

WARILLA TOWN CENTRES PLAN

The Warilla Town Centres Plan was endorsed by Council at its meeting of 15 December 2015, as a basis for the review of relevant Council Policy including Shellharbour Local Environmental Plan 2013, Shellharbour Development Control Plan, Shellharbour City Council Section 94 Contributions Plan 2013 and the capital works program.

WARILLA TOWN CENTRES PLAN

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with sub-consultant services provided by Hill PDA, CHROFI, GTA Consultants and Alluvium Consulting

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A	Draft Report	23.10.15	MC/BN	MC
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Terminology

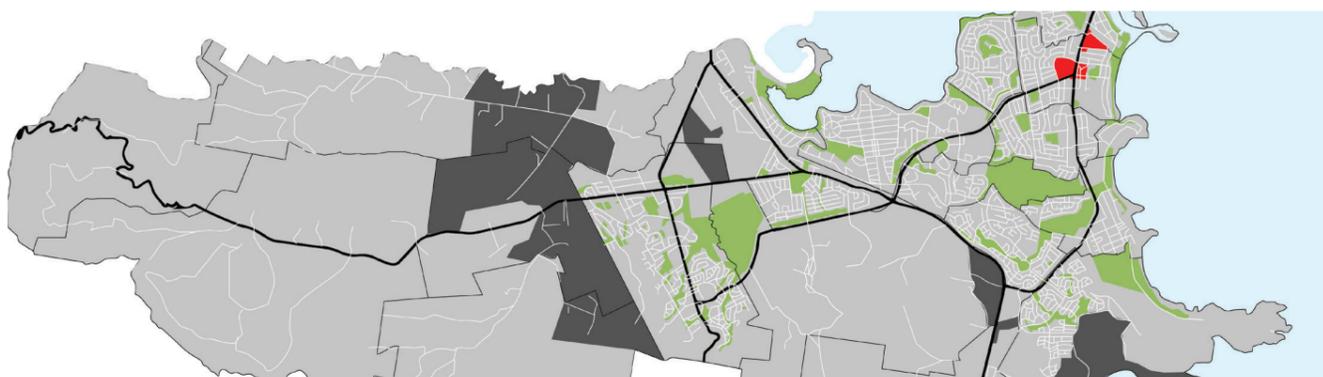
Abbreviation	Name
LEP	Local Environment Plan
DCP	Development Control Plan
ESD	Ecologically Sustainable Development
WSUD	Water Sensitive Urban Design

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1.0 Introduction

1.0 Introduction

1.1 BACKGROUND

Shellharbour City Council required the preparation of a town centres plan for Warilla. In response to this requirement McGregor Coxall has been commissioned by Shellharbour City Council to prepare a Town Centres Plan for Warilla that helps to create a vibrant, inclusive, safe, attractive, connected, convenient, accessible and commercially successful town centre.

The aims of this study are to provide written and graphic development guidelines for Warilla Town Centres in a form adaptable for inclusion in the Shellharbour DCP. Key scope of works addressed in the study are as follows;

- Conceptual block building envelope sketches identifying appropriate land use mixes;
- Development appearance/character including colours/materials palette;
- Public domain treatment/usage including integration with private domain;
- Transport /parking provisions - this will need to determine future supply needs and where increases in public parking may be needed, based on future development capacity;
- Connections within, between and to the different business centres within the subject land;
- Connectivity involving other community assets including but not limited to bus stops, schools, swimming pool and future library;
- Maps of the subject land specifying required active frontages, awning weather protection, building envelopes/setbacks, splayed corners, corner elements and entry statements, focal points, public domain treatments including possible gathering areas/meeting places and transport/parking provisions;
- Any recommended amendments to LEP 2013 as it relates to development of the subject land.

1.2 WARILLA TOWN CENTRES

The study area encompasses two town centres within Warilla, NSW. This includes Warilla Town Centre which contains a shopping strip along George Street and retail and fast food outlets along Shellharbour Road, and Warilla Grove which is a large shopping centre about 600 metres to the north. The two town centre study areas are separated by residential development.

The Warilla town centres are located 3 to 4km north of Shellharbour City Centre which is the primary activity area in the Shellharbour City Council area. Wollongong City is located approximately 17 kilometres to the north of Warilla.

1.3 STUDY BOUNDARY

Figure 1.01 and 1.03 illustrates the study boundary for Warilla Town Centre and Warilla Grove designated for this project. To ensure a comprehensive town centres plan the two centres have been analysed, strategised and planned together so that an integrated solution is established for Warilla.

1.4 REPORT STRUCTURE

The town centres plan report structure reflects the design process undertaken in preparing this Plan for Warilla Town Centres. The following sections form the structure of this document;

- Section 2 looks to understand the complexities comprising a 21st Century town centre and the key principles that make a vital town centre;
- Section 3 provides an overview of existing background documents relating to State and Local Government policy;
- Section 4 applies the key principles that comprise a vital town centre against Warilla Town Centres;
- Section 5 identifies a series of key strategic moves to revitalise Warilla Town Centres;
- Section 6 presents the Warilla Town Centres Guidance based on the Shellharbour City Council's scope of works;
- The Appendix section contains a Consultation Kiosk Summary, the Economic Study produced by Hill PDA and a Parking Provisions Study prepared by GTA Consultants.



Figure 1.01 - Warilla Town Centre

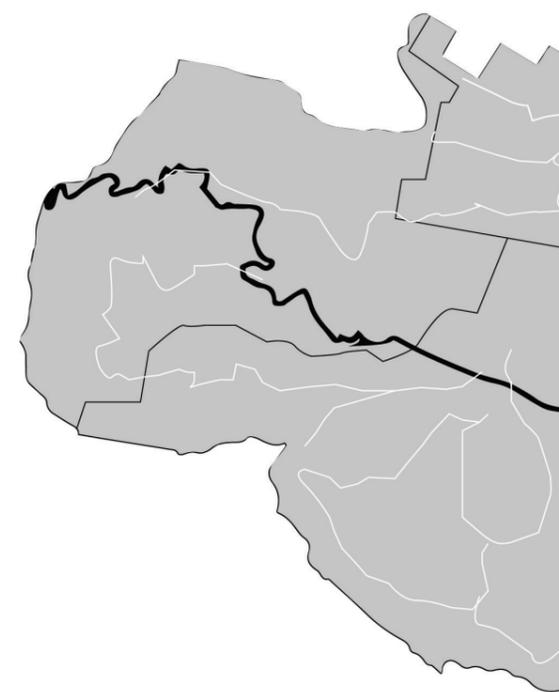
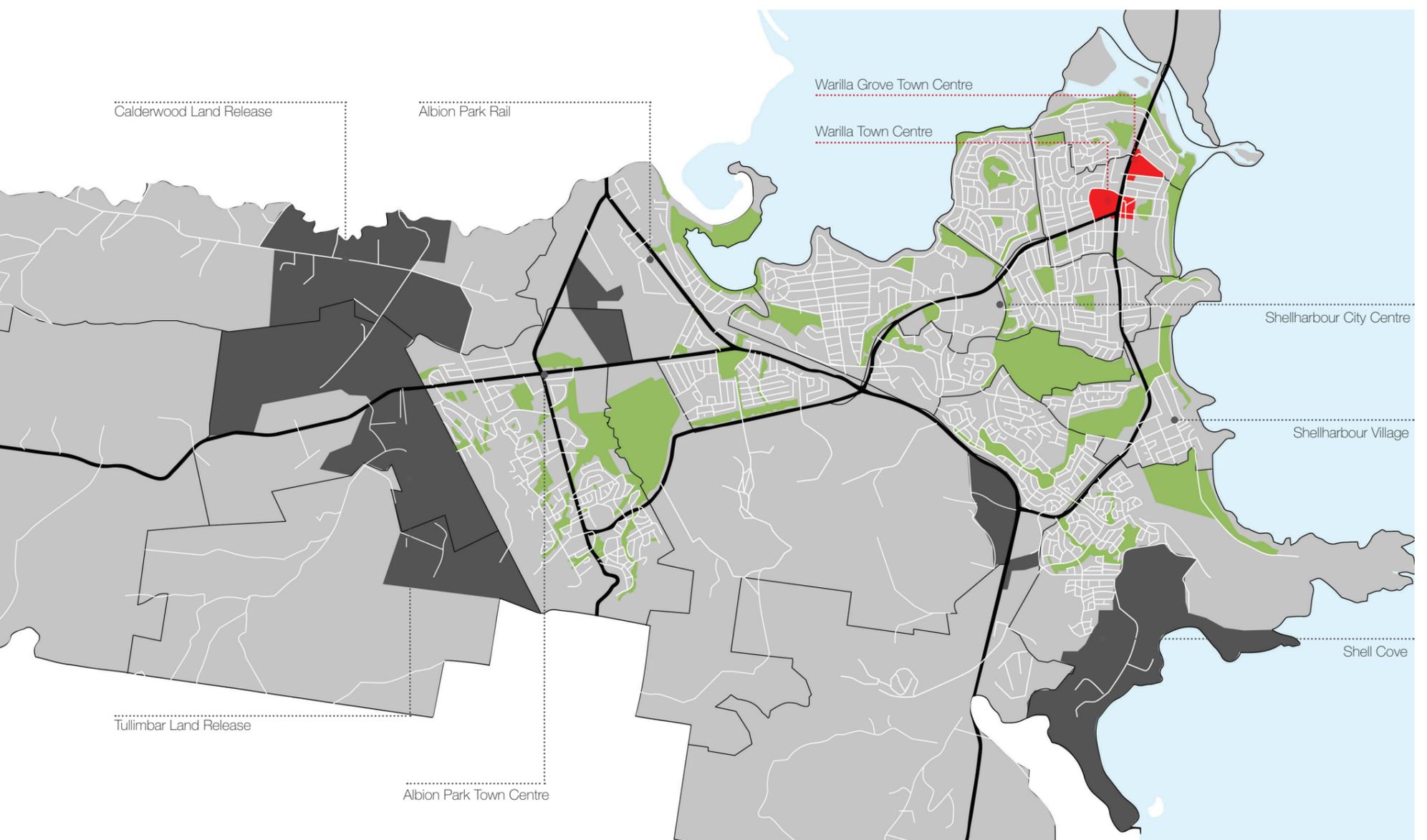
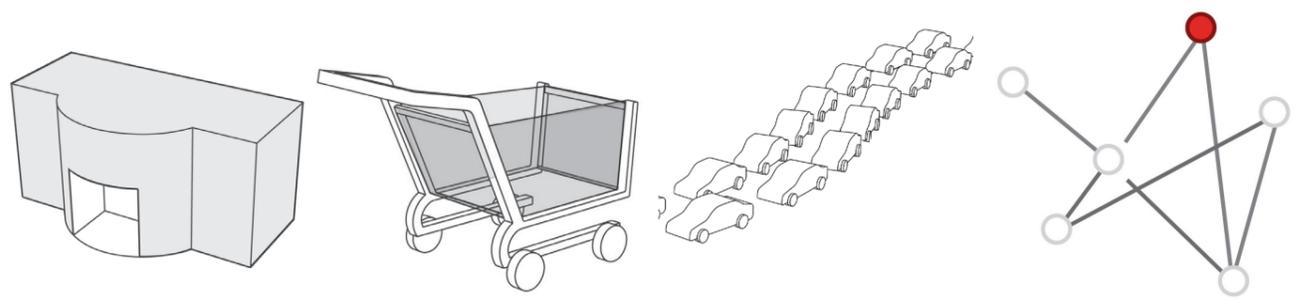


Figure 1.02 - Location Plan



Figure 1.03 - Warilla Grove





2.0 The 21st Century Town Centre

2.0 The 21st Century Town Centre

2.1 THE CHALLENGES FACING TOWN CENTRES TODAY

In order for any town centre to thrive in the future it is important to understand and identify the challenges facing town centres today. Convenience has become the new “buzz” word in our society, where the demand for easy access consumerism has radically changed the urban landscape.

The phenomenal growth of online retailing, the rise of mobile retailing, the speed and sophistication of the major national and international retailers, the modern and immersible experiences offered by todays new breed of shopping mall have all conspired to change today’s town centre. Key contributing factors that have fed our society’s demand for convenience are as follows;

- Growth of the Shopping Mall
- Rise of the Supermarkets
- Vehicular Dominance
- Online Culture

The Growth of the Shopping Mall

The lack of economic resilience within the traditional town centre has been exposed by the modernised shopping mall which has changed beyond recognition over the past 10 years. This success is largely due to the shopping malls ability to evolve and change to the needs of the consumer. With shopping centres being ran like businesses, offering an enclosed environment that is designed for convenience the town centre has fallen by the wayside resulting in a many town centres falling into a state of decline.

The Rise of the Supermarket

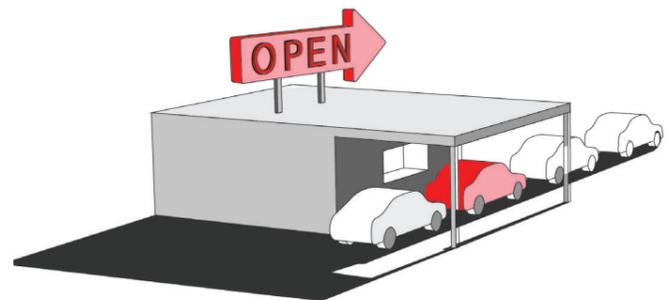
The traditional supermarket which sold groceries and food has modernised its offering to cater for the convenience of each consumer. Supermarkets have expanded their reach into home-wares, stationary, books, flowers etc effectively making it a “one-stop-shop” for local communities to utilise. The rise of the supermarket has resulted in four supermarket chains, [Woolworths, Coles, Aldi and IGA] having a total market share of 98% resulting in local independents town centre supermarkets struggling to compete.

Automobile Dominance

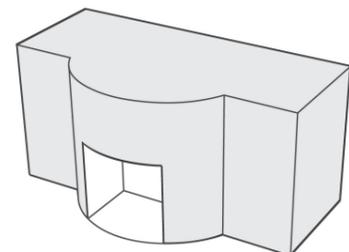
The emergence of the vehicle in Australia coincided with the post war ‘long boom’, where for 30 years Australia’s economy continuously grew. This led to town centres, shopping malls and retail outlets all been designed around the vehicle, catering for mass car parking, wide road carriageways and high volumes of traffic. The vehicle has fuelled the convenience culture creating a car dependent society that associates easy car access, ample car parking and convenient shopping as the norm.

Online Culture

New technological developments now mean that the internet is one of the key threats to retail in our town centres. With 25% of Australia’s population utilising the internet for online purchases, totalling almost \$13.5 billion in 2012, this growing trend is increasingly putting pressure on the town centre. Additionally the emergence of the mobile society means fewer shops are required in our town centres as the typical consumer can shop online directly from the mobile phone.



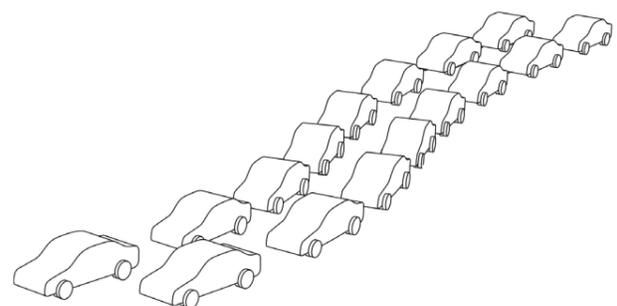
Convenience is the new ‘Buzz” Word



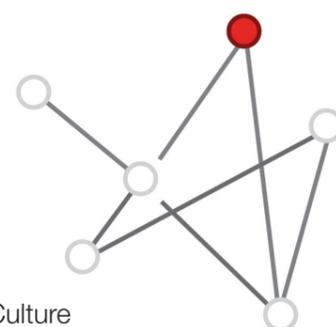
Growth of the Shopping Mall



Rise of the Supermarket



Automobile Dominance



Online Culture

2.2 CREATING A ‘VITAL TOWN CENTRE’

Uniqueness

Shopping habits and social attitudes have changed. For Town Centres to remain relevant and the focal point for communities and businesses as they have been in the past, they have to complement society’s demand for convenience rather than compete.

Town centres have always been about much more than shopping. Retail is an important part of the town centre mix, but people also come for many other reasons, such as to visit cafés, restaurants, pubs, galleries, museums, cinemas, parks, hairdressers, beauty parlours, doctors and dentists, libraries, banks, solicitors, and estate agents. And there’s a strong social factor too – the high street is often the place where local people come together to meet friends and join in community activities. It can provide a setting for shared experiences, and be a focal point of local identity, community pride, and common heritage and values.

High streets and town centres that are fit for the 21st century need to be multi-functional social centres, not simply competitors for stretched consumers. They must offer irresistible opportunities and experiences that do not exist elsewhere, are rooted in the interests and needs of local people, and will meet the demands of a rapidly changing world.

We believe that at the heart of any response to the challenges facing our town centres must be a recognition of the uniqueness of place and that these unique places are created and shaped by people who use them: they ‘build it and they will come’ model of retail development is no longer appropriate or sustainable. Town Centres can become places where we go to actively engage with other people in our communities; places where shopping is just one small part of a rich mix of activities including working, sharing, exchanging, playing and learning.

Urban Design Principles of a Vital Town Centre

By acknowledging what challenges are facing today’s town centres it is equally important to understand ‘What principles make up a vital and vibrant town centre’. To do this we have identified four principles behind the urban environment which co-exist to make a vital town centre. The key principles that will be explained are as follows;

- Principle #1 - Economic Vibrancy
- Principle #2 - Urban Composition
- Principle #3 - Access and Movement
- Principle #4 - Environment

These principles of a vital town centre that we describe and illustrate are the essential components to a successful town centre environment, founded on new urbanist thinking and accepted principles of good urban and town centre design.

By understanding the urban design principles that make up a vital town centre, we can analyse and identify any particular areas where it is lacking, thus informing the town centre planning process. Although the key principles proposed will guide the master planning process, it must be noted that in reality these boundaries inter-relate with each other, reinforcing the complex relationships that interplay in creating a vital town centre.



2.3 PRINCIPLE 1: ECONOMIC VIBRANCY

Successful town centres typically have animation, vitality, and an urban ‘buzz’. By promoting people to the street, animation and vitality is created. To create this vitality and vibrancy a close grain of vibrant uses should be accommodated which respond to the surrounding public domain.

Close Urban Grain and Diversity

Town centres that offer a close grain mix of uses, benefit the economy by encouraging a well connected catchment of customers to local businesses. A finer grain mix of uses within a town centre offers a viable alternative to large single use blocks, as its diversity ensures town centre streets are more resilient to economic uncertainty.

Flexibility and Adaptability

The built form and public domain needs to be flexible and adaptable to cater for a variety of functions. The adaptability of individual buildings and public spaces is important not only to allow for physical change but also cultural and social change. The most successful places are products of growth over time, shaped by and able to accommodate changing economic conditions, development aspirations and cultural differences.

Community Heart

The community heart acts as a focal point for social interaction, offering a variety of potential different uses and activities during the day and night. Essentially this focal point evokes a sense of place and ownership for the town centre community. Successful community hearts tend to be civic spaces, squares or a high street, where a variety of functions can be catered for, such as markets, festivals, theatre and relaxation for meeting others. It is imperative that a large proportion of the community heart is public and freely accessible at all times, to all users.

2.4 PRINCIPLE 2: URBAN COMPOSITION

“Bring half a dozen buildings together and an art other than architecture is made possible. Several buildings begin to happen in the group, which would be impossible for the isolated building. We may walk through and past the buildings and as a corner is turned an unsuspected building is suddenly revealed” (Cullen 2002). Essential to a well composed town centre is its street definition, sense of enclosure and legibility, ensuring a user is guided through a town’s key focus areas.

Definition and Enclosure

Streets and public domain have a symbiotic relation with the built form and its density. If appropriately designed the urban environment can take a positive form and possess a sense of enclosure to the public domain.

Legibility

The articulation of the built form and its relationship with the spaces that bound it are crucial to ensuring a legible network of town centre streets. By manipulating the nuances of scale and style, of texture and colour, as well as character, a route can have a strong and memorable identity that reflects its importance within a hierarchy, encouraging legibility.

Urban Character

The character of a town centre is rooted in its urban structure, quality of urban spaces and the patterns of movement and activity that exist. A town centre’s character can be expressed



through the form of urban blocks, the scale and size of the buildings and the spaces they create.

Sense of Arrival

Equally as important to a town centre's character is the sense of entering into a particular area. Successful town centres ensure that key access routes into a district offer individuals a sense of arriving to a collective entity or place, which may be achieved by physical separation or distinctiveness within the built form and spatial environment.

2.5 PRINCIPLE 3: ACCESS & MOVEMENT

Cars form a dominant characteristic in many town centres today, however the most vital town centres reconcile the importance of the pedestrian and cyclist, reducing the dominance of the vehicle and prioritising pedestrians, cyclists and modes of public transport.



A Network of Pedestrian Accessible Routes

“Emphasising walking as a viable mode of transportation with a strong impact on health is leading towards a more sustainable city and town centre, where energy consumption and a focus on a lively city during the day and night are part of the new city strategies” (Gehl 2009). The way a town centre is designed can contribute to an individual propensity to be physically active - to walk instead of drive. This can have a direct influence on improved health outcomes.



Good Public Transport Links

Good public transport can reduce vehicular use within a town centre, supporting the retention of open space, encourage traffic calming, promote walking and cycling, enhance social sustainability and encourage a more compact town centre that is easily accessed and used.

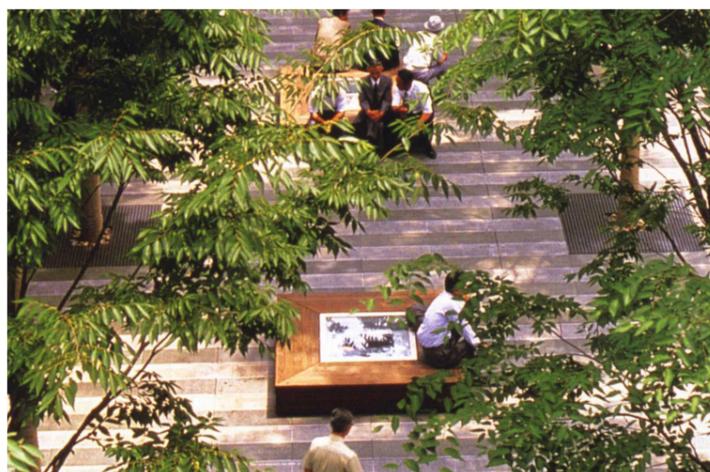
2.6 PRINCIPLE 4: ENVIRONMENT

Essential to any vital town centre is the balance between hard and soft landscape, ensuring a symbiotic relationship between the urban and natural environment. As town centres expand, natural habitats are enveloped by the urban environment, altering the natural ecosystems and bringing the urban environment into direct contact with the natural environment.



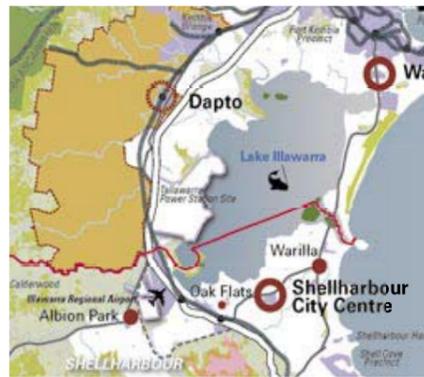
Public Domain

A quality public domain beyond providing an aesthetic component for town centres, can create an ongoing series of systems, patterns and interactions between living things. Thus a vital town centre offers a public domain that responds to the user requirements and local ecosystems, creating a more balanced environment.



Environmental Sustainability

A vital town centre must be sustainable by responding to its environment and ecosystems within it, ensuring a resilience to extreme weather conditions. Additionally, through the appropriate planting of trees and vegetation, carbon dioxide can be sequestered, winds speeds can be reduced, shelter belts are established and dust pollution can be filtered. These considerations are essential for any vital town centre.



3.0 Background Information

3.0 Background Information

3.1 STATE GOVERNMENT

ILLAWARRA - SHOALHAVEN REGIONAL PLAN

Overview

The Illawarra-Shoalhaven Regional Plan was released on 24 November 2015 and will guide strategic planning for this nationally significant region comprising the council areas of Wollongong, Shellharbour, Kiama and Shoalhaven over the next 20 years.

The new plan is focussed on:

- creating a robust, diversified economy, including access to high quality jobs
- delivering greater housing choice to suit the changing population needs
- growing the capacity of the port of Port Kembla as an international trade gateway
- developing strong and vibrant communities through improved public transport and urban design
- protecting the landscape and environment
- growing the national competitiveness of Metropolitan Wollongong to provide more jobs, housing and lifestyle opportunities
- increasing capabilities of key sites in Nowra and Shellharbour City Centres, Illawarra Regional Airport, Albatross Aviation Technology Park and the Waterfront Shell Cove

By 2036, the population of the Illawarra-Shoalhaven is forecast to grow to 463,150 – an increase of 60,400 from 2016.

Population growth will result from natural increase as well as the sustained migration of young families and retirees looking to take advantage of the lifestyles on offer.

The plan makes developing a strong, diverse and competitive economy central to building prosperity and resilience in the region, to meet any economic, social and environmental challenges that arise.

It focuses on a sustainable built environment that requires urban areas to be designed, planned and managed to improve their environmental performance. In doing so, it will make efficient use of urban lands, promote energy efficiency and support healthy and vital communities.

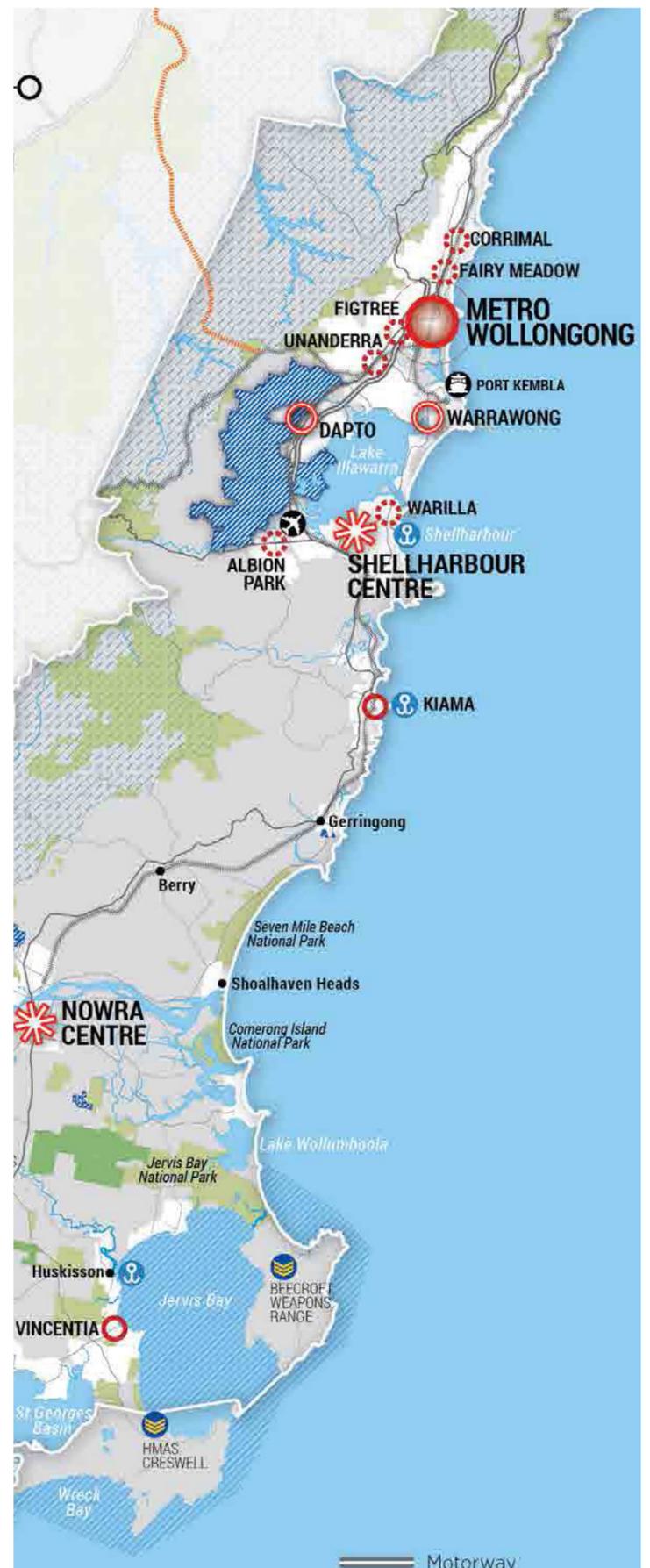
The plan adopts a balanced approach to growth that maximises development in both existing urban areas with their access to jobs, services and transport, and new urban areas that will be designed to support sustainability and healthy communities.

Making more housing available in existing urban areas is a sustainable initiative of the plan taking advantage of existing job markets, infrastructure, commercial and retail opportunities, public transport, and facilities for pedestrians and cyclists.

Warilla's centres are identified for increased housing activity in the plan.

An analysis of current planning controls in the region shows capacity of 24,100 new homes in existing urban areas, based on current market conditions.

In the plan's centres hierarchy, Warilla is identified as an urban centre. Key functions of urban centres are servicing the local area and surrounding suburbs, providing a range of business, retail and entertainment uses, including supermarkets, health and other services.



SEPP 65 & APARTMENT DESIGN GUIDE

Overview

The Apartment Design Guide is a resource to improve the planning and design of residential apartment development in NSW. It updates and replaces the Residential Flat Design Code introduced in 2002.

The Apartment Design Guide is to be used in conjunction with State Environmental Planning Policy No 65 – Design Quality of Residential Apartment Development (SEPP 65) which sets out the NSW Government’s policy direction for residential apartment development in NSW.

Key Aims

This Apartment Design Guide will help to achieve better design and planning for residential apartment development, by providing benchmarks for designing and assessing these developments.

It is designed to:

- Deliver better quality design for buildings that respond appropriately to the character of the area, landscape setting and surrounding built form
- Improve liveability through enhanced internal and external apartment amenity, including better layout, apartment depth and ceiling heights, solar access, natural ventilation and visual privacy
- Deliver improved sustainability through better traffic and transport solutions, greater building adaptability and robustness, improved energy efficiency and water sensitive urban design
- Improve the relationship of apartments to the public domain including streets, lanes and parks
- Deliver design guidance and assist in the provision of more diverse housing mix and choice
- Support councils in developing planning controls and master plans through improved guidance.

Statutory relationship to SEPP 65

There is a close and integrated relationship between this Apartment Design Guide and SEPP 65. SEPP 65 sets a consistent policy direction for residential apartment

development in NSW and provides a uniform state-wide framework for more detailed planning guidance. It has a statutory effect on development and as a consequence may modify or supplement the provisions of state environmental planning policies, local environmental plans (LEP) and development control plans (DCP).

Although this document is a guide, SEPP 65 refers to some parts of the Apartment Design Guide that must be applied when assessing development applications. Objectives, design criteria and design guidance in Parts 3 and 4 of this Apartment Design Guide that are referred to in SEPP 65 will prevail over any inconsistent DCP control. Parts 3 and 4 set out objectives, design criteria and design guidance for the siting, design and amenity of residential apartment development.

Certain design criteria referred to in SEPP 65 cannot be used as a reason to refuse a development application, if complied with. SEPP 65 establishes nine design quality principles to be applied in the design and assessment of residential apartment development. This Apartment Design Guide provides greater detail on how residential development proposals can meet these principles through good design and planning practice.

Residential apartment development

SEPP 65 and the Apartment Design Guide apply to residential flat buildings, shop top housing and the residential component of mixed use developments. They apply to buildings that are three or more storeys and that have four or more dwellings where the development consists of the:

- Erection of a new building
- Substantial redevelopment or refurbishment of an existing building
- Conversion of an existing building to a residential flat building.



Apartment Design Guide
Tools for improving the design of residential apartment development



3.2 LOCAL GOVERNMENT

SHELLHARBOUR CITY COMMUNITY STRATEGIC PLAN 2013 - 2023

Overview:

The Shellharbour City Strategic Plan sets out community objectives, strategies and indicative outcomes for the future community and council vision for the city. The plan was developed through a range of engagement activities and focuses on four main sectors: Community, Environment, Economy and Leadership. Outlining the following 10 objectives within these categories.

- Vibrant, safe and inclusive City
- Active and healthy community
- Protects and promotes its natural environment Practices sustainable living
- A liveable City that is connected through places and spaces
- Infrastructure is planned and managed in a way that meets the community's needs
- Supported by a strong local economy with business and employment opportunities
- Welcomes, engages and attracts visitors
- Led by a Council that effectively represents the community
- Supported by a Council that is responsive, accountable and financially viable

Key Points:

- Strategies provide strong links to state and regional strategies

Community strategies focus on:

- Events and culture support.
- Quality accessible community and cultural facilities, programs and services.
- Active creative community and development of creative opportunities
- Opportunities for education and leisure.
- Access to relevant and responsive health and well-being services.
- Recreation and enjoyment of parks and open spaces.
- Recreation opportunities to cater for a broad range of ages, abilities and interests
- Development of network of pathways, cycle ways for incidental exercise and alternative transport options.

Environment strategies focus on:

- Management of catchments and delivery of projects, which protect biodiversity.
- Leadership in environmental planning and management
- Education on environmental suitability and management and facilitating community involvement in caring for the natural environment.
- Effective sustainable waste management
- Reduction of ecological footprint.
- Recognising, protecting and celebrating our heritage.

Economic strategies Focus on:

- A board range of sustainable quality and cost effective infer structure.
- Renewal of ageing assets to meet current and future community needs.
- Making Shellharbour a destination of choice for tourism and community based on a dynamic, responsive and sustainable industry.
- Opportunities for local business growth
- Positive city image and lifestyle
- Employment opportunities focusing of retaining young people, encouraging new workers and opportunities for the unemployed

Leadership strategies focus on:

- Mayor and councillors representing the community providing strong, cohesive and visionary leadership.
- Facilitation of strong communication with community.
- Respect and acknowledgement for aboriginal community as traditional land custodians.
- Clear framework for council activates, planning and policies
- Enhance organisational culture.
- Transparent and accountable financial management.
- Effective communication methods and technological provision of services.
- Risk minimization and critical business functions.
- Collaboratively planned emergency response.



SHELLHARBOUR CITY COUNCIL DELIVERY PROGRAM (2013-2017) OPERATIONAL PLAN (2014-2015)

Overview:

This document aligns a delivery program, operational plans, responsibilities, time-frames and key performance indicators with the objectives and strategies outlined above in the Shellharbour City Community Strategic Plan 2013 – 2023. Organised the same objective categories of Community, Environment, Economy and Leadership. The document sets out actions that the council will undertake during the financial year (operational plan) to meet the broader strategy (delivery program). It additionally puts forward how the council will measure success in achieving the desired outcome for each strategy and action.

SHELLHARBOUR CITY COUNCIL RESOURCING STRATEGY 2013 - 2023

Overview:

The resourcing strategy ensures there is an appropriate mix and delivery of infrastructure services combined with the availability of sufficient financial and human resources. The strategy informs the development of the Shellharbour City Community Strategic Plan (CSP) and describes the resources Council is going to utilize to achieve the Objectives and Strategies.

It is made up of key components

- Sustainable Financial Strategy (SFS)
- Long Term Financial Plan (LTFP)
- Asset Management Plan (AMP)
- Workforce Management Plan (WMP)

Key Points:

- Financial Sustainability
- Maintaining and operating assets within acceptable levels of service balanced against available funding has

presented a challenge to Council over recent years.

Shellharbour City Council's primary objectives in managing these are:

- To be sustainable in the management all assets
- To provide a desirable level of service for the assets under its stewardship for the existing and future community
- Council must have a Workforce Management Plan (the plan) to ensure that it has the right mix of people, skills and resources to use when and where they are needed. This will enable Council to plan its future workforce needs to place Council in the best position to deliver on the objectives outlined in the CSP.

SHELLHARBOUR CITY COUNCIL SECTION 94 CONTRIBUTIONS PLAN 2013

The Warilla Precinct is an established urban area, consisting of the suburbs of Warilla, Lake Illawarra, Mount Warrigal and Barrack Heights. The population of the Precinct is anticipated to remain fairly stable, increasing slightly from 21,044 in 2013 to 21,993 in 2023. Dwelling numbers are projected to increase from 8,643 in 2013 to 9,032 in 2023. The provision of Open Space for the Warilla Precinct is considered adequate as on average over 90% of all residential dwellings are within 400m walking distance to any open space area. The open space within the Precinct includes beaches, parks and reserves, and the Lake Illawarra foreshore.

The need for a community centre was identified in the Cultural Facilities Study [1999] and was reinforced through the allocation of grant funding through the 'Community Solutions Program' run by the NSW Premier's Department. This infrastructure has now been constructed and Council is seeking to recoup some of the costs incurred. Due to the fairly stable population of the precinct the need for additional infrastructure has not been identified.



MAKE PLAY GROW 2015-2019 - A STRATEGY FOR A MORE CREATIVE SHELLHARBOUR

The strategy includes the following actions;

- Work with the community and business owners to encourage an ever changing display of street art murals and laneway art to contribute to a reduction of anti-social behaviour and malicious damage.
- Develop an art in public places program to seek temporary and permanent public art works that contribute to a distinctive sense of place.
- Provide and support a range of markets including food, produce, art and design markets.
- Identify and create a register of underutilised spaces and work with relevant partners to establish a program of creative pop-up events to temporarily activate space.
- Partner with local businesses regarding possible shopfront exhibitions or short term leases with property owners.
- Incorporate art components in the design of new street furniture such as seats, bus stops, shelters, lighting, bike racks and introduce clear and creative signage and way finding.
- Increase creative activity and encourage flexible use of open space, parks and bushland by identifying, developing and promoting these areas for music, literacy and theatrical performances.
- Advocate for arts and cultural advice in the early stages of planning and design of major infrastructure projects and public places such as Town Centre Plans and the City Hub to promote distinctiveness and authenticity.
- Recognise that town centres play an important role in cultural identity by implementing place programs and streetscape projects outlined in the Albion Park, Oak Flats and Shellharbour Village Town Centre Plans.

LIBRARIES AND MUSEUM STRATEGY 2024

Overview:

Shellharbour City Libraries & Museum Strategy 2024 has been developed to provide a direction on the future of our Libraries, ensuring they are flexible, responsive and meet the needs of our dynamic and diverse community. It has strong emphasis on not only the new City Library, but also on the development of our branch libraries. The Strategy is designed to guide Council’s planning and investment for libraries and the museum over the next ten years.

Key Facts on Existing Warilla Library:

- Built in 1968.
- Not purpose built as library.
- Not co-located with other community services or facilities such as retail centre.
- Limited pedestrian traffic and visibility.
- Inadequate external signage.

Key Facts on Proposed Warilla Library:

Through a detailed council investigation it was determined that the most appropriate future site for Warilla Library was Keith Fletcher Park. Key considerations for the future Warilla Library are high visibility; technology hub; Wi-Fi; community life-long learning; literacy; meeting space and comfortable space and furniture. Council is in the process of developing a concept plan and detailed cost estimates.



SHELLHARBOUR OPEN SPACE STUDY

Needs for the Study

The previous regional strategy i.e the Illawarra Regional Strategy identified Shellharbour as the local government area (LGA) in the region that has:

“...taken the major responsibility for regional Greenfield land releases over the last 30 years at Albion Park, Blackbutt, Flinders and Shell Cove. As the current estates reach completion, the focus for Shellharbour will shift towards urban renewal opportunities around towns and centres such as Warilla.” (Department of Planning 2007)

Council Brief

Shellharbour City Council commissioned GHD Pty Ltd to undertake a comprehensive open space, recreation and community needs study of the Shellharbour LGA. The purpose of the study is to provide Council with the information and planning tools to strategically plan for future open space, recreational and community facilities to meet the needs of the Shellharbour LGA to the year 2021.

Overview

In planning for long term resident needs in the Shellharbour local government area, Council has initiated this Open Space, Recreation and Community Facilities Needs Study to ensure that Council is planning now for the City’s needs all the way through to 2021.

The Needs Study Report provides the basis for moving ahead with a range of findings that will enable Council to confidently direct the development of open space, parks, sporting fields and community facilities. The three key areas of the project are:

- Passive open space (or parks);
- Active open space (or sporting grounds); and
- Community facilities.

Key Points

- Extensive linked parks exist to the east of the suburb along the foreshore, with smaller local parks located further west.
- In the centre of the suburb, a district park provides for good access from a large portion of the Warilla residents, with a “community hub” providing a community centre, senior citizens centre and pool.
- While the presence of numerous parks provides for high accessibility, the quality of parks is generally of poor condition.
- Smaller local parks are in a variety of condition, typically containing playground equipment, but few other embellishments.
- In particular opportunities exist to improve the movement within and between parks and open spaces, particularly where part of their function is to provide pedestrian and cycle linkages.
- Investigate opportunities for improvements to local parks which are poorly developed or undeveloped within the non-foreshore areas of Warilla.





4.0 Understanding Warilla Town Centres

4.0 Understanding Warilla Town Centres

4.1 CONTEXTUAL POSITIONING

This section establishes an understanding of Warilla Town Centres both physically, economically and environmentally by assessing it against the key principles that make a 'Vital Town Centre'.

Warilla comprises two town centres called Warilla Grove and Warilla Town Centre and major open spaces called Keith Fletcher Park and Shellharbour War Memorial Park. In the vicinity of the town centre is Lake Illawarra to the north with Whyjuck Bay to the north west and the Tasman Sea to the east. Shellharbour Road forms the main north to south road linking the two centres together with Lake Entrance Road supporting direct access to Shellharbour City Centre.

Economic Positioning

While Shellharbour City has seen a population growth since 1991, Warilla has seen a marginal decline in population over the last decade. This is largely because Warilla is an older more established residential area of the City and there has been little new housing since 2001.

On the other hand, new residential areas such as Shell Cove and Flinders have experienced strong growth rates. These localities have proved popular due to their proximity to Shellharbour City Centre, the provision of new services (e.g. schools and community facilities) and in some cases their proximity or views to the water.

The trade area for the Warilla Town Centres consists of its immediate surrounding residential population. However, with the recent upgrade of Stockland Shellharbour, Warilla experiences further competition. A summary of this upgrade is as follows:

- Stockland Shellharbour, in Shellharbour City Centre, is one of the largest shopping centres in the Illawarra region and has recently undergone a \$330 million redevelopment. Stockland Shellharbour now has Myer, Woolworths, Coles, Target, Kmart, JB Hi-Fi and over 220 speciality stores and services.

