data has been pulled from Spendmapp for the period of February to April 2022.

Total Spending

Spendmapp data largely confirms the existing role of centres within the existing retail hierarchy.

As the 'Regional City', the suburb of Wollongong received 28% of total local spending, which was approximately three times more than Warrawong, four times more than Dapto and five times more than Figtree and Corrimal.

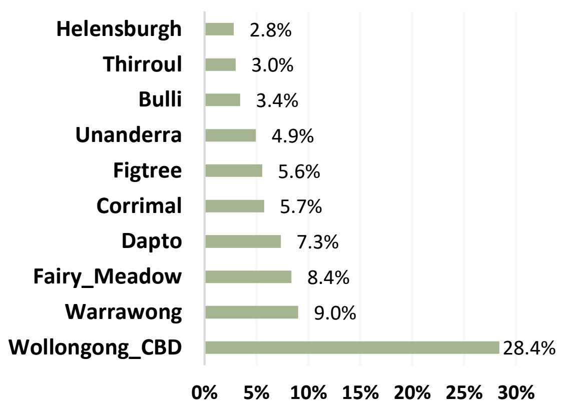


Figure 13- Proportion of total spending - Top 10 Suburbs (Source - Spendmap by Geografia

In terms of external visitor spending, Wollongong City Centre's regional role is further highlighted with the suburb receiving 35% of total visitor spending to the LGA over the period.

In terms of average proportion of total local spend, there is little difference between the contribution of suburbs containing a 'Major Regional Centre' (8.2%) such as Dapto and Warrawong and those containing a 'Major Town Centre' (6.1%) such as Corrimal, Fairy Meadow Figtree and Unanderra. However, the average contribution of suburbs containing a Town or Village Centre was much lower at 1.7% and 0.5%, respectively.

When comparing Total Local Spending and Resident Local Spending, all suburbs within the top ten remain with only minor changes to proportions and ranking (*Proportion of Resident Local Spending*).

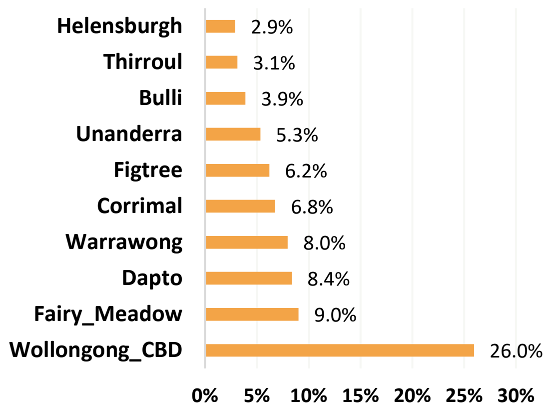


Figure 14 - Proportion of Resident Local Spending - Top 10 Suburbs (Source - SpendMapp by Geografia April 2022)

Spending Category Analysis

The following analysis relates to the period of February to April 2022 and explores the contribution of individual suburbs to total local spending per category.

Bulky and Household Goods

This category includes spending on bulky goods such as home supplies, household appliances, hardware stores, nurseries and furniture supplies.

Across the LGA, total spending in this category was concentrated in the four suburbs of Warrawong (23.1%), Kembla Grange (22.5%), Bellambi (22.3%) and Wollongong (21.5%), collectively making up 89% of total spending.

This largely reflects the current spatial distribution across the LGA of large format retail sites on the periphery of centres with access to major transport corridors.

Department Stores and Retail

This category includes spending on a wide range of retail goods at department and clothing stores as well as at more specialised and luxury retailers such as bookstores, florists, electronic stores, and jewellers.

Across the LGA, the highest spending in this category occurs within suburbs containing higher order Centres that broadly reflect the existing retail hierarchy.

The suburbs of Wollongong (36.8%) and Warrawong (22.3%) collectively made up 59% of total expenditure, which is due to them containing the two largest shopping Centres.

This is followed by Figtree (10.1%), Dapto (7.2%), Fairy Meadow (5.9%) and Corrimal (3.4%), which highlights their role in supporting suburban retail demand.

Dining, Entertainment and Travel

This broad category includes spending on hospitality (cafes, bars, restaurants), entertainment and tourist attractions as well as accommodation and travel related expenditure (airlines, car rentals etc.).

Wollongong is the strongest suburb in this category contributing 35.8% of total local spending which is likely elevated through its role as a key employment precinct as well as visitor destination.

Grocery Stores, Food & Alcohol Retailing

This category includes spending at supermarkets as well as at specialised food retailers such as bakeries, butchers and alcohol stores.

Spending here is driven mostly by local resident demand and provides insight into the role a suburb is playing in servicing its surrounding residential catchment.

Across the LGA, spending in this category broadly reflects the Centres hierarchy.

Bulli has an elevated role (ranking 5th), higher than suburbs such as Warrawong and Figtree with larger shopping precincts.

Light Industry, Trades and Transport

This broad category includes spending on a variety of industrial products, trades and contractors as well as transport related expenditure (e.g., service stations, car and other vehicle dealerships, automotive parts).

Across the LGA, Wollongong contributed 21.1% of total local spending in this category with Unanderra (11.1%) and Fairy Meadow (9.9%) also notable.

Although not as concentrated as Bulky and Household Goods, the spatial distribution of spending mostly reflects areas of industrial zoning across the LGA.

Services and Other

This category includes spending on professional services, personal services as well as miscellaneous items that do not fit within other categories.

Wollongong is clearly the strong suburb in this category contributing 42.3% of total local spending which reinforces its role as the Regional Capital.

Proportions of spending among Fairy Meadow (6.3%), Figtree (6.1%), Corrimal (6.1%) and Dapto (5.6%) were roughly equal reflecting their roles in providing local suburban services.

Warrawong (3.2%) was approximately equal to Woonona (3.2%) and shortly followed by Thirroul (3%) and Helensburgh (2.9%).

Warrawong has a lower proportion of services spending than expected for a suburb containing a Major Regional Centre.

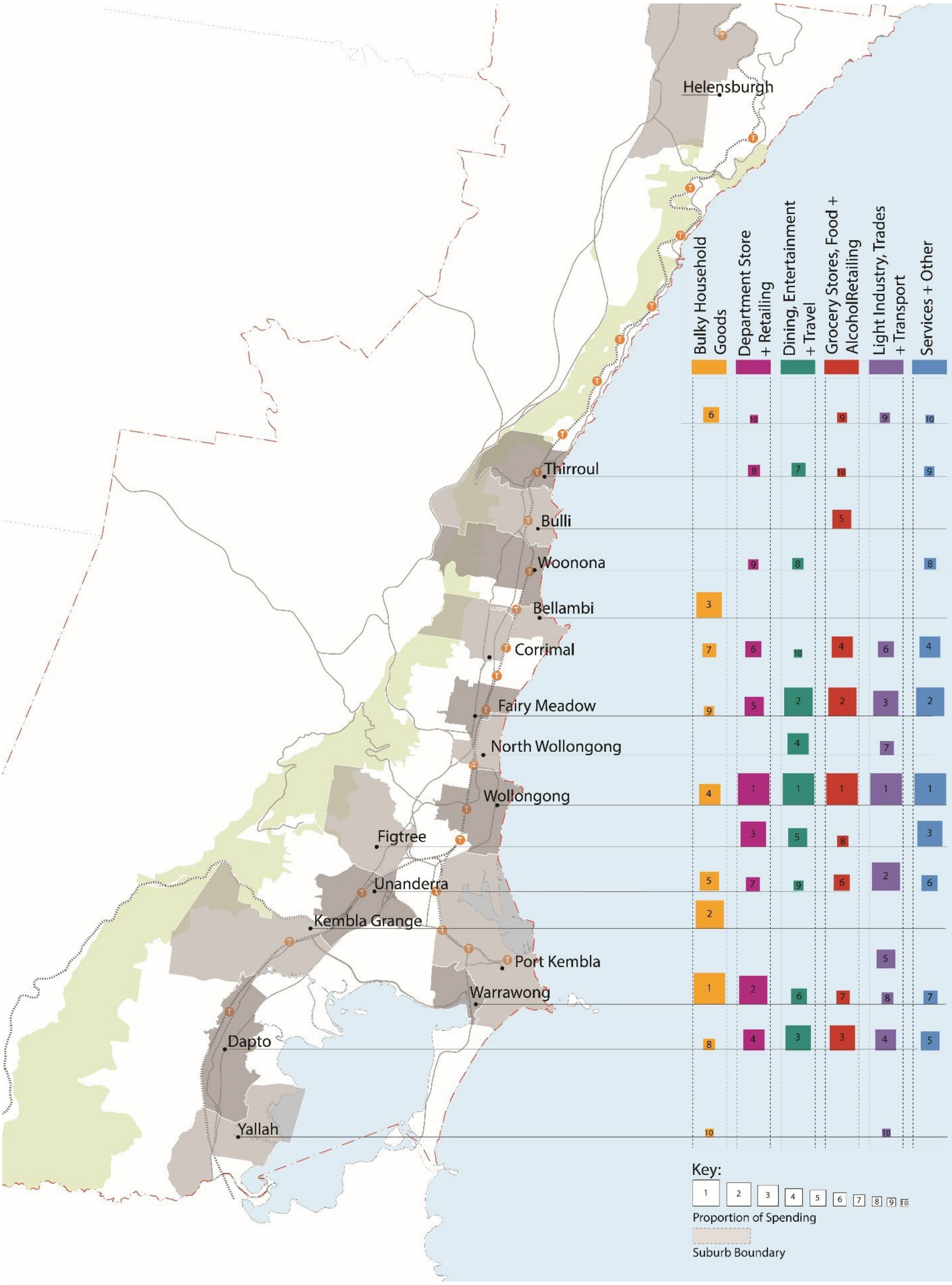


Figure 15 – Top 10 Suburbs across the Six Spending Profile Categories

4.4 Forecast growth and demand

Forecast growth and demand across Wollongong's retail and business Centres has been modelled for a 20-year horizon from 2021 – 2041. The modelling includes consideration of the following floorspace types and associated methods:

- Commercial: job forecasts for commercial offices converted to commercial floorspace at a ratio of 25m^2 per each forecast job (standard for most suburban and regional centres
- Retail goods: expenditure of forecast resident and worker populations converted to retail floorspace across 6 categories: supermarket; other food; hospitality; specialty retail; department stores and bulky goods.
- Retail services: job forecasts for retail services, then converted into retail floorspace across 8 categories: fitness; services stations; beauty and personal services; health; automotive; entertainment; childcare and social services.