Access and Movement Positioning

Shellharbour Road (also called Grand Pacific Drive) forms the main north-south road link within Warilla and between the two study areas, Warilla Town Centre and Warilla Grove. It is a State Road that also provides a major north-south connection to greater NSW, with Grand Pacific Drive leading to Port Kembla to the north, Shell Cove to the south and intersecting with the Princes Motorway (M1).

Environmental Positioning

Warilla Town Centres surrounding natural environment works as a great asset. Located between Lake Illawarra and the coastal edge of the Tasman Sea, Warilla offers the local community a unique environmental setting. In addition the two centres sit within an open space network that comprises Keith Fletcher Park, Shellharbour War Memorial Park, King Mickey Park and Howard Fowles Sports Oval. In addition the local creeks and waterways result in both centre's experiencing flooding that constrains some future opportunities for change.

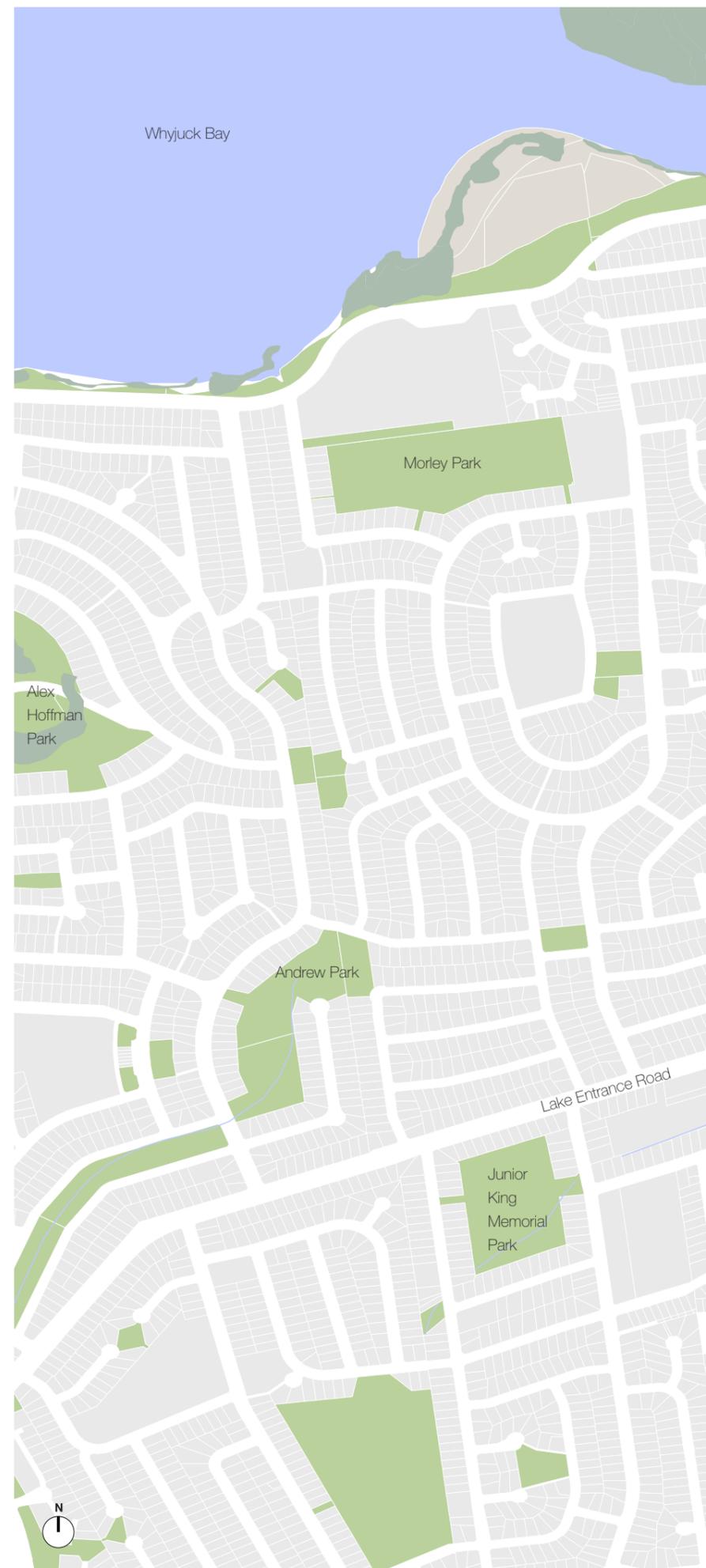
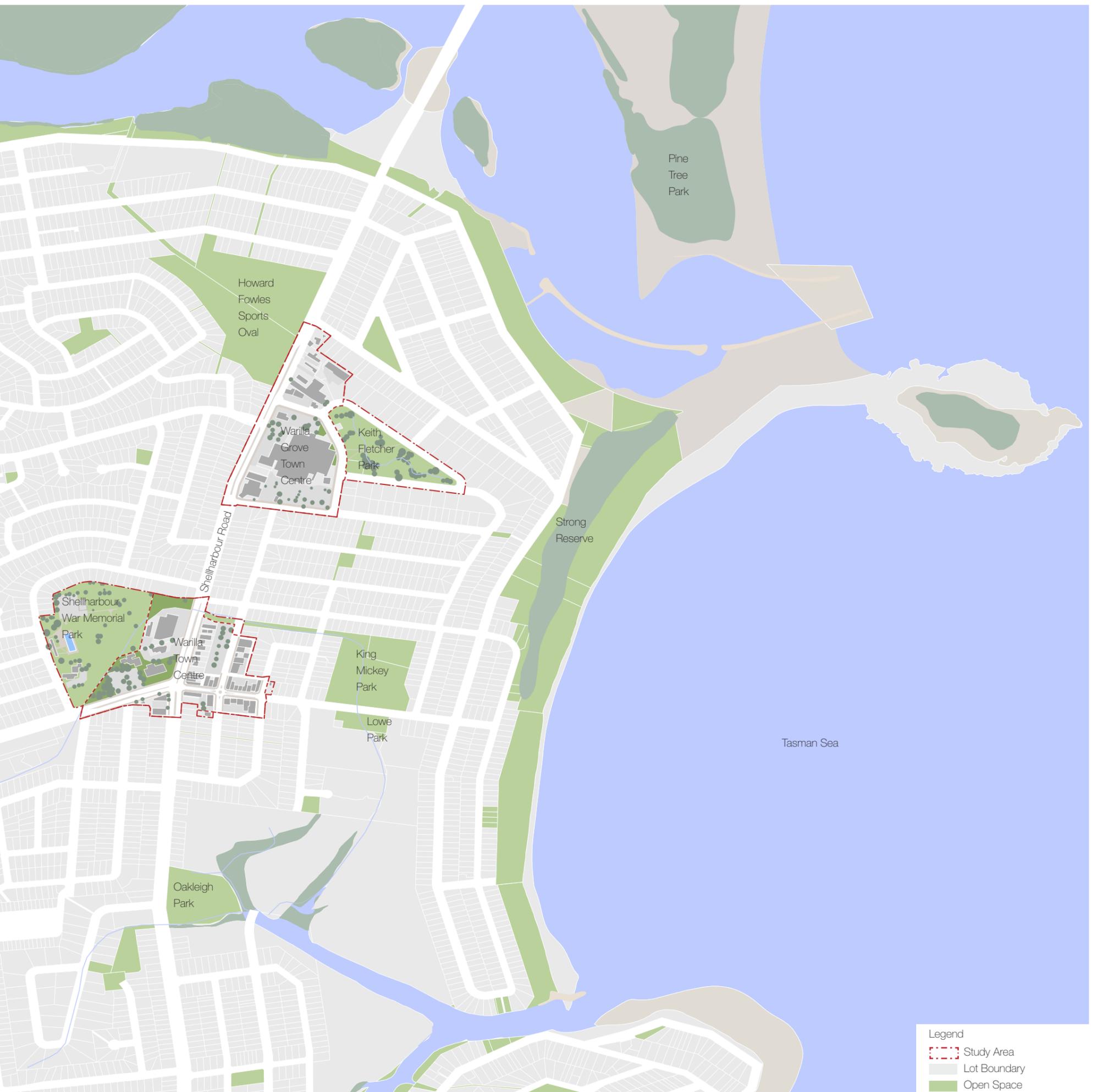


Figure 4.01 - Context Plan



4.2 ECONOMIC VIBRANCY

A key priority for the town centres plan is to guide built form, which promotes an economic vibrancy and activates the pedestrian environment. The below headings offer an understanding of what economic vibrancy exists within Warilla today.

Land Use Mix

Warilla is one of the more established areas of Shellharbour LGA, located between the suburbs of Mount Warrigal, Barrack Heights and Lake Illawarra.

Whilst the Illawarra and Shoalhaven Regional Plan as well as Shellharbour LEP (2000), identifies Warilla Grove as being part of the Warilla retail centre, they are two separate retail/commercial clusters. Warilla Grove Shopping Centre is the enclosed centre to the north of the suburb (corner of Shellharbour Road and Veronica Street). Warilla is the older strip centre located on George Street, around 650m south of Warilla Grove, with surrounding shops located on Shellharbour Road and Lake Entrance Road

Warilla provides two separate retail/commercial clusters namely:

- The enclosed Warilla Grove Shopping Centre which provides over 11,661sqm of retail floorspace and is anchored by a Woolworths (4,379sqm) and Aldi (2,399sqm commencing 2016) as well as 34 specialty stores; and
- Traditional strip retailing is provided along George Street and contains some 15,050sqm of retail and commercial floorspace (excluding community and utility uses).

There are some smaller centres in Barrack Heights, Lake Illawarra, Oak Flats, usually anchored by small format supermarkets or grocery stores. There are larger centres including Stockland Shellharbour and Westfield Warrarong that capture considerable levels of expenditure from Warilla residents.

Warilla has a main trade area that covers the suburbs of Warilla, Lake Illawarra, Barrack Heights and Barrack Point. This is an area of 16,800 people expected to grow to 17,770 by 2031. Expenditure generated by trade area residents is expected to increase from \$211.4m today to \$265.1m by 2031.

Economic Performance

There is sufficient expenditure (including tourist expenditure) now to justify centres of some 16,000sqm combined with one full-line supermarket. Based on our demand modelling which suggests an oversupply of retail floorspace in the short to medium term, Warilla is not in a position to expand. This also applies to non-retail commercial space. This is largely due to its positioning being highly exposed to the competitive pressures of the higher order and superior centres –Shellharbour City Centre and Warrarong.

Land Use Zoning [LEP 2013]

Both town centres current land use zoning is characterised as a B2 Local Centre which accommodates local retail and commercial uses, with adjacent B5 Business Development, RE1 Public Recreation, R2 Low Density Residential and R3 Medium Density Residential. Warilla Grove also has an IN2 Light Industrial zoned area located to the south east of the shopping centre.

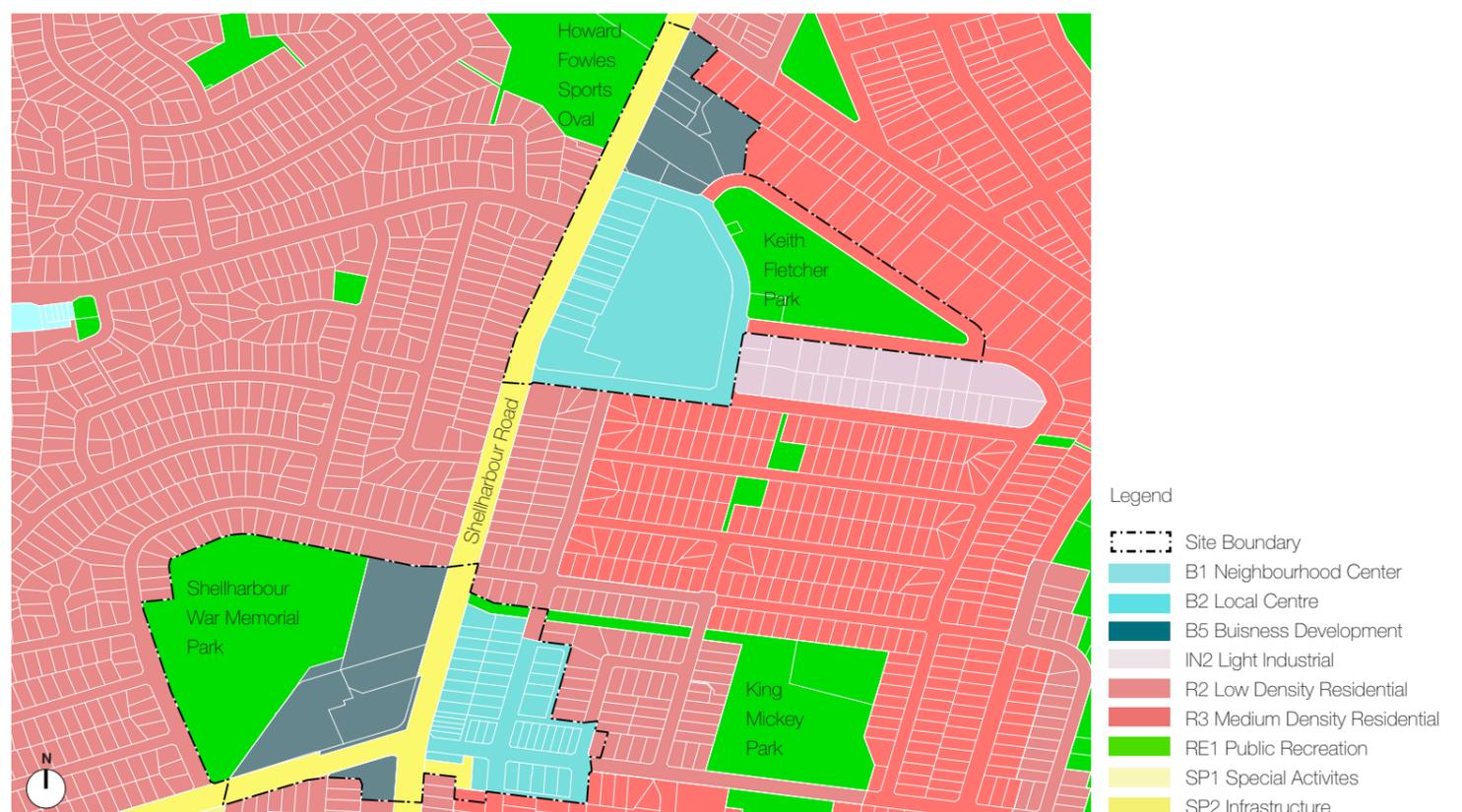


Figure 4.02 - Land Use Zones [LEP 2013]

Community Heart

Warilla has two identifiable community hearts. To the north is Warilla Grove shopping centre which contains retail and commercial providers for the local community. To the south is Warilla Town Centre which is characterised by George

Street, the town centre's Main Street. This community heart includes local retail, commercial businesses as well as shop top housing.



Figure 4.03 - Community Heart

Edges

Warilla's centres display differing conditions of edge activation due to their building typology. Warilla Grove is a big box shopping centre and exhibits a poorly activated edge on all facades of the building envelope while containing

high levels of activation within the building. Warilla Town Centre has an active main street consisting of fine grain buildings, with low levels of rear activation due to service access and owner parking.



Note: Active frontages enliven the ground floor street level with commercial and retail uses. Semi-active frontages relate to areas which have good urban frontage such as residential and community buildings but do not support active functions such as retail and commercial.

Figure 4.04 - Town Centre Edges

4.3 URBAN COMPOSITION

A key priority for the town centres plan is to create high quality streets through appropriate scale and massing. The below headings offer an understanding to what the urban composition of Warilla is today.

Height of Building [LEP 2013]

The LEP for Warilla Town Centre specifies a maximum building height zone of 15.0m [3 - 4 storeys] along Lake Entrance Road, an 11.0m to 12.0m [2 - 3 storeys] building height zone within the remainder of the study boundary and

a 9.0m [2 - 3 storeys] height zone for surrounding residential lots. Warilla Grove is characterised by a height of building zone of 11.0m to 12.0m [2 - 3 storeys] and a 9.0m [2 - 3 storeys] height zone for surrounding residential lots.



Figure 4.05 - Height of Buildings [LEP 2013]

Existing Building Heights

The majority of existing building heights within both centres sit well below the permissible LEP height zone, ranging between 5.0-7.5m [1 - 2 storeys]. The only building within

both centres that achieves its permissible height zone is Warilla Grove Shopping Centre [12.0m].



Figure 4.06 - Existing Building Heights

Floor Space Ratio [LEP 2013]

At present, the LEP permissible Floor Space Ratio [FSR] for Warilla Town Centres is largely 1.5:1, with some adjacent properties being 0.5:1. However, when analysing the

existing built form the current FSR averages between 0.4:1 for Warilla Grove Town Centre and 0.6:1 for Warilla Town Centre, which is well below the FSR of 1.5:1.



Figure 4.07 - Floor Space Ratio [LEP 2013]

Gateway Entrances

The primary entrance points to the Warilla Town Centres are located at a variety of intersection points of main and local roads. At present the majority of these intersections offer little sense of arrival due to low quality built form, inadequate

uses, wider road intersections and vacant spaces. It is crucial that these arrival points are improved, so to enhance the town centre arrival experience. Public art can assist in creating a sense of arrival.



Figure 4.08 - Gateway Buildings

Town Centres Character

The Warilla Town Centres are characterised by a mix of commercial, retail, light industrial and open green spaces. Warilla Grove Town Centre consists of a big box shopping centre surrounded by poorly defined built form and public domain. Warilla Town Centre has a stronger street grid, consistent setbacks and fine grain built form.

With many façades in poor condition alongside poorly integrated public domain, crossings and furniture, Warilla Town Centres are not reaching their true potential. The key characteristic areas of the Warilla Town Centres are as follows.

- **Character Area 1: Corner of Shellharbour Road & Woolworths Avenue** - This character area contains a mix of building typologies that accommodate a range of retail and commercial uses. The buildings situated on Shellharbour Road have facades that address the vehicle

dominated environment. The lots are currently used in an inefficient manner creating under utilised spaces to the rear and sides of buildings.

- **Character Area 2: Keith Fletcher Park** - This character area contains many existing trees and a natural water course. The water course is buffered by natural grasses which notably form a rubbish trap. The park has areas of lawn that are prone to flooding. The lawn is divided by a footpath and a small bridge which traverses the water course. The park has limited furniture and some children's play equipment.
- **Character Area 3: Warilla Grove** - This character area is defined by the big box supermarket development which is located in the middle of a large bitumen surface. There is some scattered softscape and trees which are poorly integrated into the bitumen surface. The areas around



Character Area 1. Woolworths Avenue



Character Area 1. Shellharbour Road



Character Area 1. Mix of building typology



Character Area 2. Keith Fletcher Park footpath



Character Area 2. Existing Water Course



Character Area 2. The only seat in the park



Character Area 3. Internal shopping centre



Character Area 3. Poor entry point into the shopping centre



Character Area 3. Bitumen dominated environment

the shopping centre are dominated by vehicles making it an unfriendly location for pedestrians. The area currently offers no out door resting spaces.

- **Character Area 4: Warilla Town Centre** - This character area is a more traditional local centre with fine grain built form and a grid layout of streets. The footpaths along the main street are defined by George Street a large road that detracts from the pedestrian experience in the centre. Some street trees exist along the main street, however their canopies offer little shade. The shops in the area offer a range of retail and commercial services, but the facades are of varying quality.
- **Character Area 5: Corner of Lake Entrance Road & Shellharbour Road** - This area is book ended by Casuarina trees and a main road. The existing buildings poorly utilise the existing views and spaces leaving dead

zones to the sides and rears of the buildings. An internal road with no pedestrian access runs parallel to the water course which provides circulation for vehicles between buildings.

- **Character Area 6: Shellharbour War Memorial Park** - This area offers an expansive park with several small buildings and a lap pool located to its western boundary. The buildings offer services to the local community. Pedestrian access through out the site is sporadic, with some bridges that assist in traversing the water course. The park also contains existing trees scattered through out the park which provide some shade but little spatial definition.



Character Area 4. Hicks Lane a service lane



Character Area 4. Beverley Avenue Carpark



Character Area 4. George Street



Character Area 5. Warilla Library and carpark



Character Area 5. Corner building and space off Lake Entrance Road and Shellharbour Road



Character Area 5. Inactive rear of building



Character Area 6. Open lawned area



Character Area 6. Existing water course



Character Area 6. Existing Trees

Town Centre Character Plan

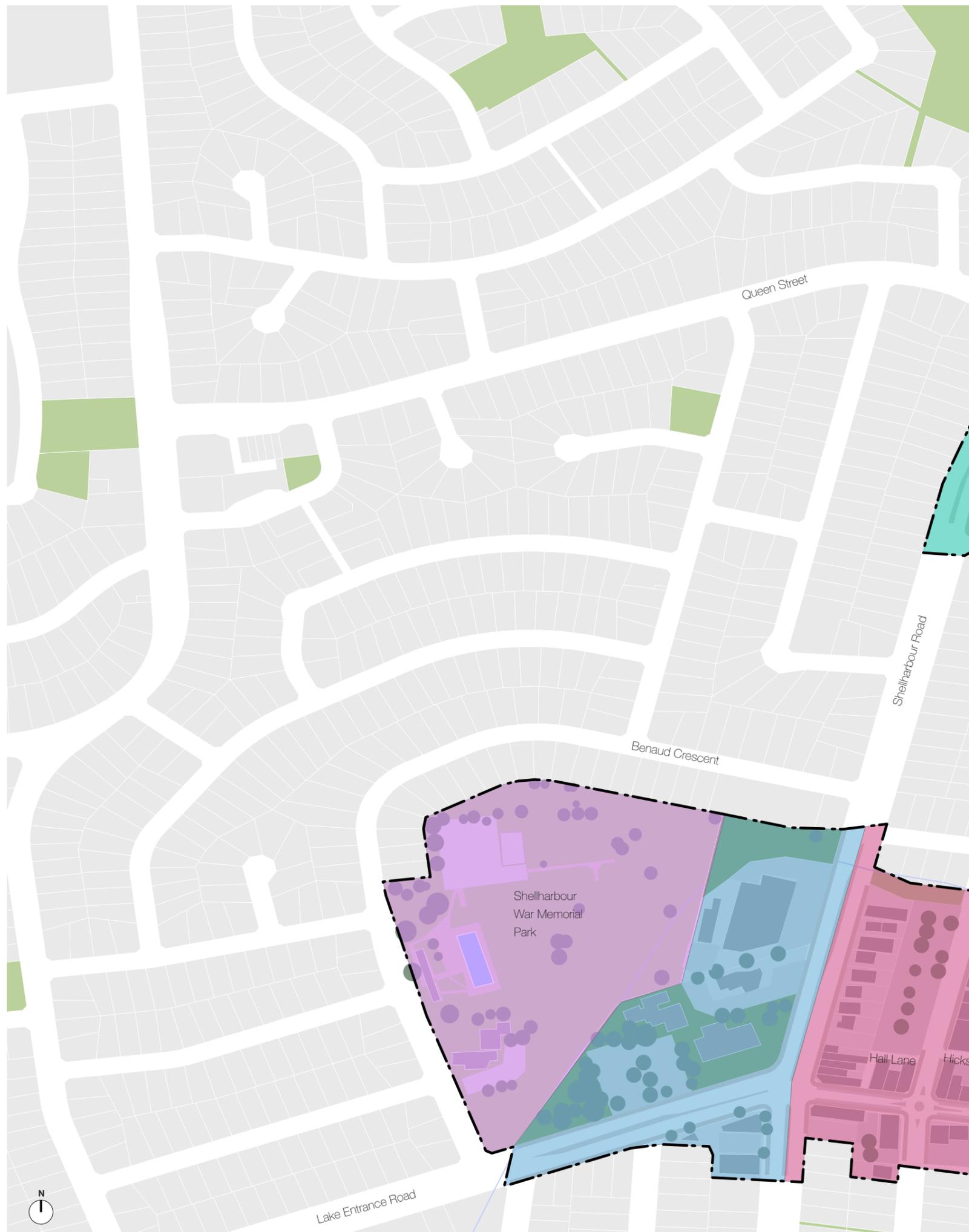
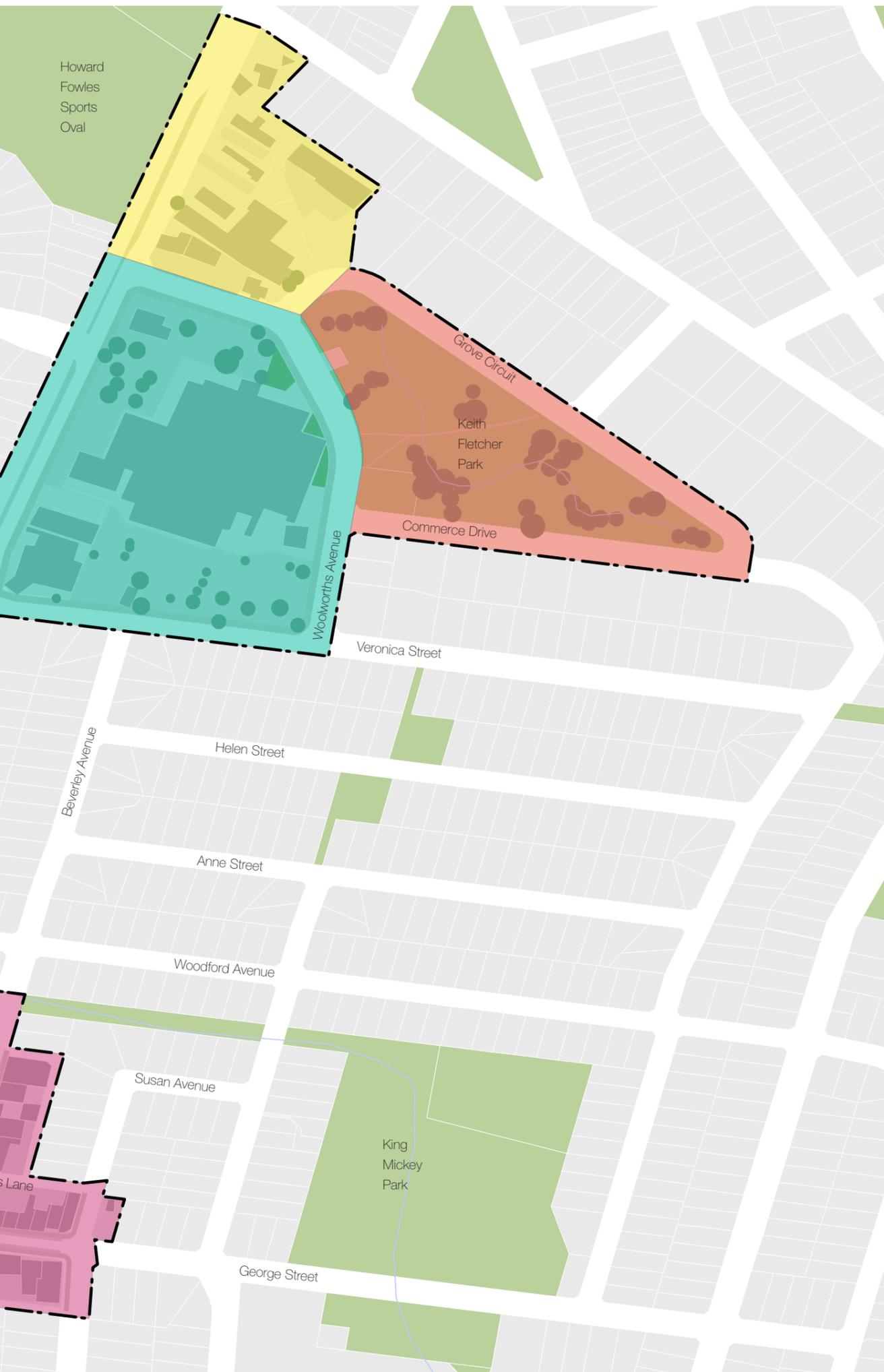


Figure 4.09 - Existing Character Plan



4.4 ACCESS AND MOVEMENT

A key priority for the town centres plan is to promote pedestrian links, cycling and greater use of the local public transport system. The below headings offer an understanding of what access and movement patterns exist in Warilla today.

Street Hierarchy

Warilla Town Centres are located on Shellharbour Road which can be accessed via the regional New Lake Entrance Road. Beverly Avenue forms the main local road connecting the town centres. Both centres can be accessed via a local

road network. Warilla Town Centre contains several access lanes which provide service access to the rear of existing shops and an alternative link to local roads.

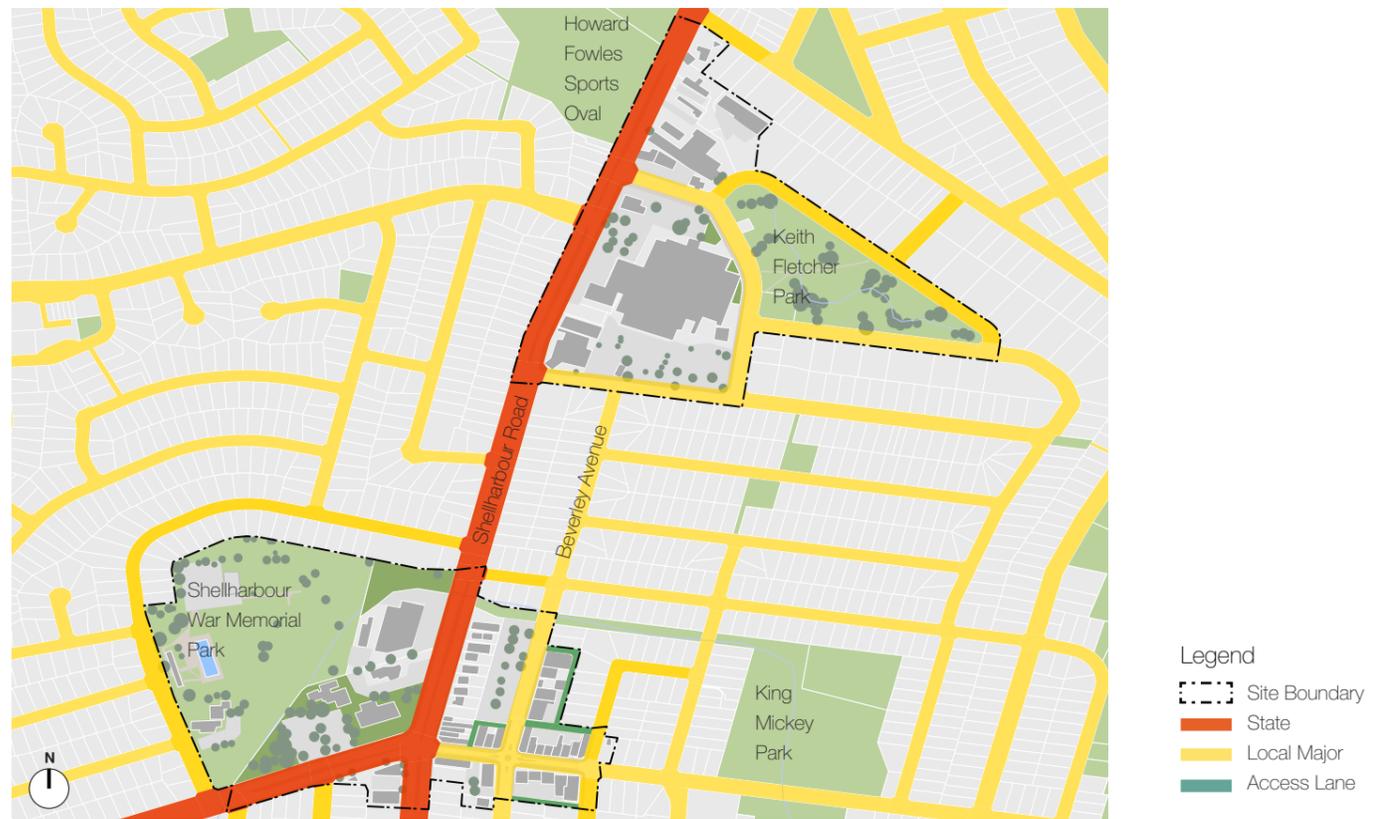


Figure 4.10 - Street Hierarchy

Access and Parking

Both centres provide a large provision of car parking, which support the local businesses. Overall, the peak parking demand was recorded as 11:00am – 12:30pm for both town centres. This time corresponds with occupancies of

57% at Warilla Grove Town Centre and 64% at Warilla Town Centre. This analysis highlights that both centres currently provide an oversupply of parking.



Figure 4.11 - Access and Parking

Public Transport and Pedestrian Links

Both centres are under a 10 minute (700m) minute walk from each other. Shellharbour Road acts as the major route for buses linking to Peterborough, Queen and George Street. The centres are serviced by buses #76 Albion

Park to Shellharbour, # 72 Shellharbour Loop, #53 and #51 Shellharbour to Wollongong. There is limited formal pedestrian connectivity between the centres other than along Shellharbour Road and Beverley Avenue.



Figure 4.12 - Public Transport and Pedestrian

Cycle Network

The Warilla Town Centres have limited existing and proposed cycle connections with one shared path to the west along Shellharbour Road which connects to the town centres.

No direct routes between the town centres have been proposed, but there are proposed off street share paths linking both centres to the coast.



Figure 4.13 - Cycle Network

4.5 ENVIRONMENT

A key priority for the Town Centres Plan is to ensure the vision for the town centres responds to the existing environmental conditions, offering a balanced environmental experience for the local community. The below headings offer an understanding to the environmental characteristics existing within Warilla Town Centres today.

Heritage

The Warilla Town Centres do not contain any buildings or urban spaces listed as heritage. Warilla Town Centre has DA approval to relocate the Freedom Wall and Lone Pine from a location near Lake Entrance Road to a site fronting Benaud

Crescent in Shellharbour War Memorial Park. The Lone Pine is listed as a heritage item in Council's Local Environment Plan 2013.



Figure 4.14 - Heritage

Hard and Soft Landscape

Warilla Grove Town Centre is situated in a bitumen parking lot, containing some integrated trees and soft landscaping. Footpaths are present around the block which Warilla Grove is situated on but access routes to the shopping centre

are poorly articulated by inconsistent hard scape. Warilla Town Centre has wide but patchy footpaths. Some street trees and furniture are located along the road but clutter the footpath.



Figure 4.15 - Hard and Soft Landscape

Topography and Views

Warilla is located relatively close to sea level keeping views to well defined corridors between the neighbouring buildings and out across roads to large areas of open park space.

Key views include; Shellharbour War Memorial Park from the rear of the existing Library. Howard Fowles Sports Oval from Shellharbour Road. Keith Fletcher Park from Woolworths Avenue. Views along George Street and Beverly Avenue.

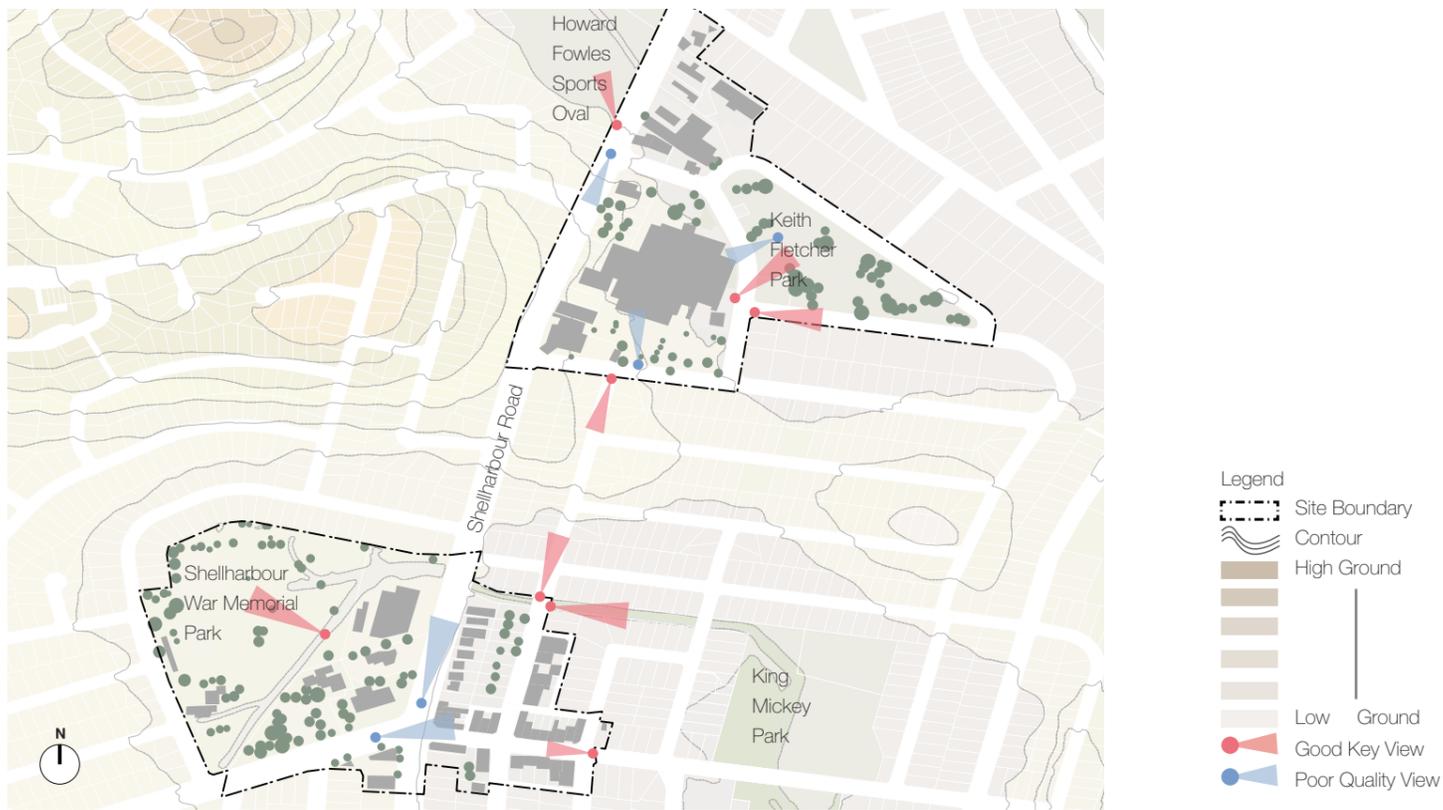
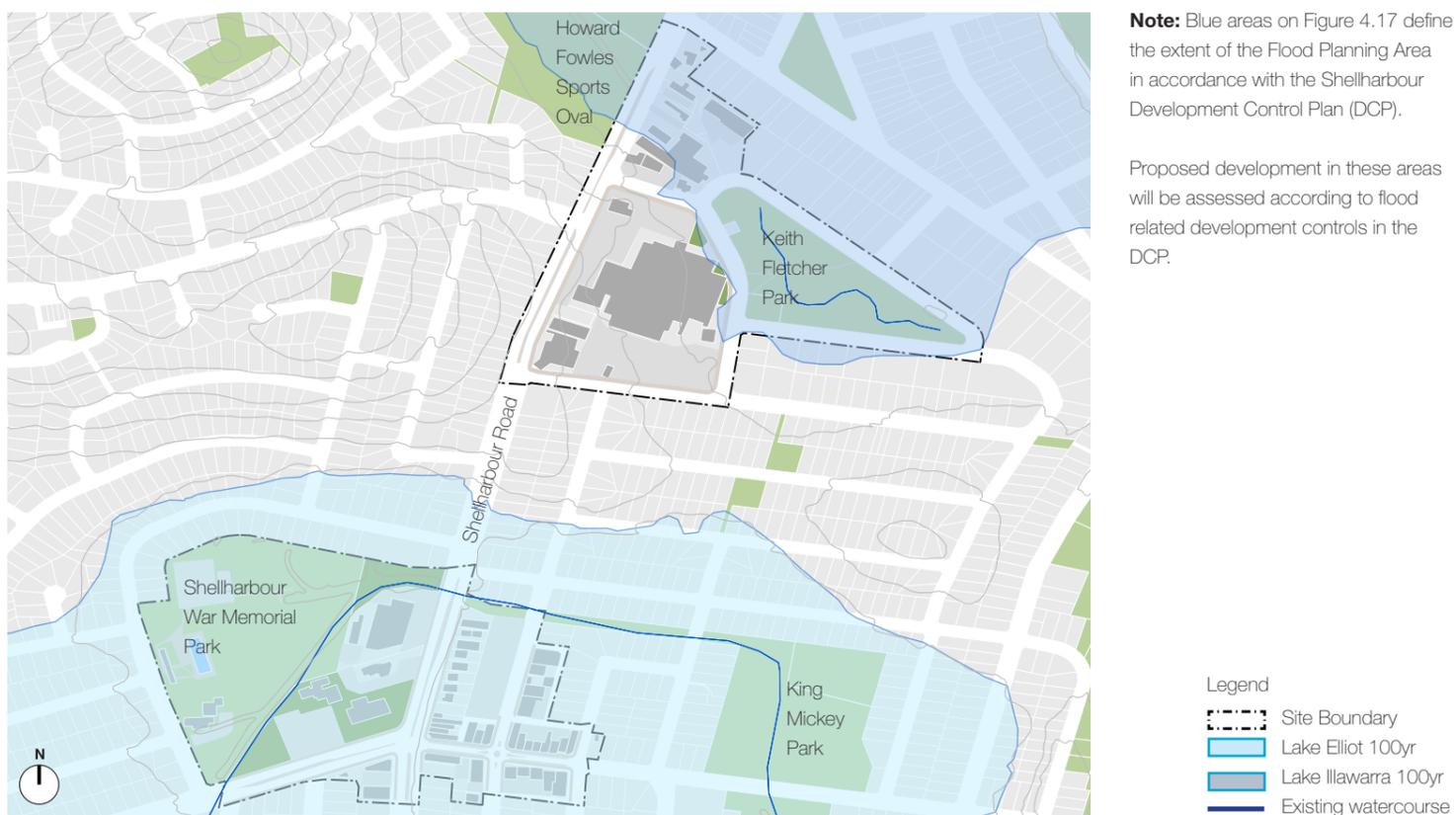


Figure 4.16 - Topography and Views

Flooding

The Warilla Town Centres are located on low ground prone to flooding. As such Warilla Grove Town Centre experiences flooding over half of its site boundary area. Warilla Town Centres entire site boundary area is subject to

flooding. There are creek lines that run through both town centres. Warilla Town Centre contains concrete storm water management channels that aid in the event of a flood.



Note: Blue areas on Figure 4.17 define the extent of the Flood Planning Area in accordance with the Shellharbour Development Control Plan (DCP).

Proposed development in these areas will be assessed according to flood related development controls in the DCP.

Figure 4.17 - Flooding



5.0 Strategising Warilla Town Centres

Strategising Warilla Town Centres

5.1 THE STRATEGIC MOVES

Building off the analysis produced for Warilla Town Centres a series of six strategic moves have been established that look to incrementally phase the transformation of Warilla Town Centres into vibrant and vital town centres. These broad strategic moves have informed the development of the Warilla Town Centres Plan.

Warilla is characterised by its open green spaces, natural drainage corridors and its proximity to a beautiful coastline that establishes it as a unique place for both locals and visitors to enjoy. However with two opposing centres, no public space, little street activation, poorly connected blocks, many dull frontages and few connections to the parks and beaches the true potential of Warilla is not being fully maximised.

Strategic Move 1: Establish a Community Hub

Strategic move 1 looks to draw on the newly proposed library facility planned in Keith Fletcher Park. By introducing a new modern library facility within the centre a broader range of user groups can be supported. This community

hub can better cater for the growing needs of the community and encourage greater use of the town centre.

The aims of this strategic move are as follows;

- Relocate Warilla Library to the proposed location of Keith Fletcher Park ensuring additional library uses can be catered for, including but not limited to a cafe, adult learning, free wireless internet, public access computers etc.
- Passive Surveillance can be improved on the proposed new Library site through appropriately addressing Keith Fletcher Park, the surrounding roads and Warilla Grove Shopping Centre.
- Outdoor library spaces alongside the new library facility can establish an improved role for Keith Fletcher Park.
- Ensure the new library facility adopts high quality flood mitigation measures that appropriately engage with the library's surroundings.

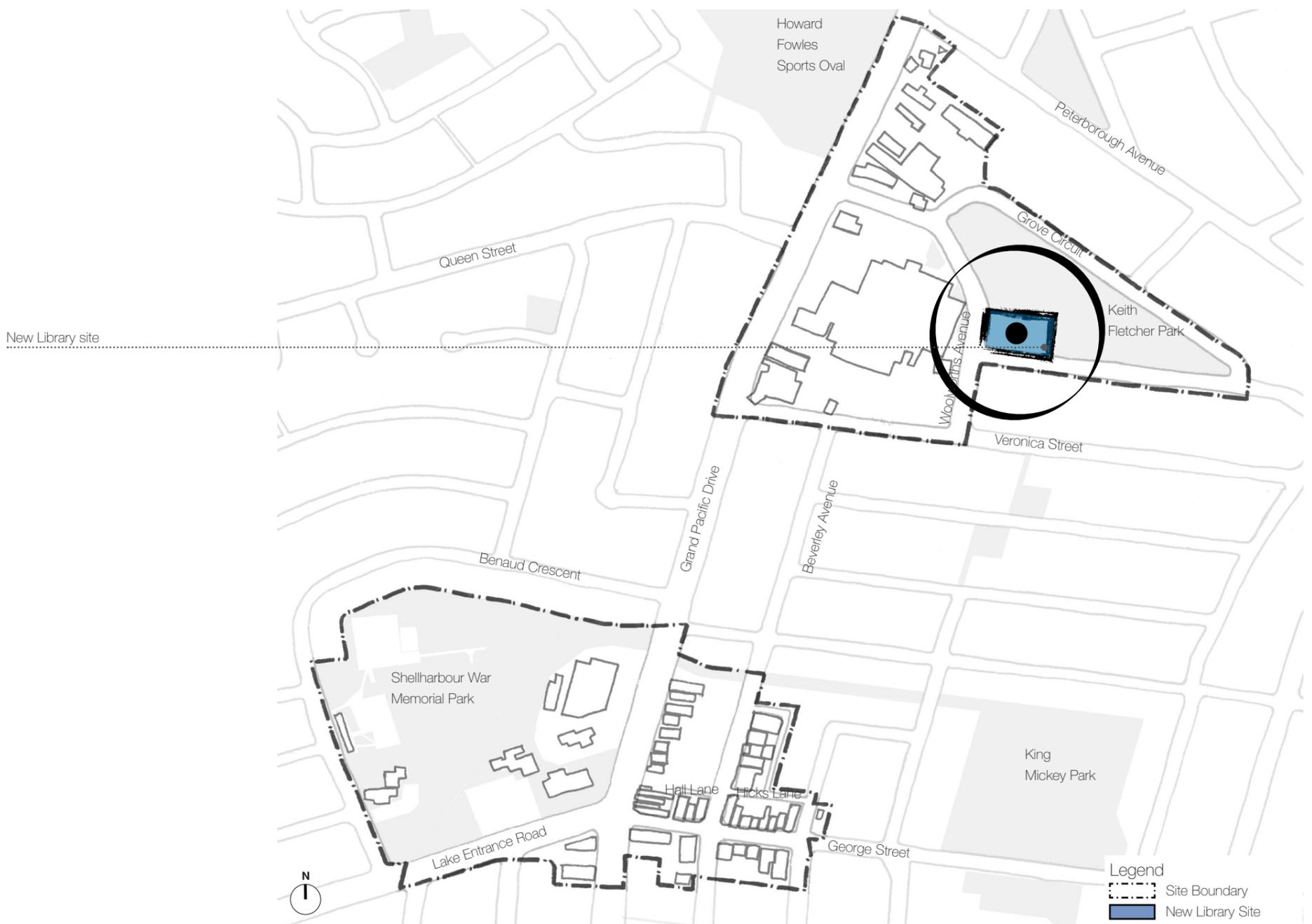


Figure 5.01 - Strategic Move 1



Outdoor Library/ Public Space



Public Space/Markets/Community Events



Street side bookstore encourages pedestrians to linger



Community mural workshops



Activate and engage the surrounding public space



Public Space/ Community Centre & Youth Skate facilities



High quality public library and community space



Temporary activation of Keith Fletcher Park

Strategic Move 2 : Create a Public Heart

Strategic move 2 looks to draw on the existing qualities of the rears of the centre’s buildings, encourage flexible use of car parking spaces and maximise the excellent solar access through establishing two community focal points for interaction. Active interventions such as pop-up cafes, bars or stalls are proposed within the temporary public spaces supporting a public heart in both centres.

Key initiatives that can be drawn from this strategic move are as follows;

The aims of this strategic move are as follows;

- Permanent public art and regular creative initiatives to help make public spaces active, safe and vibrant.
- Temporary facade treatment and rear building activation to engage with the temporary public spaces;
- Encourage the flexible use of car parking through establishing temporary public spaces within Warilla Grove and Warilla Town Centre car park;

- Ensure temporary public spaces incorporate activities such as local live music, pop-up markets and art fairs to encourage social gathering within the space;
- Passive surveillance can be improved through building and space activation, establishing a safer town centre environment;
- Encourage a sense of community ownership within the public spaces;
- Allow the local community and businesses within Warilla to offer ideas in temporarily activating the public spaces;
- Establish a link between the Warilla Grove public space and the new library facility through appropriate programming such as pop up libraries or facilities;
- Establish a link between the Warilla Town Centre public space and George Street.

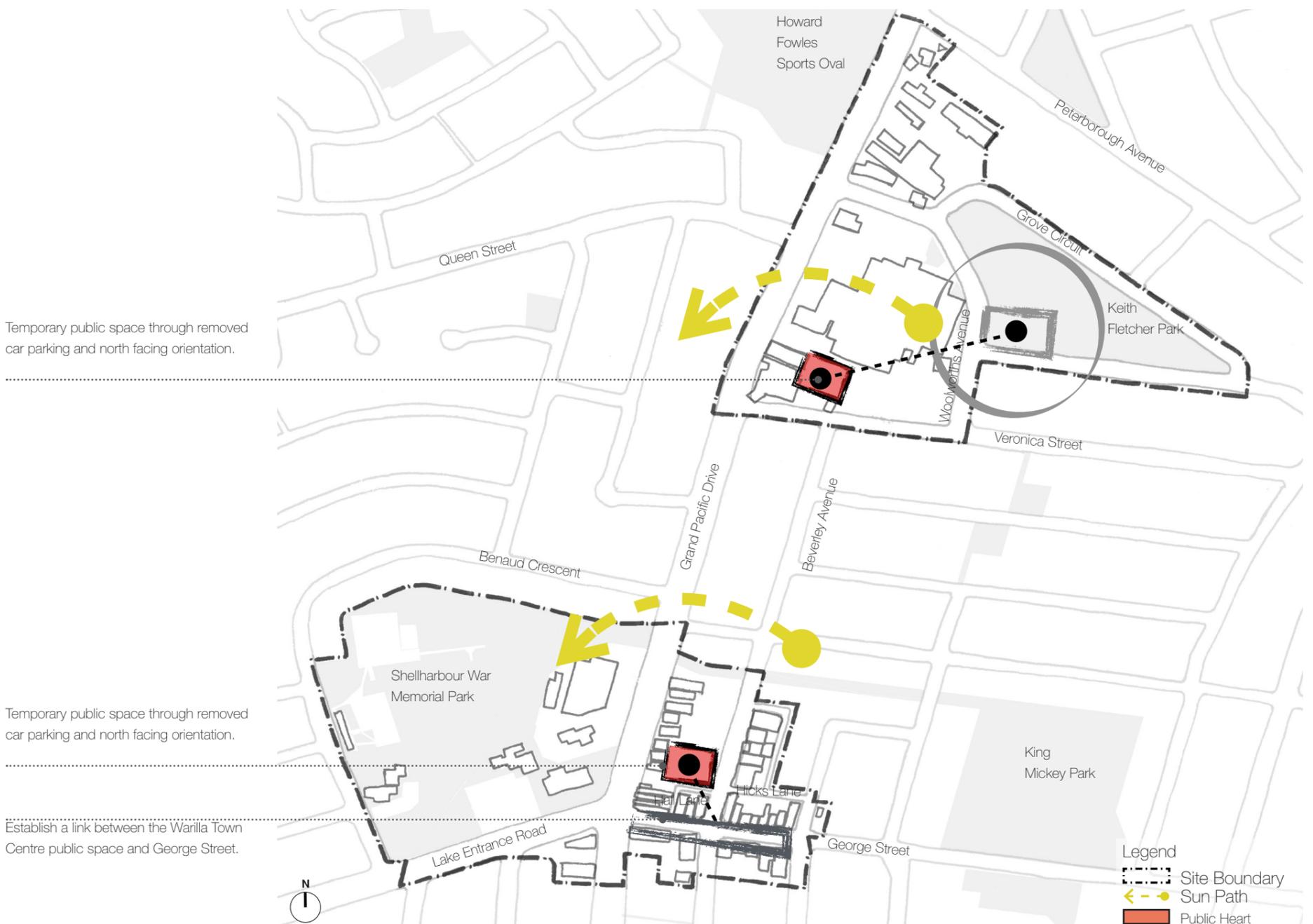
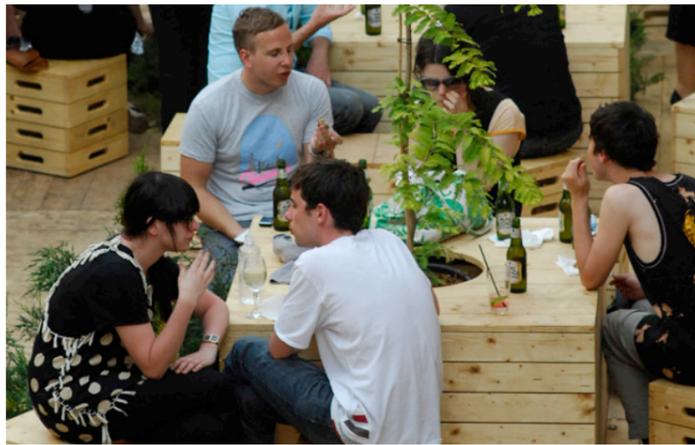


Figure 5.02 - Strategic Move 2



Facilitated markets on a regular basis



Encourage events with temporary activation of space



Integrating seating with planting for shade



Temporary facade treatment



Pop up cafes can temporarily activate the public space



Temporary activation of car parking through performance



Activate space with open facades that address the space



Utilising open space with temporary seating

Strategic Move 3 : Connect the Centres through a Green Spine.

“...walking and cycling to local shops is good for business and good for the local economy and is essential to the success of town centre revitalization strategies.” [The Heart Foundation, 2010]

It is important to ensure easy walkable access between Warilla Grove and Warilla Town Centre. A key strategic move is to establish a green spine that connects both centres together. Through introducing improved cycle links, widened footpaths and a tree lined canopy along Beverley Avenue more walkable and connected town centres can be established.

The aims of this strategic move are as follows;

- Strengthen pedestrian links between the two town centres

through footpath widening treatments along Beverley Avenue;

- Establish a pedestrian crossing at the Beverley Avenue and Veronica Street intersection;
- Introduce clear signage and wayfinding within the public spaces and along Beverley Avenue to improve walking or cycling between centres;
- Connect the town centres through providing high quality footpaths, visible signage, public domain treatments and cycle paths along Beverley Avenue;
- Plant large trees along Beverley Avenue to establish a green spine between Warilla Grove and Warilla Town Centre.

Establish Beverley Avenue as a town centre pedestrian and cycle spine.

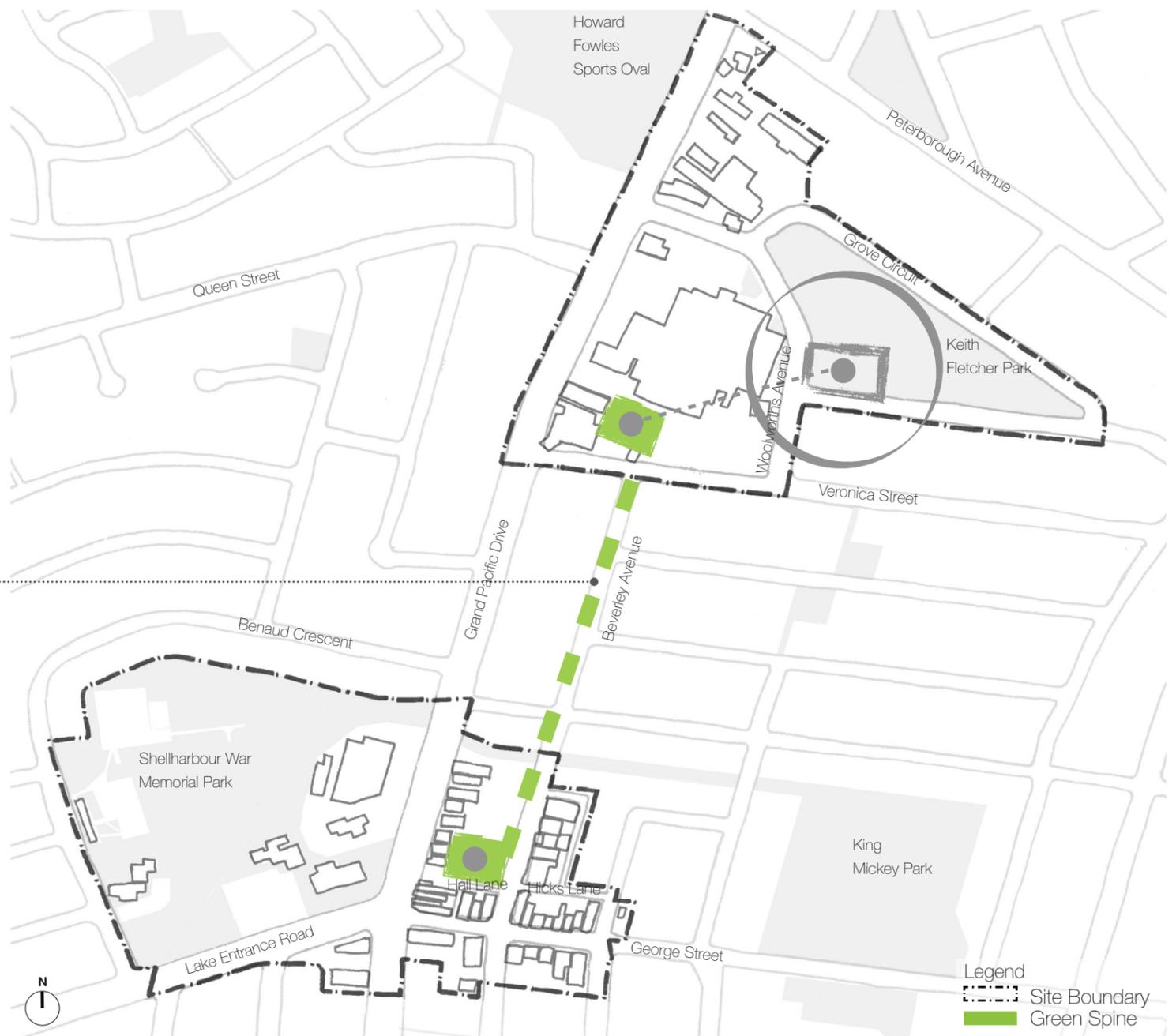


Figure 5.03 - Strategic Move 3



Strong pedestrian links improve safety of crossings.



Enhanced Visual and Pedestrian links



Bike storage



Cyclist signage along roads



Defined tree corridors



Planter Boxes enhance street edge definition and amenity.



Strengthened pedestrian links.



Enhanced public domain

Strategic Move 4 : Beautify the Centres

“People are drawn into shops when facades and shop fronts are interesting to look at, to touch and to stand beside. High quality facades and shop fronts create a welcoming sensation and encourage people to walk and stay in a centre” [Gehl, 2009]

Warilla Grove and Warilla Town Centre play an important role in supporting the local community. However, with pockets of under-utilised land and deteriorating facades, the appearance of the buildings needs to be enhanced.

The strategic move focuses on rejuvenating the existing building facades within the town centre and shopping mall to better engage with the surrounding spaces. By introducing improved building frontages within both centres, the visual appearance and identity of each town centre can be improved.

Key aims that can be drawn from this strategic move are as follows;

- Support street art murals and a variety of facade colours to improve the streetscape character;
- Encourage both the fronts and backs of existing building facades to be more open and inviting to develop a stronger evening economy;
- Ensure facade rejuvenation allows for better engagement of adjoining spaces;
- Encourage appealing and fashionable shop fronts that strengthen each town centre’s character;
- Introduce cafes, al fresco dining and fine dining within the town centres ensuring a diverse choice of restaurants are on offer.

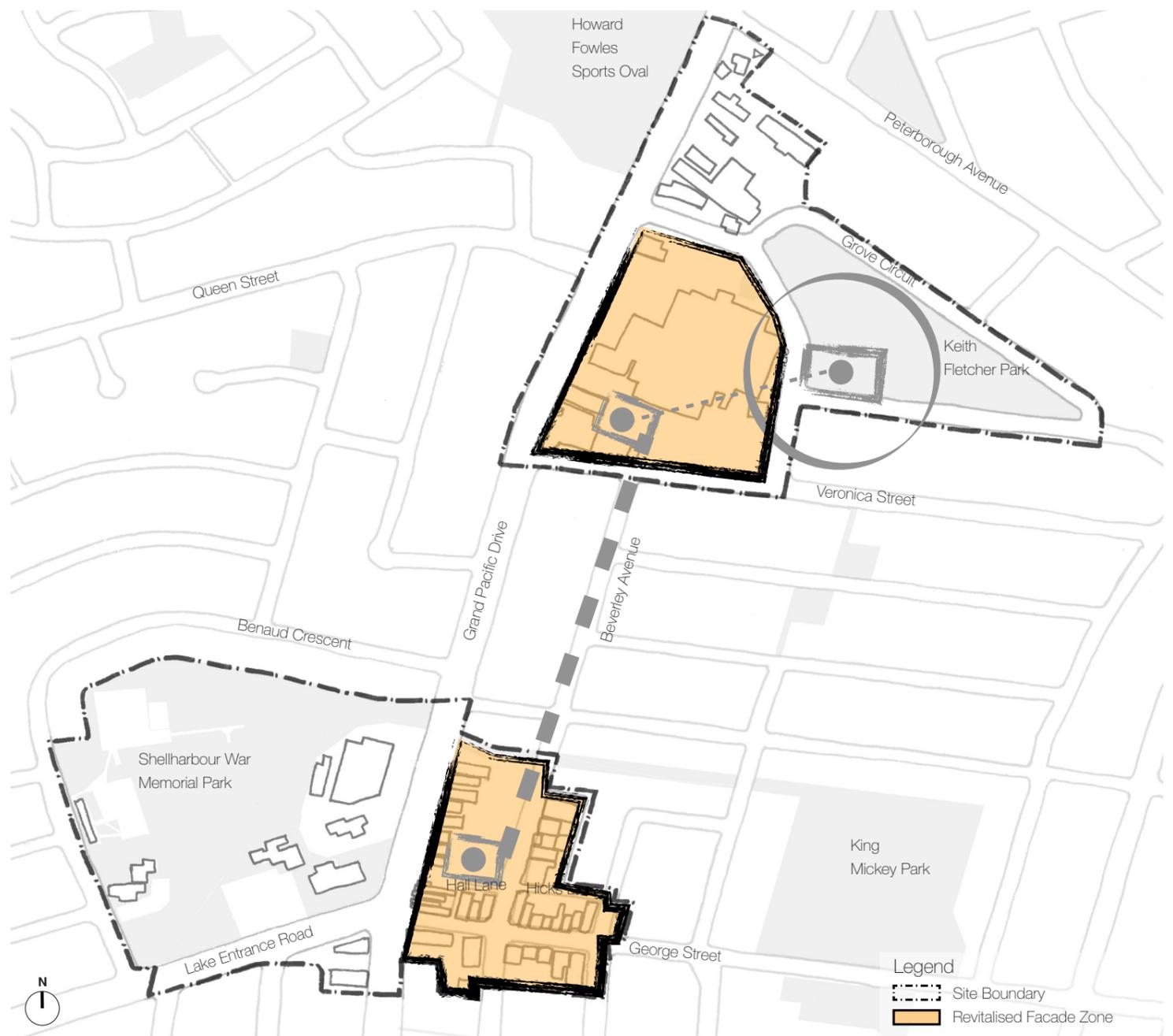


Figure 5.04 - Strategic Move 4



Colourful Storefronts collectively create street uniqueness



Storefront displays add to street character.



Bright facade adds to high street amenity and character



Facades contribute to unique store identities.



Soft colours can brighten a high street



Transparent shop fronts enhance the pedestrian experience



Painted facades and street art create a playful identity



Street murals animate low quality facades

Strategic Move 5 : Reconnect the Centres to Nature

Warilla has a rich array of existing open spaces and coastal beaches that result in a unique offering in comparison to other town centres in Shellharbour. However, with open spaces in poor condition, drainage corridors characterised by littering, limited recreational activation and extensive flooding, a more natural open space network is needed.

Through introducing a green natural network of pedestrian routes that link Howard Fowles Sports Oval, Keith Fletcher Park, Shellharbour War Memorial Park and King Mickey Park together, environmentally responsive centres can be established.

Key initiatives that can be drawn from this strategic move are as follows;

- Upgrade the existing parks through creek restoration initiatives, appropriate planting, regular usage and appropriately located park elements [benches, lighting, bins, play].
- Establish a connected network of open spaces through 'Green Streets' that provide good quality pedestrian and cycle paths that seamlessly link the town centres to the beach and surrounding cycle network;
- Introduce clear signage and wayfinding between the open spaces, streets and beaches;
- Improve pedestrian crossing points at key locations within the town centres and surroundings;
- Enhance and upgrade existing drainage lines within both town centres through appropriate riparian planting.



Figure 5.05 - Strategic Move 5



Planted streets that support nature



Natural drainage corridors that encourage pedestrian access



Natural drainage corridors



Mixed planting



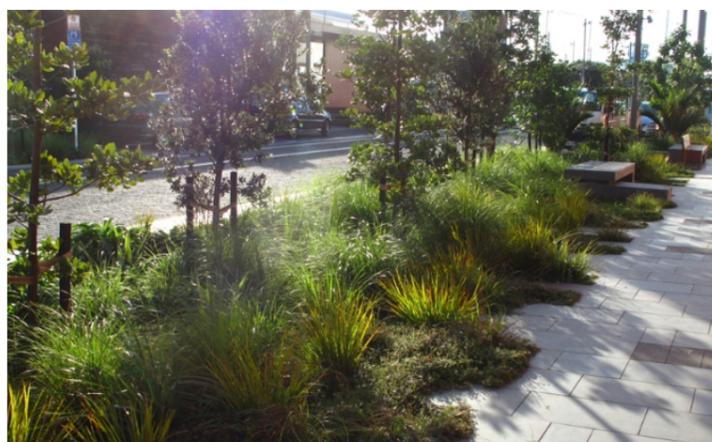
Planted Streets



Permeable surfaces for car parking



Riparian corridors and water treatment opportunities



Green vegetated links

Strategic Move 6 : Centres for Future Opportunity

By initiating the previous key strategic moves, development can be incentivised within both town centres strengthening their economic positioning within the local region.

These sites have been identified because of their long term potential to support increased density of development. Developing these sites will require a combination of public and private sector investment.

Key initiatives that can be drawn from this strategic move are as follows;

- Refurbish or redevelop the identified sites so that they support ground floor retail/ commercial with upper floor residential uses;
- Ensure future development maximises opportunities to increase density within the town centres.
- Embrace proximity to surrounding parks through open facades and high quality architecture;

- Integrate parking within the built form, freeing up space for pedestrians.

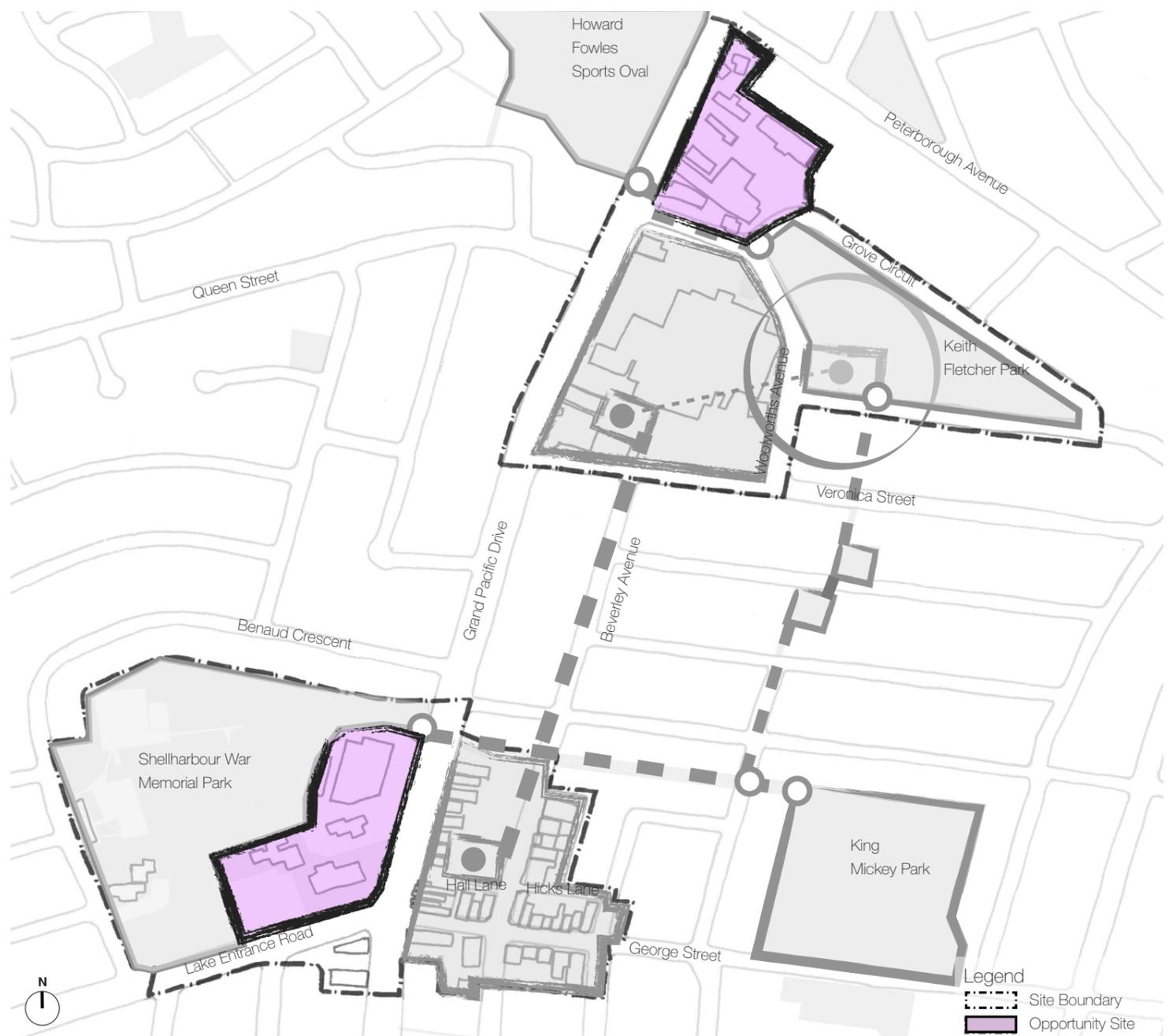


Figure 5.06 - Strategic Move 6



Address streets through high quality development



Encourage residential living within both town centres



Simple palette of colours introduced to future buildings



A balance of public domain with built form



Alfresco dining activates street corners



Contrasting architecture adds variety to the streetscape



Medium density buildings define the street



Medium density apartments with ground floor activation



6.0 Warilla Town Centres Guidance

6.0 Warilla Town Centres Guidance

6.1 TOWN CENTRE PLAN APPROACH

Warilla is a unique area of Shellharbour that is characterised by two contrasting centres. Warilla Grove is the typical big box shopping centre surrounded by surface level car parking. Where as Warilla Town Centre is your traditional main street centre fronted by small shop top housing. For Warilla to be revitalised and enhanced over the coming years it is crucial that both centres complement rather than compete with each other.

To ensure the Town Centre Plan responds to the client brief this section of the report has been broken down into a series of sub-sections that reflect Shellharbour City Council's scope of works. The scope of works requires the consultant to prepare the following for the town centre;

1. Conceptual block building envelope sketches identifying appropriate land use mixes;
2. Development appearance/character including colours/materials palette;
3. Public domain treatment/usage including integration with private domain;
4. Transport / parking provisions - this will need to determine future supply needs and where increases in public parking may be needed, based on future development capacity;
5. Connections within, between and to the different business centres within the subject land;
6. Connectivity involving other community assets including but not limited to bus stops, schools, swimming pool and future library;
7. Maps of the subject land specifying required active frontages, awning weather protection, building envelopes/setbacks, corner elements and entry statements, focal points, public domain treatments including possible gathering areas/meeting places and transport/parking provisions;
8. Any recommended amendments to LEP 2013 as it relates to development of the subject land.

6.2 THE TOWN CENTRES PLAN

The Warilla Town Centres Plan proposes a rejuvenated collection of centres that respond to the areas unique natural character. Through upgraded open spaces, pedestrian friendly streets, improved buildings and stronger links between centres. Warilla can become a vibrant, inclusive, safe, attractive, connected, convenient, accessible and commercially successful town centre.

Warilla Grove Town Centre

The intention for Warilla Grove Town Centre is to offer an improved shopping centre environment through larger entrances, a more engaging facade and better links to Keith Fletcher Park and the surrounding buildings. Key aspects of Warilla Grove are as follows;

1. Keith Fletcher Park

Keith Fletcher Park should be upgraded through an established wetland detention zone, restored creek, improved open space facilities and a easy to use path system.

2. Warilla Library

The proposed future library located on the south west corner of Keith Fletcher Park should open out towards Woolworths Avenue and address Warilla Grove. The future library should support an

array of services for adults, young people and children.

3. Warilla Grove Shopping Centre

Warilla Grove should be enhanced so that it better engages the adjacent spaces including Keith Fletcher Park, Warilla Library, Warilla Precinct and the Beverley Avenue link. Enhancements should include facade improvements, openings in the facade, larger entrance points and urban greening. **Note:** To identify additional development opportunities on Warilla Grove, Council should undertake a review of planning controls to support a mix of uses including residential development.

4. North Precinct

New medium density mixed use/ residential should be introduced towards the north of Warilla Grove to support long term growth, an increase in population, housing supply and passive surveillance within the centre.

5. Warilla Grove Plaza

Warilla Grove Plaza located to the south of Warilla Grove should form a flexible public space that can be activated through a mix of temporary events, outdoor dining and markets. Additionally the space should relate to a new pedestrian connection that links Beverley Avenue through to Warilla Grove.

Warilla Town Centre

The intention for Warilla Town Centre is to retain its role as Warilla's Main Street through a pedestrian prioritised George Street, upgraded Shellharbour War Memorial Park and new mixed use precinct. Key aspects of the town centres plan are as follows;

6. George Street

George Street's role as Warilla's Main Street should be enhanced as a pedestrian prioritised environment through larger footpath treatments, increased streetscape furniture and a rich street tree canopy.

7. Hall and Hicks Lane

Hall and Hicks Lane should be re-imagined as a vibrant laneway environment that initiates rear of building activation, al-fresco dining and shared zone that supports more pedestrian friendly activities.

8. Warilla Town Square

Warilla Town Square proposed within the car park should form a flexible public space that can be activated through a mix of temporary events, outdoor dining and markets. Additionally the space should form a complementary relationship with Warilla Grove Plaza.

9. Shellharbour War Memorial Precinct

New medium density mixed use/ residential should be introduced towards the south east of Shellharbour War Memorial Park to support long term growth, an increase in population, housing supply and passive surveillance within the centre.

10. Shellharbour War Memorial Park

Shellharbour War Memorial Park should be upgraded through an established wetland detention zone, restored creek, improved community facilities and a path system that seamlessly links with the town centre. This area should be activated to encourage positive behaviours and discourage anti-social behaviour.



Figure 6.01 - Warilla Town Centres Plan

6.3 CONCEPTUAL BLOCK BUILDING

This sub section relates to point 1 of Shellharbour City Council's scope of works which requires the consultant to prepare;

- Conceptual block building envelope sketches with optional upper floor residential or upper floor commercial or upper floor commercial/residential.

Key 'Concept Building Block' objectives for the Warilla Town Centres Plan are as follows;

- To achieve good building frontage within the town centres;
- To strengthen street definition and continuity through infill opportunities.
- To enhance passive surveillance and community safety through adopting crime prevention through environmental design principles (CPTED);
- To enhance links between town centres destinations
- To improve legibility through good built form;
- To enhance solar access to buildings;
- To ensure a diverse building mix;
- Establish an integrated mix of uses including local services.

The concept building block objectives are achieved through the following plans.

Infill Developments

Warilla offers a diverse collection of buildings and spaces that in some areas are under-utilised and detract from the overall character of the centres. It has been identified that an upgrade to selected buildings and in particular infill development to address the frontages along Shellharbour Road could significantly increase the appeal and activation across the town centres.

A high level site analysis has identified a collection of existing buildings for removal and redevelopment. These selected buildings were assessed as low architectural quality, offering a poor sense of arrival, inefficiently planned and in a strategic position to increase the economic performance of both town centres.

The Warilla Town Centres Plan adopts an approach that identifies development opportunities on these under-utilised or vacant sites. These infill sites have the opportunity to reconsolidate and strengthen the town centres. The town centres plan proposes an indicative arrangement of building blocks to address this need for infill projects along Shellharbour Road.

Note: Following this project any buildings selected for removal should be evaluated through a separate feasibility study that is informed by this Town Centres Plan



Figure 6.02 - Infill Development Sites

Form and Footprint

Warilla contains two centres that are characterised by contrasting form and footprint. It is important that any future built form reflects modern day standards and respects the town centres environment.

The proposed concept block buildings embrace the perimeter block approach so that both street, pedestrian thoroughfares and public spaces are all defined by the fronts of buildings rather than the rears of buildings.

A range of blocks and spatial types have been employed that accommodate modern building footprints whilst respecting the local urban form. Key development principles underpinning the concept block building layout for future built form are as follows;

- Solar access is optimised through ensuring appropriate building separation and maximising north aspect whilst maintaining good building frontage onto streets based on SEPP 65 Design Guidelines.
- All concept building blocks are designed to optimise thermal performance, thermal comfort, and day lighting so to improve a buildings energy efficiency.
- All concept building blocks should ensure visual privacy and acoustic privacy through adopting SEPP 65 design

principles.

Warilla Town Centres' proposed concept building blocks adopt CPTED principles through ensuring the following initiatives;

- All building blocks maximise passive surveillance ensuring buildings front onto public spaces and streets, particularly the laneways.
- The concept building blocks and public realm are designed to promote legibility through a well defined network of streets and public spaces.
- The design of the building blocks in relation to the public domain reduces the occurrence of vulnerable spaces by creating active spaces between buildings, and defining and addressing well travelled routes.
- The design of the building blocks respects and contributes to the diversity of building stock and scale within the town centres.



Figure 6.03- Form and Footprint Plan

Land Use

Proposed land uses within both centres are located along Shellharbour Road. The distribution of uses proposed are carefully organised to deliver a diverse offering of land uses that both address Shellharbour Road and sensitively integrate into the surrounding residential context. Proposed land uses aim to increase residential capacity in both centres and offer a complementary mix of uses that stimulate and support existing uses and businesses within the centres.

To ensure clarity in understanding the distribution of land uses proposed within the Warilla Town Centres Plan only the proposed built form land uses have been highlighted. However, it is intended that existing buildings should accommodate ground floor retail/ commercial uses with optional upper floor commercial/ residential uses.

Key aspects of the land use configuration that must be considered are;

- Larger format retail can potentially be accommodated along Shellharbour Road and act as both a form of street activation and buffer to the traffic experienced along Shellharbour Road.
- The potential grouping of ground floor retail and commercial uses can also be accommodated along

Shellharbour Road establishing a greater concentration of active uses within both centre's.

- A new library facility is proposed to be located on the corner of Keith Fletcher Park establishing a new hub of community activity. It is important that both the park and shopping centre are upgraded to engage and address the new library facility.
- New built form within the centre to accommodate optional upper floor residential or upper floor commercial or upper floor commercial/residential. There is also an opportunity for the upper floor residential to be used as live work units encouraging business start-ups in the town centre.
- The location of residential uses to the north of Warilla Grove and west of the Warilla Town Centre ease the transition from the mixed use buildings to the adjoining residential suburbs and open spaces. The residential area should incorporate a diverse offering of town houses, 1 bed, 2 bed, 3 bed apartments and live work premises.

Note: To identify additional development opportunities on Warilla Grove, Council should undertake a review of planning controls to support a mix of uses including residential development.

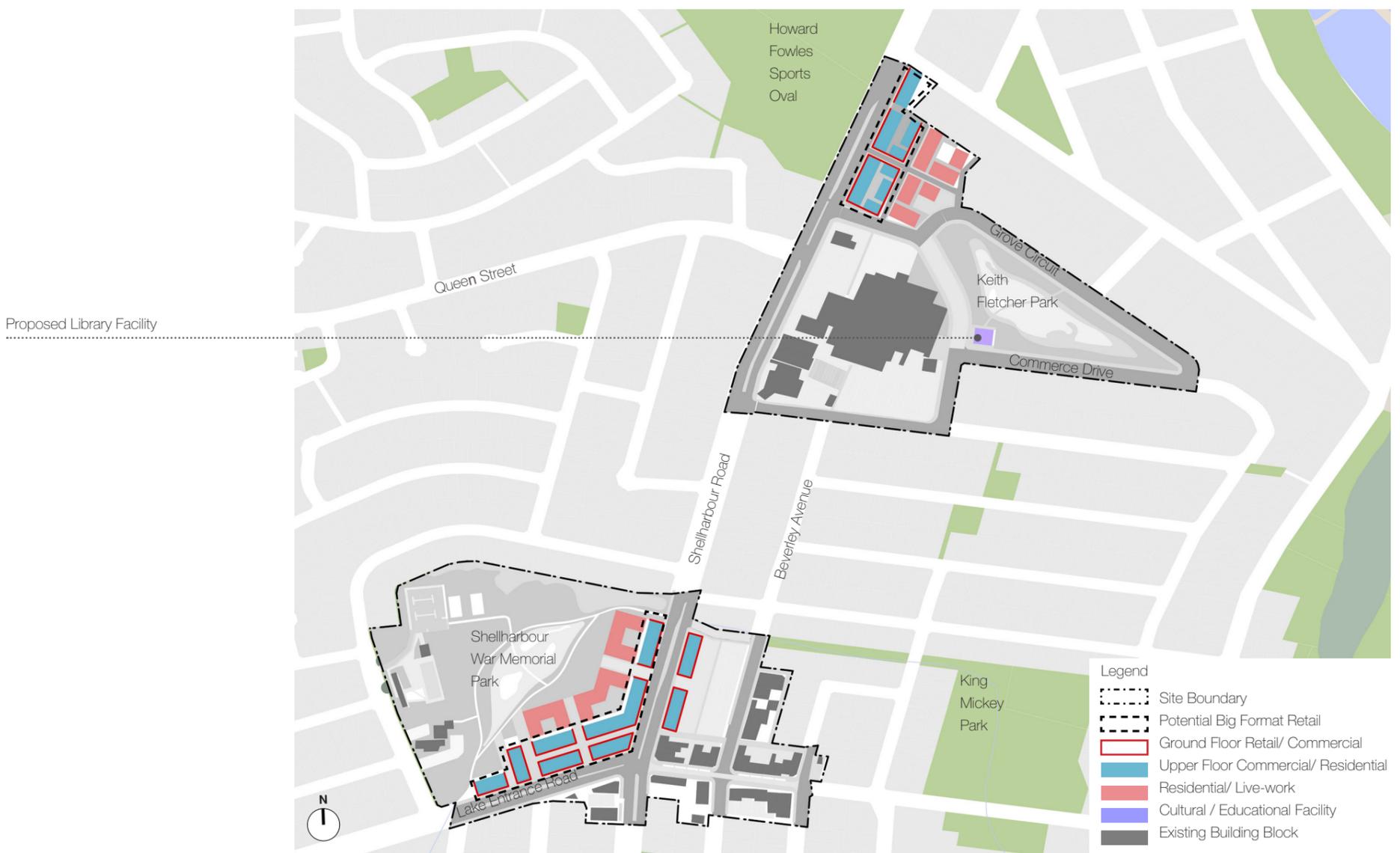


Figure 6.04 - Land Use Plan

Massing and Scale

The design approach to massing and scale has been to establish appropriate building heights that both reflect Warilla’s Illawarra Shoalhaven Regional Plan status as an urban centre and to incentivise development in the future. In particular, the town centres plan provides an increase in scale along Lake Entrance Road with a marginal decrease in mass and scale along Shellharbour Road in relation to the lower density residential context.