SGS Economics and Planning used a Gravity Model to reconcile demand and supply. The Gravity Model simulates the movement of trade flows via the LGA's current and future road network. Relevant economic interactions outside the LGA are also accounted for using Spendmapp data, to establish retail expenditure inflows and outflows. The demand generated by these flows is converted into floorspace and then reconciled against existing and planned floorspace across the LGA.

Results

Retail Goods and Services

The demand for retail goods and services floorspace across Wollongong in 2041 is largely consistent with forecast population growth and forecast job densities.

When compared with expected floorspace supply, we can identify gaps in provision, indicating whether centres will be under or over supplied in relation to demand.

Figure 16 shows the relationship between retail floorspace supply and demand at present, and in the future (2041). The table in Appendix 2 shows this in more detail, including floorspace numbers for each Centre. Where known, the available additional feasible floorspace (2021) is also shown.

In both 2021 and 2041, the results show that our floorspace supply, and the spare capacity within our centres, is tracking well with forecast demand. Overall, our current planning settings will allow the market to continue to deliver our community's required access to goods and services into the future.

2021 results show that we have a very small undersupply of ~6,000m^2 of retail floorspace across the LGA. This represents just over 1% of current demand. Resident expenditure could support more supply in Thirroul and Wollongong. Dapto, Figtree, and Port Kembla all have more supply than is demanded by catchment population expenditure.

In 2041 the results show that we will need an additional ~136,000m^2 to meet forecast demand across the LGA. Planned floorspace, in the form of known retail development and the Centres in West Dapto, would supply ~110,000m^2 of this demand, leaving ~26,000 m^2 or just over 3.5% of projected demand. The planning settings are well placed to allow the market to meet this demand over the ensuing 20 years. This relationship is shown in Figure 16.

Floorspace undersupply is evident in the short term across the new planned centres of West Dapto. It is important to note that these planned Centres have the capacity within their planning controls to meet demand, and the temporary shortfall is expected to be met by surrounding established Centres.

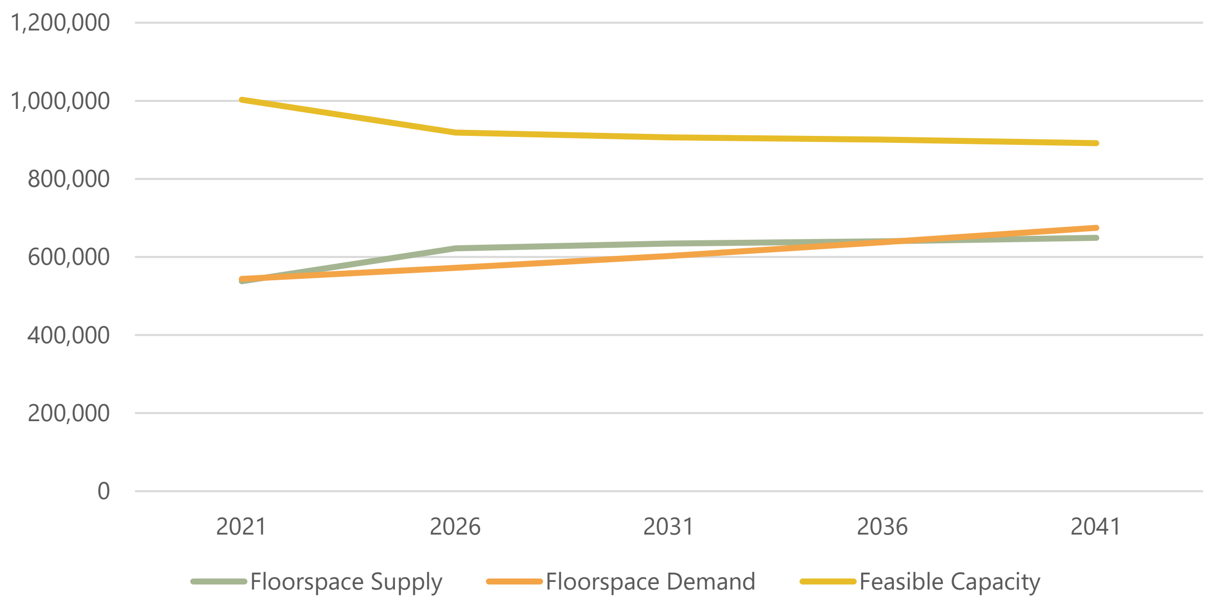


Figure 16 - Relationship between Retail Floorspace Supply, Demand and Feasible Capacity

Centre roles and relationships

The Centres Hierarchy uses floorspace thresholds as one criteria to guide the size of Centres in relationship to each other. These thresholds are shown in Table 13.

Table 13 - Centre size thresholds

Hierarchy Tier	Size (sqm)
Regional City	100,000sqm+
Major Regional Centre	40-80,000sqm
Major Town	20-40,000sqm
Town	5-20,000sqm
Village	2-5,000sqm
Small Village	100-2,000sqm

The floorspace audit and forecast growth modelling has allowed us to check in on the position of our Centres within the Centres Hierarchy.

In some cases, even if a Centre falls outside a specific size threshold, it may be appropriate to classify it within a different hierarchy tier due to its strategic location, or its current or future required function and land uses to serve the community.

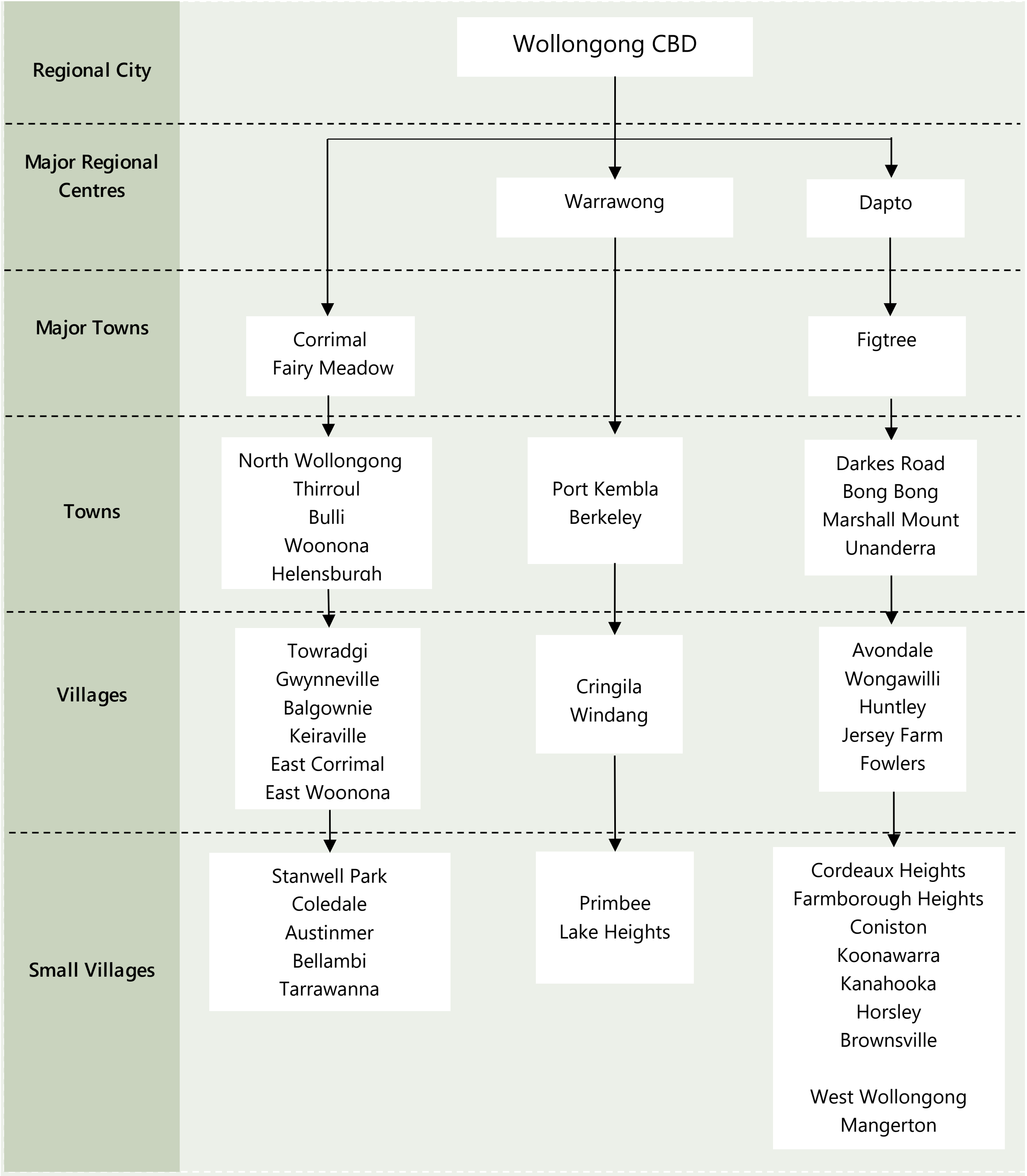
The proposed changes to the Centre hierarchy are detailed in Table 14. The proposed Centres Hierarchy is illustrated in Figure 17.

Table 14 –Proposed Centres Hierarchy

Hierarchy	Centre	Existing Retail Floorspace 2021	Demand by 2041	Proposed Change
Regional City *(110,000sqm+)*	Wollongong	122,450	213,625	-
Major Regional Centre *(40-80,000sqm)*	Dapto	40,076	50,484	-
	Warrawong	57,651	72,785	-
Major Town *(20-40,000sqm)*	Corrimal	27,646	25,296	-
	Fairy Meadow	21,927	16,104	-
	Figtree	24,069	19,440	-
Town *(5-20,000sqm)*	Bulli	9,438	11,757	-
	North Wollongong	15,674	12,624	-
	Helensburgh	9,557	11,277	-
	Woonona	14,040	17,490	-
	Port Kembla	10,599	9,276	-
	Thirroul	13,039	16,834	-
	Bong Bong	0	10,401	-
	Unanderra	*17,392*	*15,155*	Move from Major Town Centre to Town Centre
	Darkes Road	0	5,622	-
	Berkeley	5,342	3,137	Retain as Town Centre
	Marshall Mount	0	3,999	Retain as Town Centre
Village *(2-5,000sqm)*	*Windang*	2,782	2,724	Move from Town Centre to Village Centre
	Gwynneville	2,049	2,752	-
	Balgownie	*3,384*	*4,281*	Move from Town Centre to Village Centre
	Towradgi	3,024	2,664	Moved from Town Centre to Village Centre
	Avondale	0	2,038	-
	Cringila	*1,913*	*1,853*	Move from Town Centre to Village Centre. Do not shift to Small Village Centre
	Keiraville	1,797	1,786	Retain as Village Centre
	East Woonona	1,082	758	Retain as Village Centre
	East Corrimal	1,126	909	Retain as Village Centre

Hierarchy	Centre	Existing Retail Floorspace 2021	Demand by 2041	Proposed Change
Small Villages (<2,000sqm)	*Fowlers*	*0*	*2,168*	Retain as a Village Centre
	Coniston	1,583	1,419	Move from Village Centre to Small Village Centre
	Brownsville	1,415	1,174	Move from Village Centre to Small Village Centre
	Austinmer	1,371	1,340	Move from Village Centre to Small Village Centre
	Tarrawanna	*1,303*	*1,262*	Move from Village Centre to Small Village Centre
	Stanwell Park	*1,108*	*847*	Move from Village Centre to Small Village Centre
	Koonawarra	*725*	*218*	Move from Village Centre to Small Village Centre
	West Wollongong (Thames St)	688	605	-
	Cordeaux Heights	*652*	*561*	Move from Village Centre to Small Village Centre
	Coledale	*556*	*443*	Move from Village Centre to Small Village Centre
	Lake Heights	556	440	-
	Horsley	*446*	*268*	Move from Village Centre to Small Village Centre
	Kanahooka	*433*	*375*	Move from Village Centre to Small Village Centre
	Mangerton	351	321	-
	Bellambi	*286*	*247*	Move from Village Centre to Small Village Centre
	Farmborough Heights	*251*	*180*	Move from Village Centre to Small Village Centre
	Primbee	*200*	*146*	Move from Village Centre to Small Village Centre

Figure 17 – Proposed Centres Hierarchy diagram



Commercial Floorspace

Although Commercial Floorspace demand is not the focus of this study, it is important to acknowledge and plan for this floorspace type in our centres. Unlike retail demand, demand for commercial office space is not determined based on spatial catchments. Instead, it relates to the floorspace required by forecast employment types and numbers, multiplied by a sqm amount per job. Its spatial distribution should be generated through a strategic direction, established by the council through the planning controls.

Wollongong City Council has expressed a clear priority to focus employment generating office floorspace in the CBD of the Wollongong City Centre through the Economic Development Strategy 2019-2029. Our other business zones also have a role to play in delivering office floorspace, albeit significantly less and of a smaller scale. This intentional spatial distribution is critical to ensure that commercial office businesses have the benefit of agglomeration, through proximity to a critical mass of other firms. Consolidating commercial office precincts also has the benefit of focussing Council's efforts on public domain improvements and operational services relevant to this industry.

The Wollongong City Centre Urban Design Framework (2020) illustrated that whilst the current planning controls are able to facilitate a range of commercial office outcomes across the CBD, the development of consolidated commercial precincts where agglomeration benefits could occur, is under threat from residential encroachment.

SGS modelled three scenarios for commercial office demand, all using the base assumption that demand would remain concentrated in Wollongong City Centre CBD. Moderate growth was forecast in Centres with good connections to Industrial Precincts, and which offer floorspace that the City Centre cannot – namely office buildings that can be combined with industrial building types. The three scenarios included:

1. Base Case employment forecasts based on Transport for NSW projections (TZP19 – released Sept 2020)
2. COVID impact forecast – building in a temporary recession over the next 5 years, and more permanent flexible working arrangements moving forward.
3. Aspirational – based on the 10,500 jobs target (2028) projected out to 2041 and factoring in additional jobs growth across the nominated industries (finance/insurance, IT/telecommunications, professional/scientific/technical services, public administration and clean energy

Table 15- Commercial Office Forecast Floorspace Scenarios

	Total Floorspace Demand 2041 (sqm*)		
Location	**Base Case**	**COVID impact**	**Aspirational**
Wollongong City Centre	175,000	164,000	499,000
Coniston (B7)	58,000	58,000	102,000
Kembla Grange industrial	35,000	34,000	48,000
Port Kembla (B7 and industrial)	26,000	25,000	31,000
Dapto	24,000	23,000	38,000
Fairy Meadow	23,000	22,000	38,000
Montague Street Industrial	22,000	21,000	28,000
Coniston (B7 and industrial)	18,000	17,000	35,000

*Based on 25sqm per job (SGS) Note that this ratio relates to gross floor area (GFA) and is therefore more generous than a standard 8-15sqm per person allowance often quoted for office leasing purposes.

5 Strategy Recommendations

Strategic direction	Recommendation
The role of our Centres is clear	1. Update the retail and business Centres Hierarchy and definitions to reflect the contemporary role and function of Wollongong's Centres and guide their growth 2. Review and update planning documents to ensure consistency with the updated hierarchy
Our Centres are a good fit for our Community	3. Tighten Centre boundaries to create resilient and active Centres 4. Prevent the oversupply of retail floorspace 5. Protect existing required supply 6. Explore opportunities to increase residential density
Our new Centres in West Dapto are well planned	7. Encourage the development of planned Centres in West Dapto 8. Limit oversupply of retail floorspace in Centres surrounding West Dapto 9. Communicate clear expectations for Centre development outcomes
Our Centres are active and vibrant	10. Complement online trading with exceptional physical retail offerings 11. Facilitate an appropriate range of land use options to increase activity within, and patronage of, Centres 12. Update Active frontage planning controls to improve street presentation 13. Facilitate an evening economy in our Towns, Major Regional Centres and City Centre that is right for our community 14. Facilitate the activation of the road reserve for outdoor dining 15. Incorporate public art to create places which are distinctive, and which reflect local identity
Our Centres are accessible and support transport mode shift	16. Provide clear direction on the role and function of streets in our Centres 17. Provide clear parking controls and public parking facilities that are in line with sustainable community needs 18. Plan for walkable Centres 19. Support cycling to Centres
Our City Centre is a thriving commercial precinct	20. Deprioritise residential development in the Commercial Core 21. Tighten and focus the retail core 22. Facilitate diverse land use outcomes and leverage the City's assets

These recommendations are expanded on the following pages, and will be used to inform the scope, objectives and implementation of the following projects:

- Town Centre Built Form Review
- Wollongong Local Strategic Planning Statement (LSPS) Review
- Wollongong DCP 2009 Chapter B4 Development in Business Zones Review
- Wollongong DCP 2009 Chapter D1 Character Statements Review
- Amendments to the Wollongong LEP 2009
- Wollongong Housing Study
- Wollongong Industrial Land Planning Review
- Wollongong City Centre Planning Strategy
- Wollongong Integrated Transport Strategy
- West Dapto Town and Village Centre Development
- Outdoor Dining Guidelines
- Ongoing Planning Proposal review and Neighbourhood planning processes.

5.1 The role of our Centres is clear

The Centres Hierarchy is outlined in our Local Strategic Planning Statement and our Development Control Plan Chapter B4 – Development in Business Zones. The SGS Study, the Employment Zone Reforms and our community engagement all pointed to a need to retain and strengthen our centres hierarchy.

Recommendation 1: Update the retail and business centre hierarchy and definitions to reflect the contemporary role and function of Wollongong's centres and guide their growth

The proposed Centres Hierarchy is illustrated in Figure 17 in section 4.3 of this Strategy. Further to the proposed changes to selected Centre positions, updates are needed to our planning policies to ensure the hierarchy is clear and consistent. Proposed revisions will include:

- Revised hierarchy definitions
- Consistent guidance on retail and office floorspace targets, population catchments, urban structure (movement, open space networks), built form, hours of activity and land use composition
- An objective to focus large commercial office developments in the Wollongong CBD, made clear through the definitions of each tier in the hierarchy
- Small Villages as a tier in the hierarchy, and these villages be clearly listed
- Map of all centres showing their level in the hierarchy
- Review Planning controls to ensure development is alignment with the Centre's place within the hierarchy
- Glossary of key terms to ensure consistency

The revised hierarchy should be used to guide development and assessment processes to ensure developments are consistent with and contribute to the defined role and function of our centres.