The massing and scale has been designed to encourage future residential living within the town centres while retaining an appropriate height and scale that reflects a town centres environment. Key aspects of the scale and massing plan that must be considered are;

- The proposed concept building blocks along Lake Entrance Road are recommended to vary between 3 - 4 storeys [12 - 15 metres] with height emphasis being particularly important along Lake Entrance Road. This is to ensure a well defined Road that offers an arrival experience that is reflective of Warilla.
- The proposed concept building blocks along Shellharbour Road are proposed at 2 - 3 storeys [11 metres] ensuring good building frontage in both centres and a more

sensitive integration into the surrounding residential areas.

- The future library is identified as a 9m building. However it is important that this scale is seen as a guide and not a specific requirement. As the library is proposed to be located within Keith Fletcher Park it is important that the building forms a visual marker for Warilla.

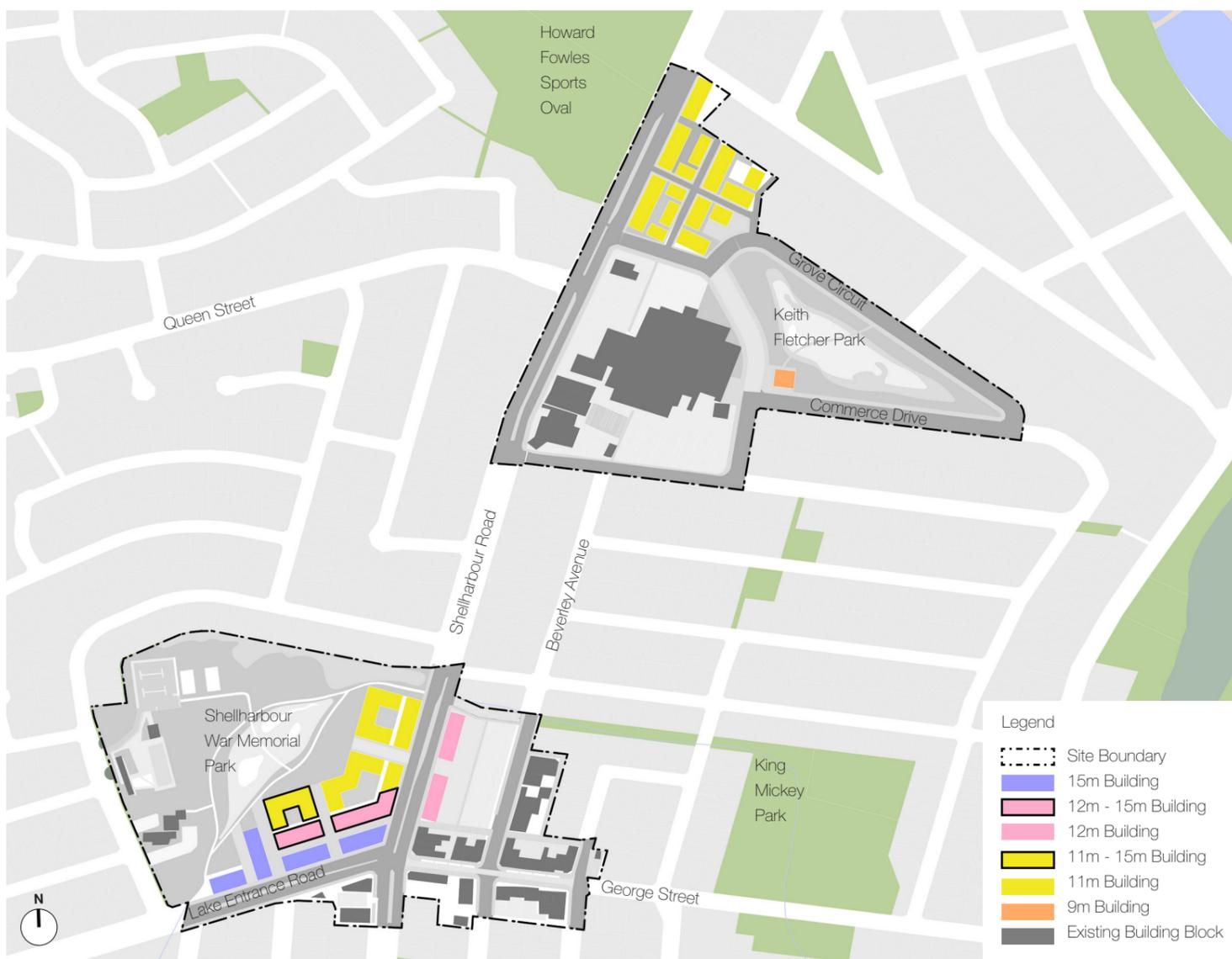


Figure 6.05 - Scale and Massing Plan

6.4 CHARACTER AND APPEARANCE

This sub section relates to point 2 of Shellharbour City Council’s scope of works which requires the consultant to prepare;

- Development appearance/character including colours/ materials palette;

Key ‘development appearance/ character’ objectives for the Warilla Town Centres are as follows;

- To achieve a development character that responds to its proposed uses and Warilla’s status as an urban centre in the Illawarra Shoalhaven Regional Plan in the Illawarra Regional Strategy.
- To ensure new development contributes positively to the public realm through respecting and complementing the existing scale, style and ambience of Warilla.
- By enhancing existing town centre characteristics through facade treatment, upkeep, rejuvenation and refurbishment suggestions.

Key objectives

Warilla offers a unique urban character due it containing two very different town centre environments. Warilla Grove takes the form of a big box shopping centre, whilst Warilla Town Centre takes the form of a traditional Main Street. Future developments and refurbishments should respect and enhance this environment, strengthening Warilla’s role within

the Shellharbour region.

The following four character and appearance objectives are informed by visual, aesthetic, public, social and urban strategies which aim to secure and enhance the character of Warilla’s Town Centres.

Warilla Town Centre

Warilla Town Centre’s cafe & outdoor eatery culture should be enhanced through appropriate street level activation that stimulates a pedestrian prioritised environment.

Warilla Grove

Warilla Grove shopping centre should be upgraded through improved facade treatments, larger open entrances, increased openings and better address to adjacent spaces.

Mixed Use Precinct

Two mixed use precincts should be located in both centres offering larger retail formats, commercial premises and residential dwellings.

Community and Leisure

Keith Fletcher Park and Shellharbour War Memorial Park should be established as community and leisure hubs that are characterised by open spaces, community facilities and natural wetland habitats.

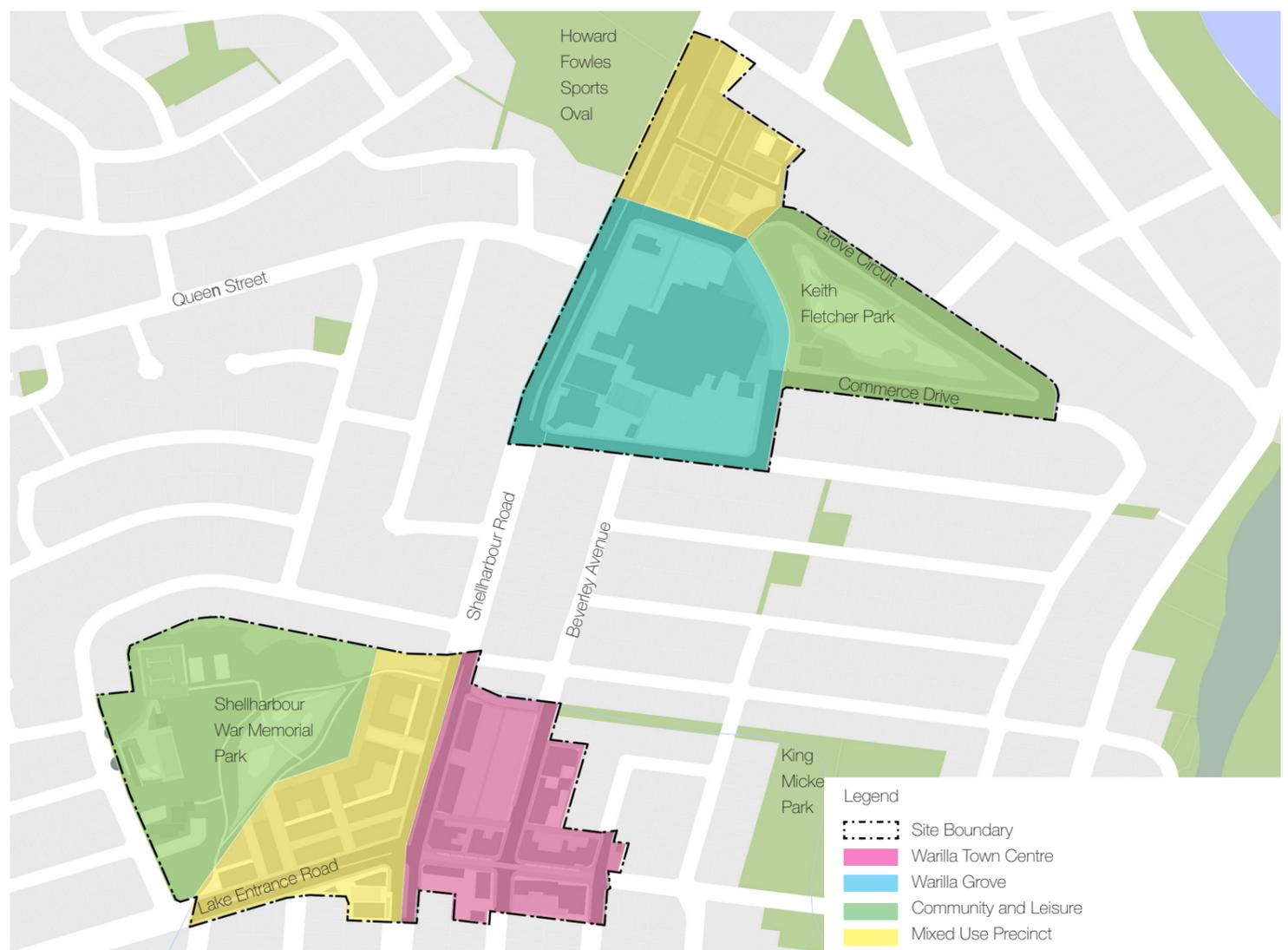


Figure 6.06 - Character Area Plan

Warilla Town Centre

Buildings and street frontages throughout the town centre should aim to engage with and enliven the street. Front and rears of building should encourage street activation through offering al fresco dining. Streets should be prioritised around the pedestrian through widened footpaths and shared zone treatments. Al fresco dining should further contribute to a vibrant public domain. Key initiatives encouraged are;

- Inviting - A lively, varied sequence of ground floor façades to improve the street level experience;
- Transparency - Attractive frontages that offer a high level of transparency and variation to encourage activities to spill out into the streets;
- Relief in frontages - Varied setbacks strengthen fine grain attention along the building frontages and façades.



Warilla Grove

Warilla Grove's buildings should adopt more modern facade treatments that enhance each buildings address of adjacent spaces. Facade treatments can include art murals, larger building openings, transparent facades and outdoor activation. Key entrance points and public focal points should be enhanced and increased in size to improve arrival experiences and secure a more integrated relationship with adjoining spaces. Key initiatives encouraged are;

- Public Art - Art and temporary facade treatments should be used to enhance building address within Warilla Grove.
- Entrances - Larger and more open entrances should be encouraged to better link the public domain and built form together.



Mixed Use Precinct

Buildings within the precinct should maintain building heights which collaboratively offer a greater sense of enclosure for adjacent streets and public domain. Structures should be able to accommodate mixed use purposes encouraging a higher density of living in both centres. Active retail or commercial ground floors should open to the street accompanied by residential dwellings which provide for the local population. Important initiatives include:

- 2-4 storey buildings should be proposed to ensure street enclosure.
- Building height variety is encouraged to establish street rhythm.
- Vertical articulation should be introduced to break up the building facades.



Community and Leisure

Warilla's parks and open spaces should openly engage with the public and be flexible enough to host a wide range of activities from school carnivals to film screenings and public performances. It is key in this area that any existing and future buildings can be utilised on a daily basis as well as within event mode. Parks should maintain a natural character with wetland and creek restoration encouraging more biodiversity within the town centre. Important initiatives include:

- Events and activities should be encouraged to utilise the open spaces. This includes outdoor cinemas, public

performance and school activities.

- Wetland treatments should be introduced to better manage the local flooding and encourage local wildlife into the centre.
- Open spaces should be grass with a clear and safe network of paths that include lighting, seating, cycle parking and bins.
- Natural and creative play areas should be provided with community, including children's input. Public art sculptures can double as play equipment.



Colour & Material Attention: Palette

The base palette acts as a suggestion tool to offer continuity throughout both centres. Rustic materials such as wooden cladding of a variety of types and finishes and exposed concrete are suggested and ideally correspond with the public domain specifications and furniture. Developments should be strongly encouraged to provide their own individual take and approach to complement these colour palettes in order to add diversity and variety to the town centres. The use of painted wood, coloured tiles and other

materials which bring the architectural individuality of a place to life are encouraged.



6.5 PUBLIC DOMAIN TREATMENT

This sub section relates to point 3 of Shellharbour City Council’s scope of works which requires the consultant to prepare;

- Public domain treatment/usage including integration with private domain;

Key public domain treatment objectives for Warilla Town Centres are as follows;

- To develop an integrated and consistent landscape across the town centres;
- Establish network of connected public spaces, laneway links and shareways throughout the town centres;
- Redefine the laneways to increase the amenity and liveability.

Public Domain Plan

The town centres are structured around proposed public domain treatments which collaboratively work to form visually connected town centres. A key aim of the proposed public domain is to ensure a consistency in treatment that responds to its intended function and the land uses that border it. Key public domain treatments proposed in the town centres plan are as follows;

Pedestrian Priority Zone

The portion of Woolworths Avenue between Grove Circuit and Commerce Drive, Hicks and Hall Lanes and internal

streets in future developments should be enhanced via new treatments as well as street furniture and elements which emphasise a shared pedestrian/cycle priority zone.

Natural Open Space

Keith Fletcher Park and Shellharbour War Memorial Park should support a natural character that provide a recreational hub for the local Warilla community.

Flexible Public Space

Warilla Town Centres should provide the community with a place to congregate as well as a location where social events and gatherings may occur. A zone within Warilla Grove and Beverley Avenue Carpark have been recommended as flexible spaces for the aforementioned purpose.

Footpaths

Footpaths should be treated right up to the edge of shop fronts and the back ends of car parks along corners to create an integrated public domain.

Street Tree Planting

Street trees should be retained or replaced to continue tree lined street feel. Planting may also act as a buffer between alfresco dining and car parking. Additional floral trees should further enhance median strips and add to the town character and sense of enclosure.

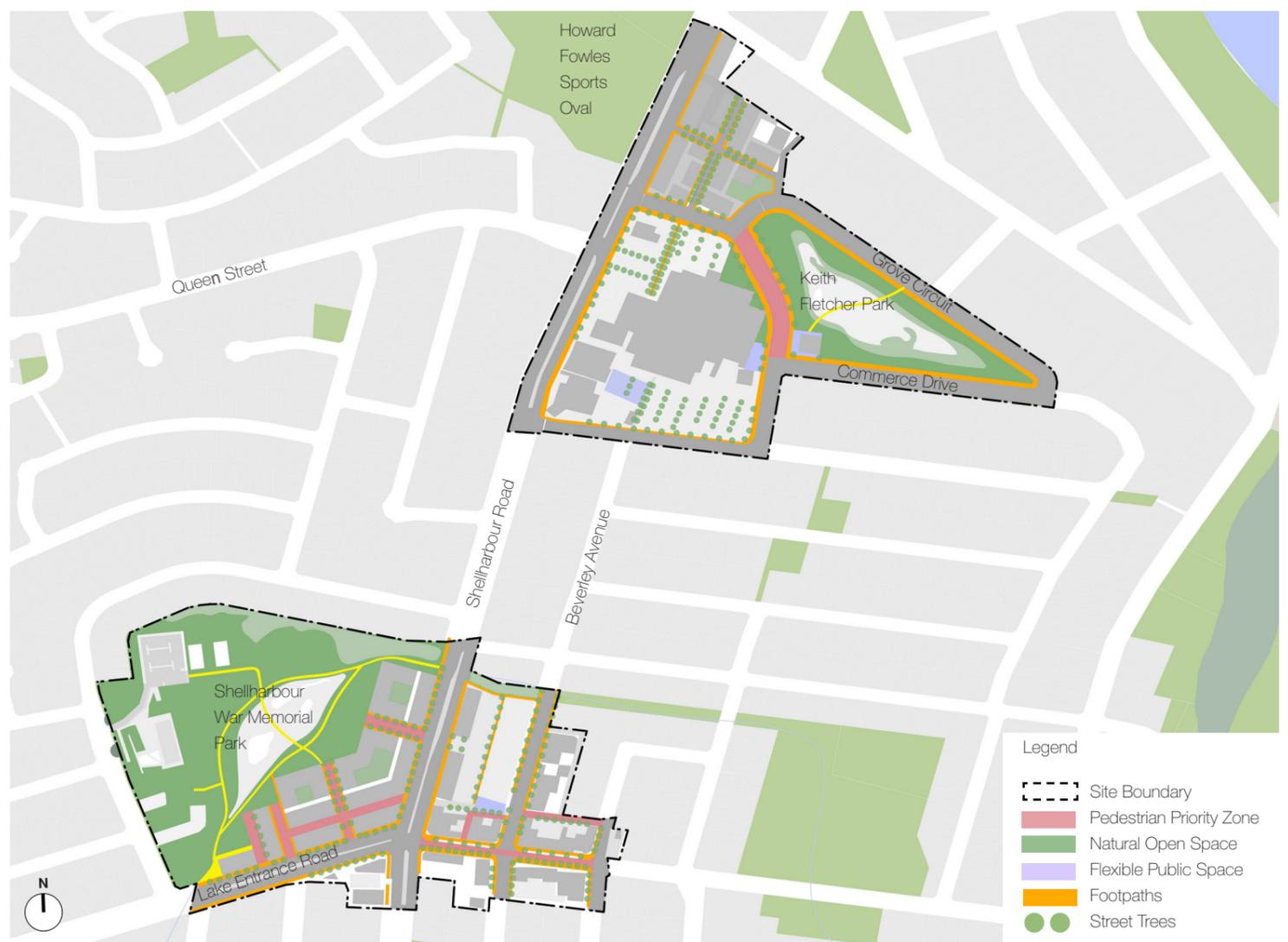


Figure 6.07 - Public Domain Treatment Plan

Pedestrian Priority Zone

Both centres should offer pedestrian prioritised zones to encourage people to spend time more within the town centre. Pedestrian priority zones located in both centres should establish spaces for cyclists, pedestrians and residents. Bike parking, street trees, planting, public street

furniture and widened footpaths should work together to create high quality pedestrian priority environments. Consistent paving treatment for the pedestrian and the vehicle is essential to communicate street use hierarchy.



Natural Open Space and Flexible Public Space

Public spaces should act as popular lunch, dining and meeting spots. Public space design should be flexible and accommodate for temporary events such as markets, festivals and community gatherings. Public spaces should be defined by both hard and soft landscape encouraging both active and passive recreation opportunities;

consistent to define key spaces.

- Portions of Warilla Grove parking lot and Beverley Avenue parking lot should integrate street elements such as flexible seating, lighting, planters and bins.
- Integrate child friendly by design principles by incorporating play trails, natural play and shade.
- Public domain materiality and colour should be simple and

- Keith Fletcher Park and Shellharbour War Memorial Park should be established as the main open spaces offering a green and natural character that includes a variety of recreational spaces for the community uses.
- Public space should provide opportunities to showcase local art including sculptures which can act as both a landmark and offer a backdrop for public performances and buskers.
- Public space should have areas suitable for outdoor meetings / gathering places and creative activities including public art.

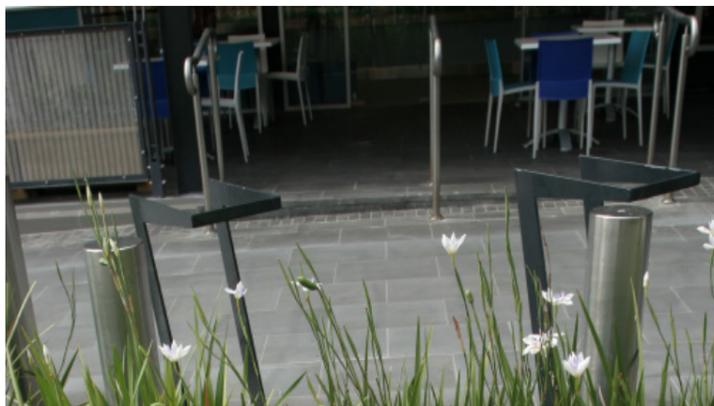


Footpaths and Treatments

Footpath design and treatment is critical to achieving a consistent public domain and town centre identity. Parking provisions should be integrated with the landscape design providing visual breaks with planting or street furniture. Pedestrian links should be expressed through defined connections. By integrating planting with parking divisions the streets will develop a stronger sense of enclosure

enhancing the character of the Warilla Town Centres. Warilla Grove and George Street paving treatment variation should define movement zones within the centre.

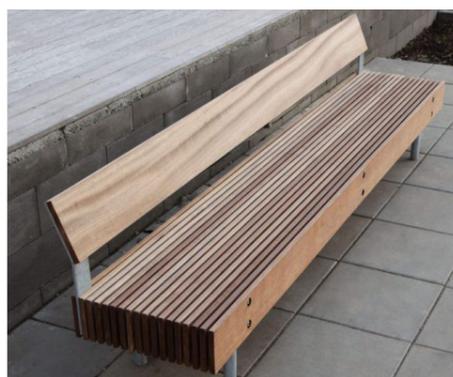
Public art, potentially narrative and or text based can also be integrated into footpath treatments, especially around or leading to the proposed future library.



Furniture

Street furniture should integrate the character of each centre through natural tones. Furniture should comprise of a mix of fixed and flexible options. Fixed furniture should have a simple and consistent wooden pallet and aesthetic while flexible furniture should embrace the variety, colour and vibrancy of each centre. Street furniture can also act as

integrated and or interactive public art.



Fittings & Lighting

The character of furniture, fittings and lighting is critical to communicating the identity of the town centres as a whole. Attention to this level of detail will help prevent the town centres from feeling disjointed and will enhance links visually and spatially. Key principles behind fittings and lighting are as follows;

- Fixed fittings should adopt a neutral pallet while flexible fittings such as umbrellas, outdoor dining, window planters should be bold to enhance street character.
- Lighting should be warm and tonally consistent, highlighting the architectural assets such as coloured façades.
- Lighting can also be used to enhance street furniture design and trees, encouraging the public to linger during the evening.
- Larger scale lighting should also aim to enhance the

centre through additions such as hanging planters.

- Signage along George Street should be consistently hung/ displayed to reduce clutter while laneway signage may be less controlled and responsive.
- Signage design in both centres should be flexible in materiality/form to embrace the unique character/colour/ aesthetic of each front.

All lighting and furniture must adhere to CPTED principles such as;

- Street furniture layout should be designed to minimise occurrence of concealment of spaces;
- Lighting design should enhance surveillance and ensure visual corridors are maintained;
- Seating should be provided in public spaces encouraging public ownership of the public realm.



Material palette

The public domain materials have been suggested in order to achieve consistency of surfaces around Warilla Grove, along George Street, Beverley Avenue and any future works. The paving should adopt a finish and scale variation to define spaces, laneways and building use. This paving

colour scheme should enhance the centre look and feel of Warilla in accordance with the existing character of the area. The selection of colours and surfaces should account for the need to avoid graffiti.



Consistent paving

Varied paving treatments establish a space hierarchy

Use same paving style as used in other Shellharbour centres.

Planting: Groundcovers and Shrubs

Planting should embrace a variety of endemic species, native to the coastal plain region of Illawarra. Street planting should adopt a variety of ground-covers, grasses, shrubs and trees depending on the necessary coverage. Planting for Warilla should prioritise floral plants with a long flowering period to enhance the character of the town centre. Planting

must not interfere with sight lines and must ensure the intent of view lines and vistas achieved as a result of the subdivision layout are not compromised as well as adhering to CPTED principles. Priority species of shrubs and ground cover are outlined below. For other species refer to the Illawarra Natives Garden Guide.



Carpobrotus glaucescens (Pigface)



Scaevola aemula (Fairy Fan Flower)



doryanthes excelsa (Gynea Lilly)



Hibbertia scandens (Guinea Flower)



Carex appressa (*Carex appressa*)



Crinum pedunculatum (Crinum Lily)



Fuchsia Heath (*Epacris longifolia*)



Coastal Tea-tree (*Leptospermum laevigatum*)



White Correa (*Correa alba*).

Planting: Trees & Climbers

Street trees should be a combination of existing species which add to Warilla Town Centres character and future proposed species. Future tree and climber planting should adhere to CPTED principles and embrace species native to the coastal plain region. For other species refer to the

Illawarra Natives Garden Guide. Use of deciduous trees should account for the potential of causing slips and falls.



Lilly Pilly (*Acmena smithii*),



Ornamental Pear Tree (*Pyrus calleryana*)



Tuckeroo (*Cupaniopsis anacardioides*)



False Sarsaparilla (*Hardenbergia violacea*)



Ornamental Pear Tree (*Pyrus calleryana*)

6.6 TRANSPORT/ PARKING PROVISIONS

This sub section relates to point 4 of Shellharbour City Council's scope of works which requires the consultant to prepare;

- Transport /parking provisions - this will need to determine future supply needs and where increases in public parking may be needed, based on future development capacity.

GTA Consultants have provided a detailed assessment on Warilla Town Centres' transport and parking provisions, which is located in Appendix C. This section provides a summary of key planning initiatives proposed through the Warilla Town Centres Plan.

Key 'transport and parking' objectives for the Warilla Town Centres are as follows;

- Integrate car parking into the town centres footpaths, planting and material treatments, reducing the width of the asphalt roads;
- Maintain an efficient supply of car parking, that is integrated within building envelopes.

Access and Parking

Warilla currently has an oversupply of parking. However, it is noted that future developments would be required to maintain private parking areas to prevent adverse impacts on public parking and overall town centres parking supply.

The town centres should retain a range of parking options with

the majority of the centres being serviced by Warilla Grove and Beverley Avenue car park and private internal parking. The aim is to deliver a public environment that is practical in its level of parking provision but not visually dominated by the car. The range of parking solutions across the town centres plan includes;

- Maintain the majority of parking at Warilla Grove and Beverley Avenue carpark. Investigate opportunities to flexibly change the function of parking areas for events and festivals.
- Maintain on-street parking along the north of George Street and remove car parking to the south of the main street. This allows widened footpaths in areas with excellent solar access.
- Incorporate parking below future development within the town centres with a reduction in parking requirements to 0.5 spaces per 1-bedroom unit, 1.0 space per 2-bedroom unit, 1.5 spaces per 3-bedroom unit, and no visitor spaces for multi-dwelling housing, shop top housing, residential flat buildings and mixed use developments. This will help to improve the viability of development in Warilla (saving \$25,000 to \$45,000 per car space).
- Podium car parking for all future buildings, supporting the commercial, retail and residential users with parking access limited to certain areas.

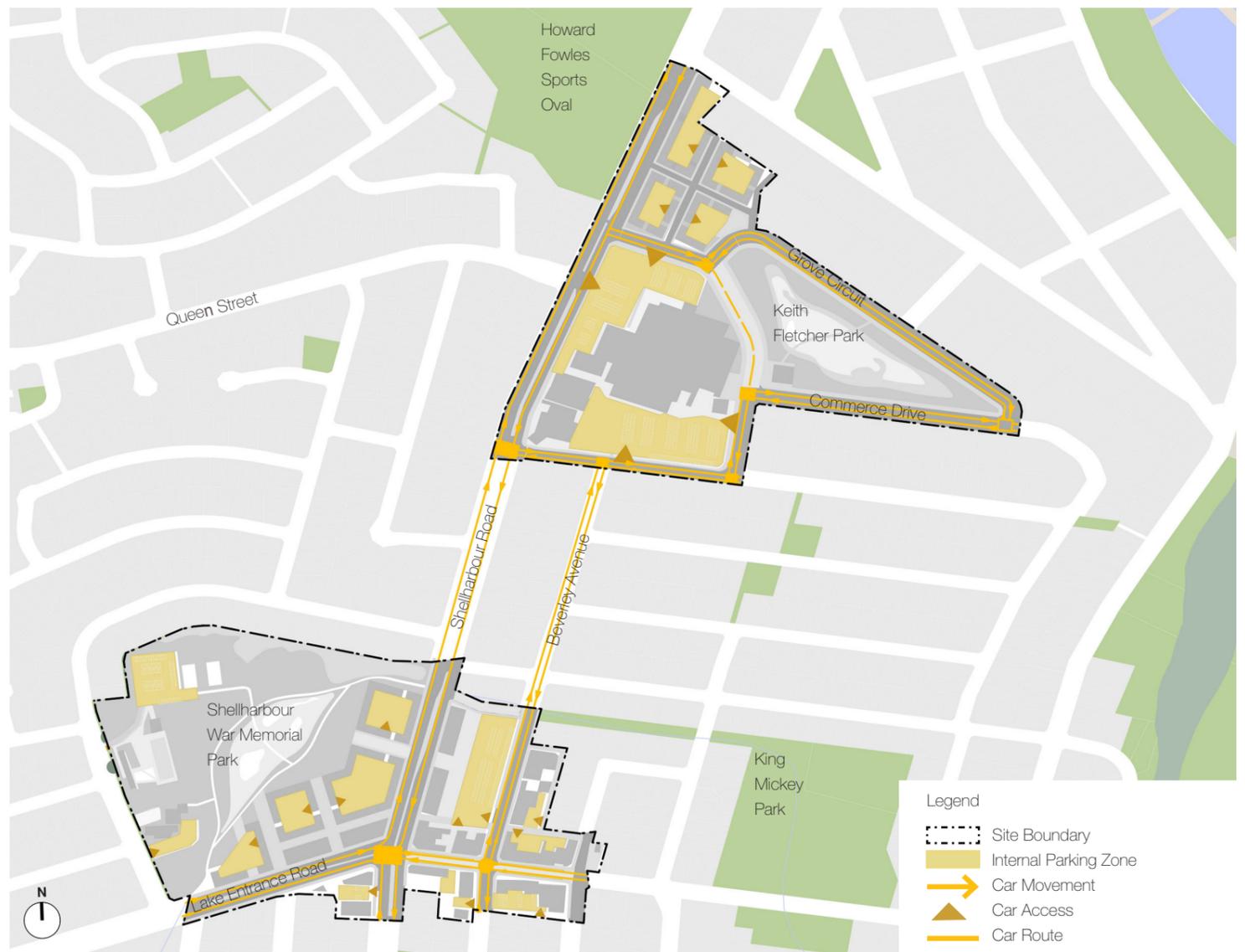


Figure 6.08 - Access and Parking Plan

6.7 BUSINESS CENTRE CONNECTIONS

This sub section relates to point 5 of Shellharbour City Council's scope of works which requires the consultant to prepare;

- Connections within, between and to the different business centres within the subject land.

Key 'Business Centre Connections' objectives for the Warilla Town Centres are as follows;

- Establish a connected & safe cycle network
- Enhance access to public transport.

Public Transport and Cycle Network

The town centres plan looks to further develop Warilla Town Centres' public transport and cycle path offering and encouraging greater community use of bicycles and the local bus network, with less of a reliance on the vehicle. The following initiatives can enhance the public transport and cycle path offering within Warilla Town Centres, creating more sustainable town centres;

- Improve the existing bus network through an increase in bus frequency encouraging greater community use of the bus system.
- Improve the bus stop facilities in the town centres, enhancing the town centres character and encouraging greater use of the public transport.

- Increase facilities for bicycle parking.
- Establish cycle links within both centres that link seamlessly to the coastal cycle network and local parks;
- Ensure cycle paths and cycle parking are integrated into Keith Fletcher Park and Shellharbour War Memorial Park.
- Establish cycle links between both centres including Beverley Avenue, Shellharbour Road, George Street and Queen Street.

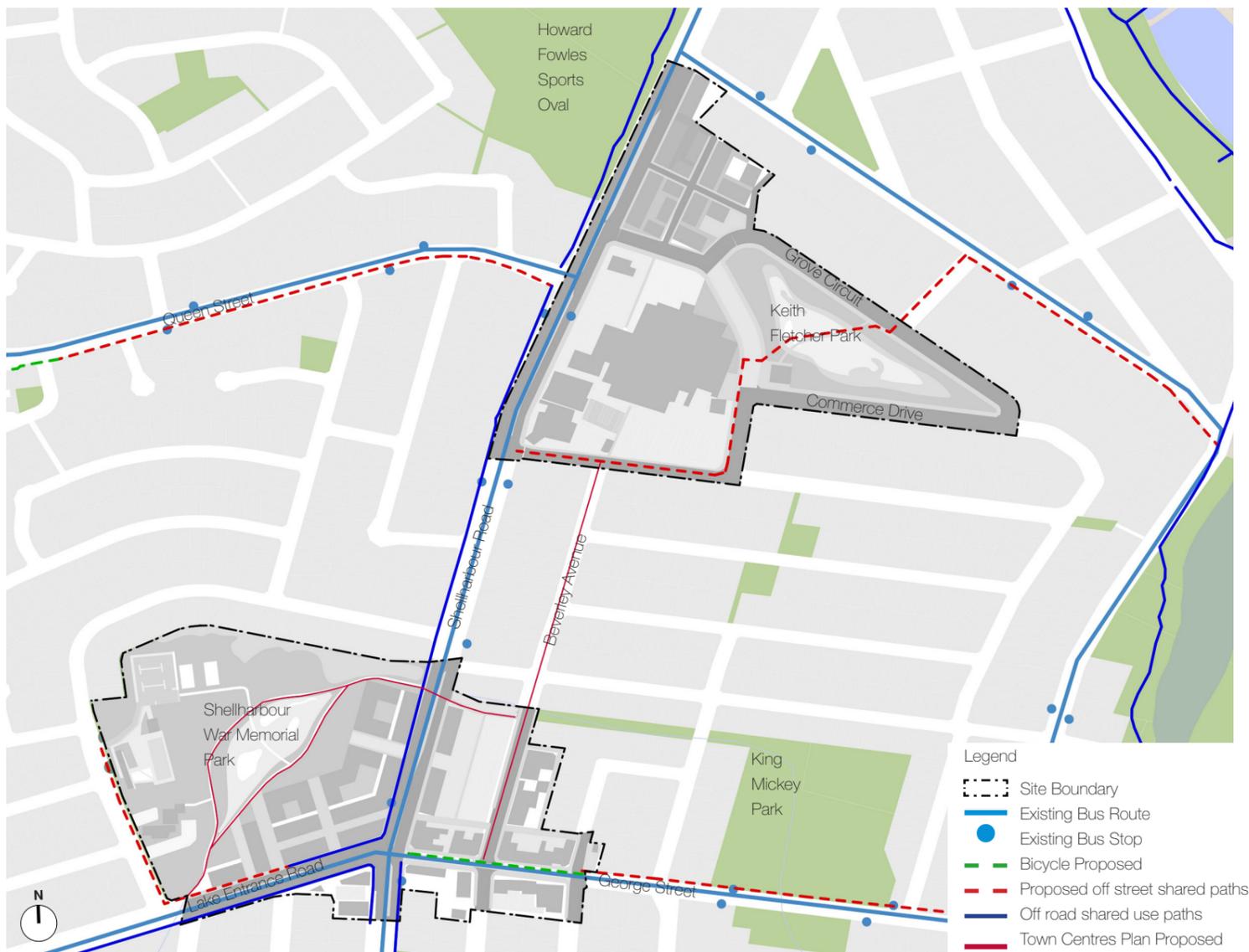


Figure 6.09 - Bus, Pedestrian and Cycle Plan

6.8 COMMUNITY CONNECTIONS

This sub section relates to point 6 of Shellharbour City Council's scope of works which requires the consultant to prepare;

- Connectivity involving other community assets including but not limited to bus stops, schools, swimming pool and future library.

Key 'Community Connections' objectives for the Warilla Town Centres are as follows;

- Develop a walk-friendly environment across the town centre including improved pedestrian crossing points;

Pedestrian Network

Warilla already contains a network of footpaths, links and crossings. However Warilla Grove and George Street are not working to their full potential and can be unfriendly for pedestrians and disjointed at crossings and intersections. The following key pedestrian opportunities can enhance connectivity within the Warilla Town Centres.

- Paving should be extended to the edge of road with integrated planters at all intersections to minimise the width of asphalt at all crossings surrounding Warilla Grove and along George Street.
- Incorporate creative wayfinding and signage.
- Investigation of all intersections for means to increase

pedestrian priority.

- Improved pedestrian crossing points at the intersection of Veronica Avenue and Beverley Avenue should be investigated. This should include the possibility for road treatment changes to indicate the presence of pedestrians and create awareness.
- Footpath should be widened on key streets to improve pedestrian priority, reduce the speed of traffic and establish a more traffic calmed town centre environment.
- Increased planting to road edges at intersections with Shellharbour Road should visually narrow the road to create a sense enclosure when entering the Town Centres and passively reduce traffic speeds for greater pedestrian safety and amenity. Planting should not obscure pedestrian or motorist visibility.
- Wide footpaths should be established on major movement corridors through both Keith Fletcher Park and Shellharbour War Memorial Park.
- Account for movement and parking of motorised scooters.
- Footpath design should be conducive to older users and persons with a disability.



Figure 6.10 - Community Connections

6.9 MAPS OF WARILLA TOWN CENTRES

This sub section relates to point 7 of Shellharbour City Council’s scope of works which requires the consultant to prepare;

- Maps of Centres specifying required active frontages, awning weather protection, building envelopes/setbacks, corner elements and entry statements and focal points.

Key objectives for the Warilla Town Centres that respond to the list of maps are as follows;

- To facilitate ‘active edges’ on the high street and its links to promote a safe and vibrant street life during the day and night;
- To establish appropriate shading within the town centres through awning treatment and shaded outdoor seating;
- Establish appropriate setbacks that reflect the character of the town centres by considering existing neighbouring properties and centre character;
- Strengthen the built form character at key entry points to enhance the sense of arrival and identity of the town centre.

Active Frontages

Active frontages enliven the ground floor street level with commercial and retail uses. Semi-active frontages relate to areas which have good urban frontage such as residential and community buildings but do not support active functions such as retail and commercial.

Street frontages throughout the town centres should aim to enliven the street and encourage mixed uses at ground floor which enhance and activate the public domain. Access to Warilla Grove and George Street should provide covered entries, open and visible façades and spatial provisions for alfresco dining.

Business should be encouraged to utilise the public domain as a part of their frontage. Examples include : windowsill seating, hole in the wall style businesses, use of public domain alfresco, bi-fold doors and business permeability from the street and parking areas. Businesses with back of house adjoining laneways are encouraged to open this space to the customer and the public to further activate edges. Temporary activations of underutilised spaces by for instance hot desks, creative pop ups and studio space should be considered.

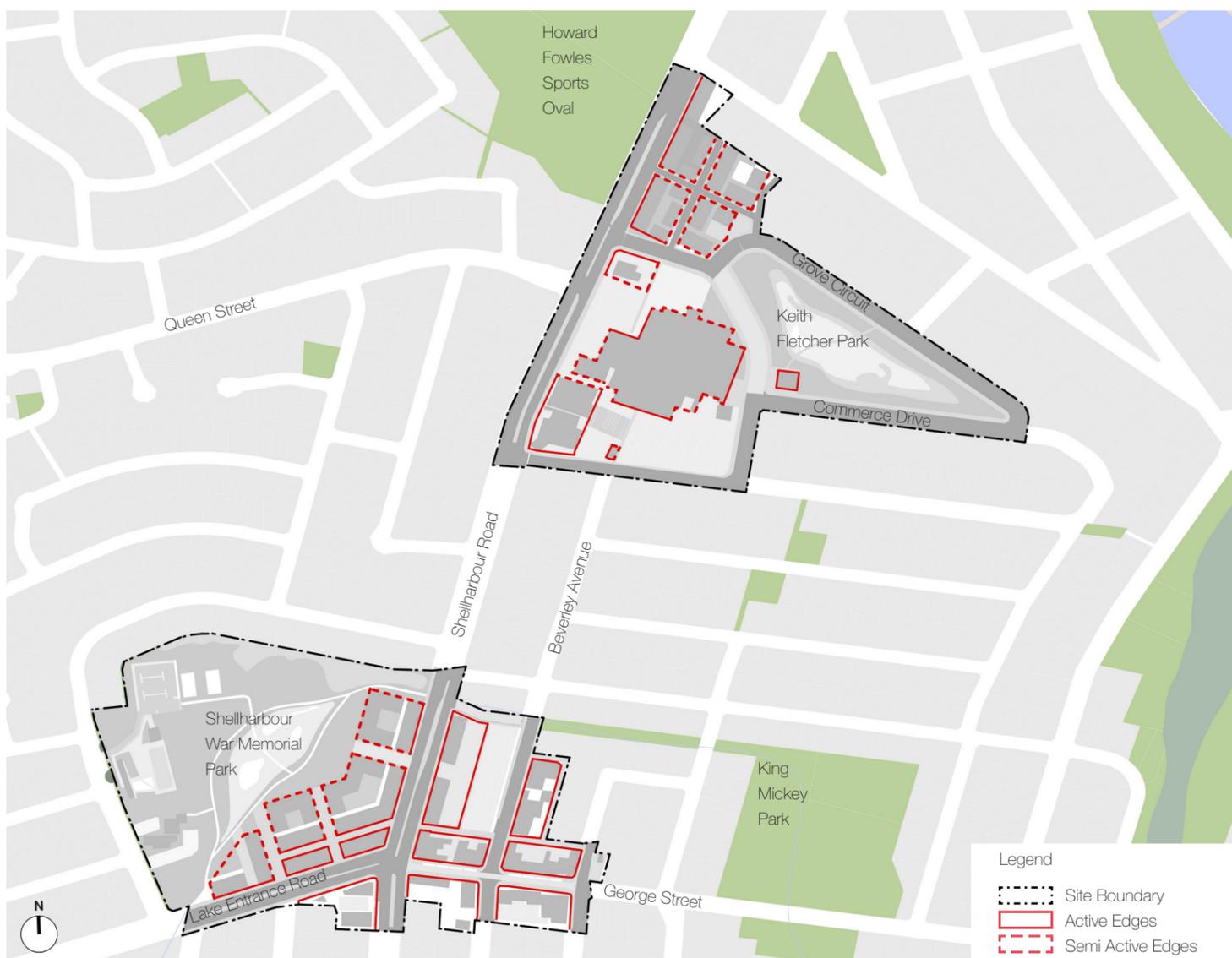


Figure 6.11 - Active Edges Plan

Building Envelopes and Setbacks

Building setback is the distance between the boundary of a site and proposed or existing building edge. Appropriate building envelopes and setbacks dictate the sense of enclosure experienced along a street.