Recommendation 2: Review and update the following planning documents to ensure consistency with the updated hierarchy:

- Wollongong DCP 2009 Chapter B4 *Development in Business Zones*
- Wollongong DCP 2009 Chapter D1 *Character Statements*
- Wollongong DCP 2009 Chapter D16 *West Dapto Urban Release Area*
- Wollongong DCP 2009 Appendix 4 *Definitions*
- Wollongong LEP 2009 Land Use Table and Local Provisions
- Wollongong Local Strategic Planning Statement

5.2 Our Centres are a good fit for our community

Recommendation 3: Tighten centre boundaries to create resilient and active centres

The SGS Study illustrated that the physical extent and feasible capacity of some centres was in excess of what was required to meet demand. SGS confirmed the findings of the City Centre Planning Strategy – that the City Centre's retail core is spread out too far, which results in empty shops and reduced street activation. Town and Village Plans have also identified portions of business zoned land which is considered excess to the functional extent of the centre. These excess areas are often plagued by vacancies, or have been developed as strata residential and are unlikely to be redeveloped for business uses. Excessively large business zones also dilute retail activity, often leaving central areas less active than is optimal.

Where appropriate, the transition of some business land to a medium density residential outcome needs to be considered in order to provide housing diversity and increase pedestrian foot traffic to support our retail spaces. This is in line with the recommendations of the Wollongong Housing Strategy to:

- *Review the opportunity to provide of additional housing in key Town Centres, to be undertaken following the completion of the Retail and Business Centres Strategy*
- *Review the zoning of town centres which could result in changes to both the Business and Residential zonings.*

For centres where ground floor capacity exceeds current and future demand, or where previous development has removed feasible development outcomes for commercial uses, consider reducing the extent of business zoning.

The following actions are recommendations from Council adopted Town and Village Plans:

- Undertake a planning proposal process to rezone 2 portions of land in Helensburgh Town Centre from B2 – Local Centre to R3 Medium Density Residential, in line with the adopted Helensburgh Town Centre Plan 2020-2045
    - 65-71 Walker Street, and
    - the block bound by Stuart St, Bush Pea Lane, Gibbons Lane and Lilyvale St
- Undertake a planning proposal process to rezone 3 portions of land in Warrawong Town Centre from B3 Commercial Core to R3 Medium Density Residential, in line with the adopted Warrawong Town Centre Masterplan and Implementation Strategy
    - 21-35 Greene Street
    - 282 Cowper Street
    - 7-17 Montgomery Ave
- Review the B4 Mixed Use land west of Warrawong Town Centre along Cowper St. As per the findings of the SGS Study, this land currently contributes no floorspace supply and is not required to meet future retail demand. Consider transition to a residential land use zoning.
- Review the B2 Local Centre land on Wentworth Street Port Kembla, between Church and Fitzwilliam Streets in line with the adopted Port Kembla 2505 Revitalisation Plan 2018 - 2045. Consider transitioning this zoning to B4 Mixed Use, and amending Wollongong LEP clause 7.13 to omit reference to B4 Mixed Use (see Recommendation 5)
- As part of the Industrial Lands Review:
    - review the B2 zoned land on Military Road Port Kembla between Darcy Rd and Allan St. Consider transition to IN2 Light Industrial, in line with the vision for Military Road Spine (pg 24) in the adopted Port Kembla 2505 Revitalisation Plan 2018 - 2045.
    - review the recommendation of the adopted Unanderra Masterplan 2013 to

transition the B6 Enterprise Corridor zoned land south-east of Unanderra Town Centre to a B2 – Local Centre zoning to improve street activation along the Princes Hwy corridor.
  - Review the residential zoning at 95 Gladstone Street Wollongong and consider if appropriate to rezone to an Industrial use.

The following actions are recommendations of this Strategy and will require further investigation:

- Review the B4 Mixed Use land on Railway St in Thirroul Town Centre. As per the findings of the SGS Study, the two northern lots contribute to the Town Centre with complimentary uses, however the remaining lots to the south provide no floorspace supply and are not required to meet future demand. Consider transition to a residential land use zoning.
- Review the B1 Neighbourhood Centre land on Moore Street Austinmer. Consider extent of retail goods and services businesses, and community uses. Consider established retail used on residential zoned land on southern side of Moore St.
- Review the lot at 9 Devon St Berkeley and consider transition from B2 Local Centre zoning to a residential zoning.
- Review the Flinders Street B6 – Enterprise Corridor zoned land (between Smith St and Ajax Ave Wollongong). Consider which areas need to be preserved as Enterprise Corridor/Productivity Support, and which areas should transition to other zoning, including Mixed Use and/or Residential. In line with the recommendations of the Wollongong Housing Strategy
  - Rezone parts of B6 Enterprise Corridor Zone along Bourke Street, Edward Street and Gipps Street back to a residential zone (as existed prior to 2007)

Recommendation 4: Prevent the oversupply of retail floorspace

The SGS Study noted that the feasible capacity for employment generating floorspace in B4 zoned land made up a relatively small proportion of total feasible capacity in centres. Town and Villages Plans, and the Wollongong City Centre Urban Design Framework have demonstrated the poor outcomes that occur when ground floor commercial/retail uses are mandated across a larger area than the market demand can sustain. Removing the requirement for non-residential ground floors in B4 zones will provide an impetus for older retail floorspace within B1, B2 and B3 zones to be refurbished for more competitive stores entering the market, helping to revitalise centre cores where foot traffic and activation is concentrated. Removing this requirement would remove the effective prohibition of Residential Flat Buildings in the B4 zone.

Consider removing requirements for commercial at ground in B4 Mixed Used zones surrounding centres.

- Review clause 7.13 of the Wollongong LEP 2009 and consider removing the reference to land in B4 Mixed Use zones.

Recommendation 5: Protect existing required supply

Many of our centres have components of active and productive business uses that are not on land zoned for business uses. This means the supply provided by the business, and the role it has in the structure and operation of the centre, is not assured, and could be lost to redevelopment for other uses.

For centres where the business zoning boundary does not reflect the functional extent of the commercial activity of the centre consider expanding business zoning to encompass adjacent properties with established business uses where appropriate.

The following action is a recommendation of an adopted Town and Village Plan:

- Undertake a planning proposal process to rezone 1 portion of land in Helensburgh Town Centre from R3 Medium Density Residential to B2 – Local Centre, in line with the adopted Helensburgh Town Centre Plan 2020-2045
    - 112 Parkes Street (Helensburgh Hotel)

The following actions are recommendations of this Strategy and require further investigation:

- Review the following land portions which form part of functional town centres and consider the merits of rezoning them from residential to business zonings:
    - 749-759 Lawrence Hargrave Drive Coledale (established collection of shops and Fire Station)
    - 34-40 Moore St Austinmer (established collection of shops)
    - 236-278 Princes Hwy Bulli (established collection of shops and Bulli Heritage Hotel)
    - 231-233 Princes Hwy Bulli (established businesses in heritage listed Former Stockbank House and Former Post Office)
    - 424 – 440 & 493 – 507 Crown Street West Wollongong (Services Stations/convenience stores etc)

Some businesses have established or maintained functional neighbourhood centres on land that is currently zoned residential. Often maintaining or altering these premises can be difficult, requiring the need to establish existing use rights to continue operations. Given the active role some of these places have in our retail network, there is a need to consider whether a formal business zoning is required, or if there are other planning pathways available.

Review the following land portions which function as well-located commercial businesses and consider the merits of rezoning them from residential to business zonings, and/or establishing additional permitted uses for these sites. These actions are recommendations of this Strategy and will require further investigation:

- Cordeaux Village Centre (26 Derribong Rd Cordeaux Heights)
- 4 lots at the corner of Bourke St and Cliff Rd North Wollongong (7-9 Bourke St and 16-18 Cliff Rd)
- 2 lots with 5 tenancies in traditional shop-top housing typology (41-43 Yellagong St West Wollongong)
- 5 lots with shop-top housing and parking (40 Point Street)
- 1 lot at 64 Mount Kiera Road, Mt Keira
- 1 lot at 196 Mt Kera Rd. Mt Keira
- 2 lots at 99-101 Bellevue Rd Figtree
- 2 lots at 20-22 Walang Avenue Figtree

Recommendation 6: Explore opportunities to increase residential density

The SGS Study determined that there were some centres where there would be more retail supply than needed for future demand.

For centres with excess supply moving forward consider the opportunity to increase residential density when the centre has the urban structure and transport connectivity to support an increased population.

The Wollongong Housing Strategy makes the following recommendations in relation to our centres:

- *Review the opportunity to provide of additional housing in key Town Centres, to be undertaken following the completion of the Retail and Business Centres Strategy*
- *Review the FSR in town centres*
- *Review the building height in town centres*

In alignment with the Wollongong Housing Strategy and from a retail and business centres perspective, review residential density controls in the direct catchments of the following centres:

- Warrawong; Corrimal; Unanderra; Fairy Meadow; Berkeley

5.3 Our new Centres in West Dapto are well planned

The West Dapto Vision and Structure Plan identifies 3 future Town Centres and 5 Village Centres to service the growing community. At this stage none of the planned Centres have been delivered.

Recommendation 7: Encourage the development of planned Centres in West Dapto

The timely development of planned West Dapto Centres is important to ensure appropriate access to goods and services for our growing communities. Delaying the delivery of these centres in the long-term, including the full suite of their intended commodities and facilities, will establish and prolong the negative impacts of residents needing to travel further by car to access their closest centre. It may also force oversupply in existing centres, discouraging new centre development in West Dapto.

- Council to continue to work with land-owners to develop place-specific planning frameworks for planned centres and ensure Centres are developed in parallel with residential development.

Recommendation 8: Limit oversupply of retail floorspace in Centres surrounding West Dapto

The SGS Study illustrated the impact that the delayed development of the planned West Dapto centres will have on the short-term performance of surrounding centres, which would need to supply the residual demand from population growth in urban release areas. Given this demand is likely to be spread fairly evenly, it can be managed in the short term without triggering overtrading or a need for additional supply through new development.

- In order to maintain local demand within appropriate catchments in West Dapto, the expansion of retail floorspace supply surrounding adjacent centres should be discouraged.

Recommendation 9: Communicate clear expectations for centre development outcomes

New communities in West Dapto will need appropriate access to centre based goods and services. The *Wollongong DCP D16 West Dapto Urban Release Area* outlines the locations and proposed functions of the planned towns and villages. To avoid poor outcomes for the community, there is a need to strengthen the development controls, and the planning process prescribed for the realisation of these centres.

- Council to continue to improve and evaluate the neighbourhood planning process to provide strong planning guidance to applicants. Applicants to be required to provide detailed structure plans for planned village centres. Structure planning for town and village centres is to be informed by thorough site analysis and link with the surrounding context.
    - Structure plans for town centres are to include street structure, pedestrian links, open spaces, built form massing, active frontages, street walls and setbacks and be adopted as site specific DCP controls and amendments to the LEP where appropriate.
    - Structure plans for village centres are to include street structure, pedestrian links, open spaces, active frontages, street walls and setbacks and be adopted as site specific DCP controls.
- Ensure the LEP and DCP controls for new centres in West Dapto facilitate the outcomes described for towns and villages in the updated Centres Hierarchy.
- Ensure alignment between *Wollongong DCP Chapter D16 West Dapto Urban Release Area* and *B4 Development in Business Zones*.

5.4 Our Centres are active and vibrant

Recommendation 10: Complement online trading with exceptional physical retail offerings

The SGS Study highlighted the important role that centres play in offering consumers a physical context for the experience of goods and services. This compliments the role that online retailing plays in the wider retail framework.

In order to ensure that centres continue to compliment online trading, it is critical that they perform well across a range of physical criteria.

Visual presentation

- Ensure that planning controls facilitate an appropriate response to active shopfronts positive place characteristics including heritage and interfaces with natural amenity.

Physical access

- Ensure adequate traffic and pedestrian movement strategies are in place across the centres
- Develop local provisions to mitigate the impact of increased vehicle use for click-and-collect Local Distribution Premises etc in centres

Increased foot traffic

- Have strong anchors in strategic locations.
- Make use of major infrastructure such as new community facilities, transport facilities and natural assets such as parks and foreshores to improve the amenity and enjoyment of retail precincts.

Recommendation 11: Facilitate an appropriate range of land use options to increase activity within, and patronage of, centres

- Continue to discourage out-of-centre retail development by limiting the scale and/or permissibility of retail uses in other zones.
    - o Implement the proposed changes of the Employment Zone Reform to remove indoor recreation and Take-away food and drink premises from the Land Use Table in Heavy Industrial Zones.
    - o As part of the Industrial Lands Review, consider whether further limitations on retail premises are required in Industrial zoned land.
- Locate new, and revitalise existing community uses like libraries and community centres within Centres.
- Provide a mix of housing types and densities in and around centres
- Provide spaces for events and social gathering in centres. Revitalise and improve the amenity of existing open spaces. Require high quality public domain outcomes from large scale centre development.

Recommendation 12: Update Active frontage planning controls to improve street presentation

A high level of pedestrian interest and interaction at street level and a direct connection between the ground floor of buildings and the street is critical in Centres. This is known as an active 'frontage'.

- Update the Wollongong LEP 2009 Clause 7.13 to include additional requirements that ground floor premises in centres
    - o will be used for the purposes of business premises or retail premises,
    - o will enable direct visual and physical contact and interaction between the street and the interior of the building.
- Update Wollongong LEP 2009 Clause 7.13 to remove 'vehicular access' from part c.
- Undertake an analysis of key centres to map all active frontages, in conjunction with the Movement and Place planning for centres. Prioritise Centres based on their level in the Centres Hierarchy. Update the Wollongong

LEP Active Street Frontages Map to include these.

- Once mapping is complete and included in LEP clause 7.19, remove clause 7.13 from the LEP.
- Update Wollongong DCP 2009 to include appropriate controls to improve the street presentation of active frontages.

Recommendation 13: Facilitate an evening economy in our Towns, Major Regional Centres and City Centre that is right for our community

- Consider the expansion of the city centre evening economy policy throughout the LGA.
- Map areas that lend themselves to increased night-time activation.
- Develop comprehensive late night trading management DCP controls that deliver clear direction on expectations for land use and operations within the night-time economy for both assessment officers and the community.

Recommendation 14: Facilitate the activation of the road reserve for outdoor dining

- Produce clear guidelines for the safe and effective use of road reserves for outdoor dining
- Monitor and review licensing of road reserves within centres
- Conduct investigation into where road reserves can be further used for outdoor dining and encourage business owners to explore outdoor dining options.

Recommendation 15: Incorporate public art to create places which are distinctive, and which reflect local identity

- Investigate opportunities to integrate public art opportunities when undertaking projects within Centres in line with the Public Art Toolkit (Draft Public Art Strategy 2022).

5.5 Our Centres are accessible and support transport mode shift

- Encourage walkable and cycling friendly centres
- Support local living by providing mixed-use developments, compact neighbourhoods and local access to shops, public facilities and services.
- Design centres to be inclusive and diverse, fostering a sense of ownership, encouraging physical activity, and supporting social interaction.

Recommendation 16: Provide clear direction on the role and function of streets in our centres

In order to effectively inform streetscape design, built form controls and operational guidelines for street-based activities, we need to understand the desired role of the streets in our centres. Whilst this is unclear, streets remain contested places. The Movement and Place Framework recognises the network of public spaces formed by roads and streets and the spaces they adjoin and impact. It offers a process by which we can classify the function of our streets to guide a range of movement-related projects at various phases, and scales.

- As part of the Integrated Transport Strategy, classify the movement and place function of centre streets
- Review LEP active frontage controls and align with street roles and functions
- Review DCP general and centre specific built form controls considering street roles and functions. Consider specifically street wall height, ground floor setback, active frontages, and vehicle access controls.
- Review and develop operational guidelines for street-based activities which illustrate how to deliver activities safely and effectively on streets with different Movement and Place functions.
- Use the Movement and Place framework to inform future streetscape master plans for various centres, if and when required.
- Work with Transport for NSW under the Movement and Place Framework to deliver the vision for streets in centres located along Classified Roads.
- Enhance pedestrian comfort in Centres through the delivery of street tree canopy in line with the Urban Greening Strategy

Recommendation 17: Provide clear parking controls and public parking facilities that are in line with sustainable community needs

- Develop shared parking supply and management strategies for Town and Village Centres to reduce traffic impact on these important community places.
- Develop an integrated approach to parking for developments in centres to reduce the need for parking overall. Consider:
    - access to public transport
    - managed parking schemes for on-street parking to promote turnover of visitors and short-stay parking.
    - consolidated parking structures
    - micro-mobility or mobility-as-a-service (such as car share spaces) as a substitute for parking demand.
- Ensure car parking does not dominate the urban environment and its built form is permeable to the surrounding network.
- Where 'at-grade' parking is provided in centres:
    - provide adequate trees, landscaping and permeable surfaces
    - locate parking to the rear of the site to allow buildings to define the street edge and contribute to the streetscape.
- Consider the inclusion of end of trip facilities, e-charging stations and micro-mobility/car share and cycle parking when

assessing parking needs and designing parking provision in centres
- Continue to deliver accessible parking in priority locations.

Recommendation 18: Plan for walkable centres

- Support wayfinding by providing clear sightlines to place features such as key facilities, public open spaces, landmarks and civic built form.
- Ensure developments in centres provide through-site links, including opportunities to integrate new local traffic or walking and cycling connections through large-format blocks and uses.
- Where possible, adopt speed limits and intersection treatments that minimise the risk of fatality for vulnerable road users (e.g. 30 or 40 km/hour or less).
- Integrate alternative materials in low-speed streets to aid pedestrian legibility and reinforce pedestrian priority.
- Continue to increase the number of continuous accessible paths of travel that include parking, footpaths and kerb ramps in our town centres.
- Support public transport access through walking and cycling connections, thereby helping increase the attractiveness of public transport and helping to achieve/influence a shift away from private vehicles.

Recommendation 19: Support cycling to centres

- Connect key locations such as transport stops or interchanges, centres, local open spaces and schools to the cycle network.
- Provide supporting infrastructure in those key locations such as secure cycle parking and end-of-trip facilities.

5.6 Our City Centre is a thriving commercial precinct

SGS's work included an in-depth analysis of the City Centre's role in network of centres. The City Centre is our highest order centre, and its success as an employment generating precinct is important to the economies of our LGA, the Illawarra Shoalhaven City and the Greater Cities Region.

Recommendation 20: Deprioritise residential development in the Commercial Core

Council has committed to an aspirational jobs target of 10,500 net new jobs by 2028. Through the Invest Wollongong business attraction program, a number of industry sectors are being targeted, including those that will require sufficient supply of high-quality office space, much of which is expected to be accommodated within the Wollongong City Centre. To attract these jobs to Wollongong requires several preconditions:

1. A city centre that is competitive with other city centre options in the Greater Sydney-Hunter-Illawarra Region
2. A work precinct which has a distinctly commercial flavour with a commercial sense of address, where businesses feel their needs will be prioritised
3. Developers that possess the ability to attract major tenant businesses (even before completion of the construction project)
4. Fully activated streets that employees will enjoy spending their workdays in
5. Networking opportunities amongst allied businesses, with the appropriate conference/hospitality facilities to facilitate that outcome
6. Commercial address with marketable frontages
7. Competitive leasing prices for floorspace

Points 2, 3, 6 and 7 would all be seriously compromised in a mixed-use precinct, whilst point 5 requires a strong critical mass of commercial activity to be maximised.

For these reasons, it is reasonable and appropriate for Council to be deprioritising residential development within the B3 Commercial Core.

- Prevent the loss of commercial floorspace in the commercial core
- Avoid vertical mixed use (apartments on top of office space) in the commercial core.
- Deprioritise residential development in the commercial core. Provide defined areas where medium and large-scale commercial outcomes are incentivised to provide a critical mass of commercial activity. Consider how conference and hospitality uses in proximity can complement this outcome.