The distribution of setback distances is based on the role and character of the built form. It is important for Warilla Town Centres that the proposed setbacks allow for a sense of enclosure reflecting a more urban setting.

The proposed setbacks in the Warilla Town Centres Plan ensure a level of flexibility is applied to future development.

- Future town centres buildings should be setback 0m to 2m from the front boundaries across all of the study area.
- Side and rear setbacks may vary in the context of amenity, solar access and privacy.
- Setbacks for future buildings adjacent to existing residential areas and parkland should be 2 to 4m. This allows the opportunity for landscape buffers and a softer edge to the peripheral edges of the town centres.

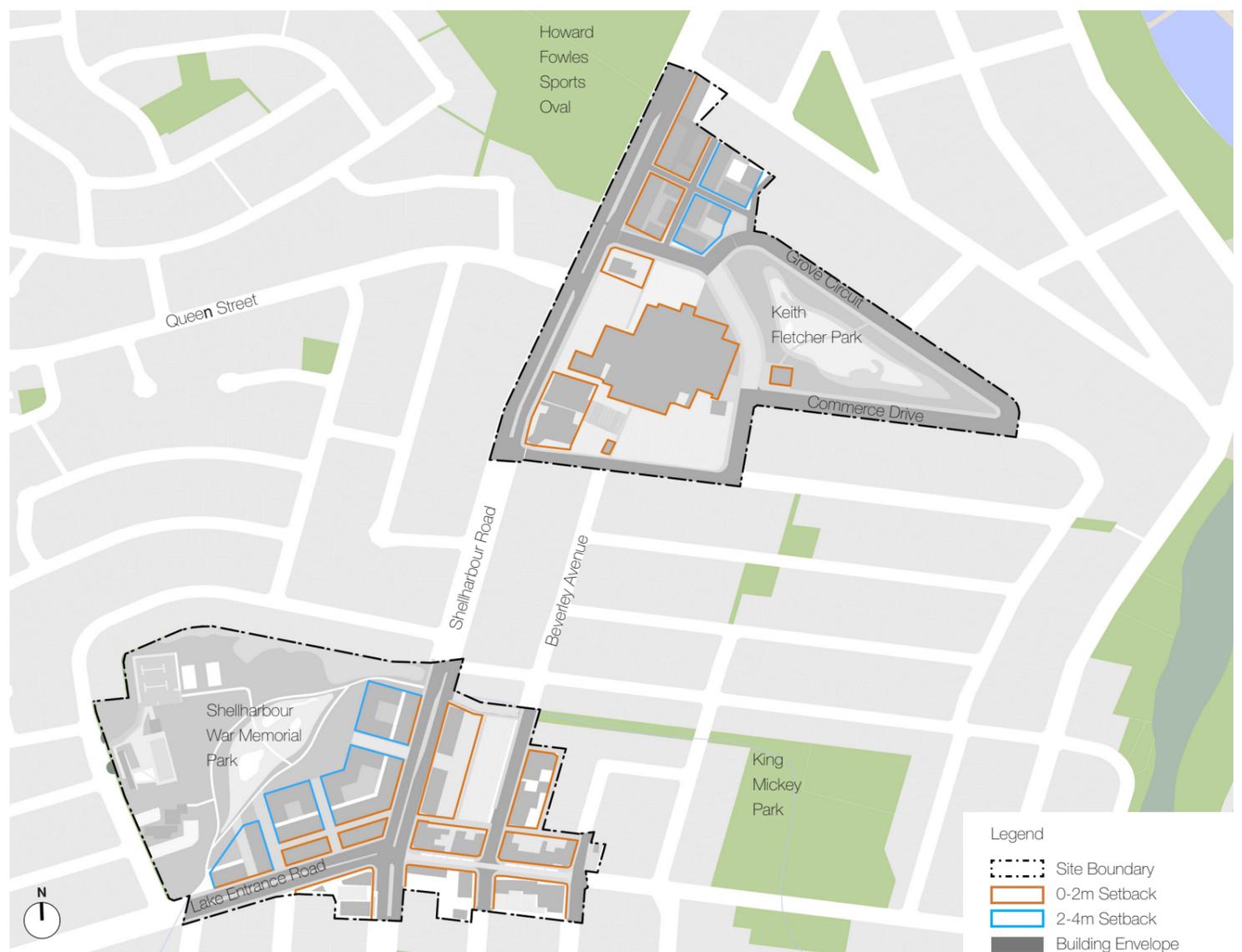


Figure 6.12 - Building Setbacks Plan

Awnings & Signage

Awnings and signage significantly affect the amenity, appearance and character of streetscapes and the pedestrian environment. Key aims for the proposed treatments are as follows;

- To improve pedestrian amenity by providing weather protection to footpaths in appropriate locations;
- To encourage awnings that possess a high quality architectural design that reflects the architecture of its building while also complementing the streetscape;
- To encourage awning forms that provide good levels of lighting to footpaths and to ground floor spaces within buildings.

Key initiatives for Warilla Town Centres are as follows;

- Ensure consistent awning treatment along George Street and Shellharbour Road, strengthening the sense of enclosure along the road;
- Introduce varied awning treatments at the entrances to Warilla Grove and along the laneways of Warilla Town Centre to encourage variety along the building edge;
- Reduced signage will be an important treatment within

both centres ensuring that the building architecture and public domain remain uncluttered.

Consistent Awning Treatment

- Lighting is required on the underside of awnings to supplement existing street lighting and 'spill' lighting from shop-fronts and other ground floor uses.
- Signs are to be consistent with the overall design of the awning.
- The awning ceiling and underside of the fascia should be consistent.
- Awning colour is to suit the architecture of the host building and the adjoining awnings.
- The underside of the awning is to be not less than a typical floor to ceiling height of 3200mm above the footpath.
- Steps for design articulation and to accommodate sloping streets should be incorporated into the awning treatment.
- Awnings should be setback to accommodate utility poles, street trees, street lighting and smart-poles.

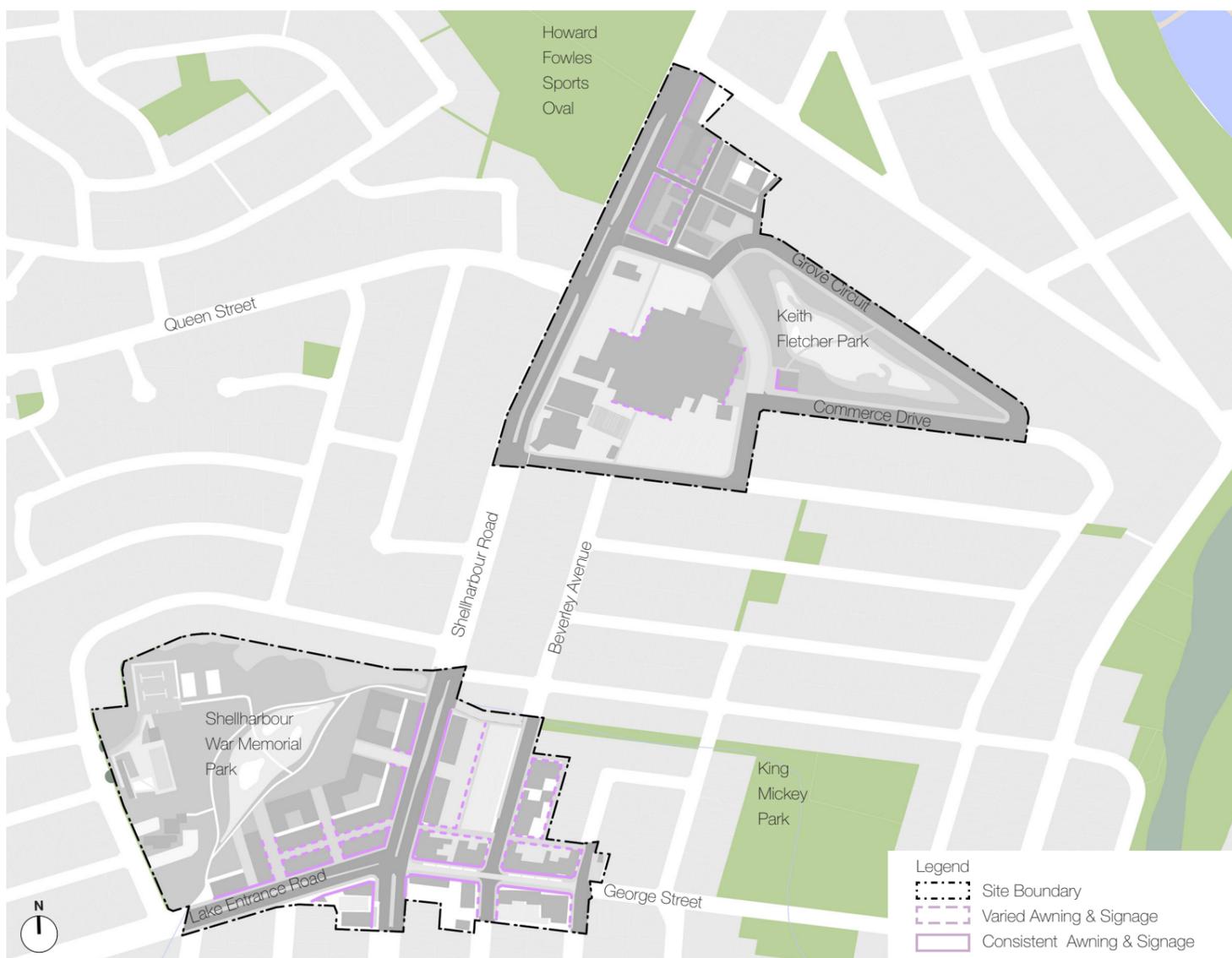


Figure 6.13 - Awnings and Signage Plan

Varied Awning Treatment

- Soft canopies can be used rather than rigid awning treatments.
- The underside of the awning is to be not less than a typical floor to ceiling height of 3200mm above the footpath.
- Is not required to Integrate signage in design.
- Allows for use of varied colours, styles and sign types.
- May provide weather protection for shop fronts and diners however is not required to provide consistent weather protection.
- Awnings or canopies should be setback to accommodate utility poles, street trees, street lighting and smart-poles.

Signage

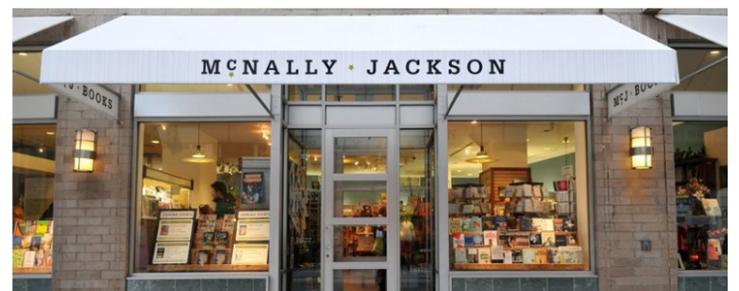
Signs help users navigate both centres and identify the location of business and services. Signage can strongly add to or detract from the character of a town centre.

Key aims for signage treatments are as follows;

- To maintain the small scale & fine grain character of Warilla.
- Signage should be integrated with and reflect the character of the building.
- The number of signs per business should be kept to a minimum to avoid street clutter.



Consistent awning treatment should integrate lighting.



Minimal signage reflecting the character of small business.



Consistent awning treatment integrating signage



Varied treatments enhancing the character of small business.



Consistent awning and signage treatment complement the building architecture.



Awning style should vary within the town centre laneways.

Focal Points

A focal point is essentially the community heart of a town centre. It is a gathering area for social interaction, offering a variety of potential different uses and activities during the day and the night. These spaces should evoke a sense of place and ownership for the town centres community. Successful community hearts tend to be civic spaces, squares or a main street, where a variety of functions can be catered for, such as markets, festivals, theatre and relaxation for meeting others. It is imperative that a large proportion of the community heart is public and freely accessible at all times, to all users.

The Warilla Town Centres Plan locates three focal points. These three focal points are;

1. Library and Public Space

- A new library building, with highquality frontage onto Keith Fletcher Park.
- The public space will provide a meeting place for the community, with seating and shade trees and potentially cafe/dining.

- Warilla Grove should activate the edge and spaces that face onto the proposed future Warilla Library.

2. Warilla Grove (North end of Beverley Avenue)

- Upgraded carpark with potential for a community space and temporary facilities offering a space for community.
- Consider temporary seating elements and stalls.

3. George Street and Beverley Avenue Carpark

- Upgraded carpark with potential for a community space and temporary facilities offering a space for community.
- Consider temporary seating elements and stalls.
- A vibrant main street with bold frontages activated by alfresco dining, public seating and cafes for locals and tourists.

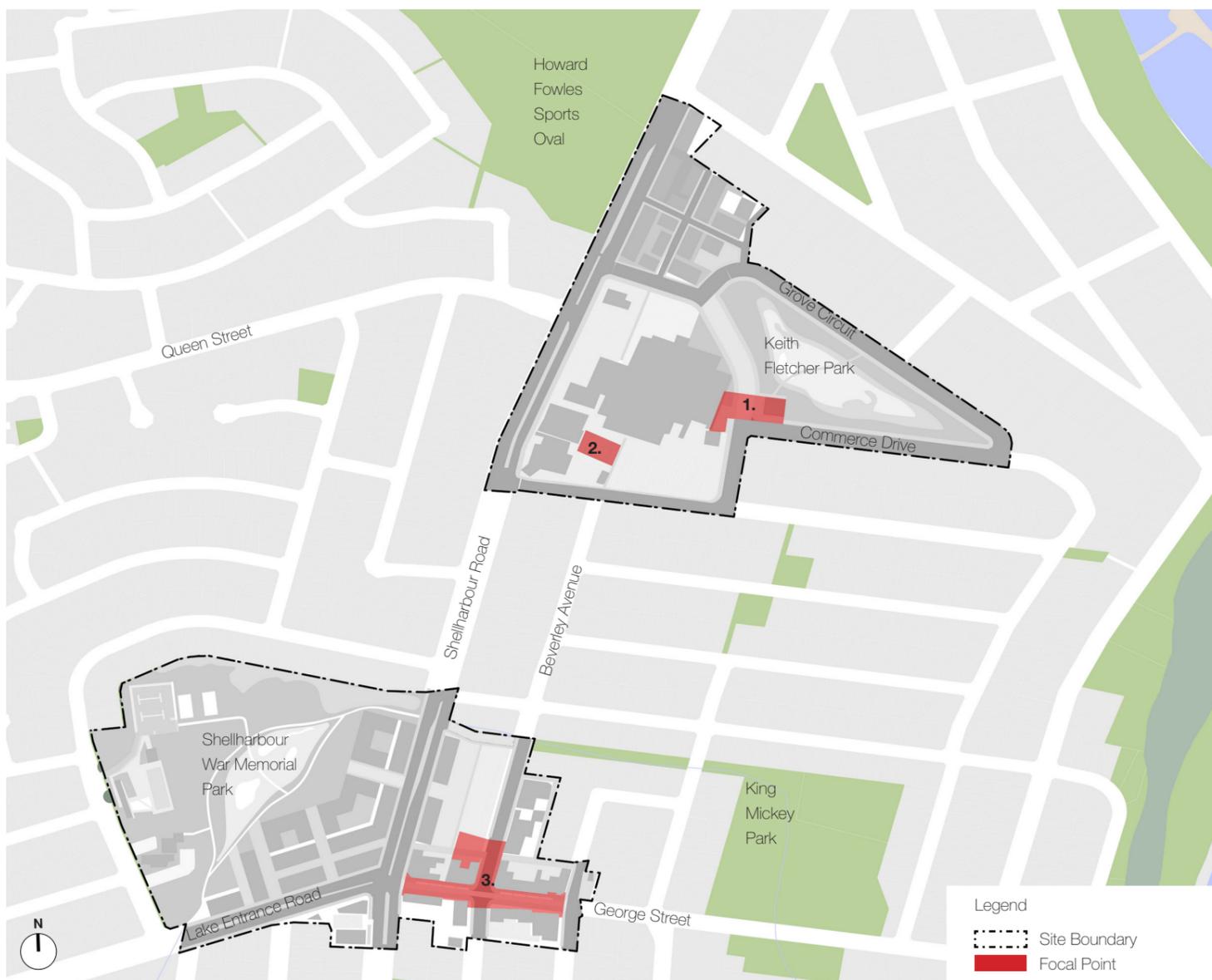


Figure 6.14 - Focal Points Plan

Entry Statements

Successful town centres ensure that key access routes into a district offer individuals a sense of arriving to a collective entity or place. This sense of arrival or entry statement may be achieved by physical separation or distinctiveness within the built form, planting and spatial environment.

Consideration should be given to include public signage at entry statement locations that acknowledges the Aboriginal people as the traditional custodians of this land.

To assist in understanding the role of these identified buildings, trees and spaces the town centres plan has been broken down into the following categories;

- Vehicular Gateway Entry Statements
- Pedestrian Gateway Entry Statements

Vehicular Gateway Entry Statements

Key vehicular gateway entry statements located within Warilla Town Centres reflect the arrival experience along the key vehicular road corridors. Key entry points identified as vehicular gateway entry statements for Warilla Town Centre

are as follows;

1. Lake Entrance Road and Shellharbour Road Intersection
2. George Street and Susan Avenue Intersection
3. Shellharbour Road northern entry

Key entry points identified as vehicular gateway entry statements for Warilla Grove Town Centre are as follows;

4. Shellharbour Road and Veronica Street Intersection
5. Shellharbour Road and Woolworths Avenue Intersection
6. Shellharbour Road northern entry
7. Veronica Street and Woolworths Avenue Intersection

All buildings and spaces located in these areas should aim to instil a sense of arrival along the road corridors' arrival zone when entering Warilla Grove Town Centre and Warilla Town Centre.

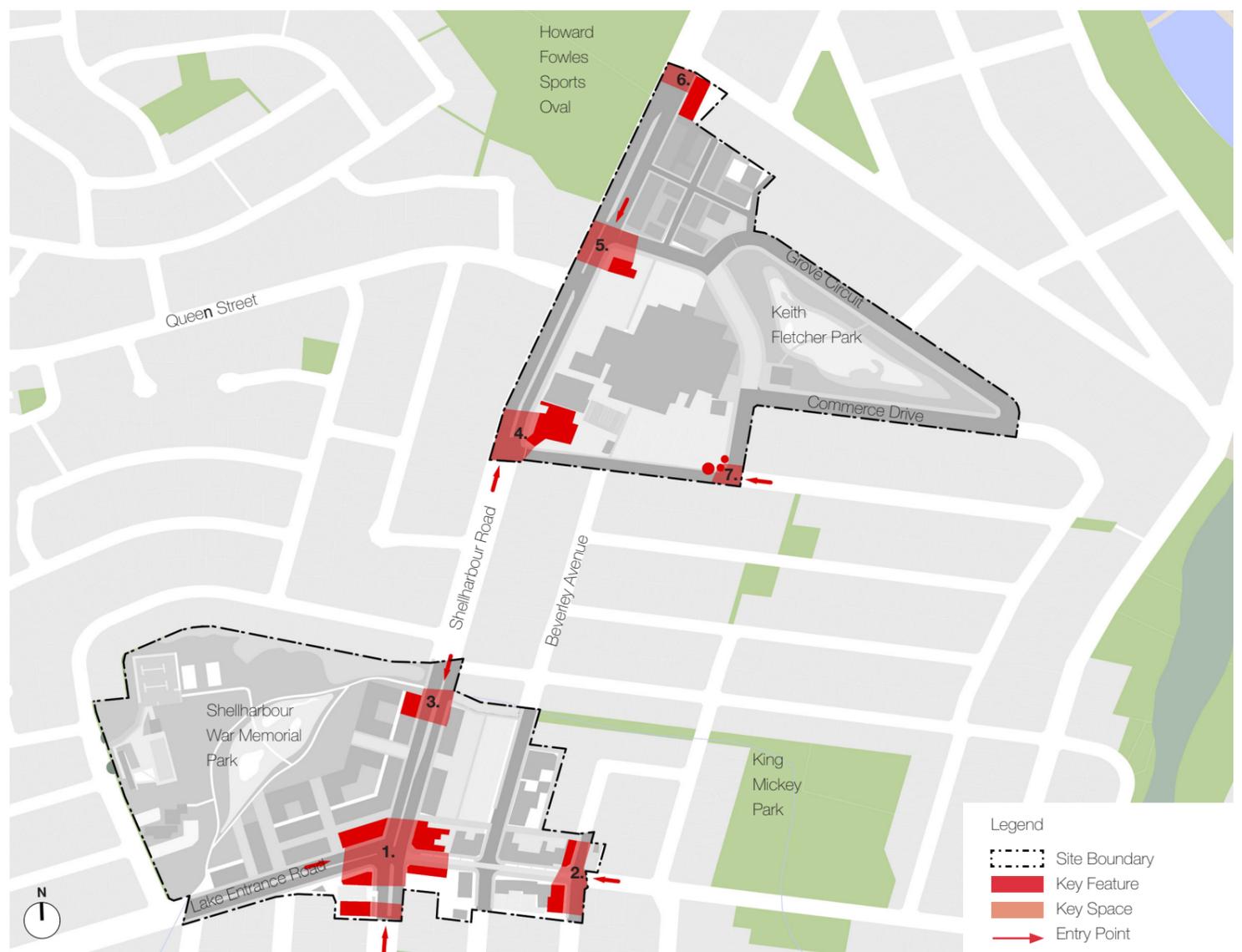


Figure 6.15 - Vehicular Gateway Entry Plan

Pedestrian Gateway Entry Statements

Key pedestrian gateway entry statements located within Warilla Town Centres reflect the arrival experience to major public spaces and the town centres from bus arrival points and major car parks. These routes are identified in the town centres plan as an important view corridor and pedestrian route. Key buildings and spaces identified as pedestrian gateway entry statements are as follows;

1. Beverley Avenue Carpark
2. Beverley Avenue Entry
3. Warilla Grove Beverley Avenue Entry
4. Warilla Library Entry
5. Warilla Grove Precinct arrival

All buildings and uses located in these areas should aim to instil a sense of arrival within the key public spaces for pedestrians when entering Warilla Grove Town Centre and Warilla Town Centre.

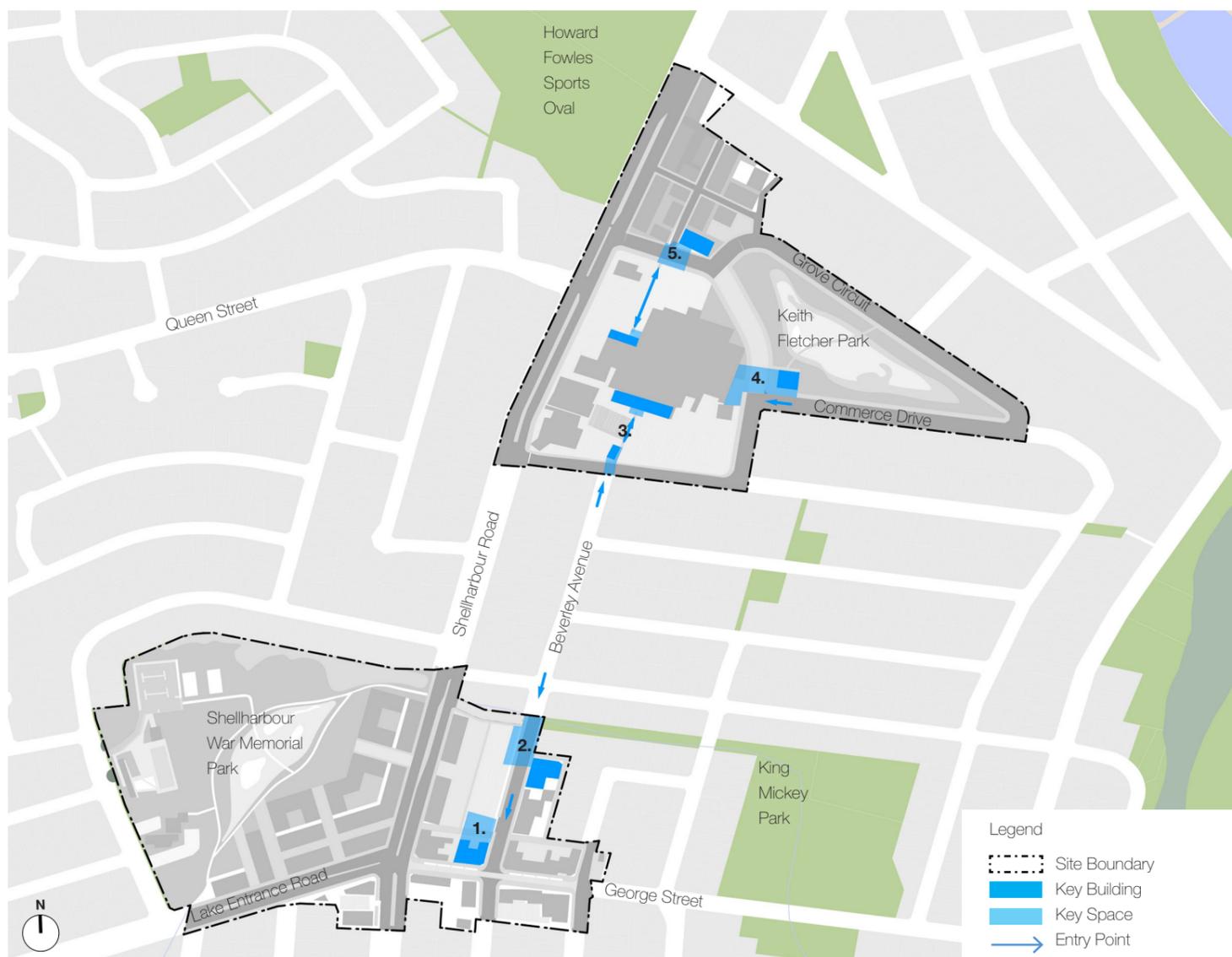


Figure 6.16 - Pedestrian Gateway Entry Plan

6.10 LEP RECOMMENDATIONS

This sub section relates to point 8 of Shellharbour City Council's scope of works which requires the consultant to prepare;

- Any recommended amendments to LEP 2013 as it relates to development of town centres.

Key LEP objectives for Warilla Town Centres are as follows;

- To ensure appropriate land use zoning controls for the town centres to establish a well connected and vibrant mix of uses;
- To ensure height controls establish a sense of enclosure within the town centres and create incentive for future development;
- To ensure floor space ratio controls encourage a greater density and critical mass of people within the town centres;
- To ensure character of the town centres is maintained.

Land Use [LZN] Zoning Controls

The LEP recommendation for the Warilla Town Centres land use controls are as follows;

- Zone 1 - The existing B5 Business Development corner of Woolworths Avenue and Grove Circuit should be changed to B4 Mixed Use to encourage activation and diversity and allow stand alone residential flat buildings.
- Zone 2 - The existing B5 Business Development at the rear of the corner of Shellharbour Road and Lake Entrance Road should be changed to B4 Mixed Use to encourage activation and diversity and allow stand alone residential flat buildings.

Note: To identify additional development opportunities on Warilla Grove, Council should undertake a review of planning controls to support a mix of uses including residential development.

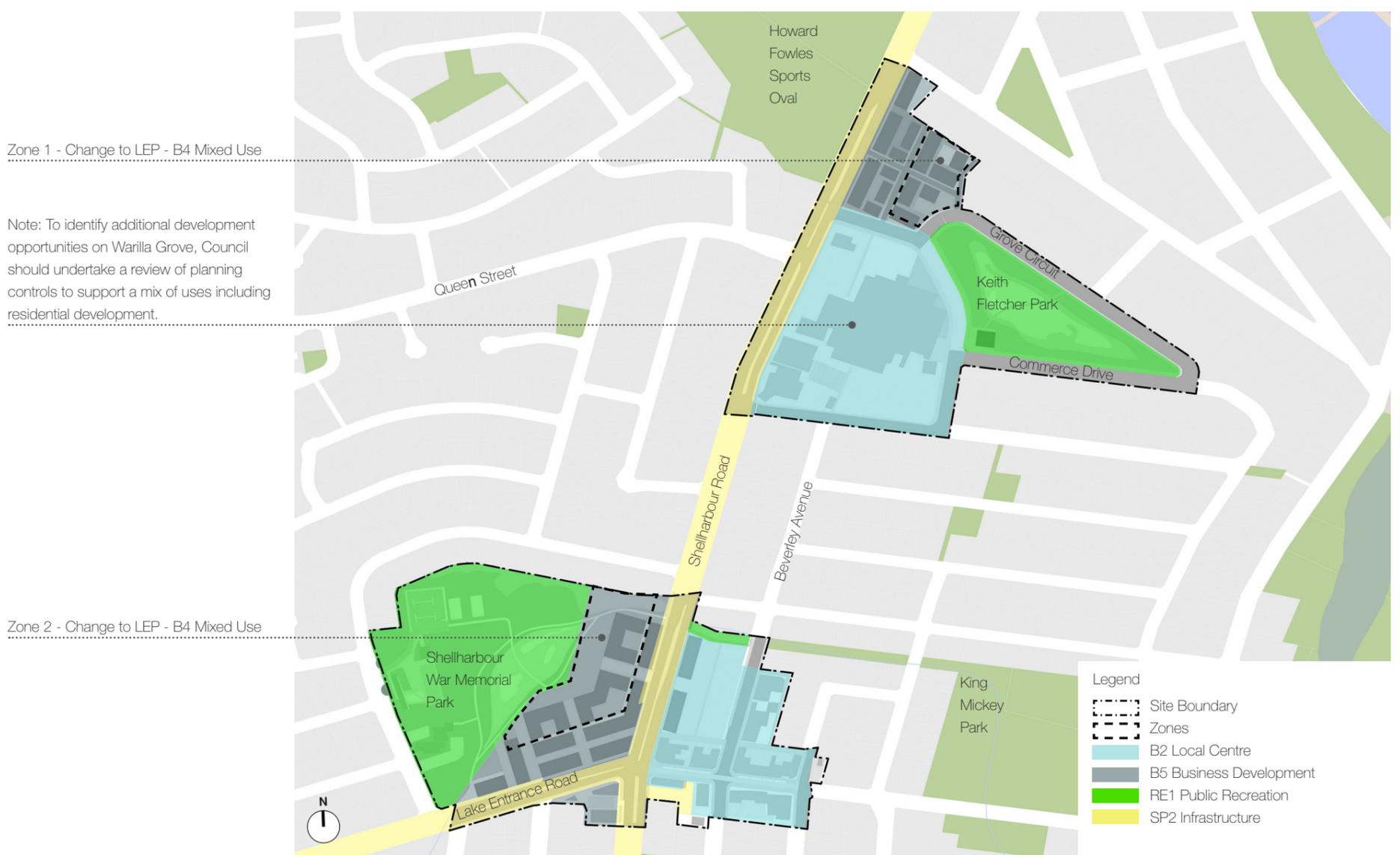


Figure 6.17 - Land Use Recommendations

Height of Building [HOB] Controls

Definition

Height of Building means the vertical distance between ground level (existing) and the highest point of the building, including plant and lift overruns, but excluding communication devices, antennae, satellite dishes, masts, flagpoles, chimneys, flues and the like.

Considerations

- Key floor to floor height [including floor slab] considerations incorporated within this plan are as follows;
 1. Retail and Commercial - 3.5m to 4.5m
 2. Residential - 3.0m
- Pitched roofs are optional

Recommendations

Warilla Town Centres should contain a variety of building heights that reinforce a sense of being a town centre. The LEP 2013 height of building maps provide generic development guidance that prescribes a limit to future buildings.

Based on an evaluation of building heights through this project there are no recommended changes to the LEP Height of Building zone for Warilla Town Centres.

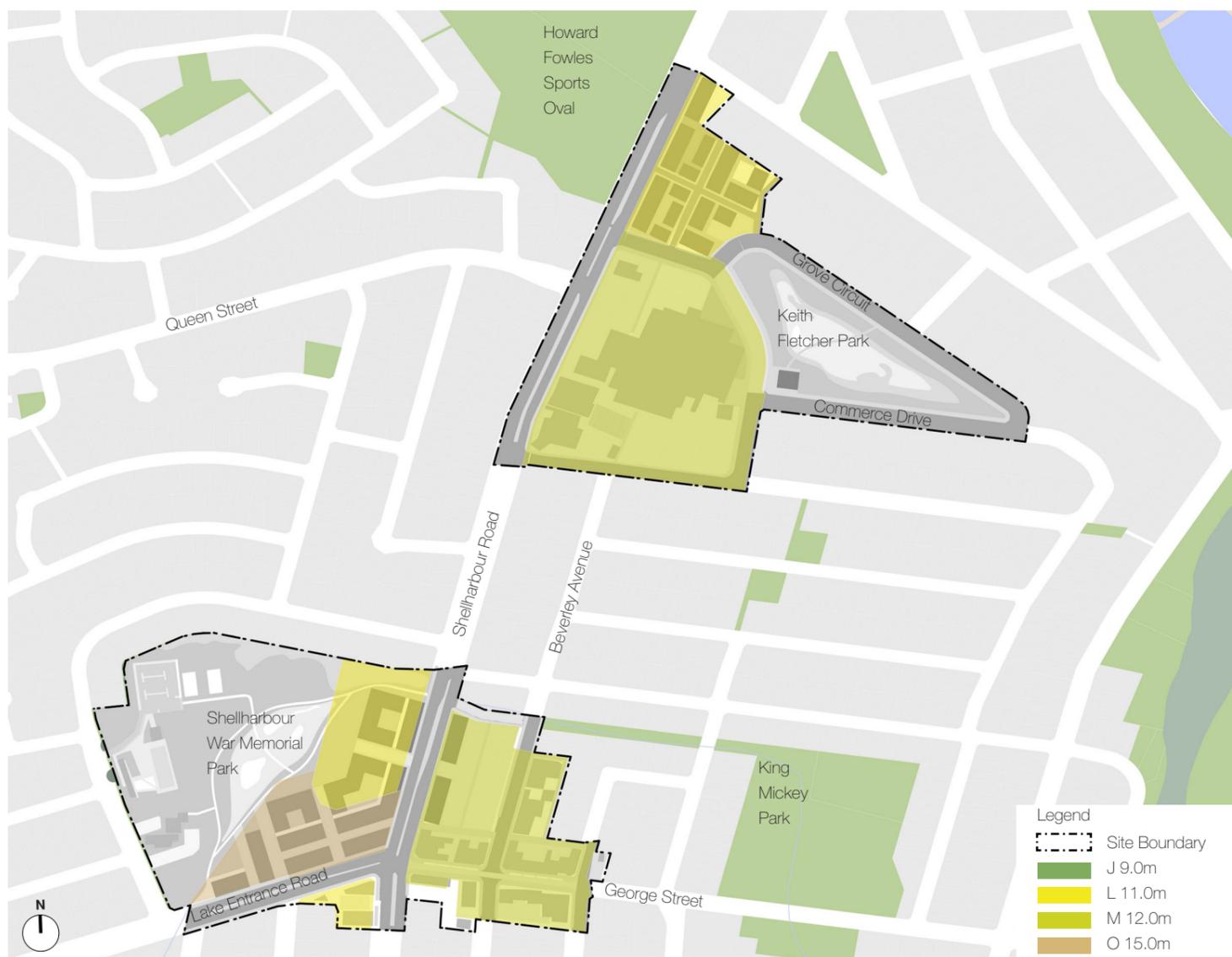


Figure 6.18 - Height of Building Recommendations

Floor Space Ratio [FSR] Controls

Definition

The floor space ratio of buildings on a site is the ratio of the gross floor area of all buildings within the site to the site area.

Recommendations

Warilla Town Centres suffers from under-utilised land and limited rear block activation.

The key intention of the FSR recommendations is to ensure a critical mass of development in the town centres, excellent street enclosure and incentivise the redevelopment of key sites.

The LEP recommendations for the Warilla Town Centres floor space ratio [FSR] controls are as follows;

- Zone 1 - The existing 0.5:1 should be changed to FSR 1.5:1
- Zone 2 - The existing 0.5:1 should be changed to FSR 1.5:1

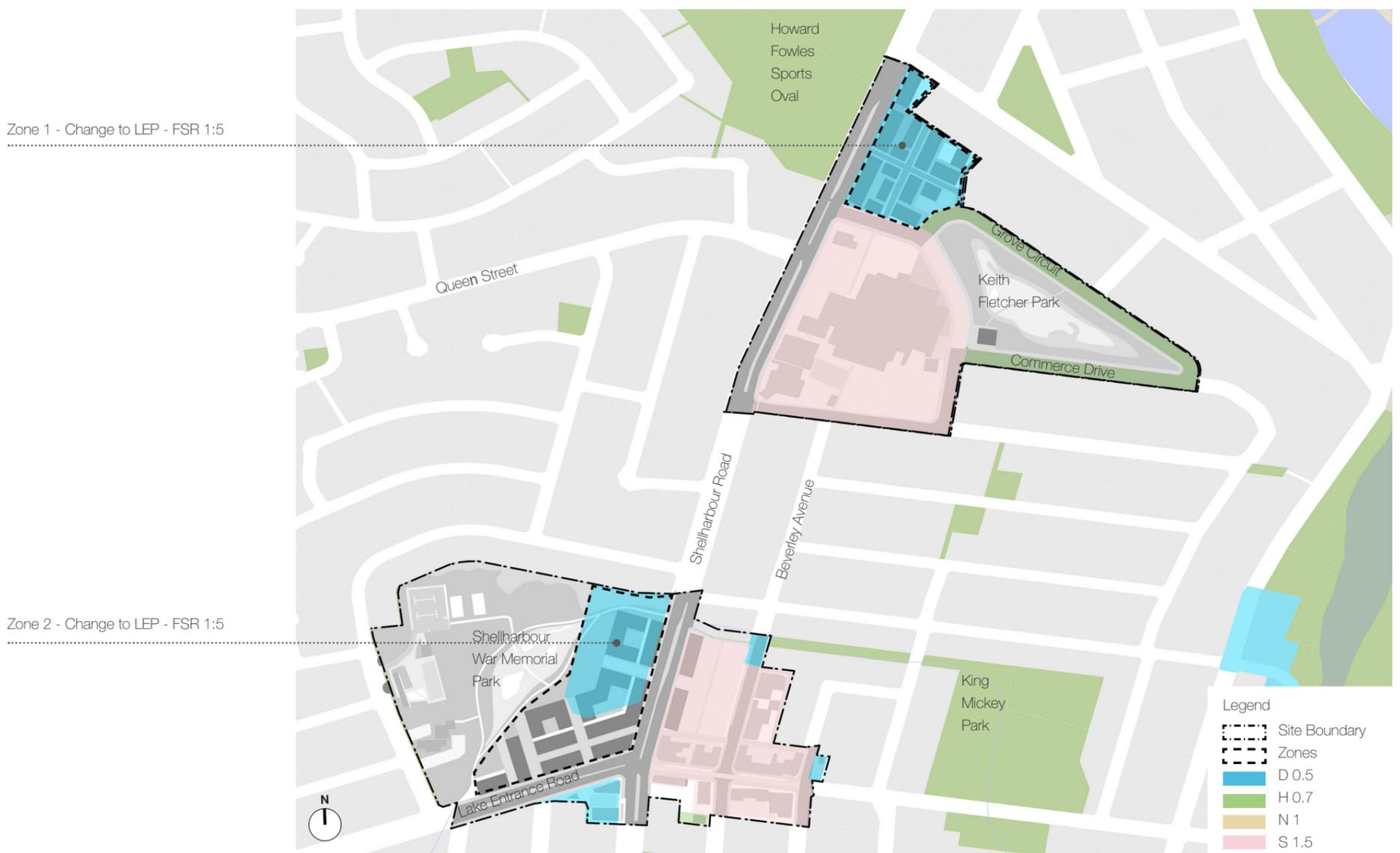


Figure 6.19 - Floor Space Ratio Recommendations



Appendix A: Community Consultation Summary

Appendix A: Community Consultation Summary

COMMUNITY ENGAGEMENT

To inform the development of the Warilla Town Centres Plan, a stage of consultation was undertaken to discuss the strategic ideas presented through the six strategic moves.

The key moves were exhibited at two community kiosks on the 31 August 2015 and for two weeks on the 'Councils Peak Management' website. The community were asked to provide feedback on the strategic moves put forward for Warilla Town Centres.

Both the consultant team and Council carried out a range of conversations with the community in Warilla Grove and Warilla Town Centre. Key points raised were noted and will ultimately inform the town centre planning process.

The key message from the consultation was an overarching support for the key strategic moves presented. Key points noted are as follows;

Strategic Move 01

- Would be great to have enhanced library experiences here. Make it inviting for families. Cafe and playground as described. This site floods though so it needs to be managed appropriately.
- Create a park where people can go and sit and not just a sports park but where you can walk, have a picnic and sit in the sun. Trees and BBQ areas are a must.
- Proposed library is out of the way. It needs to be incorporated more to the centre or related back to the town centre.
- Need to account for flooding.
- Keith Fletcher Park could have a permanent pond for aesthetic/ visual value.
- Terry Street and McKeon Lane feel unsafe.

Strategic Move 02

- Important that George Street is referenced and that the temporary space compliments the role of the main street.
- George Street parking should be limited and reduced to no more than an hour stay.
- Close part of George Street for markets and events.
- Further investigation is needed into appropriate traffic calming measures in both centres.
- These two areas definitely need work. Very scary places to go at night. Markets etc may work here.
- Improve maintenance for both centres, including more bins.
- Hart Lane is definitely a better option as there is already existing shops and businesses there. There is an opportunity to embrace the industrial area and introduce pop-up shops and outdoor dining areas. Areas like Braddon in Canberra have utilised their existing industrial areas and made fantastic cafes and restaurants and eateries such as 'Hamlet', 'Autolyse'. Places like these would work fantastically in a small centre like Warilla.
- Library should be attached to the centre or more viable from Shellharbour Road.

Strategic Move 03

- The problem of Beverley Avenue is traffic. It needs to slow down. Also I believe it needs a tonne limit. I am concerned about residents coming in and out of driveways - will the trees block the view of traffic and pedestrians?
- Green spine could potentially accommodate buses, offer improved lighting and offer standardised finishes and symbols. Green spine would need bins.
- Ensure consistency in footpath and paved area treatments.
- Completely support.
- Having easy access footpaths to walk and cycle are a great option to encourage a green environment, however, pathways must be central so that people feel safe.

- Council needs to change zoning to encourage business/shop fronts along Beverley Ave between the shopping centre and Warilla township. This is a missing link.

Strategic Move 04

- Completely support. Warilla needs different kinds of businesses though to change the feel of the centres. It's hard to make pawn shops and liquor stores attractive.
- I highly support all of what is written regarding the topic. Making the area look inviting so people want to pull over and have a coffee rather than chained up window fronts. Embrace street art like Melbourne has, make the laneways appealing by having street art rather than grey and dull concrete.
- More outdoor dining in both centres.
- More trees are needed around the shopping centre and possibly encourage the centre to improve its facade.
- Big box format such as Warilla Grove should complement the streets and not be inward looking.
- Support facade improvements.
- Warilla Grove should complement street and not be inward looking.

Strategic Move 05

- Concrete canals work well for drainage purposes.
- Completely support. It's disgraceful that the only semi-decent kids play equipment in the area is the one at McDonalds! Make the green areas more attractive and safer for families. Things to do. Nature trail along the creek, viewing platforms. Play equipment, park benches, shade trees, landscaping.
- By enhancing the current King Mickey Park to be more appealing when driving past would entice people to use the area. It has great frontage to traffic and is a highly visible area.
- Any improvement to these parklands will be great as they have been let go and no money spent since established.
- Create a safer and better entrance point to the beach.

Strategic Move 06

- Residential would be needed to make old library site work.
- 1:5 FSR for B5 zone not appropriate.
- More mixed use development should be encouraged.
- Should note the potential between the centre and township along Beverley Avenue.
- Important that planning controls encourage increase in density and high quality development outcomes including mixed use.
- Need to account for flooding.
- Compactness needed. May need to confine densification to B2 areas.

Other

- Centralising services e.g. post office, health in smaller centre like Warilla Grove. Good for old people to get around.
- Tiled facades less of a graffiti target.
- More bike parking needed.
- Bike parking should incorporate public art.
- Some streets not conducive to commercial vehicular manoeuvring and need onsite manoeuvring.
- Suggest no right turn into Woodford Avenue and install right turn lane on Shellharbour Road into George Street.

The two community kiosks and 'have your say' website comments identified a range of ideas, actions and aspirations for Warilla Town Centres. This feedback has informed the development of the Warilla Town Centres Plan and development guidelines.



Figure 7.01 - Kiosk Consultation Boards



Figure 7.02 - Kiosk Consultation Photographs



Appendix B: Hill PDA: Property Market Appraisal

Appendix B: Property Market Appraisal



Warilla Town Centres Plan

Property Market Appraisal

Prepared for Shellharbour City Council

Final – November 2015

Appendix B to the Warilla Town Centres Plan

The Warilla Town Centres Plan was endorsed by Council at its meeting of 15 December 2015, as a basis for the review of relevant Council Policy including Shellharbour Local Environmental Plan 2013, Shellharbour Development Control Plan, Shellharbour City Council Section 94 Contributions Plan 2013 and the capital works program.

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Quality Control

This document is for discussion purposes only unless signed and dated by a Principal of HillPDA.

Reviewed by:



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LIST OF ABBREVIATIONS

ABS	Australian Bureau of Statistics
ANZSIC	Australian and New Zealand Standard Industrial Classification
BTS	Bureau of Transport Statistics
CPI	Consumer Price Index
GDP	Gross Domestic Product
GFA	Gross Floor Area
GLA	Gross Lettable Area
LGA	Local Government Area
MTA	Main Trade Area
NAB	National Australian Bank
NSW	New South Wales
PTA	Primary Trade Area
RTD	Retail Turnover Density
Sqm	Square metre
STA	Secondary Trade Area

EXECUTIVE SUMMARY

HillPDA has undertaken a Property Market Appraisal and forecast of economic and residential growth in Warilla. The growth forecasts, together with an assessment of local property market characteristics, have informed a high level assessment of demand for appropriate land uses that meet the needs of Council, the community and the market.

Population and Household Change (Chapter 2)

The residents of Warilla are typically in the older cohorts and lower income brackets and enjoy their proximity to Shellharbour City Centre. The majority of residents live in detached dwellings. Lone person households are the most common type of household.

In 2011, the total population of Warilla was estimated to be 6,487 people. It is expected to increase by over 230 people to 6,718 by 2031, at an average annual growth rate of 0.2% – which is well below Shellharbour City growth rate at 1.0%.

Residential Assessment (Chapter 3)

Demand for new residential stock in Warilla Town Centre comes from several sources including:

- The ageing of the population and the need or desire to reduce car dependency and downsize to smaller dwellings proximate to services and amenities;
- Established and older couples and the need for lower maintenance and affordable living in proximity to major employment areas such as Shellharbour City Centre; and
- Investors enticed by record low interest rates and increasing pent-up demand combined with undersupply of rental housing.

Whilst Warilla is considered a desirable location, the end sale values of medium density in the Study Area may not be high enough to provide sufficient reward (i.e. profit) for development to cover the risks of site acquisition, finance and redevelopment. This is particularly the case on smaller, more complex sites that are fragmented in ownership.

Retail and Commercial Floorspace (Chapter 4)

Warilla provides two separate retail/commercial clusters namely:

- The enclosed Warilla Grove Shopping Centre which provides over 11,661sqm of retail floorspace and is anchored by a Woolworths (4,379sqm) and Aldi (2,399sqm) commencing 2016 as well as 34 specialty stores; and
- Traditional strip retailing is provided along George Street and contains some 15,050sqm of retail and commercial floorspace (excluding community and utility uses).

There are some smaller centres in Barrack Heights, Lake Illawarra, Oak Flats, usually anchored by small format supermarkets or grocery stores. There are larger centres including Stockland Shellharbour and Westfield Warrarong that capture considerable levels of expenditure from Warilla residents.

Warilla has a main trade area that covers the suburbs of Warilla, Lake Illawarra, Barrack Heights and Barrack Point. This is an area of 16,800 people expected to grow to 17,770 by 2031. Expenditure generated by trade area residents is expected to increase from \$211.4m today to \$265.1m by 2031.

There is sufficient expenditure (including tourist expenditure) now to justify a centre of some 16,000sqm with one full-line supermarket. Based on our demand modelling which suggests an oversupply of retail floorspace in the short to medium term, Warilla is not in a position to expand. This also applies to non-retail commercial space. This is largely due to its positioning being highly exposed to the competitive pressures of the higher order and superior centres – Shellharbour City Centre and Warrarong.

Warilla could benefit from improving the café and restaurant offer along with expanding the provision of gifts/homeware retail floorspace which would also cater to the tourist market.

Implications (Chapter 5)

Issues surrounding the viability of higher density residential in regional town centres are not uncommon. Whilst many regional towns recognise the benefits of incorporating residential development into their town centres, they struggle to prove viable due to lower socio demographic profiles, lower income levels, lower end sales values, costly construction and less expensive housing alternatives including existing and lower-cost detached project homes.

New apartments are not viable at this stage since there is insufficient profit for developers to overcome the risk of site acquisition, finance

and redevelopment. The design and construction of apartments in Warilla would need to be cost effective in order for such development to be viable.

Market research indicates there is limited demand for retail and commercial shopfronts in Warilla and this is unlikely to change. Shellharbour City Centre will continue to attract key retailers and service businesses, particularly whilst land and tenancies within the City Centre are available and are competitively priced. Warilla has the potential to capture a greater proportion of the trade expenditure through the improvement of the retail mix.

On this basis Warilla should consider a revitalisation strategy, with some beautification measures and improvements to the public domain to encourage more outdoor seating and eating places.

1 INTRODUCTION

HillPDA has undertaken a Property Market Appraisal and forecast of economic and residential growth in Warilla. The growth forecasts, together with an assessment of local property market characteristics, have informed a high level assessment of demand for appropriate land uses that meet the needs of Council, the community and the market.

In doing so, advice on land use mix and composition will inform the urban design and development options for the Warilla Town Centres as being prepared by McGregor Coxall. The options may consider a range of cultural, civic, community, commercial, retail and residential development.

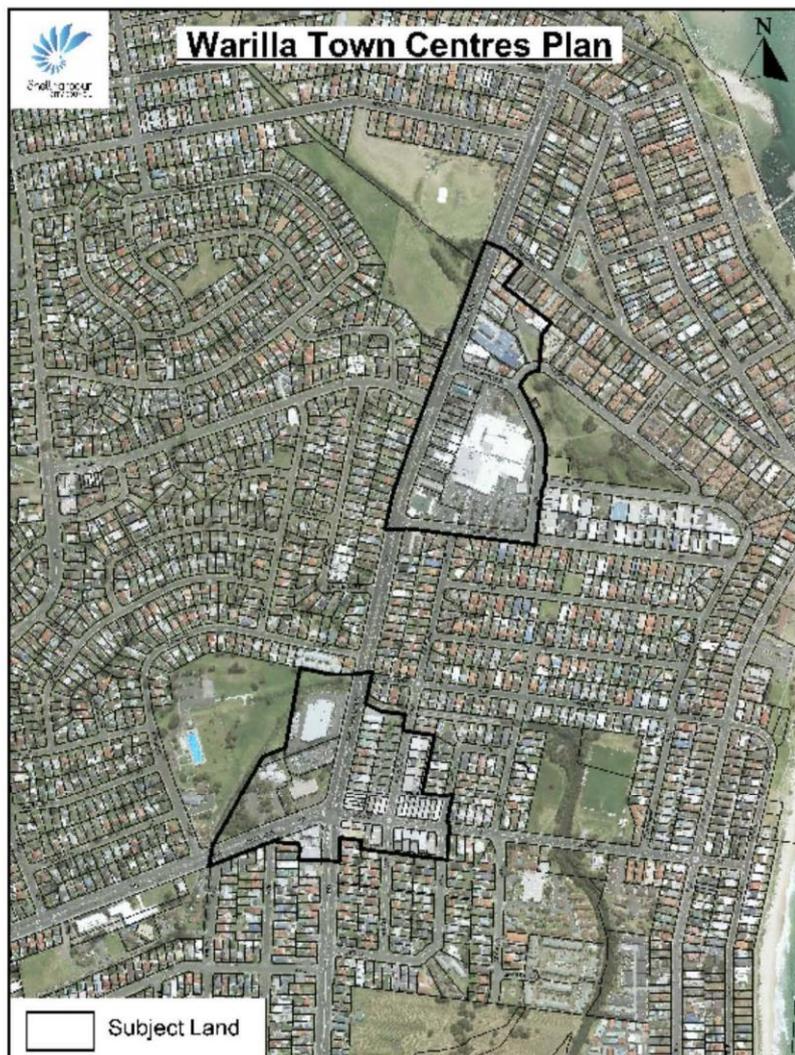
The overall outcomes of this project will inform the review of relevant Council policy including Shellharbour Local Environmental Plan 2013, Shellharbour Development Control Plan, Shellharbour City Council Section 94 Contributions Plan 2013 and the capital works program.

Warilla Town Centres

Warilla is one of the more established areas of Shellharbour LGA, located between the suburbs of Mount Warrigal, Barrack Heights and Lake Illawarra.

Whilst the Illawarra Regional Strategy, identifies Warilla Grove as being part of the Warilla retail centre, they are two separate retail/commercial clusters. Warilla Grove Shopping Centre is the enclosed centre to the north of the suburb (corner of Shellharbour Road and Veronica Street). Warilla is the older strip centre located on George Street, around 650m south of Warilla Grove, with surrounding shops located on Shellharbour Road and Lake Entrance Road (as shown in the below map).

Figure 1 Warilla Town Centres Plan Study Area



Source: Shellharbour City

Background Documentation and Consultation

The following documents were reviewed as background to this Property Market Appraisal:

- Illawarra Regional Strategy (2006-2031);
- Shellharbour LGA Retail and Commercial Centres Study (2008); and
- Shellharbour LGA Employment Lands Study (2009).

The following individuals were consulted as part of the research process which informed this Appraisal:

- Gabrielle Wilson, MMJ Commercial – Wollongong, 0407 439 611
- Tony Hunt, Ray White – Wollongong, 0419 994 369

- John Venn, Property, 0429 949 800
- Marta Amann, Colliers International Wollongong, 0414 253 763
- Nathan Campbell, Right Choice Real estate (02) 4257 6444

2 POPULATION AND HOUSEHOLD CHANGE

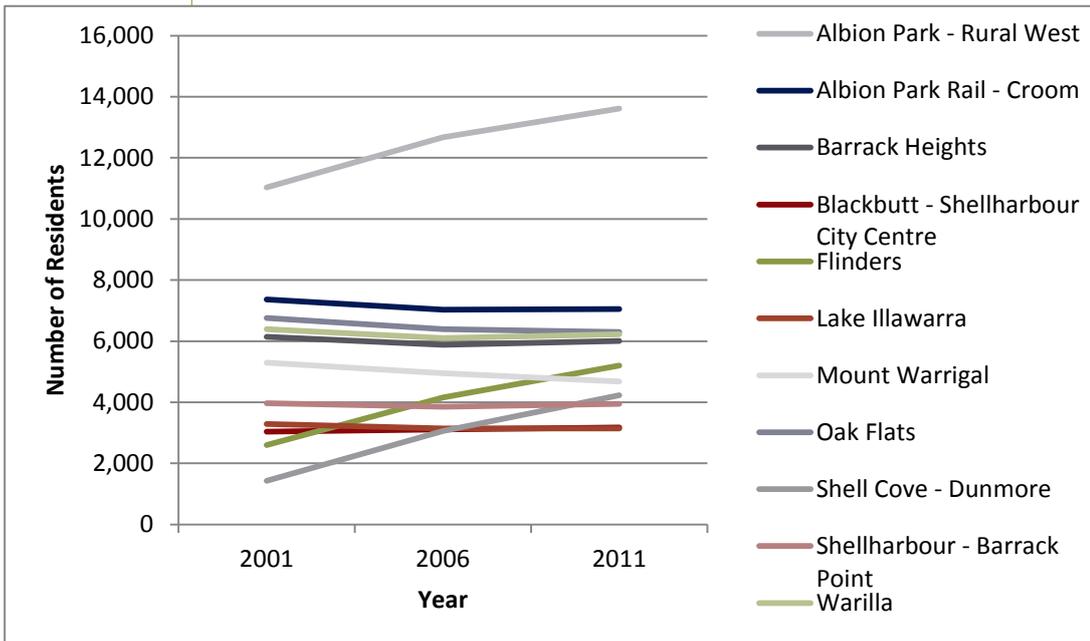
This chapter examines the key population and household characteristics of the resident population of Warilla. Comparisons have been made with Shellharbour City where appropriate. The analysis compares historical demographic trends with Council’s population and household growth forecasts.

Historical Population Growth

In 2011 Shellharbour City accommodated 63,605¹ persons, which represented growth of 6,196 persons or average annual growth of 1.0% since 2001.

As depicted in the figure below, Warilla has seen a marginal decline in population over the last decade, from 6,393 in 2001 to 6,222 in 2011. Warilla is an older more established residential area of the City and there has been little new housing since 2001.

Figure 2 - Historical Population Growth in Shellharbour City by Locality (2001-2011)



Source: Shellharbour profile.id (viewed December 2014)

On the other hand, new residential areas such as Shell Cove and Flinders have experienced strong growth rates. These localities have

¹ Source: Shellharbour profile.id. Shellharbour profile.id has sourced the population estimates from the Australian Bureau of Statistics Census Counts, 2001, 2006 and 2011. Please note the profile.id population estimates for 2011 differ from the forecast.id population estimates for 2011. This is because forecast.id estimates are derived from Estimated Resident Population from the Australian Bureau of Statistics, rather than the Census Count. The Estimated Residential Population factors in population missed by the Census and population overseas on Census night.

proved popular due to their proximity to Shellharbour City Centre, the provision of new services (e.g. schools and community facilities) and in some cases their proximity or views to the water.

Study Area

The following section provides a snapshot of demographic data for Warilla from the ABS Census of Population and Housing 2001, 2006 and 2011 (as shown in the figure below).

Figure 3 Warilla Suburb



Source: Shellharbour profile.id (2015)

Population Projections

The below table outlines the population projections for Shellharbour City by suburb and has been sourced from forecast.id. Compared to other locations within Shellharbour City, there is small population growth anticipated in Warilla over the period of 2011 to 2036. Blackbutt - Shellharbour City Centre, Shell Cove, and the Rural Balance are anticipated to accommodate the majority of growth in Shellharbour City.

Table 1 Shellharbour City Forecast Population Growth (2011 to 2036)

Location	2011	2016	2021	2026	2031	2036	Change 2036-2011	Avg. Annual % Change
Shellharbour City	66,218	69,512	73,292	77,379	81,335	85,262	19,044	1.0%
Albion Park	13,287	13,317	13,280	13,375	13,542	13,596	309	0.1%
Albion Park Rail	7,236	7,072	6,955	6,935	6,991	7,114	-122	-0.1%

Barrack Heights	6,276	6,343	6,285	6,266	6,298	6,355	79	0.1%
Blackbutt - Shellharbour City Centre	3,341	3,465	4,942	5,322	5,349	5,262	1,921	1.8%
Flinders	5,436	6,478	6,475	6,301	6,162	6,066	630	0.4%
Lake Illawarra	3,276	3,326	3,372	3,409	3,430	3,456	180	0.2%
Mount Warrigal	4,877	4,779	4,700	4,677	4,705	4,746	-131	-0.1%
Oak Flats	6,623	6,539	6,517	6,541	6,592	6,665	42	0.0%
Rural Balance	1,049	1,315	2,502	5,603	9,378	13,267	12,218	10.7%
Shell Cove	4,203	6,147	7,524	8,124	7,930	7,610	3,407	2.4%
Shellharbour - Barrack Point	4,126	4,223	4,186	4,201	4,240	4,333	207	0.2%
Warilla	6,487*	6,510	6,553	6,625	6,718	6,791	304	0.2%

Source: Shellharbour forecast.id (November, 2014)

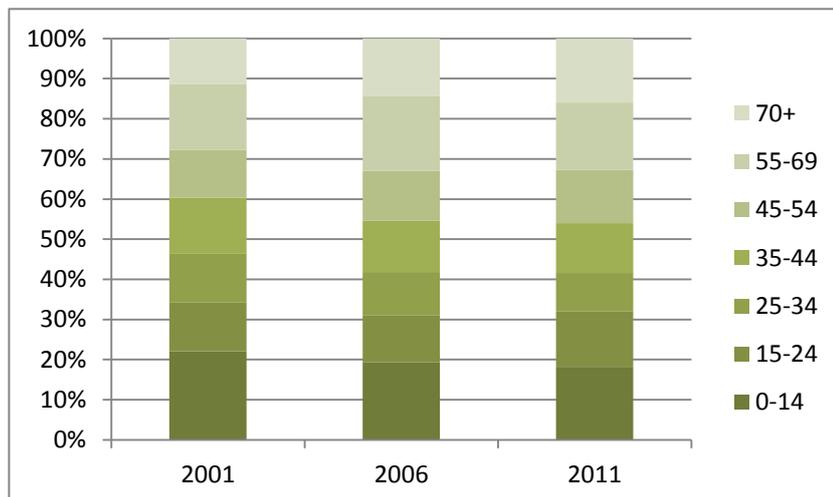
Note the table above is based on population numbers in forecast.id. The population numbers in forecast.id for the 2011 base year are derived from Estimated Resident Population from the Australian Bureau of Statistics. These differ from (and are usually higher than) Census counts (which were used for Figure 2 which displayed historical population growth) as they factor in population missed by the Census and population overseas on Census night.

Age Profile

In terms of the age profile of Warilla (refer to Figure 4):

- The area is characterised by an aging population, with the median age increasing from 37 years to 42 years over the period 2001 to 2011²;
- Growth was particularly noticeable in the 70+ year age cohort;
- Compared to Shellharbour City, there was a lower proportion of people in the younger age groups (under 15) and a higher proportion of people in the older age groups (65+) in Warilla; and
- In 2011, 18.2% of the population was aged between 0 and 15, and 21.6% were aged 65 years and over, compared with 21.3% and 14.3% respectively for Shellharbour City.

Figure 4 - Warilla Historical Age Structure (2001-2011)

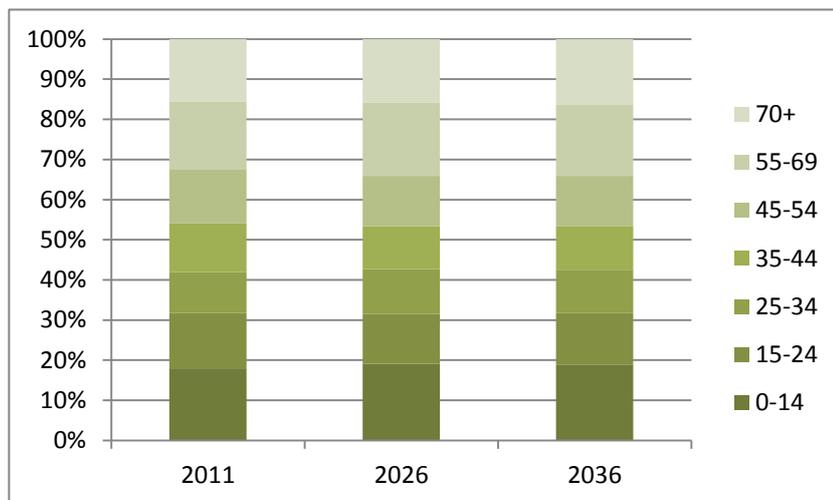


Source: Shellharbour profile.id (viewed November 2014)

Warilla is expected to continue to experience an aging population (see figure below), with the proportion of persons aged 55 and over expected to increase from 33% in 2011 to 34% of the total persons in 2036.

² Warilla ABS Census of Population and Housing 2001 and 2011

Figure 5 - Warilla Forecast Change in Age Structure to 2036



Source: Shellharbour forecast.id (November, 2014)

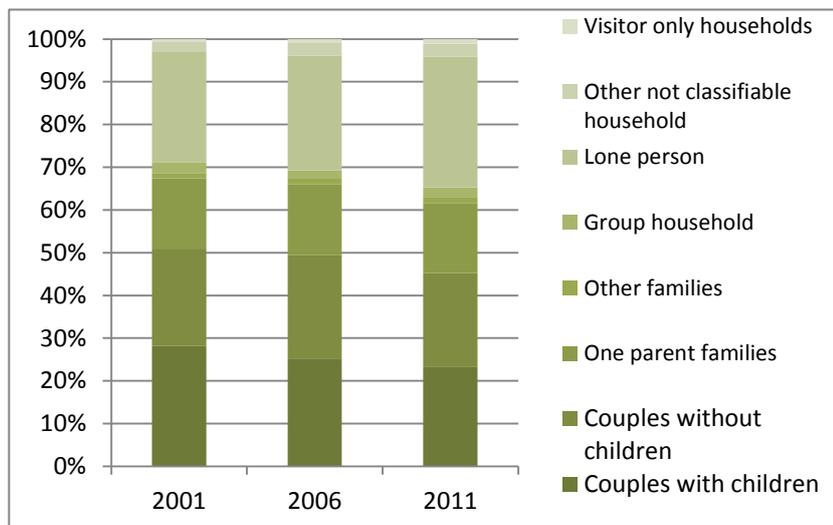
Household Structure

There were 2,529 households in Warilla in 2011, slightly up from the 2,418 recorded in 2001³. In terms of the nature of households (refer to figure below):

- The proportion of couples with children has declined substantial from representing 28% of all households in 2001 to 23% in 2011.
- The proportion of lone person households experienced high rates of growth over the period. It is expected that this relates to an aging population rather than an increase in single persons relocating to Warilla.
- Over the period, the median household size has declined from 2.5 persons in 2001 to 2.4 persons in 2011. Declining household sizes were also experienced in other older established suburbs such as Oak Flats.

³ Shellharbour profile.id (viewed July 2015)

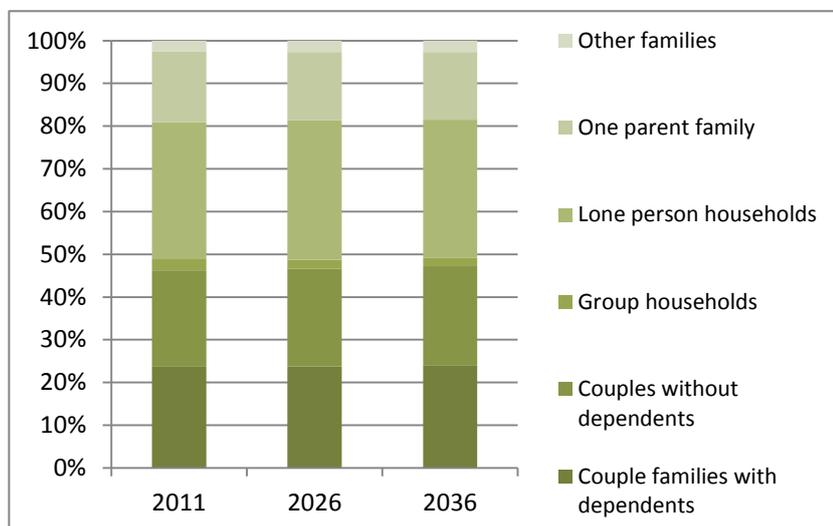
Figure 6 - Warilla Historical Household Structure (2001-2011)



Source: Shellharbour forecast.id (November, 2014)

The following graph compares forecast household change in Warilla. Warilla is anticipated to accommodate 2,809 households by 2036⁴. The household structure is assumed to remain stable to 2036 with the greatest proportions of households projected to be lone persons.

Figure 7 - Warilla Forecast Change in Household Structure to 2036



Source: Shellharbour forecast.id (November, 2014)

The tables below sets income data and employment characteristics for Warilla based on the 2011 ABS Census.

⁴ Shellharbour forecast.id. (November 2014)

Table 2 - Household Income Level Comparisons for Warilla

	Warilla	Shellharbour City	Regional NSW
\$0-\$399	21.2%	12.7%	14.8%
\$400-\$799	28.3%	20.4%	22.6%
\$800-\$1,499	21.0%	22.5%	23.7%
\$1,500-\$2,499	13.5%	20.7%	16.7%
\$2,500-\$3,499	4.4%	10.2%	8.4%
\$3,500+	1.3%	3.2%	2.9%
All incomes not stated	10.4%	10.4%	10.8%

Source: ABS Community Profile 2011

Table 3 Occupation Profile for Warilla and Shellharbour City

Occupation	Warilla		Shellharbour City	
	2006	2011	2006	2011
Managers	6%	6%	9%	9%
Professionals	9%	10%	13%	14%
Technicians and Trades Workers	17%	18%	18%	18%
Community and Personal Service Workers	11%	12%	10%	12%
Clerical and Administrative Workers	12%	13%	14%	14%
Sales Workers	12%	11%	12%	11%
Machinery Operators And Drivers	13%	12%	11%	10%
Labourers	17%	15%	12%	11%
Inadequately described	3%	2%	2%	2%

Source: ABS Community Profile 2006 and 2011

From the above tables the following analysis of employment and income characteristics has been derived:

- The proportion of residents within white collar occupations (i.e. managers and professionals) has remained level from 2006 to

2011 at 16% and remains below the Shellharbour City benchmark.

- The proportion of 'blue collar' workers in Warilla has remained stable 46% from 2006 to 2011 and remains above the Shellharbour City average.
- Warilla contained a higher proportion of households earning less than \$1,499/week (70%) and a lower proportion earning greater than \$2,500/week or more (6%) when compared to the Shellharbour City Average and the Regional NSW profile.

3 RESIDENTIAL ASSESSMENT

This Chapter undertakes an assessment of the residential market in Shellharbour City and specifically in the Warilla suburb. It uses published data sources and conversations with local agents to provide an insight into the nature of residential market demand and supply in the Warilla locality.

Drivers of Demand

Low interest rates and improved business confidence since the Federal election has succeeded in stimulating the property sector in parts of Australia, including NSW, despite uncertainties in the global economy. Increased construction activity is reported⁵ and business and consumer confidence is growing in most sectors.

The development of residential is driving more widespread renewal than any other land use at present, representing the 'highest and best use' from a development standpoint. Sales of development sites reflect this sentiment, with sites offering residential development opportunities observed to be principally driving sales activity in the development market.

A period of soft residential activity and growth since 2004 resulted in significant pent-up demand. This is a large contributing factor to the high levels of market activity currently witnessed, from generous premiums paid to assemble and amalgamate development sites to rapid and high level of pre-sales.

Late 2013 was the start of a property bubble in the NSW market evident by significant price rises, increase in development activity, buyer enquires and clearance rates. Residential property prices and investor interest over the 5 years prior to 2013 were quite flat and construction activity was failing to keep up with long term demand (which resulted in average household sizes or occupancy rates increasing slightly in the last inter-censal period). The recent upward trend in the residential market is a correction to the previous 5 years of flat growth.

The key drivers to Illawarra's residential property market are:

- Low interest rates underpinning affordability;
- High cost of ownership leading to a higher propensity for households to rent;

⁵ Source: Property Week, Property Council of Australia (October 2013)

- Downsizing of empty nesters;
- Demographic trends leading to declining household sizes;
- Strong population growth from international migration and natural increase; and
- Strong demand from international investors particularly from Asia.

Market Activity

Warilla is a predominately a low rise and low density area, with the vast majority of dwellings separate dwellings. 2011 Census Data indicates that almost three quarters (74%) of all dwellings are separate house dwellings followed by semi-detached, row terrace houses or townhouses (9%). Warilla is considered an attractive destination for retirees and established families drawn to the area due to its proximity to Shellharbour City Centre and Shellharbour Village, employment opportunities and beaches.

Drawing from discussions with local agents active in Warilla undertaken in July 2015, the following observations are made about the owner occupier market:

- The profile of buyers in Warilla comprises of retirees and older couples and families looking to downsize. There are a small proportion of young professional and young families also attracted to the area mainly due to the area's affordability, however Shellharbour City Centre is typically the preferred location for these buyers. Warilla residential market also comprises a proportion of investors;
- Residential properties in Shellharbour City Centre, Shellharbour Village and Warilla have a relatively strong take up rate. It was indicated that properties in these areas are typically absorbed within a few weeks to a month of being listed. For Warilla this is attributed to low supply and affordability;
- There is strong demand from first-time homebuyers for representation in Shellharbour Village and Shellharbour City Centre, whilst Warilla typically attracts second/third – home buyers generally downsizing;
- Agents opined that buyers could be attracted to Warilla due to the suburb's proximity to the Stockland Shellharbour, proximity to employment and beaches, the area's competitively priced homes and buyer's affiliation, familiarity or attachment to the area;

- According to selling agents, single level dwellings (i.e. villas rather than townhouses), apartments with lift access and low maintenance properties are desirable forms of housing in the current market given the demographic profile of current buyers in the area (i.e. an elderly market); and
- Selling agents observe that new housing stock in Warilla, Shellharbour City Centre, Shellharbour Village are typically townhouses or villas as there is little financial incentive to buy apartments given that there is an availability of competitively priced townhouses and detached homes.

Rental Demand

Demand from the investor market drives a notable component of residential development and sales in Shellharbour City Centre, Shellharbour Village and Warilla. 39% of households rented in Warilla in 2011, which is well above the NSW average (30%) and is indicative of the high proportion of investors in the area - largely a function of the lower sale price of homes at Warilla, making it affordable for investors to buy.

Discussions with leasing agents revealed that:

- The renter market for Warilla is characterised by a mix of young families and elderly couples attracted to the area's highly accessible nature, proximity to Shellharbour employment hub and affordable rental prices;
- The renter market in Warilla is very limited. This is further supported by realestate.com which revealed only two units and one townhouse is currently being advertised for lease as of July 2015; and
- The leasing agent opined that there is greater demand for 2 to 3 bedroom dwellings, with 2 bedroom dwellings attracting those seeking to downsize and 3 bedrooms dwellings attracting young families.

The median unit rental prices for 2-bedroom dwellings in the Shellharbour LGA is \$310 which is \$115 or 27% lower than NSW average (\$430)⁶. This is supported by analysis of realestate.com.au (July 2015) which found only 11 apartments are currently advertised

⁶ Rent and Sales Report Issue 111, Housing NSW (June 2014)

for rent within Shellharbour City and the surrounding suburbs (one 1-bedroom units; six 2 bedroom units and four 3 bedroom units), with no units located in Warilla. This is consistent with the local agent's observations that supply of units in Warilla is low.

Residential Sales

The median house price for Warilla in the year ending September 2014 was \$416,000 – an increase of 18% from the previous year. The median unit price for Warilla over the same period was \$346,000, which represents an 11% increase from the previous year.⁷

Selling agents observe that new housing stock in Warilla are typically townhouses or villas rather than apartments owing to size of the lots and affordability in the area. The majority of units are typically located near Shellharbour City Centre which commands a premium over Warilla.

New Apartments in the Local Area

Despite little development in the Warilla area, there have been three new developments in the surrounding suburbs which provide good comparisons (shown in the table below). Recent apartments in Flinders, Barrack Heights and Shellharbour City Centre provide the most up to date prices being achieved in the area. It should be noted, however, that units in Shellharbour City Centre are likely to attract a premium when compared to Warilla.

Table 4 Recent Sales Activity of Residential Units in Barrack Heights and Shellharbour

Development	Unit Type	Sale Price	Comment
Tabourie Cl, Flinders NSW 2529	2b units *12 (110sqm)	\$420,000 - \$440,000 (\$3,800- \$4000/sqm)	Upon completion in December 2015, this residential development will provide 27 units. The development has been staged over two stages with all units in stage one sold (i.e. 14 units). Stage 2 units are currently not on the market, however the local agent expects a quick take up rate based on stage one sales (with all units sold within 3 months). The agent advised that buyers of 2 bedroom units were evenly split between young professionals and elderly couples looking to downsize, whilst 3 bedroom units were typically sought out by young families.
	3b units*15 (140sqm)	\$500,000 - \$570,000 (\$3,500 - \$4,100/sqm)	

⁷ Residex Report, September 2014

Tahlia Apartments 121-125 Lake Entrance Road, Barrack Heights, NSW 2528	1b units*2 (50sqm)	\$280,000- \$315,000 (\$5,600/sqm)	The Tahlia development consists of 14 apartments over 2 levels and 4 townhouses. Due to delays with construction, completion is now anticipated for March 2016. There are currently only 5 remaining with 20% sold in the first two weeks on the market (February 2014). Local agents advised that the 5 remaining units are also the only affordable housing units ⁸ provided as part of this development. Local agents advised the majority of buyers were older elderly couples seeking to downsize and had an affiliation with the area. There were also a small proportion of investors.
	2b units*15 (67-80sqm)	\$310,000- \$369,000 (\$4,600/sqm)	
	3b units*1 (96sqm)	\$370,000* (\$3,750/sqm)	
1 Memorial Drive, Shellharbour City Centre	2b units*4 (80sqm)	\$395,000 (\$4,940/sqm)	This mixed use development was completed in mid 2015 and consists of 6 units, with all units sold within six months of marketing (with marketing commencing July 2014). Local agents advised that the sale of units was evenly split between owner occupiers and investors (including holiday home owners).
	3b units*2 (95sqm)	\$420,000- \$449,000 (\$4,420- \$4,726/sqm)	

Source: HillPDA research July 2015

*Local agent advised in current market the unit would sell for \$390,000-\$400,000.

Shellharbour City Centre has some clear advantages over Warilla. It provides a far superior retail offer and has a strong market appeal due to the proximity to community services and employment. By contrast, residential stock within Warilla located along the coastline and/or with ocean views have the potential to attract a premium over residential stock located within Shellharbour City Centre.

Agents confirmed that although Warilla is predominately single storey detached housing, attached dwellings including new apartments could potentially work within Warilla due to the area being within close proximity to the Shellharbour City Centre, the beaches and sporting ovals. Fast take up rates would be achieved if sale values were priced according to the current market. Further local agents indicated given Warilla's demographic profile (i.e. a stronger presence of retirees relative to Shellharbour City, Oak Flats and Flinders) single level dwellings including villas or units with lift access would be prudent for new residential stock in Warilla.

⁸ Affordable housing refers to housing that has been developed with some assistance from the NSW and/or Commonwealth Governments, including through planning incentives. It is only available in some locations and eligibility criteria apply.

Despite the above apartments may not be viable at this stage in Warilla, meaning that there is insufficient profit for developers to overcome the risk of site acquisition, finance and redevelopment. The design and construction of any apartments in Warilla would need to be cost effective in order for such development to be viable.

Medium Density Development Pipeline

There are limited medium density developments within the suburb of Warilla, with only 13 townhouses and units in the pipeline over the next few years.

The following table depicts the type and mix of new residential units planned for delivery in Warilla and surrounding area over the next few years.

Table 5 Strata Residential Supply Pipeline in the City of Shellharbour

Address	Status	Completion	Dwelling Type	No.	Residential Mix
77 Reddall Pd, Lake Illawarra, NSW 2528	Construction	2015	Townhouses	4	3+ bedroom: 100%
121-125 Lake Entrance Rd, Barrack Heights, NSW 2528	Construction	2015	Units	18	1 bedroom: 11% 2 bedroom: 78% 3+ bedroom: 11%
31-35 Chapman Av, Mount Warrigal, NSW 2528	Contract Let	2015	Units	8	1 bedroom: 25% 2 bedroom: 75%
19-23 Bradman Av, Warilla, NSW 2528	Contract Let	2015	Units	10	2 bedroom: 100%
138 Pur Pur Av, Lake Illawarra, NSW 2528	Contract Let	2015	Townhouses	3	3 bedroom: 100%
149-151 Pur Pur Av, Lake Illawarra, NSW 2528	Contract Let	2016	Townhouses	3	3+ bedroom: 100%
13-15 Ulster Av, Warilla, NSW 2528	Contract Let	2015	Townhouses	3	Not disclosed
32 Day St, Lake Illawarra, NSW 2528	Application	2016	Villas and Townhouses	3	3 bedroom: 100%
30 Peterborough Av, Lake Illawarra, NSW 2528	Application	2016	Units	9	2 bedroom: 100%
19 Pur Pur Av, Lake Illawarra, NSW 2528	Application	2017	Townhouses	10	3+ bedroom: 100%
70 Jason Av, Barrack Heights, NSW 2528	Approval	2016	Villas and Townhouses	7	2 bedroom: 57% 3+ bedroom: 43%
Total				78	

Source: Cordell Connect, HillPDA Research (October 2014)

The table above indicates that there are only 78 strata developments planned within City of Shellharbour, with units accounting for 58%. The low supply of strata developments is indicative of the under-representation and lower demand for strata developments within this locality.

In addition to the above there are large greenfield release areas at Calderwood, Tullimbar and Shell Cove. The below table describes the potential sale prices of dwellings at the planned Shell Cove release area.

Table 6 Residential Estate Pipeline in Shell Cove

Development	Sale Price	Unit Type	Comment
Shell Cove Precinct	\$670,000	Detached 4br (284sqm internal)	This Australand development is a large scale project consisting of multiple uses at an approximated total value of \$436m (source: Cordell Connect).
	\$645,000	Attached 4br (214sqm internal)	
	\$550,000	Attached 3br (195sqm internal) Sample size: 24	There is an Aged Care/Seniors living component, with 128 single bedrooms and a further 98 independent living units. The development will also create marina facilities, deliver open community space and involve work to the wetlands. Business park with Gross Floor Area (GFA) of 31,000sqm and retail development GFA of 22,000sqm including a beachfront hotel.

Source: Cordell Connect and discussion with Australand.

Key Findings from Market Research

This Chapter has indicated the following with respect to the residential market in Warilla:

- Residential demand emanates from retirees, older couples and families as well investors who are attracted to the central location of Warilla and the affordability of the area;
- There is a limited supply of strata developments in Warilla and surrounding suburbs, with the majority of the new stock provided in Warilla typically townhouses or villas. This coupled with the relatively quick uptake of these types dwellings within the locality (as advised by local agents) suggests that there may be latent demand for medium density developments (i.e. townhouses and villas) within Warilla;

- Whilst demand for housing is growing in the greater area, land for medium to high density within Warilla has been limited. Such a predicament is rarely a result of any one factor. Rather the successful redevelopment of an area relates to a range of market and socio-economic conditions including the ability to raise finance, the availability of land for redevelopment (which relates to the willingness of existing land owners to sell), the cost of construction, the desirability of the Warilla by the market and the capacity of development permitted under the current planning controls; and
- Whilst Warilla is considered a desirable location, the economics of redeveloping to medium density in the Study Area may not be at a stage whereby there is sufficient reward (i.e. profit) for the developer to overcome the risk of site acquisition, finance and redevelopment. This is particularly the case on smaller, more complex sites that are fragmented in ownership.

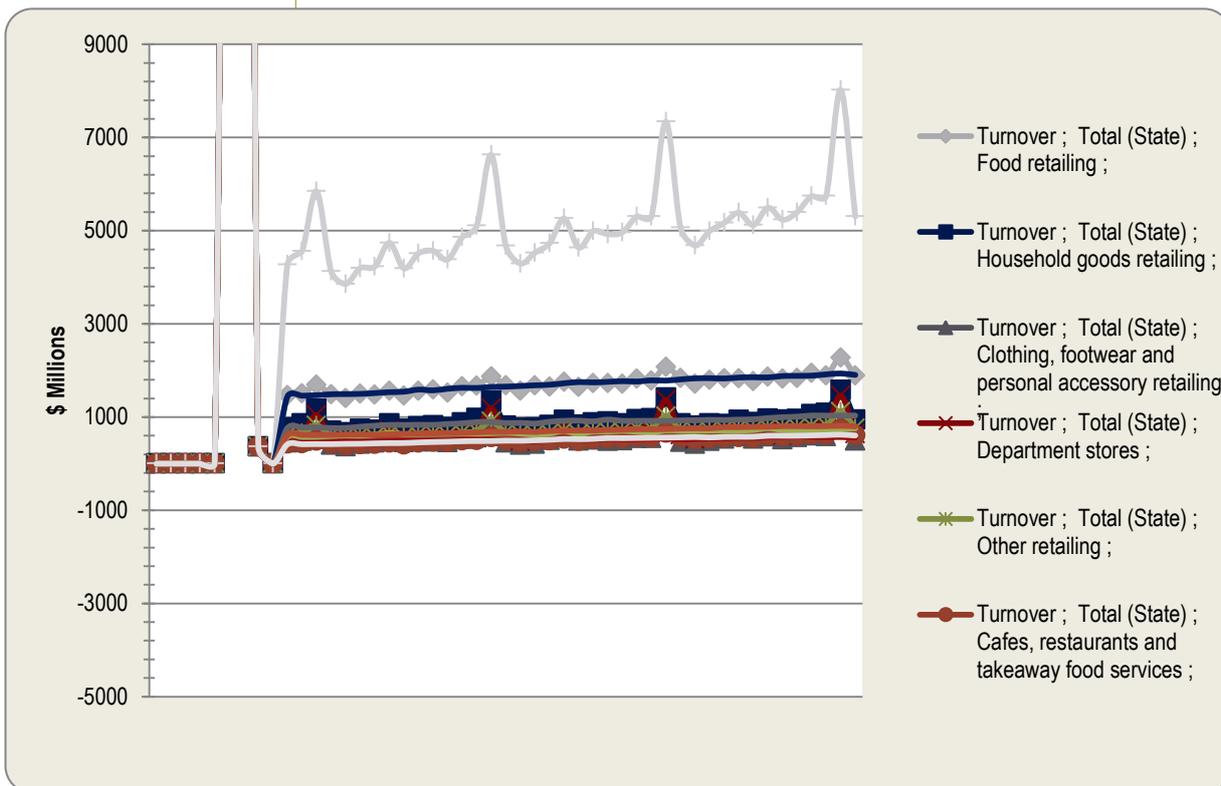
4 RETAIL AND COMMERCIAL FLOORSPACE ASSESSMENT

This chapter examines retail trends and the market for retail and commercial floorspace in Warilla based on a review of Council’s strategy for accommodating growth, a demand assessment of shopfront floorspace.