Recommendation 21: Tighten and focus the retail core

The success of retail facilities is predicated on the concept of co-location and density that leads to activated streets with high volumes of pedestrian traffic. Such concentrated activity also leaves Council with a more focused task of improving the public realm of those targeted locations. The economic reality of the contemporary retail industry is that demand for retail goods and services is limited. An oversupply of floorspace can lead to a dispersal and dilution of retail activity.

The City Centre planning controls currently require non-residential uses on the ground floor of the B3 Commercial Core and the B4 Mixed Use Zone. Combined with the high feasibility of shop top housing development, this results in ground floor retail floorspace being spread across a larger area than is needed to supply current demand. This has led to the degradation of older tenancies in the centre of the city, and vacancies in many newer developments.

Removing the requirement for non-residential ground floors in the B4 Mixed Use zone may be an impetus for older retail floorspace to be refurbished for new stores that enter the local market and allow retail businesses to be established in the city fringe where there is demand.

- Reduce the area where ground floor employment activity is mandated, to ensure ground floor activation is concentrated in strategic locations in the City Centre, and those core locations are frequently refreshed.

Recommendation 22: Facilitate diverse land use outcomes and leverage the City's assets

- Commit to the broadening of jobs growth to include non-office activities in and around the commercial core. Diversification of land use should be wider than just residential, retail and office space.
- Consider how large format showroom type floorspace developments which focus more on marketing brands and user experience will be accommodated in the retail core
- Consider how City Centre cultural facilities can integrate better with public open space, pedestrian networks and complementary retail food offerings.

6 Appendices

6.1 Review of Strategic Policies

<table>
<tr><th>Strategic Plan or Policy</th><th>Implications for Wollongong's Retail and Business Centres</th></tr>
<tr><td>NSW State Government</td><td></td></tr>
<tr><td>Planning for the future of retail – discussion paper 2018 (DPE 2018)</td><td>Highlights the need for an adaptable and flexible planning approach, allowing for innovative, contemporary retail solutions that match consumer need.</td></tr>
<tr><td>Employment Zone Reforms (DPE 2021)</td><td>The Department of Planning and Environment is currently progressing the Employment Zone Reform. The Reform seeks to provide a more flexible planning framework for existing Business and Industrial zoned land by transitioning to fewer zones with broader objectives and permissible land uses.
<table>
<tr><th>Existing zones</th><th>New zone</th></tr>
<tr><td>Business and Industrial Zones</td><td>Employment zones</td></tr>
<tr><td>B1 Neighbourhood Centre</td><td rowspan="2">E1 Local Centre</td></tr>
<tr><td>B2 Local Centre</td></tr>
<tr><td>B3 Commercial Core</td><td>E2 Commercial Centre</td></tr>
<tr><td>B5 Business Development; B6 Enterprise Corridor; B7 Business Park</td><td>E3 Productivity Support</td></tr>
<tr><td>IN1 General Industrial</td><td rowspan="2">E4 General Industrial</td></tr>
<tr><td>IN2 Light Industrial</td></tr>
<tr><td>IN3 Heavy Industrial</td><td>E5 Heavy Industrial</td></tr>
<tr><td>IN4 Working Waterfront</td><td>W4 Working Waterfront</td></tr>
<tr><td>B4 Mixed Use</td><td>MU1 Mixed Use</td></tr>
<tr><td>B8 Metropolitan Centre)</td><td>SP4 Enterprise</td></tr>
</table>
Key implications for Wollongong are the collapsing of the B1 Neighbourhood Centre and B2 Local Centre zones a new E1 Local Centre zone. This specifically impacts our existing B1 Neighbourhood Centres (generally our villages and small villages) which will now share the same land use objectives and permissible uses as our larger town centres.
Wollongong Council has sought to mitigate any negative impacts of these reforms through the introduction of several local provisions, intended to maintain the nuanced approach to centres in different tiers of the Centres hierarchy.</td></tr>
<tr><td>The Fun SEPP (2021)</td><td>The Fun SEPP Explanation of Intended Effects (EIE) informed of changes to the State Environmental Planning Policy (Exempt and Complying Development Codes) 2008 including:

Make permanent the trial that allows pubs and small bars to have outdoor dining on the footpath as exempt development
Increase the number of days that event can be held at major event sites
Make COVID-19 emergency measures for food trucks and dark kitchens permanent
Make a complying development pathway to allow a change of use of premises to artisan food and drink industry in certain circumstances, including development standards
Make a complying development pathway to allow a change of use of retail premises to small live music or arts venues, including developments standards and amendments to the Building Code of Australia
Clarify the exempt development standards for events
Extending the number of days for filming as exempt development.
</td></tr>
<tr><td>Building Business Back Better (DPE 2021)</td><td>The Building Business Back Better amendment to the State Environmental Planning Policy (Exempt and Complying Development Codes) 2008 created a complying development pathway to allow:</td></tr>
</table>

Strategic Plan or Policy	Implications for Wollongong's Retail and Business Centres
	• A wider range of land uses so businesses can quickly adapt their offerings to new market demands for things like entertainment facilities, indoor recreation facilities and creative industries. • New and larger building allowances to attract more investment. • Flexibility to carry out site and parking upgrades to accommodate new modes of delivery. • Longer opening hours in certain areas to support night-time economies
COVID-19 recovery measures (2020-2022)	In response to the COVID-19 pandemic, the NSW Government introduced the COVID-19 Legislation Amendment (Emergency Measures) Bill 2020, which made temporary changes to the Environmental Planning and Assessment Act 1979 (the EP&A Act) to support the state's economy and jobs. These measures lapsed in March 2022, however, some of these measures were made permanent in April 2022. [9] Relevant measures include: • Extended opening hours for businesses (in business areas) including supermarkets (6am – 10pm) • 24 operations for delivery and non-trading activities within business areas • Dark kitchens (24-hour non-trading) can operate in existing commercial kitchens (some limits in resi areas) • Food trucks can operate 24 hours (some limits in resi areas)
Greater Cities Commission (GCC)	In December 2021, the NSW Premier announced the formation of the Greater Cities Commission, which extends the jurisdiction of the Commission from the Greater Sydney area to include the Central Coast, Newcastle, and the Illawarra-Shoalhaven. As part of the Illawarra Shoalhaven City, it is understood that Wollongong will subscribe to the Greater Cities Commission's directions including achieving the following indicators relevant to centre development: • Increased 30-minute access to a metropolitan centre/cluster (Wollongong CBD) • Increased use of public resources such as open space and community facilities • Increased walkable access to local centres • Increased access to open space • Percentage of dwellings located within 30 minutes by public transport of a metropolitan centre/ cluster • Percentage of dwellings located within 30 minutes by public transport of a strategic centre • Increased jobs in metropolitan and strategic centres • Increased urban tree canopy **Note* – The Illawarra Shoalhaven Regional Plan 2041 continues to have effect, as if it were a district strategic plan, until a district strategic plan is made for the Illawarra-Shoalhaven City.
Illawarra Shoalhaven Regional Plan 2041 (DPE 2021)	The Regional Plan highlights the importance of the retail economy in the region, and the need for retail businesses and destinations to evolve to meet changing consumer behaviours. The Plan takes a strong centres-based approach to jobs, housing and services and defines the importance of strategic centres as key places. The Strategic centres of the Wollongong LGA are Metro Wollongong, Dapto, Warrawong and Corrimal. The Plan encourages Council to: • Consider measures that diversify retail focused centres to provide a diverse mix of uses, • Consider the impact of technological change on warehousing and distribution. • Align city wide retail studies with town centre studies that promote public domain design measures to enhance centre activation and vibrant street life. • Enhance the amenity, vibrancy and safety of centres and township precincts • Support appropriate growth of the night-time economy • Develop new centres in urban release areas to support new communities, including shopping services, community services and jobs. Integrate active and public transport connections to enhance accessibility to diverse employment opportunities, retail, health and education facilities. • Protect distinctive local character and embrace heritage values even as places grow and change. • Provide access to vibrant public open space and cultural facilities.

[9] Department of Planning and Environment, Covid 19 Response and Recovery

Strategic Plan or Policy	Implications for Wollongong's Retail and Business Centres
Illawarra Regional Transport Plan (TfNSW 2021)	The IRTP proposes a 'hub and spoke' approach to ensure improved multi-modal connectivity to, from and between the five regionally significant centres*, as well as with Greater Sydney. The plan nominates four objectives: • Increased population within a 30-minute public transport trip of a regionally significant centre* • Connectivity between Metro Wollongong and Greater Sydney by public transport is efficient, reliable, comfortable and safe • Future residents of regionally significant growth areas (ie West Lake Illawarra/West Dapto) are within a 30-minute public transport trip of a regionally significant centre • Maintain reliable north-south, east-west transport spines Further relevant initiatives raised in the plan include: • The use of the Movement and Place Framework to deliver improved amenity and liveability and to ensure the right balance is achieved between the need to facilitate the movement while supporting successful places. • Investigate areas that could be suitable for a 30km/h speed zone trial to provide a safer environment in areas of high pedestrian and cycling activity • Work collaboratively to increase the number of all trips – be they work, education, health, retail or recreation-related – made by walking, cycling or public transport across the Illawarra-Shoalhaven to one in every five (20%) trips **Metro Wollongong, Shellharbour City Centre, Kiama, Nowra City Centre and Milton-Ulladulla*
Local Character and Place Guidelines (DPE 2019)	The Local Character and Place Guideline is a response to community feedback and Government's direction to elevate the consideration of local character in NSW planning decision making. The guideline outlines how to prepare a character assessment in order to evaluate whether the character of areas should change, be enhanced or be maintained. The assessment can be utilised to illustrate a local character statement or to inform council plans or strategies.
Wollongong City Council	
Wollongong Community Strategic Plan – Our Wollongong 2032	The Community Strategic Plan identifies a number of strategies across all six goals that are relevant to the Retail and Business Centres Study. *Goal 1 We value and protect our environment* • 1.5 Maintain the unique character of the Wollongong Local Government Area, whilst balancing development, population growth and housing needs. • 1.6 West Dapto urban growth is effectively managed with facilities and spaces to support the future community. • 1.7 Develop and implement programs and projects that achieve proactive heritage management, education and promotion. *Goal 2 We have an innovative and sustainable economy* • 2.3 Increase and attract new business investment and enterprise to Wollongong while supporting and growing existing local businesses • 2.8 Continue to build Wollongong as a vibrant, modern city with a revitalised city centre and an active evening economy. *Goal 3 Wollongong is a creative, vibrant city* • 3.5 Provide communities with access to quality local spaces and places to meet, share and celebrate. *Goal 4 We are a connected and engaged community* • 4.12 Technology is used to enhance urban planning and service provision for our community *Goal 5 We have a healthy community in a liveable city* • 5.2 Urban areas are created and maintained to provide a healthy and safe living environment for our community. • 5.3 Work towards enabling all people in our community to have access to safe, nutritious, affordable and sustainably produced food. • 5.12 Plan and deliver an accessible, safe, clean and inviting public domain *Goal 6 We have affordable and accessible transport* • 6.4 Plan and provide sustainable infrastructure for safe and liveable places integrated with the environment and accessible to key transport routes.