Retail Trends

Retail is an important sector of the Australian Economy. In 2009-10 retail contributed 4.3% to the Country’s Gross Domestic Product (GDP) and in 2011, 11% of Australian employees worked in the retail industry⁹. Recent trends suggest that retail sales are increasing after a decline following the GFC. Retail sales recorded growth of 4.4% between May 2014 and May 2015¹⁰.

Figure 8 Retail Trade in Australia October 1984 to May 2015



Source: : 8501.0 - Retail Trade, Australia, May 2015 – seasonally adjusted

The retail industry is a dynamic one with a range of trends influencing its shape, form and composition. The following section explores some

⁹ Source: ABS Census 2011

¹⁰ Source: 8501.0 - Retail Trade, Australia, May 2014

of the trends likely to influence the nature of the proposed Warilla Town Centres and the needs of the residents they serve.

Lifestyle Trends

Traditionally retailing followed a hierarchy from regional through to district to small local centres. More recently that hierarchy has been challenged by the following social and economic trends:

- Increase in the proportion of working women;
- Increase in the proportion of part-time and casual employment and reduction in full-time employment;
- Reduction in the proportion of households that match the ‘traditional family’ model and an increase in the number of single persons and single parent households;
- Increase disparity of household income, ranging from high double income households to households that rely on welfare;
- Ageing of the population; and
- Increasing working hours for those in full-time employment.

The industry’s response to these changes has led to the growth and introduction of:

- The regional centre which incorporate a large diversity of shops, including department stores, complemented by leisure activities and other facilities with an extensive trade area;
- ‘Convenience community centres’ usually dominated by a supermarket to meet daily and weekly shopping needs and ‘standalone supermarkets’ offering a just-in-time ‘one stop shop’ (petrol, video, pharmacy, groceries, fast food, etc.);
- ‘Convenience service centres’ being petrol stations on main highways but offering a just-in-time shop with a range of groceries and fast foods (e.g. 7 Eleven and Five Star);
- ‘Category killers’ that provide an extensive range and depth of competitively priced merchandise within a single market segment (– e.g. Bunnings, BabyCo, Harvey Norman, Freedom, Toys R Us, etc). Bulky Goods that integrate warehousing with retailing and ‘Power Centres’ that incorporate multiple category killers and bulky goods retailers in one large centre.
- Factory Outlets usually in fringe industrial areas providing a cluster of out of season clothing and homeware stock.

All the above demographic and employment trends point to the need for more flexible trading hours to provide convenience for what is

Larger retail centres are more attractive to both shoppers and retailers comparative to smaller centres

termed the “time-poor” shopper. In other words, we are steadily replacing the once-a-week shop with a series of small shopping trips as and when we need to buy various goods. This is called “just in time” shopping. The increasing percentage of working couples has demanded this change.

Regional centres because of their size and complexity find it hard to provide convenience shopping. A market niche has therefore emerged for smaller centres to provide this convenience of “quick-in” and “quick-out” shopping. Furthermore, many people find the larger malls impersonal and seek a sense of community with the smaller convenience centres. Such smaller centres can incorporate community services and facilities, integrated residential development and restaurants to provide an urban village that the community can identify as reflective of their local area/identity.

In terms of broader future retail trends, research undertaken by HillPDA has identified a number of significant trends likely to influence the retail sector over the next decade. It is important to note that this is not an exhaustive list, nor does it purport to comment on trends which would affect the in-store experience (e.g. the increasing emphasis on personalised marketing). Some of the key trends identified include the following:

- Consolidation of demand within larger centres;
- Large supermarkets in smaller centres;
- Increasing demand for residential uses in centres; and
- Continued evolution of online retail.

For the purpose of context, each of these trends are broadly explored below.

Consolidation of Demand within Large Centres

Large retail centres are attractive to shoppers because of their retail choice, product range and the mixed-use nature of their offer which extends well beyond purely retail uses. Larger centres are also more attractive to retailers comparative to smaller centres owing to their larger catchment areas. It is anticipated that larger centres will continue to strengthen their offer as a result of the expansion of new international retailers in the Australian market.

As consumers are becoming more brand savvy and are increasingly looking for particular brand names, it is expected that they will be increasingly attracted to the larger centres which provide this retail offer.

Smaller dwellings in accessible locations and lifestyle changes will see an increase for housing within centres

Larger Supermarkets in Smaller Centres

A recent trend which is likely to continue to influence the retail market relates to demand for larger supermarkets in smaller centres. This trend would see an increase in proposals seeking to develop supermarkets of up to 1,400sqm in smaller centres where previously smaller supermarkets or convenience stores may have prevailed.

It is anticipated that this trend will continue owing to:

- Increasing consumer habits towards undertaking multiple smaller convenience shopping trips during the week;
- Increasing desire from consumers for walkable and convenient access to food and grocery shopping reflecting declining vehicle ownership / usage; moreover there is expectations for access to retail facilities outside of traditional trading hours; and
- Strong activity from smaller supermarket operators including ALDI and IGA with Coles and Woolworths increasingly competing at this end of the market.

Increasing Demand for Residential Uses in Centres

Demand for housing within centres is increasing as a result of:

- Demand for smaller dwellings in accessible locations to support affordable living; and
- Lifestyle changes with residents increasingly favouring proximity to the strong offer of retail and personal services in centres. This reflects the increasing preference of young households to live in highly accessible and well serviced locations, retirees seeking to remain in their local neighbourhoods and downsize accordingly.

Continued Evolution of Online Retail

A major topic of debate regarding the future of retail in Australia is the continued growth of online retail and the likely impacts this may have to 'bricks and mortar' retail.

The latest data from National Australia Bank (NAB) indicates that for the year to January 2014 online retail spending increased to \$14.9 billion or by 11.3%. This accounted for approximately 6.5% of traditional retail spending overall¹¹, although market penetration rates vary significantly across category types. There has been continued growth for electronic games and toys, fashion, homewares

¹¹ Source: NAB Online Retail Sales Index, January 2014 (March 2014)

and appliances, groceries and liquor but trends have been much weaker for recreational and personal goods and media.

Retail analysts agree that online retail growth would continue in the future although there is no consensus as to the amount of growth that can be expected. The rate of growth from October 2013 to January 2014 was estimated at 0.1%.

It is likely that the growth of online retail will change the way shoppers interact with physical stores but current industry forecasts suggest this may not lead to a significant decline in demand for high street floorspace (with particular regard to supermarket floorspace), due largely to forecast population growth.

In addition to the above HillPDA have also reviewed recent retail spending figures and have identified the key retail trends which are likely to influence the type of retailers which prosper over the coming years. Our key findings are as follows:

- Growth in retail spending in NSW has generally been in line with the Australian average. The strengthening of consumer confidence has seen retail spending growth in NSW exceed the Australian average in last quarter of 2013 (2.4% vs 2.1%);
- Turnover in food and supermarket spend has seen an increase of 2.5% over the period of 2012 to 2013, reflecting the higher spend on basics;
- Department store turnover has seen a steady decline, down by -0.6% over 2012 to 2013;
- Clothing retailing turnover observed strong increases in NSW (10.5% increase from 2012 to 2013);
- Pharmaceutical sector experienced growth of +7.4% in NSW, the highest of all states nationally;
- Newspaper and book retailing sector fell in NSW by 20.2% over this same period, reflecting the structural change in the industry away from paper news and magazines to e-readers and electronic subscriptions. A similar decline has also been observed in music stores and photo printing retailing;
- Café turnover remained stable in NSW over 2012-2013, however has shown a growth nationally of 4.4% with trend expected to continue; and

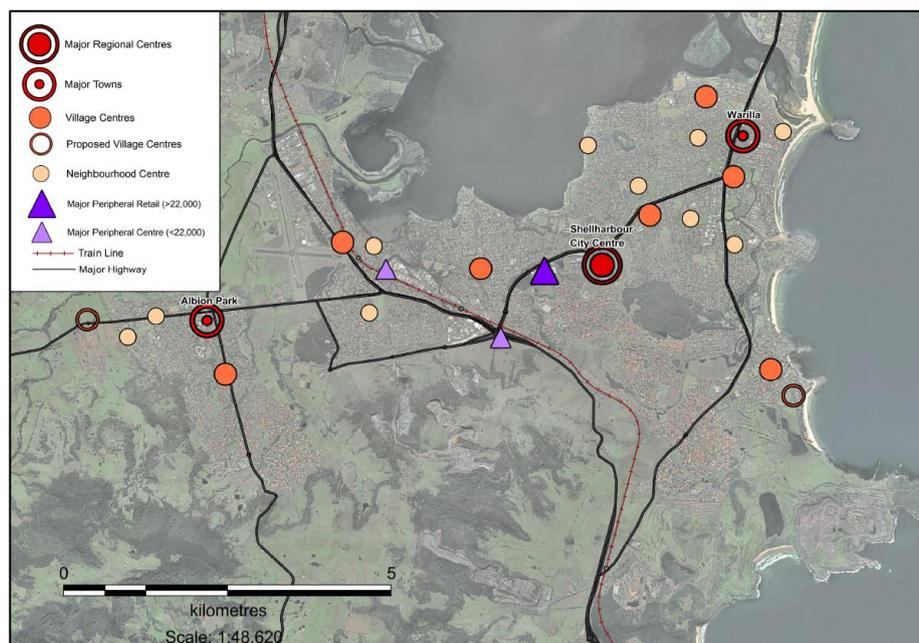
- The performance of the residential market in NSW is likely to result in improved demand for hardware and household goods, which had previously been below trend¹².

Warilla's Role and Function

Warilla town centres' trade area covers Lake Illawarra, Warilla, parts of Barrack Heights and Barrack Point. With no large supermarket in the south-east of the LGA, it is possible that Warilla is capturing some expenditure from Shellharbour Village due to easy access along Shellharbour Road. There is possibly some capture of expenditure from outside the LGA, via Windang (in Wollongong LGA); although it's expected that most expenditure from Windang would go to Warrawong.

The following map identifies the centres hierarchy in the City of Shellharbour.

Figure 9 Shellharbour City Centres Hierarchy



Source: Map produced by HillPDA using MapInfo 12.0 software and Microsoft Bing © 2013 Microsoft Corporation

Barrack Heights

The Barrack Heights retail centre, provided along Captain Cook Drive, is an enclosed two story building with a total lettable floorspace of

¹² Retail Market Overview – 2014 propell markets; ABS Retail Trends

4,596sqm, anchored by the 3,100sqm Centre Health Complex¹³. The centre also adjoins Shellharbour Private Hospital.

The complex accommodates various health and medical practitioners including a general medical centre, dentist, optometrist, a sleep clinic, pathology services, physiotherapy centre, cosmetic healthcare, and x-ray services. Within the same building are a 333sqm IGA Supermarket, 1,045sqm BWS Liquor Store, a small Australia Post outlet, a small café, and a travel agent¹⁴.

Lake Illawarra

Lake Illawarra provides some 2,340sqm of floorspace along Addison Avenue, of which all is associated to retail uses¹⁵. The specialties typically included a furniture store, hairdresser, takeaway food store, and a grocery store (720sqm).

Oak Flats

Oak Flats accommodated some 10,630sqm of Gross Lettable Area (GLA), of which 7,080sqm is attributed to retail uses¹⁶. Tenants typically included personal services and non-food specialty stores. Recent discussions with local agents suggest that vacancy levels have remained constant at around 700 to 800sqm.

Shellharbour City Centre

The City Centre is defined as a Major Regional Centre under the Draft Illawarra Regional Strategy (2006-31) and is the largest retail centre in Shellharbour City. The Centre developed out of the need for a central retail, commercial and civic centre in the LGA. The City Centre is located in the geographic heart of the urban area just south-west of Warilla, adjacent to Barrack Heights, and east of Albion Park Rail and Albion Park.

The retail precinct of the City Centre is focussed around Stockland Shellharbour, which has recently been redeveloped to a regional shopping centre of over 75,000sqm¹⁷. The centre includes a new Myer store as well as Target, Kmart, Coles and Woolworths, 220 speciality stores, a new and expanded fresh food precinct, and a community plaza with alfresco dining¹⁸. Whilst Stockland Shellharbour competes somewhat with smaller centres like Albion

¹³ Shellharbour LGA Retail and Commercial Centres Study, HillPDA (2008)

¹⁴ Shellharbour LGA Retail and Commercial Centres Study, HillPDA (2008)

¹⁵ Shellharbour LGA Retail and Commercial Centres Study, HillPDA (2008)

¹⁶ Oak Flats Town Centre Plan, HillPDA, 2015

¹⁷ Shellharbour LGA Retail and Commercial Centres Study, HillPDA (2008)

¹⁸ Source: <http://www.stockland.com.au>

Park and Warilla Grove, it also competes with other regional centres such as Warrawong and Figtree.

Stockland Shellharbour is located adjacent to Council's administration building and within close proximity to the 15,630sqm City Plaza which is located along Memorial Drive. Between City Plaza and Stockland are a few strip retail tenancies (along Holm Place and Lamerton Crescent), including a 1,400sqm Aldi Supermarket. The Cygnet Centre is a recently completed commercial office and retail development opposite City Plaza and accommodates a variety of small and medium sized retail and commercial businesses.

The HillPDA 2008 Retail Study indicated the Shellharbour City Centre accounted for almost 62,700sqm of total GLA, of which 45,000sqm was associated with retail uses and around 11,200sqm with commercial floorspace. The study did not take into account the expansion of Stockland Shellharbour, this has increased total GLA in the Centre to just under 100,000sqm of which around 75,000sqm would be retail uses.

Shellharbour Village

Shellharbour Village accommodated some 5,000sqm of Gross Lettable Area (GLA) retail floorspace¹⁹ which is focussed along Addison Street, Shellharbour. Tenants include personal services as well as numerous cafes and non-food specialty stores.

Albion Park Rail

Located east of Albion Park and west of Oak Flats, the Albion Park Rail retail precinct has various different clusters of retail and commercial activity stretched along Princes Highway, from the Central Business Park in the south to retailing in the north-west near the intersection with Creole Road and Mallee Street. The centre is relatively small by comparison to other centres in the City, partly due to retailing activity being fragmented along Princes Highway for a relatively long travel distance.

Albion Park Rail comprises 4,200sqm of lettable floorspace, of which 3,220sqm is attributed to specialty retail stores, and 460sqm to commercial services²⁰. A Masters store (13,500sqm) has recently opened in Shandan Circuit in Central Business Park²¹.

¹⁹ Review of Illawarra Retail Centre, SGS (2014)

²⁰ Shellharbour LGA Retail and Commercial Centres Study, HillPDA (2008)

²¹ Cordell Connect; Nearmaps

Albion Park South

To the south of Albion Park is the Albion Park Village Centre which has a convenience shopping role providing a wide range of specialty shops and medical services. Albion Park South equates to some 2,100sqm of floorspace, of which 1,960sqm is associated to retail uses, and the remainder to the local doctor's surgery²².

Ash Avenue/Pine Street Neighbourhood Centre

An Aldi supermarket of around 1,400sqm has been built in Albion Park Rail²³. The Aldi was built on a site previously identified in the 2008 Retail Study as the Ash Avenue/Pine Street Neighbourhood Centre. The Neighbourhood Centre is not located on a main road and is within a residential enclave of Albion Park Rail. That said, given the nature and offer of Aldi they do draw from a large trade area and are destinations in their own right.

Proposed Centres

There is a mixed use residential development in Tullimbar currently under construction that has been explicitly designed as an alternative to low density urban sprawl. Initial plans for Tullimbar incorporated a town centre which would accommodate 3,300sqm of retail and 4,770sqm of commercial floorspace. The design of the centre was based on 'traditional village life' with a mix of shops, café's, taverns, a supermarket, town hall, sports oval, pavilion, and church. The centre is anticipated to be completed by 2016²⁴.

The release area of Calderwood proposes a future town and village centre. The town centre will be anchored by larger supermarkets, and include specialty stores, cafes and restaurants. The village centre is planned to include a supermarket and local shops to cater for every day needs. The exact timeframe for delivery of the centres are unknown, however it is acknowledged that the stage one subdivision is to enable the delivery of a future village centre.

A retail/commercial/hotel/community development is proposed as part of planned Shell Cove Boat Harbour Precinct which will include a full-line supermarket. The development is in the planning stages, with the exact timeframe for delivery unknown.

²² Shellharbour LGA Retail and Commercial Centres Study, HillPDA (2008)

²³ Shellharbour LGA Retail and Commercial Centres Study, HillPDA (2008)

²⁴ Cordell Connect

Retail Context

Warilla provides two separate retail/commercial clusters which are described as follows:

- The enclosed Warilla Grove Shopping Centre is provided in the north of the suburb (corner of Shellharbour Road and Veronica Street. The centre provides over 11,661sqm of retail floorspace and is anchored by a Woolworths (4,379sqm), Aldi (2,399sqm) starting 2016 and 34 specialty shops.
- Traditional strip retailing is provided along George Street and contains some 15,050sqm of retail and commercial floorspace (excluding community and utility uses). Of this, 49% (7,755sqm) is dedicated to commercial floorspace, whilst only a third (5,357sqm) is attributed to retail uses. The remainder is representative of automotive, recreational/cultural, or utility associated floorspace.

Warilla Town Centres Floorspace Supply

Total Gross Lettable Area in the Warilla Town Centres is currently around 28,215sqm (excluding utility and community uses), of which 18,324sqm is being used for the retail of goods. The table below indicates the retail floorspace and types of retail businesses within the Warilla Town Centres.

Table 7 Warilla Town Centres Floorspace

Shop Use	GLA (sqm)	No. Businesses
Supermarket	6,778	2
Convenience Store	100	1
Service Station Conven. Store	235	3
Discount Depart. Store	0	0
Specialty Food	2,212	12
Specialty Non Food	3,376	20
Clothing	745	5
Cafes & Restaurants	690	4
Take Away Food	799	5
Personal Services	1,793	14
Second Hand Goods	652	3
Bulky Goods	486	1
Vacant Retail	458	4
Total Retail	18,324	74
Commercial - Finance	1,265	11
Commercial - Travel	155	1
Commercial - General	986	9
Commercial - Medical	3,703	11
Commercial - Real Estate	893	6

Commercial - Legal	694	6
Commercial - Vacant	369	2
Total Commercial	8,065	46
Entertainment	0	0
Recreation/Fitness	415	1
Hotel	560	1
Automotive	851	4
Wholesale/Homemaker	0	4
Utility	1,326	1
Community	104	1
Total Floorspace	29,645	132

Source: Shellharbour Retail & Commercial Centre Study 2008. Floorspace has been updated to reflect current floorspace using Cordell and discussions with agents whom have indicated there has been little change over this period.

During the time of the survey²⁵ Warilla had around 14 individual retail shops of which 4 were vacant.

A desktop review based on Cordell records has indicated that there have been no significant retail or commercial developments that have occurred over the period of 2008 and 2014 and discussions with local agents have also suggested the vacancy rate is generally in line with the previous 2008 levels.

Retail Performance

Warilla Grove reported moving annual turnover for the year to 31 July 2014 was \$100.16million²⁶, therefore trading at \$8,994/sqm, which is 10% higher than average for similar sized centres.

In light of the above and considering the age of Warilla Grove Shopping Centre the centre is trading considerably well despite increasing competition from Stockland Shellharbour and expansion of the Shellharbour City Centre.

However, the trade area of Warilla Grove is not growing, and may in fact contract once retail/commercial accommodation is developed in Shell Cove. Even though Warilla Grove is fairly convenient for commuters, the area is fairly built out, both in terms of residential and commercial development, without many options for expansion.

Warilla developed quickly during the manufacturing industry boom of the 1950's. With Port Kembla steelworks being relatively close, Warilla and the north-eastern parts of the LGA absorbed much of this new migrant population. Council moved from Albion Park to Warilla

²⁵ Shellharbour Retail & Commercial Centre Study 2008.

²⁶ Shopping Centre News, Mini Guns 2014

in 1969, and remained there until 1991, when the administration components moved to Shellharbour City Centre. The Council Chambers remain at Warilla today.

In terms of the traditional strip retailing provided along George Street the high proportion of shop front commercial floorspace indicates the centre is failing to attract good quality retail occupants, with many landlords having to settle for the lower rents provided by non-retail commercial tenants.

Warilla is not really in a position where it has demand to expand. The trade area of the centre has contracted over time, and the centre has lost dominance in the retail hierarchy firstly with the opening of Warilla Grove, then later with Stockland Shellharbour. New retail businesses have a preference for a well performing enclosed shopping centre like Warilla Grove or Stockland Shellharbour.

Notwithstanding this, the retail is performing sustainably supporting local businesses with few vacancies and an established local workforce.

Shopfront Floorspace Demand

In order to determine demand for shopfront floorspace in Warilla and the impact this will have on land uses in the centre, HillPDA has reviewed and updated the retail demand assessment. In doing so, HillPDA adopted the following methodology:

- Identify a resident trade area for the Warilla town centre;
- Determine the resident population of the trade area based on Council Forecasts and Bureau of Transport Statistics (BTS). Determine the total amount of resident retail expenditure generated by the trade area based on the ABS Household Expenditure Survey and Anysite 2014 data²⁷;
- Escalate total resident retail expenditure from 2014 to 2031 based on population growth (adopting Council population forecasts) and growth in real retail spend (assumed at 1.0% per annum);

²⁷ AnySite Data 2014 provides household expenditure by broad commodity type. The ABS Retail Survey 1998-99 (Cat No. 8624.0) provides a cross tabulation of store type (defined by ANZIC), by commodity type. Multiplying the percentages in the cross tabulation by total dollars spent generates household expenditure by retail store type.

- Apply capture rates to available expenditure by retail store type reflecting the proportion of spend that could be retained by retail stores within the trade area; and
- Determine demand for retail floorspace (sqm GLA) in the trade area by applying target sales turnover rates (retail sales per square metre based on industry benchmarks) to total available retail.

Identification of the Trade Area

It is recognised that the resident trade area of any retail centre is implicated by a range of factors including:

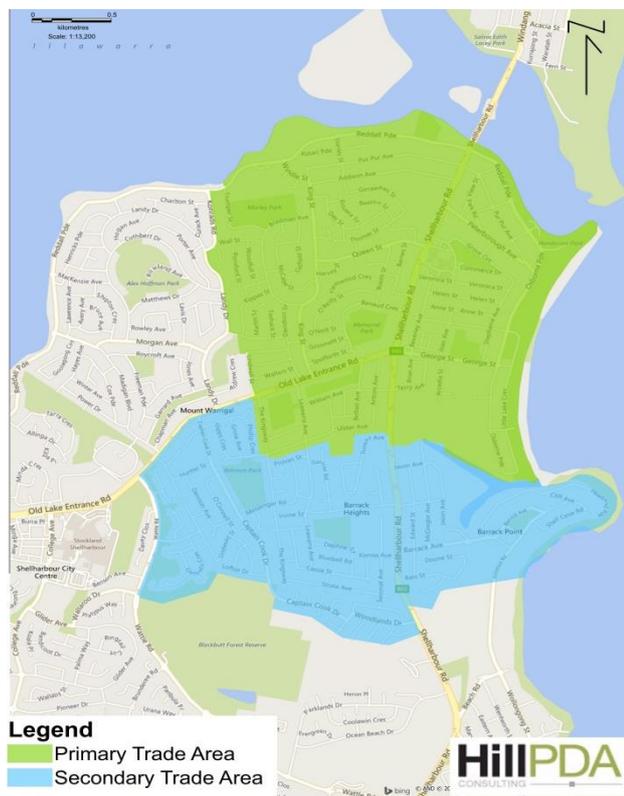
- The strength and attraction of the centre in question, determined by factors such as its composition, layout, ambience/atmosphere and car parking provision;
- Competitive retail centres, particularly their proximity to the centre in question and respective sizes, retail offer and attraction;
- The location and accessibility of the centre, including the available road and public transport network and travel times; and
- The presence or absence of physical barriers, such as rivers, railways, national parks and freeways.

Based on the retail hierarchy and competitive offer described above, Warilla's trade area has been defined to include one Primary Trade Area (PTA) and a Secondary Trade Area (STA) as follows:

- Warilla's PTA is defined as the residential area immediately surrounding the Town Centres and comprises the suburbs of Warilla and Lake Illawarra. Retail provision at Shellharbour City Centre restricts the extent of the PTA to the west whilst the larger centre of Warrawong restricts Warilla's PTA to the north. Retail facilities at Warilla would capture a proportion of everyday food and grocery shopping, as well as top-up shopping from residents in this area; and
- The STA includes those residents of Barrack Heights and Barrack Point. However owing to the retail provision provided within these localities and the proximity to Shellharbour, the proportional draw of trade from the STA would be significantly lower than the PTA.

The extent of the trade areas are shown in the following map.

Figure 10 – Warilla Main Trade Area (2015)



Source: HillPDA, MapInfo 12.5

We refer hereafter to the combination of the PTA and STA as the Main Trade Area (MTA) for Warilla.

Trade Area Population

For the purpose of this analysis HillPDA have adopted Council forecasts over the period of 2014 and 2031 for the PTA and Anysite Data 2014 for the STA which is largely aligned with Council's forecast²⁸.

Table 8 Warilla MTA Forecast Population Growth (2011 to 2031)

Year	2014	2019	2024	2031	Change 2014-2031	Avg. Annual Change
PTA	9,807	9,889	9,990	10,148	341	0.2%
STA	7,007	7,207	7,377	7,622	615	0.5%
MTA	16,814	17,096	17,367	17,770	956	0.3%

Source: Shellharbour forecast.id; Anysite Data 2014 (November, 2014)

²⁸ HillPDA adopted Anysite Data 2014 forecasts since Council boundaries for STA did not align with STA boundary however population growth rates were broadly in line.

Expenditure for Retail Space

Retail expenditure was sourced from AnySite Data 2014 which provides household expenditure by broad commodity type.

Based on the above, and assuming population growth forecasts as discussed in previous section of this chapter, HillPDA has forecast household retail expenditure from the MTA as provided in the following table.

Table 9 Forecast Retail Expenditure Generated by MTA Residents (\$m)

YEAR	2014	2019	2024	2031
Food & Groceries	65.3	69.9	74.6	81.9
Liquor Take-Away	21.3	22.7	24.3	26.7
Take-Away Food	7.2	7.7	8.2	9.1
Apparel	14.7	15.7	16.8	18.4
Homewares & Manchester	7.2	7.7	8.3	9.1
Bulky Goods	25.1	26.9	28.7	31.5
Other Goods	38.8	41.5	44.3	48.6
Selected Personal Services	6.5	7.0	7.5	8.2
Liquor Consumed On Premises	5.4	5.8	6.2	6.8
Meals in Pubs, Clubs, Restaurants	11.9	12.7	13.6	14.9
TOTAL	203.5	217.6	232.4	255.1

Source: HillPDA using Anysite Data 2014

The above forecast allows for 1.0% per annum real growth in retail spend per capita which is in line with historic growth from 1986 to 2010 and reflects growing affluence²⁹.

The ABS Retail Survey 1998-99 (Cat No. 8624.0) provides a cross tabulation of store type (defined by ANZSIC), by commodity type. Multiplying the percentages in the cross tabulation by total dollars spent generates household expenditure by retail store type. Turnover by retail store type generated by household expenditure is provided in the table below.

²⁹ Hill PDA Estimate based on data from ABS including Retail Sales, Consumer Price Index and Historical Population Statistics.

Table 10 Retail Expenditure from MTA by Retail Store Type (\$m)

YEAR	2014	2019	2024	2031
Supermarkets & Grocery Stores	68.6	73.4	78.4	86.0
Take-away Liquor Stores	15.0	16.1	17.2	18.8
Specialty Food Stores	7.7	8.2	8.8	9.6
Fast-Food Stores	10.0	10.7	11.4	12.5
Restaurants, Hotels and Clubs*	17.3	18.5	19.8	21.7
Department Stores	13.4	14.4	15.4	16.9
Apparel Stores	13.5	14.4	15.4	16.9
Bulky Goods Stores	29.8	31.8	34.0	37.3
Other Personal & Household Goods Retailing	29.6	31.7	33.9	37.2
Selected Personal Services**	6.5	7.0	7.5	8.2
Total Retailing	211.4	226.1	241.5	265.1

Source: * Turnover relating only to consumption of food and liquor (excludes all other types of revenue such as accommodation, gaming and gambling)

** Selected Personal Services includes hair and beauty, laundry, clothing hire and alterations, shoe repair, optical dispensing, photos and hire of videos

HillPDA Estimate using data from Anysite data 2014 and ABS Retail Survey 1988-99 (Cat 8624.0)

The expenditure totals in the above two tables do not quite equate. This is because some expenditure is lost to non-retailers (such as internet shopping) and some revenue enjoyed by retailers is not household expenditure related including wholesale trade and the hire of equipment for example.

As shown in the above table the MTA generated \$211.4 million of retail expenditure in 2014, including \$68.6 million in Grocery and Supermarket retailing. Retail expenditure is expected to increase to \$265.1 million by 2031 (an increase of 25%). Of the expenditure generated within the MTA, a substantial proportion would be captured by Shellharbour City and Westfield Warrawong.

HillPDA adopted a range of capture rates as shown in the table below. The capture rates do not represent the current situation, but rather they are aspirational targets that take account of the intended role and function of the Warilla Town Centres and an improved retail mix.

Table 11 Warilla Town Centres' Assumed Capture Rates³⁰

Retail Store Type	PTA	STA
Supermarkets & Grocery Stores	85%	35%
Take-away Liquor Stores	85%	35%
Specialty Food Stores	85%	35%
Fast-Food Stores	65%	25%
Restaurants, Hotels and Clubs*	65%	25%
Department Stores	0%	0%
Apparel Stores	15%	10%
Bulky Goods Stores	0%	0%
Other Personal & Household Goods Retailing	65%	25%
Selected Personal Services	65%	25%

Source: HillPDA 2014

Based on the above capture rates the proportion of resident retail spend available to Warilla's Town Centres from the MTA is shown in the following table. The analysis indicates that retail turnover available to retail facilities within the Warilla Town Centres is equivalent to \$106.3million in 2014, equivalent to around 50% of total available expenditure³¹. By 2031 retail turnover is forecast to increase to \$132.0 million, an increase of \$25.6 million over the period.

³⁰ Data relating to capture rates on the current situation is not available, however we would expect capture rates to be substantially lower particularly for 'Supermarket and Grocery Stores' category given the limited offer.

³¹ This only includes turnover from residents in the MTA

Table 12 Potential Capture of MTA Resident Expenditure in Warilla Town Centres to 2031 (\$m)

YEAR	2014	2019	2024	2031
Supermarkets & Grocery Stores	51.4	54.8	58.4	63.8
Take-away Liquor Stores	11.2	12.0	12.7	13.9
Specialty Food Stores	5.8	6.1	6.5	7.1
Fast-Food Stores	5.7	6.0	6.4	7.0
Restaurants, Hotels and Clubs*	9.8	10.4	11.1	12.1
Department Stores	0.0	0.0	0.0	0.0
Apparel Stores	2.1	2.2	2.3	2.6
Bulky Goods Stores	0.0	0.0	0.0	0.0
Other Personal & Household Goods Retailing	16.7	17.8	18.9	20.7
Selected Personal Services**	3.7	3.9	4.2	4.6
Total Retailing	106.3	113.2	120.6	131.9

Source: HillPDA 2014

In addition to the above MTA residential expenditure, we have assumed there is likely to be a further 20% of expenditure from residents beyond the MTA and workers in the Warilla Town Centres.

Demand for Shopfront Floorspace

Demand for retail floorspace is forecast by applying target retail turnover density (RTD) rates to expenditure by target captured rates. Retail turnover density is measured by dollars per square metre per annum (\$/sqm/ann). Target RTDs vary depending on retail store type and composition.

The following table forecasts demand for retail floorspace (sqm) for the Warilla Town Centres to 2031 based on the application of these

target turnover rates to captured spend and includes an allowance of 0.5% per annum for real turnover increases³².

Table 13 - Demand for Retail Floorspace in the Warilla Town Centres to 2031 (sqm GLA)

YEAR	Target Rate	Growth**	2014	2019	2024	2031
Supermarkets & Grocery Stores	11,000	0.50%	4,675	4,857	5,047	5,331
Take-away Liquor Stores	12,000	0.50%	935	972	1,010	1,067
Specialty Food Stores	8,000	0.50%	719	747	777	820
Fast-Food Stores	8,000	0.50%	707	734	763	806
Restaurants, Hotels and Clubs	5,000	0.50%	1,956	2,032	2,111	2,229
Department Stores	3,600	0.50%	0	0	0	0
Clothing Stores	6,000	0.50%	342	357	371	393
Bulky Goods Stores	3,700	0.50%	0	0	0	0
Other Personal & Household Goods Retailing	4,900	0.50%	3,407	3,539	3,677	3,883
Selected Personal Services	3,500	0.50%	1,053	1,094	1,136	1,200
Total Retailing	7,704	0.50%	13,795	14,330	14,890	15,728

Source: ABS Retail Survey 1998-99 (escalated to 2007 dollars), JHD Retail Averages, Shopping Centre News, HillPDA and various consultancy studies

** This is in line with historic trends. Expenditure per capita has increased at around 1.1% to 1.3% above CPI every year since 1986. Around half of this increase has translated into an increase in retail floorspace per capita (from 1.8sqm in the 1980s to around 2.1-2.2sqm today). The balance of the increase in expenditure has translated into a real increase in turnover per square metre rates.

The results indicate the Warilla Town Centres' demand approximately 14,000sqm (GLA) of retail floorspace in 2014, increasing to around 15,700sqm (GLA) by 2031³³.

Please note that the above target RTDs are industry benchmark or average levels. Retailers can trade sustainably at lower levels - as much as 25% or even 30% lower. In fact most of the retailers in the Warilla Town Centres are probably trading at lower levels than shown in the above table given the high level of floor space in the centre.

³² This is in line with historic trends. Expenditure per capita has increased at around 1.1% to 1.3% above CPI every year since 1986. Around half of this increase has translated into an increase in retail floorspace per capita (from 1.8sqm in the 1980s to around 2.1-2.2sqm today). The balance of the increase in expenditure has translated into a real increase in turnover per square metre rates.

³³ This does not include demand generated from tourist expenditure.

Tourist Expenditure

Located near the entrance of Lake Illawarra, the coastal suburb of Warilla would also generate a proportion of expenditure from tourists. Tourist expenditure was sourced from:

- Shellharbour Visitor Profile December 2014³⁴ which provides the total annual visitor spend (including airfares, fuel and accommodation) for international, domestic overnight and domestic day trippers in 2014;
- Regional Tourism Profiles 2012/13³⁵ for the South Coast which provides the breakdown of visitor expenditure by category. The South Coast profile indicated that retail and entertainment accounted for 45% of the total overnight domestic visitor spend and 66% of the total domestic day trip visitor spend in 2012/13. Applying these rates to total visitor spend for the Shellharbour LGA gives a total retail spend for the Shellharbour LGA of \$1m for international tourists, \$15m for domestic overnight visitors and \$16m for domestic day trippers; and
- Shellharbour Visitor Profile December 2014 (Destination NSW, December 2014) which quantified around 3,000 international visitors, 93,000 overnight visitors and 278,000 domestic day trippers in 2014.

HillPDA have assumed that the trade area would capture around 40% of Shellharbour LGA tourist expenditure within the trade area. On this basis, tourists currently demand an additional 2,000sqm of retail floorspace increasing to 2,700sqm in 2031.

As such the Main Trade Area and tourist market for Warilla demands approximately 16,000sqm (GLA) of retail floorspace in 2014, increasing to around 18,500sqm (GLA) by 2031.

The following table compares the estimate of current supply of retail floorspace to demand in 2031. The results indicate the Trade Area could be oversupplied by around 1,737sqm of retail floorspace in 2019. There is however an undersupply of take-away liquor, fast food stores and restaurant floorspace which in turn presents opportunities for Warilla Town Centres to expand and improve its café culture.

³⁴ Shellharbour Visitor Profile, Destination NSW

³⁵ Regional Tourism Profiles 2012/13, Tourism Australia

Table 14 Comparison of Retail Supply to Demand in the Warilla Town Centres (sqm GLA)

Retail Store Type	Supply 2014	2019	2024	2031
Supermarkets & Grocery Stores	7,113	2,130	1,929	1,632
Take-away Liquor Stores	0	-1,088	-1,135	-1,204
Specialty Food Stores	2,212	1,378	1,341	1,289
Fast-Food Stores	799	-370	-434	-521
Restaurants, Hotels and Clubs	690	-2,037	-2,174	-2,362
Department Stores	0	0	0	0
Clothing Stores	745	273	249	215
Bulky Goods Stores	486	486	486	486
Other Personal & Household Goods Retailing	4,028	205	44	-191
Selected Personal Services	1,793	302	227	123
Vacancy	458	-	-	-
Total Occupied Retail Floorspace	18,324	1,279	533	-534
Total Retail Floorspace (inc vacancy)	18,324	1,737	991	-76

Source: HillPDA 2014

Further to demand for retail tenancies is demand for shopfront space occupied by non-retail commercial uses. Warilla's Town Centres contain some 28,215sqm of lettable floorspace (excluding community and utility uses). Of this, 29% (8,065sqm) is dedicated to commercial floorspace, whilst 6% is representative of automotive, recreational/cultural, or utility associated floorspace.

Aside from Shellharbour City Centre, Warilla has the second highest proportion of commercial floorspace in the LGA, with medical uses being most common, followed by finance and real estate services.

Warilla does provide additional commercial services which are underrepresented in Shellharbour City Centre, especially with regards to real estate agents, property services, and legal services. The vast majority of commercial floorspace is accommodated in ground floor shopfronts, with a minor proportion being either shop top or in alternative accommodation (e.g. within a residential cottage). Thus commercial uses are integral to Warilla.

Implications

An important objective of any retail assessment is to achieve the right level of shopfront retail and commercial floorspace. An undersupply of floorspace creates the following issues:

- It reduces the range and availability of shopping opportunities and commercial services for customers and can lead to considerable escape expenditure to other centres as customers seek greater quantity, quality and convenience;
- It can lead to longer travel times for shopping and increased car use; and
- It results in increased congestion, parking difficulties and loss of convenience.

Correspondingly, oversupply of shopfront retail and commercial floorspace results in:

- High vacancies, low rents and neglect of retail centres;
- Inefficient use of land and other resources; and
- An uninviting appearance and ambience due to a lack of customers.

Market Activity

Drawing from discussions with local agents active in Warilla undertaken in July 2015, the following observations are made about the retail market:

- The retail market is performing satisfactorily currently as demonstrated by the lower vacancy rates, however has somewhat suffered from the expansion of Stockland Shellharbour and other additions in Shellharbour City;
- Major incentives for retailers to locate at Warilla are the lower rental and sale prices and strong provision of easily accessible carparking relative to Shellharbour City Centre and Wollongong. Local agents advised Warilla is predominately serviced based with a greater proportion of commercial floorspace. Consequently, there are difficulties with attracting high profile retailers in Warilla's older strip centre located on George Street. There could be demand for retail space if provided at a reasonable price, however the demand is not strong nor is it driving the market within this area;

- Historically, the demand for retail was generally driven by small local businesses, with larger units taking a considerably longer period to lease; and
- Over the past 12 months around the Warilla Town Centres there has been approximately a few shopfronts that have remained vacant over this period with very little enquires made. This is largely because of their dated appearance and larger size.

Sale and Rental Prices of Retail Developments

HillPDA undertook a desktop review of recent sale and rental prices of retail developments within Warilla³⁶. The below tables outline the average sales and rental price of retail developments within Warilla. Due to the limited supply we have also considered sales within neighbouring suburbs Shellharbour City Centre and Oak Flats which serve as good comparisons.

The sale prices for retail floorspace typically range between \$2,000 to \$3,200 per sqm within Warilla and the surrounding area, with Shellharbour City Centre commanding a slightly higher premium. Retail floorspace as part of a mixed-use development (for example 7/20-26 Addison Street, Shellharbour Village and 75 Cygnet Avenue, Shellharbour City Centre) were found to achieve significantly higher sales prices (i.e. in the range of \$5,091 to \$6,522). Retail floorspace within Warilla typically attracted lower sale prices compared to Shellharbour City Centre, which is reflective of the areas' more limited retail offer and removed nature.

The net rental price within Oak Flats, Shellharbour City Centre and Warilla ranges from \$140-\$420 per sqm.

The Warilla properties considered in the tables below which achieved sales of below \$2,000/sqm and rental return below \$200/sqm were typically older stock and thus would be expected to achieve lower sales and/or rental return than that of new stock. As such we would expect new stock within Warilla to achieve sales prices greater than \$3,000 per sqm and rental prices greater than \$250 per sqm. However, as indicated by local agents, prices for retail floorspace at Warilla would need to remain financially economical in order to compete with the nearby Shellharbour City Centre, which currently offers a stronger retail offer (including two full line supermarkets, Myer and Target).

³⁶ HillPDA also liaised with local agents regarding sale and rental prices within Warilla.