Strategic Plan or Policy	Implications for Wollongong's Retail and Business Centres
Wollongong Local Strategic Planning Statement (2020)	The Statement re-affirms the importance of our local centres as a focus for local jobs, community facilities, social interactions as well as increased housing opportunities. The Retail and Business Centres Strategy is a key action of the Statement.
Wollongong Economic Development Strategy (2019-2029)	The Strategy sets an aspirational jobs target of 10,500 new jobs by 2028, with a focus on increasing office capacity in the Wollongong City Centre to attract and accommodate these new jobs. The Strategy recognises that jobs growth in population serving industries, including retail, will continue to grow with an increasing population. The Strategy recommends: • Developing local transport policies that ensure all residents can access employment opportunities in job centres such as Metro Wollongong • Investigating options for reducing car parking rates to assist commercial building feasibility in the city • Providing infrastructure to support activities and improve amenity and activation within the Wollongong city centre
Integrated Transport Strategy (underway)	The Strategy will be Council's guiding supporting document for transport in Wollongong. It will bring together other strategies across all transport modes and use the Movement and Place Framework to develop a clear understanding of the role and function of our movement networks. This is of significance in our Centres, where the road reserve is often a contested space with multiple competing priorities placed upon it.
Wollongong Housing Strategy)	The Wollongong Housing Strategy was adopted on 27 February 2023. The Strategy has been prepared to address a range of housing issues, including housing supply and demand, emergency housing, social housing, housing for disabled persons and affordable housing. The Wollongong Housing Strategy is a result of a comprehensive review of housing issues in the LGA. It proposes a combination of continuing several existing strategies, modification of others and the introduction of new strategies to better address the housing needs of the LGA. The following recommendations of the Strategy are particularly relevant to the consideration of our Centres: • Review the opportunity to provide of additional housing in key Town Centres, to be undertaken following the completion of the Retail and Business Centres Strategy • Review the zoning of town centres which could result in changes to both the Business and Residential zonings. • Review the FSR in town centres • Review the building height in town centres
Climate Friendly Planning Framework Discussion Paper	The Discussion Paper promotes enhancements to our planning framework to improve the environmental outcomes of development. The paper has 5 focus areas: Landscaping and Urban Greening; Solar and Energy Efficiency; Materials, Building Form and Waste; Transport and Car Parking; Policies and Incentives. Relevant to centres is the encouragement to: • Increase quantity and quality of canopy cover in the public domain • Encourage walkable and cycling friendly centres, particularly in CBD's
Urban Greening Strategy	The strategy seeks to increase the quality and quantity of all vegetation and open green space on all land types in an urban setting. Wollongong's average urban tree canopy cover is well below the national average of 39% (ISF Benchmarking report). Optimal urban canopy cover for amenity and wellbeing is estimated at 35- 40%. Some suburbs in Wollongong have canopy cover as low as 3%. New urban release areas will need to be planned to establish a tree canopy from scratch. Canopy cover is not evenly distributed across the LGA, and priority must be given in public tree programs to protecting the most vulnerable by increasing canopy cover where it is needed most. Council's investment will focus on providing high quality shade where people are most active by targeting town centres, streets and active transport routes, and parks.
Social Infrastructure Planning Framework (2018-2028)	Within the Social Infrastructure Planning (SIP) Framework, Wollongong City's Planning Areas and 'hard' social infrastructure assets are categorised according to scale, based on a hierarchy of provision that aligns with Wollongong Council's 'Centres' hierarchy. Facilities are categorised as local/neighbourhood, district, or regional facilities, based on size and the size of the community they serve, or will serve in the future. Strategically, this results in a larger number of small, local/neighbourhood facilities, distributed across the LGA and relatively few large, regional facilities, in key locations.

Strategic Plan or Policy	Implications for Wollongong's Retail and Business Centres
	The location of social infrastructure facilities like libraries and community centres within our town and village centres acts as a key attractor and increase activity in these places.
Wollongong City Centre Urban Design Framework (2021)	The Framework provides Council with strong recommendations to develop a suite of clear and consistent planning controls and guidelines that facilitate better design outcomes and economically feasible development in the City Centre. It identified the following selected findings: • Current land use controls could result in a City filled with residential development, compromising long term employment growth • The retail core is spread out too far, which results in empty shopfronts and creates inactive streets • General development controls don't respond to the character and historic qualities of places in the City And proposed the following selected directions: • Prioritise jobs growth and establish a resilient commercial core • Develop active commercial streets that respond to character • Strengthen and simplify planning controls to promote built form diversity in response to people and place
Town and Village Plans	The following centre-focused strategic plans and studies have been prepared, some of which were supported by additional economic analysis (noted by [EA]). The plans include actions relating to proposed changes to zoning and built form controls. Where relevant, these recommendations have been included as recommendations in this Strategy. • Warrawong (2013) • Unanderra (2013) [EA] • Figtree (2013) [EA] • West Dapto (2009 updated 2018) [EA] • Corrimal (2015) • Dapto (2017) [EA] • South Wollongong (2017) [EA] • Port Kembla (2018) [EA] • Helensburgh (2020) • Wollongong City Centre (2016 + 2021) [EA] A review of the current adopted Town and Village Plans revealed some common themes evident in the Implementation Actions: • Undertake LGA-wide studies to inform planning controls changes • Undertake economic analysis to test proposed changes to planning controls aimed at improving feasibility. Consider all relevant factors, especially flood mitigation costs. • Redefine Town Centre boundaries (and associated zoning) where centres have excess floorspace for future needs. • Provide transition areas surrounding business zones to mitigate land use conflicts with surrounding residential or industrial precincts. • Consider where it may be appropriate to allow residential development at ground on the fringe of oversupplied centres. • Acknowledge through DCP controls the functional extent of the centre, including areas which may not be on land zoned for business. • Support the revitalisation of centres through public domain and streetscape improvements, and access to transport. • Undertake built form analysis and testing to encourage development that is appropriate to context and character and update relevant LEP and DCP controls. • Take an LGA wide perspective on housing provision. The centres have a role to play but must balance commercial outcomes and adverse impacts on traffic generation and character.
West Dapto Vision (2018)	The Vision outlines that the town centres of West Dapto will fill diverse roles, functions and mixed uses. Configurations will reflect the town centre hierarchy with a focus on pedestrian priority. Supported with a decision process (zoning, neighbourhood planning, etc.), appropriate locations will promote the social and economic functions and outcomes sympathetic to character and 'place'. West Dapto Town Centres are to be planned to meet three objectives:

Strategic Plan or Policy	Implications for Wollongong's Retail and Business Centres
	1. *Hierarchy*: Hierarchy reinforces role and function, supports the Wollongong City Centre and higher order centres and provides certainty for investment decisions. Hierarchy reinforces character and identity as well as provides direction around appropriate residential density sympathetic to community facilities and service locations. 2. *Movement Sensitive*: The town centres of West Dapto are expected to facilitate social contact, employment and living needs in a sustainable manner. The town centres will be located to promote active transport and healthy lifestyle. Centres will provide activities, attractions and services within walking distance. Centres must also be supported and surrounded by a network of connected streets, paths and cycle ways, providing opportunities for active transport and convenient access to public transport. The network will link centres with open space and recreation areas. 3. *Diversity and Identity*: Centres will facilitate a diverse range of activities by prioritising spaces for people of all ages that become vital to the social fabric of a neighbourhood where people gather, meet friends and family and engage in social activities. Centres will be developed to capitalise on existing features of heritage, environment (vegetation, topography etc.) and contribute to a new theme expressing the centre's role in the urban residential landscape.
Urban Release area neighbourhood plans	The Neighbourhood Planning Process is outlined in the *Wollongong DCP 2009 D16 West Dapto Urban Release Area.* Neighbourhood Planning is a progressive step between the West Dapto Structure Plan, the urban zoning process, and a development application for subdivision. It allows issues to be considered on a neighbourhood or catchment scale. Neighbourhood Planning is intended to set urban density targets at an appropriate scale that supports town and village centre development. DCP Chapter D16 includes a map of the defined neighbourhoods of West Dapto including the location of future centres. Adopted Neighbourhood plans including planned centre development include: • Bong Bong East and North (Bong Bong Town Centre) • Wongawilli North (Wongawilli Village Centre) • West Dapto Road/Sheaffes Road (south) (Darkes Road Town Centre) • Yallah/Marshall Mount (Marshall Mount Town Centre) To date, the neighbourhood planning process has provided limited guidance to the development of town and village centres.

6.2 Retail Floorspace Supply and Demand 2021- 2041 by Centres

(Source – SGS Study)

Unmet demand >500m² / Oversupplied >500m²	2021 Retail Floorspace m²				2041 Retail Floorspace m²		
Centre or Area	Existing Supply	Existing Demand	Gap	Additional feasible capacity	Forecast Supply	Forecast Demand	Gap
Austinmer	**1,265**	1,265	0	386	1,265	1,340	-75
Goods	580						
Services	684						
Avondale	0			-	1,875	2,038	-163
Goods	0						
Balgownie	**3,384**	3,384	0	1,409	3,684	4,281	-597
Goods	1,773						
Services	1,611						
Bellambi (Bellambi Ln)	**169**	169	0		169	228	-58
Services	169						
Bellambi (Rothery St)	**304**	304	0	1,570	304	247	58
Goods	242						
Services	62						
Bellevue Road	**406**	406			406	396	10
Goods	156						
Services	250						
Berkeley	**987**	5,342	0	12,548	5,342	3,137	2,205
Goods	987						
Services	0						
Berkeley (Kelly St)	**672**	672	0		672	75	596
Goods	672						
Services	0						
Bong Bong	**50**	50	0	43,560	10,550	10,401	149
Goods	0						
Services	50						
Brownsville	**1,189**	1,189	0	1,197	1,189	1,174	15
Goods	696						
Services	493						
Bulli	**9,438**	9,438	0	8,003	9,438	11,757	-2,319
Goods	5,338						
Services	4100						
Bulli (Farrell Rd)	**0**	0	0	742	0	0	0
Services	0						

Unmet demand >500m² / Oversupplied >500m²	2021 Retail Floorspace m²				2041 Retail Floorspace m²		
Centre or Area	Existing Supply	Existing Demand	Gap	Additional feasible capacity	Forecast Supply	Forecast Demand	Gap
Coledale	**575**	575	0	726	575	443	132
Goods	384						
Services	190						
Coniston	**1,449**	1,449	0	6,196	1,449	1,419	31
Goods	816						
Services	633						
Coniston (B7)	**906**	906	0		906	844	62
Goods	906						
Services	0						
Cordeaux Heights	**653**	653	0		653	561	93
Goods	432						
Services	222						
Corrimal	**27,646**	27,374	272	13,113	27,646	25,296	2,351
Goods	17,353						
Services	10,293						
Corrimal (B6)	**3,977**	3,977	0		3,977	4,331	-354
Goods	2,050						
Services	1,926						
Corrimal (Railway Street)	**509**	509	0	441	509	401	108
Goods	383						
Services	126						
Cringila	**1,914**	1,914	0	2,277	1,914	1,853	60
Goods	998						
Services	915						
Dapto	**40,550**	39,721	829	89,528	42,950	50,484	-7,534
Goods	28,043						
Services	12,506						
Dapto (Kent Rd)	**1,577**	1,577	0		1,577	2,396	-819
Services	1,577						
Dapto (Lakelands Dr)	**406**	406	0		406	130	275
Goods	406						
Services	0						
Darkes Road	**0**			11,074	5,625	5,622	3
Goods	0						
East Corrimal	**1,107**	1,107	0	504	1,107	909	198
Goods	687						
Services	420						
East Woonona	**1,171**	1,171	0	717	1,171	758	414
Goods	978						

Unmet demand >500m² / Oversupplied >500m²	2021 Retail Floorspace m²				2041 Retail Floorspace m²		
Centre or Area	Existing Supply	Existing Demand	Gap	Additional feasible capacity	Forecast Supply	Forecast Demand	Gap
Services	194						
Fairy Meadow	**21,927**	22,167	-240	21,149	21,927	16,104	5,823
Goods	17,079						
Services	4,848						
Fairy Meadow (B6)	**13,836**	13,836	0		13,836	12,507	1,329
Goods	8,871						
Services	4,964						
Fairy Meadow (C Tree Ln)	**180**	180	0		180	106	74
Goods	168						
Services	12						
Fairy Meadow Industrial	**0**	0	0		0	0	0
Services	0						
Farmborough Heights	**182**	182	0	248	182	243	-61
Services	182						
Figtree	**24,478**	22,442	2,036	3,383	24,478	19,440	5,037
Goods	18,704						
Services	5,774						
Figtree Hotel (B6)	**415**	415	0	7,038	415	324	91
Goods	179						
Services	235						
Fowlers	0				1,875	2,168	-293
Goods	0						
Gwynneville	**2,049**	2,049	0	918	2,449	2,752	-303
Goods	1,044						
Services	1,005						
Haywards Bay	**18,169**	5,547	0	7,416	18,169	22,650	-4,481
Goods	5,547						
Services	12,623						
Helensburgh	**9,556**	9,556	0	32,985	9,856	11,277	-1,421
Goods	6,347						
Services	3,210						
Helensburgh (B6)	**34**	34	0		34	21	13
Goods	34						
Services	0						
Horsley	**446**	446	0		446	268	179
Goods	446						
Huntley	**0**				1,500	1,654	-154
Goods	0						
Jersey Farm	0			5,747	1,875	1,696	179

Unmet demand >500m² / Oversupplied >500m²	2021 Retail Floorspace m²				2041 Retail Floorspace m²		
Centre or Area	Existing Supply	Existing Demand	Gap	Additional feasible capacity	Forecast Supply	Forecast Demand	Gap
Goods	**0**						
Kanahooka	**427**	427	0		427	375	53
Goods	412						
Services	16						
Keiraville	**1,797**	1,797	0	688	1,797	1,786	10
Goods	786						
Services	1,011						
Kembla Grange	**1,733**	1,733	0	31,317	1,733	2,084	-351
Goods	493						
Services	1,240						
Koonawarra	**893**	893	0		893	218	675
Goods	893						
Services	0						
Lake Heights (Weringa Av)	**625**	625	0	1,634	625	440	185
Goods	478						
Services	147						
Mangerton	**274**	274	0	337	274	321	-47
Goods	126						
Services	148						
Marshall Mount	**0**	0	0		3,675	3,999	-324
Goods	0						
Montague Street Industria	**0**				0	0	0
	0						
North Wollongong (B6)	**15,674**	15,674	0	208,063	15,674	12,624	3,050
Goods	8,416						
Services	7,258						
Port Kembla	**10,600**	9,909	690	2,971	10,600	9,276	1,324
Goods	6,822						
Services	3,777						
Primbee	**201**	201	0	210	201	146	55
Goods	201						
Services	0						
Russell Vale	**808**	808	0	1,585	808	601	206
Goods	609						
Services	199						
Stanwell Park	**1,273**	1,273	0	1,030	1,273	847	426
Goods	1,111						
Services	162						
Tallawarra	**0**			25,450	1,500	1,828	-328

Unmet demand >500m² / Oversupplied >500m²	2021 Retail Floorspace m²				2041 Retail Floorspace m²		
Centre or Area	Existing Supply	Existing Demand	Gap	Additional feasible capacity	Forecast Supply	Forecast Demand	Gap
Goods	0						
Tarrawanna	**1,221**	1,221	0	674	1,221	1,262	-41
Goods	734						
Services	487						
Thirroul	**13,039**	13,627	-588	10,445	16,439	16,834	-395
Goods	9,051						
Services	3,988						
Towradgi	**3,024**	3,024	0	11,428	3,024	2,664	360
Goods	2,892						
Services	132						
Unanderra	**17,110**	17,110	0	32,928	17,110	15,155	1,955
Goods	11,785						
Services	5,326						
Unanderra (Farmborough Rd	**963**	963	0		963	584	379
Goods	859						
Services	104						
Unanderra Industrial	**0**	0	0		0	0	0
Services	0						
University of Wollongong	**9,920**	9,920	0		9,920	14,218	-4,298
Services	9,920						
UoW Innovation Campus	**2,482**	2,482	0		2,482	3,452	-970
Goods	335						
Services	2,147						
Warrawong	**57,652**	58,120	-468	71,041	69,752	72,785	-3,034
Goods	45,861						
Services	11,790						
Warrawong (B6)	**31,040**	31,040	0		31,040	30,032	1,008
Goods	28,749						
Services	2,291						
Warrawong Industrial	**0**	0	0		0	0	0
Services	0						
West Wollongong (Thames)	**540**	540	0	292	540	621	-81
Goods	181						
Services	359						
Windang	**2,782**	2,782	0	3,366	2,782	2,724	58
Goods	1,803						
Services	979						
Wollongong	**124,243**	132,735	-8,492	232,938	186,243	213,625	-27,381
Goods	80,196						

Unmet demand >500m² / Oversupplied >500m²	2021 Retail Floorspace m²				2041 Retail Floorspace m²		
Centre or Area	Existing Supply	Existing Demand	Gap	Additional feasible capacity	Forecast Supply	Forecast Demand	Gap
Services	44,048						
Wollongong (B6)	**22,695**	22,695	0		22,695	22,816	-120
Goods	10,526						
Services	12,170						
Wollongong West (Crown West)	**771**	771	0		771	602	169
Goods	771						
Services	0						
Wollongong West (Princes Hwy)	**1,680**	1,680	0	350	1,680	1,460	220
Goods	532						
Services	1,148						
Wongawilli	**0**	0	0	4,240	1,875	2,068	-193
Goods	**0**						
Woonona	**14,040**	14,040	0	11,906	14,040	17,490	-3,540
Goods	7940						
Services	6100						
Grand Total	**537,847**	543,808	-5,961		649,047	674,667	-25,620

Our Wollongong Our Future

From the mountains to the sea...

We value and protect our environment

We have an innovative and sustainable economy

Wollongong is a creative, vibrant city

We are a connected and engaged community

We have a heathy community in a liveable city

We have affordable and accessible transport

wollongong
city of innovation

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