Table 15 Retail Sales with Oak Flats, Shellharbour City Centre and Warilla over the last 24 months

Address	Suburb	Date	Space Use	Price	Area	\$/sqm
50 Central Av	Oak Flats	9-Apr-14	Office & Residential	\$610,000	265	\$2,302
64 Central Av	Oak Flats	1-Aug-13	Shops	\$750,000	370	\$2,027
32 Addison St	Shellharbour City Centre	26-Feb-15	Retail Shop	\$255,000	177	\$1,441
1 Burra Pl	Shellharbour City Centre	25-Feb-15	Office & Retail	\$2,432,000	1142	\$2,130
75 Cygnet Av	Shellharbour City Centre	3-Jun-14	Office Suite	\$560,000	110	\$5,091
Unit 7/20-26 Addison St	Shellharbour City Centre	14-May-14	Retail Shop	\$450,000	69	\$6,522
30b Addison St	Shellharbour City Centre	11-Apr-14	Restaurant	\$820,000	177	\$4,633
20-26 Addison St	Shellharbour City Centre	23-Sep-13	Retail Shop	\$115,000	37	\$3,108
35 Addison St	Shellharbour City Centre	23-Aug-13	Shops	\$750,000	237	\$3,165
35a Addison St	Shellharbour City Centre	30-Jul-13	Shop/Office	\$750,000	237	\$3,165
2 Memorial Dr	Shellharbour City Centre	8-Jul-13	Retail & Office Building	\$6,060,000	2,271	\$2,668
8-10 George St	Warilla	17-Jul-14	Retail & Office Building	\$1,400,000	1202	\$1,165
12-14 Beverley Av	Warilla	4-Apr-14	Retail Shop	\$218,000	93	\$2,344
119 Shellharbour Dr	Warilla	20-Mar-14	Shop	\$540,000	247	\$2,186
144 Shellharbour Rd	Warilla	12-Nov-13	Retail & Showroom Bldg	\$1,950,000	1,590	\$1,226
12 George St	Warilla	11-Oct-13	Retail & Office Building	\$1,610,000	1,212	\$1,328
12-14 Beverley Av	Warilla	13-Sep-13	Retail Shop	\$235,000	77	\$3,052

Source: HillPDA Research 2015 , PIM

Table 16 Rental Prices within Oak Flats, Shellharbour City Centre and Warilla over the last 12 months

Address	Suburb	Date	Rent p.a	Area	\$/sqm
12 George Street	Warilla	10/06/2015	\$19,760	67	\$295
3/121 Shellharbour Road	Warilla	11/02/2015	\$16,000	95	\$168
3a/10 College Ave	Shellharbour City Centre	25/05/2015	\$50,000	147	\$340
18/2 Memorial Drive	Shellharbour City Centre	6/07/2015	\$31,000	73	\$425
Shop 2/55 Central Ave	Oak Flats	14/09/2014	\$14,000	100	\$140

Source: HillPDA research 2015, Realestate.com, local agents

Key Findings

The key findings of the 2015 determination of shopfront floorspace demand are:

- Market research indicates there is limited demand for retail and commercial shopfronts in Warilla and this is unlikely to change. Shellharbour City Centre will continue to attract key retailers and

service businesses, particularly whilst land and tenancies within the City Centre are available and are competitively priced. Warilla has the potential to capture a greater proportion of the MTA expenditure through the improvement of the retail mix;

- Based on our demand modelling which demonstrates an oversupply of retail floorspace in the short to medium term, Warilla is not in a position where it has demand to expand in the short to medium term. This also applies to commercial floorspace. This largely is due to its location between Shellharbour City Centre, and Warrawong;
- However given Warilla Grove's is a well performing centre, this creates opportunities for Warilla, Warilla Grove in particular, to attract new retail occupants in order to capture a greater share of the market; and
- Our demand and supply model demonstrates that the level of restaurant floorspace provided at Warilla is relatively low. This is an area of expenditure that has increased dramatically over the past couple of decades as households with less time but more affluence are eating out more. Retail trends show a growing demand for cafes, pharmaceuticals, hardware and household goods. As such Warilla could benefit from improving the café and restaurant offer along with expanding the provision of gifts/homeware retail floorspace which would also cater to the tourist market.

5 KEY IMPLICATIONS FOR WARILLA

The key implications and outcomes of this Report are:

- Issues surrounding the viability of higher density residential in regional town centres are not uncommon. Whilst many regional towns recognise the benefits of incorporating residential development into their town centres, they struggle to prove viable due to lower socio demographic profiles, lower income levels, lower end sales values, costly construction and less expensive housing alternatives including existing and lower-cost detached project homes;
- Historically, there has been limited pressure on infill development in Warilla given significant residential development land availability in greenfield areas. Residential development in Warilla is competing with available offer in Shell Cove, Blackbutt and Shellharbour City Centre – which are proving more popular locations by new residents and families;
- Increased pressure is likely to be placed on aged services or on residential product appropriate for seniors given forecast aging of the population. However for people to downsize there needs to be either a price differential or significant lifestyle and amenity improvements (e.g. seniors who want to downsize and be able to walk to retail/community services), however there is not a big price differential between detached homes and new townhouse development in Warilla. Further selling agents observe that there is little financial incentive to buy apartments given that there is availability of competitively priced townhouses, villas and detached homes;
- New apartments are not viable at this stage since there is insufficient profit for developers to overcome the risk of site acquisition, finance and redevelopment. The design and construction of apartments in Warilla would need to be cost effective in order for such development to be viable;
- Further to the challenge of achieving higher densities in Warilla will be convincing new residents to move into a residential apartment over purchasing a competitively priced detached dwelling in the locality;
- Market research indicates there is limited demand for retail and commercial shopfronts in Warilla and this is unlikely to change. Shellharbour City Centre will continue to attract key retailers and service businesses, particularly whilst land and tenancies within

the City Centre are available and are competitively priced. Warilla has the potential to capture a greater proportion of the MTA expenditure through the improvement of the retail mix;

- Warilla should consider a revitalisation strategy, with some beautification measures implemented which encourage more outdoor seating and attracting more eating places;
- Based on our demand modelling which demonstrates an oversupply of retail floorspace in the short to medium term, Warilla is not in a position where it has demand to expand in the short to medium term. This also applies to commercial floorspace. This largely is due to its location between Shellharbour City Centre, and Warrawong;
- However given Warilla Grove is a well performing centre, this creates opportunities for Warilla and Warilla Grove in particular, to attract new retail occupants in order capture a greater share of the market; and
- Our demand and supply model demonstrates that the level of restaurant floorspace provided at Warilla is relatively low. This is an area of expenditure that has increased dramatically over the past couple of decades as households with less time but more affluence are eating out more. Retail trends show a growing demand for cafes, pharmaceuticals, hardware and household goods. As such Warilla could benefit from improving the café and restaurant offer along with expanding the provision of gifts/homeware retail floorspace which would also cater to the tourist market.

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Appendix C: GTA Consultants: Car Parking Study

Appendix C: Car Parking Study



Appendix C to the Warilla Town Centres Plan

The Warilla Town Centres Plan was endorsed by Council at its meeting of 15 December 2015, as a basis for the review of relevant Council Policy including Shellharbour Local Environmental Plan 2013, Shellharbour Development Control Plan, Shellharbour City Council Section 94 Contributions Plan 2013 and the capital works program.

Warilla Town Centres Plan

Car Parking Study

Client // McGregor Coxall
Office // NSW
Reference // 15S1608000
Date // 23/10/15

Warilla Town Centres Plan

Car Parking Study

Issue: A 23/10/15

Client: McGregor Coxall
Reference: 15S1608000
GTA Consultants Office: NSW

Quality Record

Issue	Date	Description	Prepared By	Checked By	Approved By	Signed
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1. Introduction

1.1 Background

Shellharbour City Council (Council) commissioned a specialist team led by McGregor Coxall to prepare a Warilla Town Centres Plan to assist Council in the development of a vibrant, inclusive, safe, attractive, connected, convenient, accessible and commercially successful centres.

GTA Consultants (GTA), as part of the McGregor Coxall team, undertook a car parking study of the two centres in Warilla to inform the overall plan. The findings of the parking study will influence future parking provisions to be included within the recommendations for the town centres plan.

1.2 Purpose of this Report

This report sets out an assessment of existing car parking demand and characteristics of the Warilla town centres and future requirements based on proposed future development. This includes:

- an assessment of the supply and location of existing car parking spaces in the town centres
- existing car parking demand
- anticipated future development for the town centres
- anticipated additional car parking requirements to accommodate future development.

1.3 References

In preparing this report, reference has been made to the following:

- parking demand surveys conducted on Saturday 18 and Thursday 23 July 2015
- Shellharbour City Council Development Control Plan (DCP) 2013
- Shellharbour Retail & Commercial Centres Study, Hill PDA, March 2008.

2. Existing Conditions

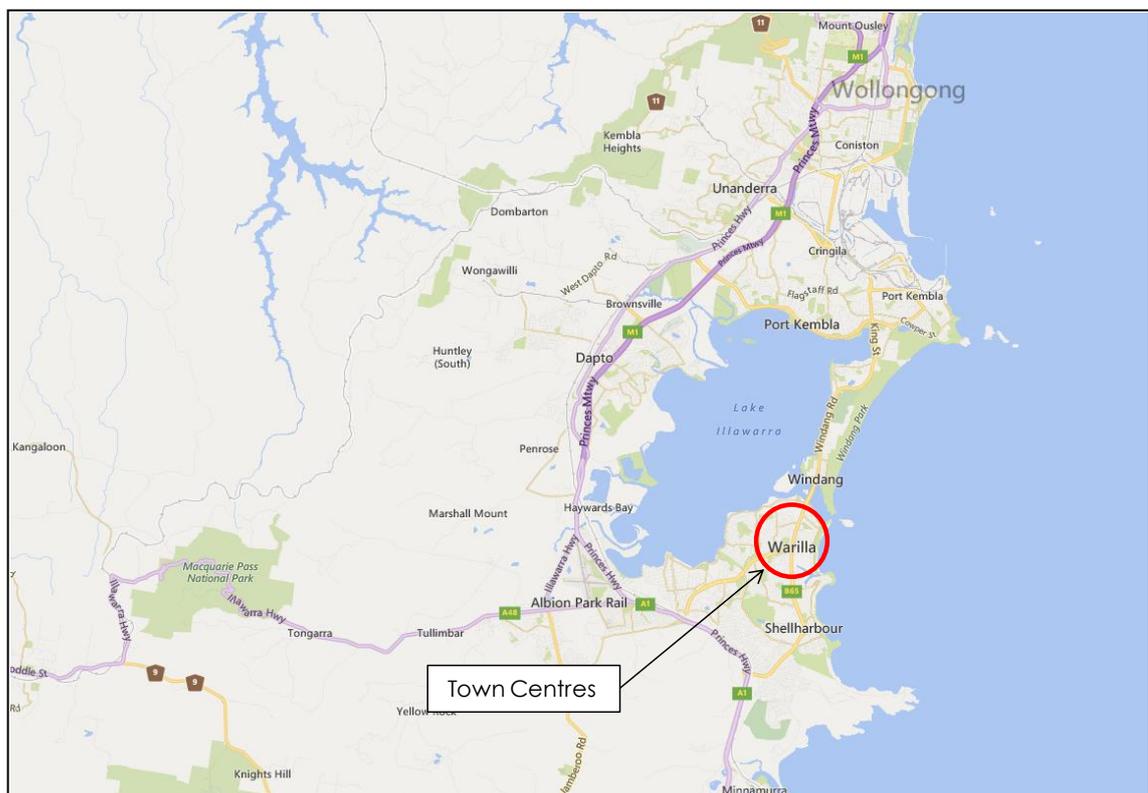
2.1 Study Area

The study area encompasses two town centres within Warilla, NSW. This includes Warilla Town Centre which contains a shopping strip along George Street and retail and fast food outlets along Shellharbour Road, and Warilla Grove which is a large shopping centre about 600 metres to the north. The two town centre/ study areas are separated by residential development.

The Warilla town centres are located 3 to 4km north of Shellharbour City Centre which is the primary activity area in the Shellharbour City Council area. Wollongong City is located approximately 17 kilometres to the north of Warilla.

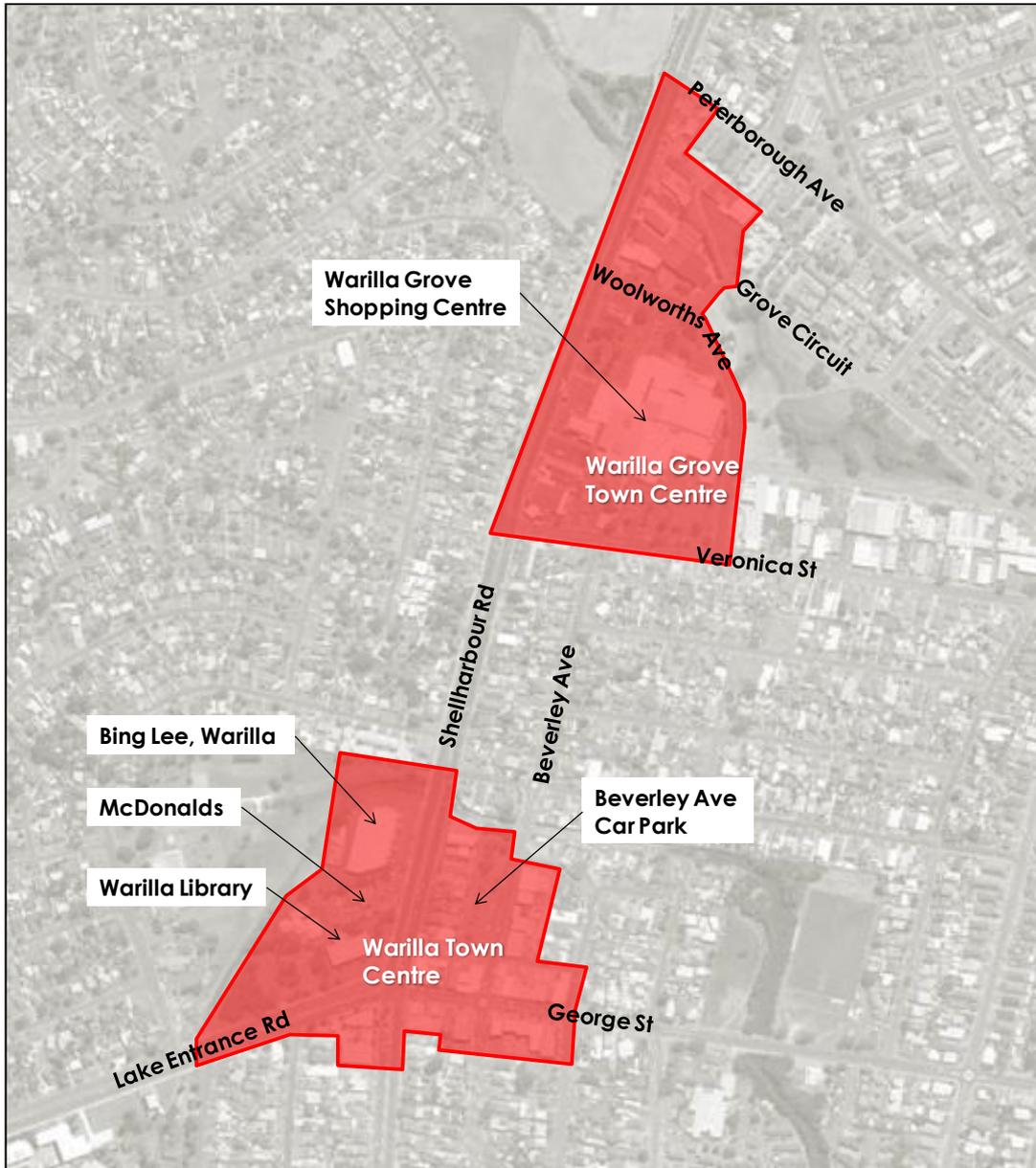
The regional context of Warilla is shown in Figure 2.1, while the extents and key features of the two study areas are shown in Figure 2.2.

Figure 2.1: Regional Context



Basemap source: Bing Maps

Figure 2.2: Study Areas



Basemap source: Land and Property Information, accessed 29/07/15

2.2 Road Network

Shellharbour Road

Shellharbour Road (also called Grand Pacific Drive) forms the main north-south road link within Warilla and between the two study areas, Warilla Town Centre and Warilla Grove. It is a State Road that also provides a major north-south connection to greater NSW, with Grand Pacific Drive leading to Port Kembla to the north, Shell Cove to the south and intersecting with the Princes Motorway (M1).

Shellharbour Road is two-way, six-lane divided road with a 25 metre wide carriageway set within a 30m wide road reserve (approx.). Several bus routes traverse Shellharbour Road, providing public transport connections to the wider Shellharbour local government area. Kerbside parking is

permitted on both sides of Shellharbour Road subject to clearway times of 3:00-6:00pm on the eastern side and 6:00-9:30am on the western side.

George Street

George Street forms the main street of Warilla Town Centre with the main shopping strip located along it. A large portion of the land uses on George Street are food and beverage outlets. Adjacent to George Street, Shellharbour Road contains retail and community land uses to the west and residential to the east.

George Street is a two-way, 2-lane road with a 12.5m wide carriageway set within a 20m wide road reserve (approx.). Bus route 72 (Shellharbour Loop) traverses George Street. Short term kerbside parking is provided on both sides of George Street.

Veronica Street & Woolworths Avenue

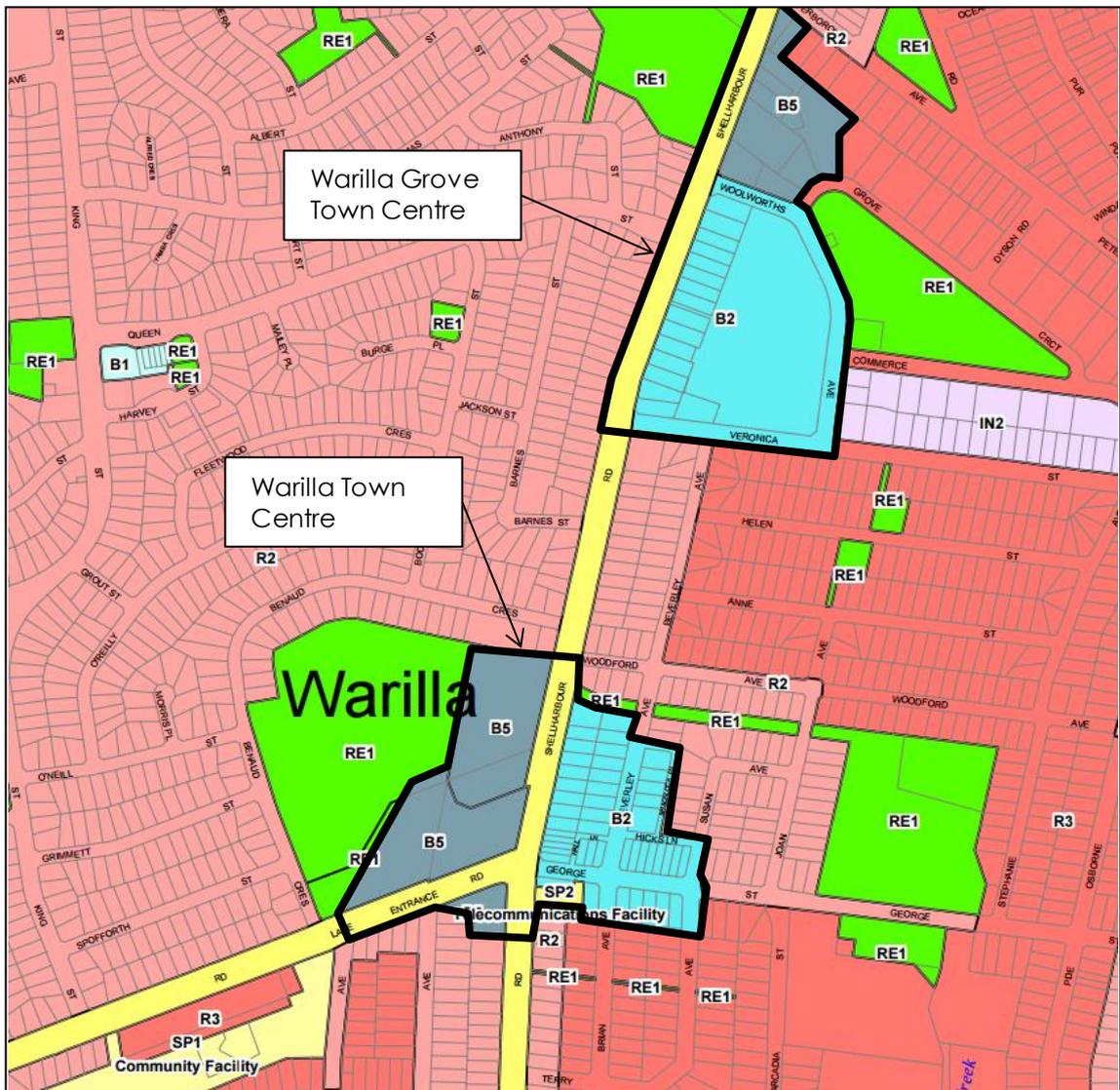
Veronica Street and Woolworths Avenue via Shellharbour Road provide access to the Warilla Grove Shopping Centre and adjacent commercial properties. Some of the adjacent properties are accessed from Shellharbour Road via a left-in/ left-out arrangement.

Veronica Street and Woolworths Avenue are two-way, 2-lane roads with a 12m wide carriageway set within a 20 to 25m wide road reserve.

2.3 Land Use Zoning

The study areas comprise B2 (Local Centre) and B5 (Business Development) zoning, as shown in Figure 2.3. The surrounding area largely includes RE1 (public recreation) and R2/R3 (Residential) zoning with an IN2 (Light Industrial) zone located east of the Warilla Grove Town Centre.

Figure 2.3: Warilla Town Centres Land Zoning



The general objectives of B2 Local Centre as stated in the Shellharbour Local Environmental Plan (LEP) 2013 are:

- to provide a range of retail, business, entertainment and community uses that serve the needs of people who live in, work in and visit the local area
- to encourage employment opportunities in accessible locations
- to maximise public transport patronage and encourage walking and cycling
- to allow for a limited range of residential accommodation while maintaining retail, business or other non-residential active uses at street level.

The general objectives of B5 Business Development as stated in the LEP are:

- to enable a mix of business and warehouse uses, and bulky goods premises that require a large floor area, in locations that are close to, and that support the viability of, centres
- to ensure that development does not detract from the function or viability of other business, commercial or retail centres.

In-line with these objectives, the supply of car parking within the B2 zoned sections of the town centres should reflect the expectation that measures will be implemented to prioritise public transport, walking and cycling modes of travel over private vehicle usage. There is therefore the potential to provide a reduction in the total number of car parking spaces to reflect this promotion of non-car based modes of travel. This is however also dependent on the provision of a reliable and efficient public transport system (principally buses) servicing the town centres, as well as well-connected and safe pedestrian and bicycle facilities.

In the B5 zoned sections of the town centres, the supply of car parking should aim to support local business and ensure ongoing viability. This implies that time limits and restrictions supporting the requirements of commercial and retail uses should be implemented and/or continue to be implemented.

2.4 Land Uses and Floor Areas

The Warilla and Warilla Grove Town Centres contain a range of land uses. The land uses within the town centres can be summarised as follows:

Warilla Town Centre:

- Retail
- Food and Beverage
- Medical
- Office
- Shop top housing.

Warilla Grove Town Centre:

- Retail
- Supermarket
- Bulky goods
- Food and Beverage
- Medical
- Other special uses (e.g. funeral services, car servicing, etc.).

A detailed floor area breakdown of the retail establishments within the Town Centres is provided in Table 2.1. These floor areas were obtained from Hill PDA's Property Market Appraisal of the Warilla Town Centres.

Table 2.1: Existing Retail Land Uses

Description	Floor Area (sq.m)
Supermarket & Grocery Stores	7,113
Take-away Liquor Stores	0
Specialty Food Stores	2,212
Fast-Food Stores	799
Restaurants, Hotels and Clubs	690
Departments Stores	0
Clothing Stores	745
Bulky Goods Stores	486
Other Personal & Household Goods Retailing	4,028
Selected Personal Services	1,793
Vacancy	458
Total Estimated Additional Requirement (Net)	18,324

Source: Hill PDA, 2015

2.5 Car Parking Rates

The car parking rates for future developments within the Warilla town centres are detailed within Council's 2013 Development Control Plan (DCP). Rates relating to potential future land uses within the town centres are summarised in Table 2.2. Additional requirements such as loading facilities and set-down/ pick-up provision are also detailed in the DCP.

Table 2.2: Shellharbour 2013 DCP Car Parking Rates

Land Use	General Minimum Parking Space Requirement	Rate per 100sq.m	Staff, Bicycle and Motorcycle Parking Requirement(s)
Office/ Business Premises	1 per 40 sq.m. GFA	2.50	N/A
Retail Shop	1 per 35 sq.m. GFA	2.86	N/A
Supermarket/ Regional Centre	1 per 20 sq.m. GFA	5	1 bicycle and 1 motorcycle space/ 25 car parking spaces after the first 25
Bulky Goods Premises	1 per 45 sq.m.	2.22	1 per staff on-site
Licensed club	15 per 100 sq.m. internal and outdoor areas	15	1 per staff on-site
Reception Function Centre	The greater of 1 per 4 sq.m of customer area (indoor + outdoor) 1 per 3 seats	say 25	1 per staff on-site
Restaurant	1 per 4 sq.m customer area (indoor + outdoor)	25	2 per 3 staff on-site
Take Away Food No on-site seating	1 per 1 sq.m of customer waiting area	say 25	2 per 3 employee 1 per home delivery vehicle
Take Away Food with on-site seating	The greater of 1 per 5 seats (indoor + outdoor) 1 per 2 seats (indoor)	N/A	2 per 3 employee
Take Away Food with on-site seating and drive through	The greater of 1 per 3 seats (indoor + outdoor) 1 per 2 seats (indoor)	N/A	2 per 3 employee
Medical Centre	The greater of 3 per health care professional 4 per 100 sq.m	say 4	1 per all staff 1 per ambulance
Veterinary surgery	2 per veterinarian		1 per all staff
Shop-Top Housing	(Including visitor) 1.25 per 1 bed dwelling 2 per 2+ bed dwelling	N/A	N/A
Place of Worship Place of public entertainment	The greater of 1 per 4 sq.m 1 per 5 seats	say 25	1 per staff 1 bicycle and 1 motorcycle space per 25 car parking spaces after the first 25
Community/ Civic facilities	1 per 40 sq.m GFA	2.5	1 per staff 1 bicycle and 1 motorcycle space per 25 car parking spaces after the first 25
Gymnasium	The greater of 1 per 20sq.m or 1 per 2 students (additional requirements if back to back classes)	say 5	1 per staff

As can be seen from Table 2.2, the required car parking rates for a number of uses are based on staff/ practitioner numbers instead of general requirements based on floor areas. This adds difficulty in the assessment of future parking requirements in the town centres as staff/ practitioner densities vary from land use to land use and may change over time following development approval. However, reasonable estimates can be calculated and will better reflect demand for staff/ employee parking.

3. Existing Parking Conditions

Car parking surveys were carried out by GTA within the Warilla and Warilla Grove Town Centres as part of this assessment. The surveys included a car parking spot check on Saturday 18 July 2015 and a car parking demand survey on Thursday 23 July 2015. The surveys were carried for the following periods:

- Saturday: from 11:00am to 2:00pm
- Thursday: from 11:00am to 3:00pm.

The two Warilla town centres car parking provisions comprise:

- on-street kerbside parking on local roads
- on-street kerbside parking on State Roads (Shellharbour Road and Lake Entrance Road)
- off-street public car parking (this includes privately owned, publically accessible car parks)
- off-street private parking, both formal and informal, generally located at the rear of the sites.

Kerbside parking on State Roads (Shellharbour Road and Lake Entrance Road) is relatively underutilised and would skew parking demand for the town centres. As such, Shellharbour Road and Lake Entrance Road are not included in the supply and demand calculations detailed in the following sections.

Shellharbour Road accommodates approximately 38 kerbside car parking spaces within the Warilla Town Centre (including six 1/2P spaces) and 65 car parking spaces within the Warilla Grove Town Centre. Both sides of Shellharbour Road have peak period clearway restrictions as previously discussed. South of George Street, Shellharbour Road contains 4 unrestricted car parking spaces, with peak occupancy of 50%. Elsewhere on Shellharbour Road, on-street spaces were observed to be unoccupied during the survey. There are also 4 unrestricted car parking spaces on Lake Entrance Road within the study area. All were observed to be unoccupied during the survey.

3.1 Warilla Town Centre

3.1.1 Car Parking Supply

Within the Warilla Town Centre (excluding Shellharbour Road and Lake Entrance Road) approximately 560 car parking spaces were identified. This quantum includes:

- 64 restricted spaces
- 318 unrestricted spaces (including 16 accessible spaces)
- 169 private spaces (including 2 accessible spaces)
- 7 other spaces (taxi zones, staff only, hold bays).

On-street parking spaces within the Warilla Town Centre are largely located around the George Street shopping strip, east of Shellharbour Road. Most of these spaces are time restricted, including 15 minute, 30 minute and 1 hour spaces.

Off-street parking accounts for the majority of the parking available within the town centre, with 485 off-street parking spaces compared to 75 on-street parking spaces. Private parking spaces account for 35% of all off-street spaces. An unrestricted public car park is available on Beverly Avenue containing 124 parking spaces, including 3 accessible spaces and approximately 7

informal/ unmarked parking spaces. Adjacent to this car park are several accesses to private car parks for properties along Shellharbour Road. Many of these private car parks belong to medical centres and doctors' offices.

A considerable number of the private car parking spaces occur in unmarked hardstand areas. As such, supply was estimated by on-site observation, with the assumption that vehicles will generally space out further in these areas. It is likely that formalising such areas would result in higher yields.

A map of the surveyed car parking areas is shown in Figure 3.1, with kerbside parking represented by blue lines and off-street parking areas represented by boxed areas. An inventory of car parking areas, supply and demand is provided in Appendix A.

Figure 3.1: Warilla Town Centre Car Parking Survey Areas



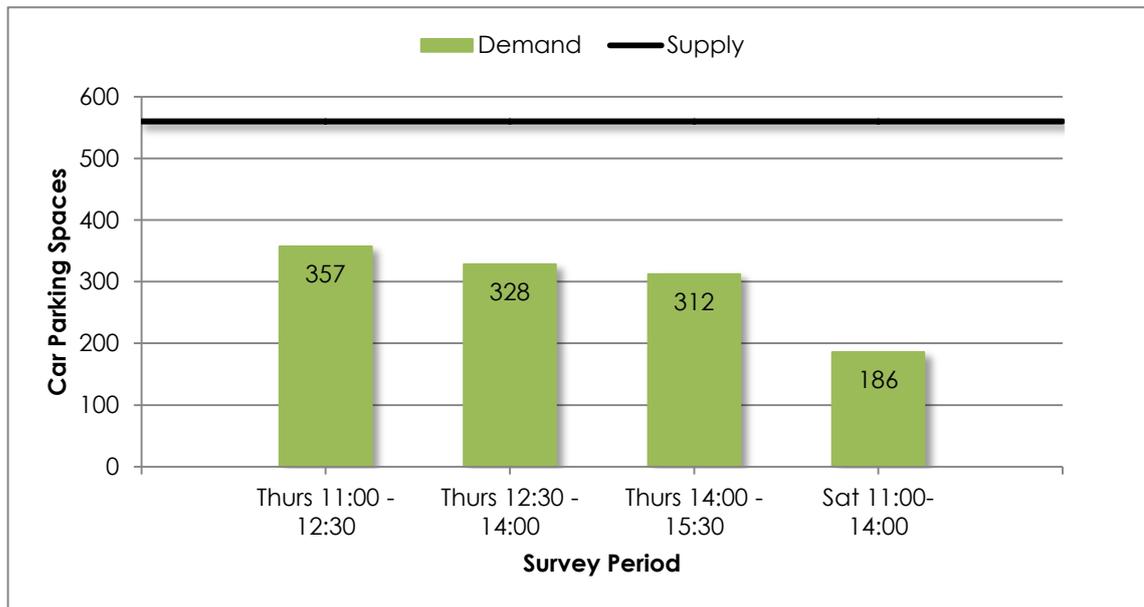
Basemap source: Land and Property Information, accessed 29/07/15

3.1.2 Car Parking Demand

An analysis of car parking demand within the Warilla Town Centre indicates that demand is higher on a Thursday, ranging from 312 to 357 spaces, compared to a Saturday demand of 186 spaces. This is likely related to employee parking, and/or study (i.e. for library parking). Peak demand occurred during Thursday 11:00am to 12:30pm. After this period the demand steadily declines.

The results of the survey are summarised in Figure 3.2.

Figure 3.2: Parking Demand – Warilla Town Centre



3.1.3 Peak Demand Analysis

Overall the peak parking demand occurred on Thursday between 11:00am–12:30pm, with an overall occupancy of 64%.

The peak demand (Thursday 11:00am–12:30am) is shown in Figure 3.3, and provides percentage demand and actual number of parked cars within defined zones.

Figure 3.3: Parking Demand – Thursday 11:00am–12:30pm



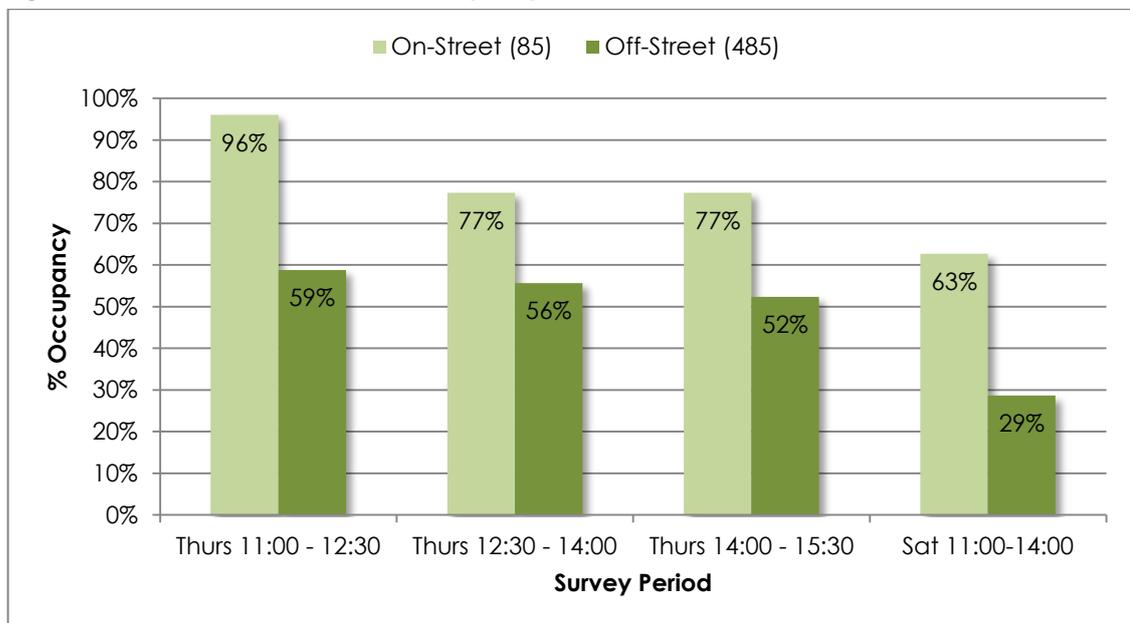
Basemap source: Land and Property Information, accessed 29/07/15

3.1.4 On-street and Off-street Comparison

The on-street and off-street car parking demands for the Thursday and Saturday survey periods is shown in Figure 3.4. The figure illustrates that off-street parking has a higher demand during a Thursday and is generally consistent throughout the day, with demand ranging between 52% and 59%. This is likely a reflection of employee parking, with public car parks such as the Beverley Avenue Warilla Library car parks experiencing far higher demands during the Thursday than the Saturday, while retail parking such as Bing Lee saw a lower demand.

Peak on-street parking occurs also during Thursday 11:00am to 12:30pm. On-street parking within the Warilla Town Centre is largely time restricted with 15 minute, 1 hour and 2 hour restrictions. These parking spaces largely service the adjacent retail land uses and reflects a peak shopping period during 11:00am to 12:30pm. The occupancy of on-street parking during this period is 96%. The retail land uses adjacent to the on-street parking areas do not provide off-street parking, which would contribute to the high parking demand.

Figure 3.4: On-street and Off-street Occupancy – Warilla Town Centre



3.1.5 Car Parking Controls

Car parking was separated into seven categories for analysis, as summarised in Table 3.1.

Table 3.1: Warilla Town Centre Parking Inventory

Restriction	General Description	Supply	Percentage
15 minute	Western side of Brian Avenue	2	0.4%
1 hour	On-street spaces along George Street, Beverly Avenue, Susan and Terry Avenue	44	7.9%
2 hour	Off-street parking at Warilla Library	20	3.6%
Unrestricted	Off-street parking at Warilla Library, and Beverly Avenue Car Park and on-street spaces along Susan and Terry Avenue	302	53.9%
Private	Rear of shop staff parking and customer car parks (McDonalds, Bing Lee, Blockbuster).	167	29.8%
Disabled	Scattered throughout the town centre	18	3.2%
Other	Taxi Zone, Staff Only, special use zones	7	1.3%
Total		560	100%

As can be seen in Table 3.1, there are relatively few restriction types for a town centre. These restricted parking spaces are generally well utilised on both Thursday and Saturday, with up to 96% occupancy. Off-street public parking accounts for 54% of all parking in the town centre, with a peak occupancy of 64%. Private parking accounts for the majority of the remaining parking, with approximately 30% of spaces and a peak occupancy of 50%.

3.1.6 Future Increased Parking Demand Summary

Overall, the surveys indicate that the Warilla Town Centre has capacity to accommodate additional parking demand, with many of the off-street parking areas containing spare capacity. In particular, the areas west of Shellharbour Road have a vacancy of 49%, with 94 car parking spaces vacant of 195 spaces and Shellharbour Road provides approximately 38 spaces outside of clearway times.

East of Shellharbour Road, on-street parking is near capacity during the peak and the Beverly Avenue Car Park is the nearest alternative for public parking. Private parking, east of Shellharbour Road has significant capacity to accommodate additional parking demand. As such, private parking demands currently do not impact upon public parking. Maintaining private off-street parking supply would be beneficial for any significant future growth, to reduce impact upon public parking within the Warilla Town Centre (noting that consolidation improves utilisation and efficiency).

3.2 Warilla Grove Town Centre

3.2.1 Car Parking Supply

Within the Warilla Grove Town Centre (again excluding Shellharbour Road), approximately 775 car parking spaces were identified. This quantum includes:

- 3 restricted spaces (time restricted "No Standing")
- 622 unrestricted spaces (incl. 13 accessible spaces)
- 147 private spaces (incl. 2 accessible spaces)
- 3 other spaces (taxi zone).

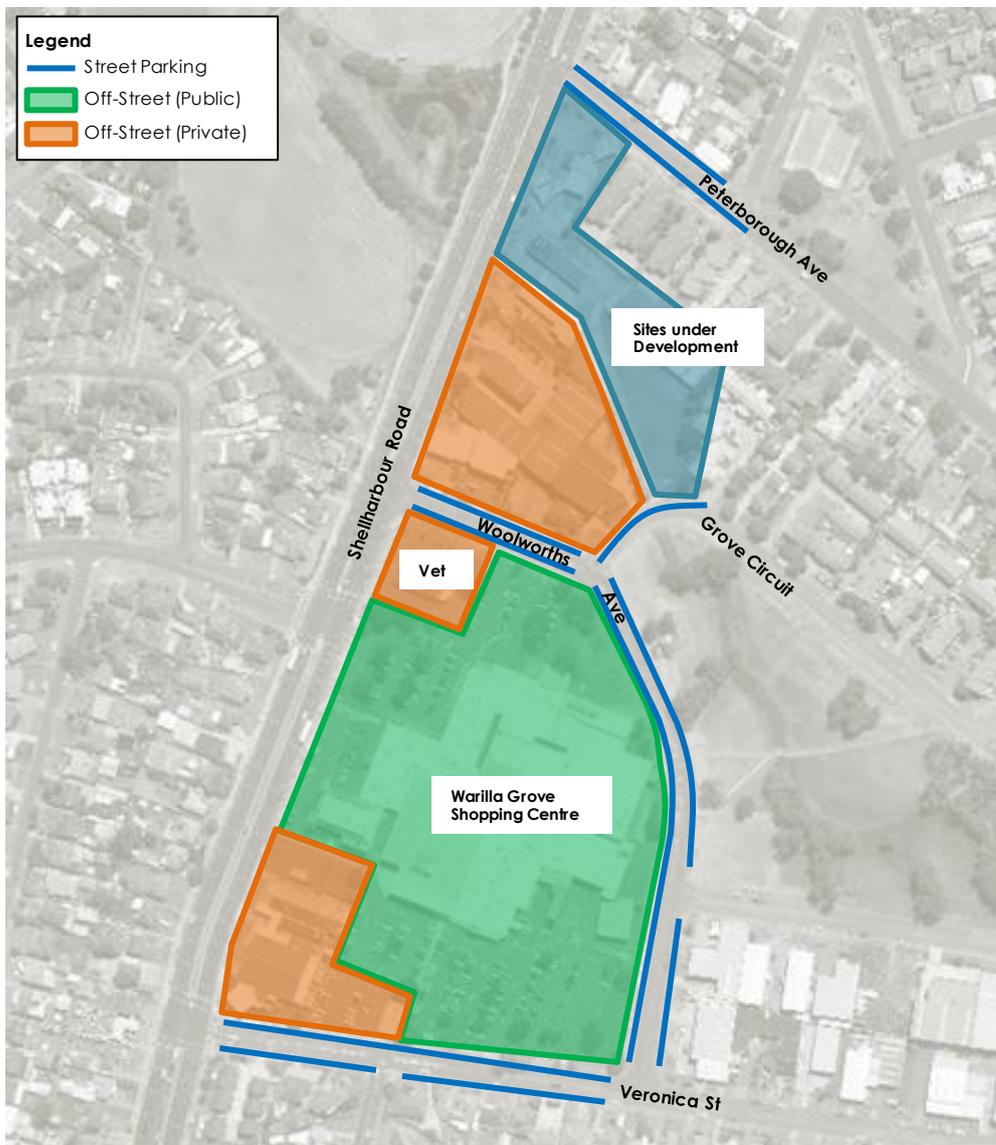
The Warilla Grove Town Centre contains approximately 67 on-street car parking spaces and 706 off-street parking spaces. Approximately 79% of the off-street parking is within the Warilla Grove Shopping Centre.

Private parking accounts for approximately 20% of off-street parking in Warilla Grove Town Centre. Similarly to the Warilla Town Centre, many private parking spaces are on unmarked hardstand areas and as such, supply was estimated by on-site observation.

It should be noted that the properties at 31 Shellharbour Road, 2 Peterborough Avenue and 25 Grove Circuit have not been included in the parking supply counts as these properties are under development, under construction and for sale, respectively and do not contribute to the current parking supply. However, the properties are likely to provide their own private parking in the future.

A map of the surveyed areas is shown in Figure 3.5. An inventory of car parking demand is provided in Appendix A.

Figure 3.5: Warilla Grove Town Centre Parking Survey Areas



Basemap source: Land and Property Information, accessed 29/07/15

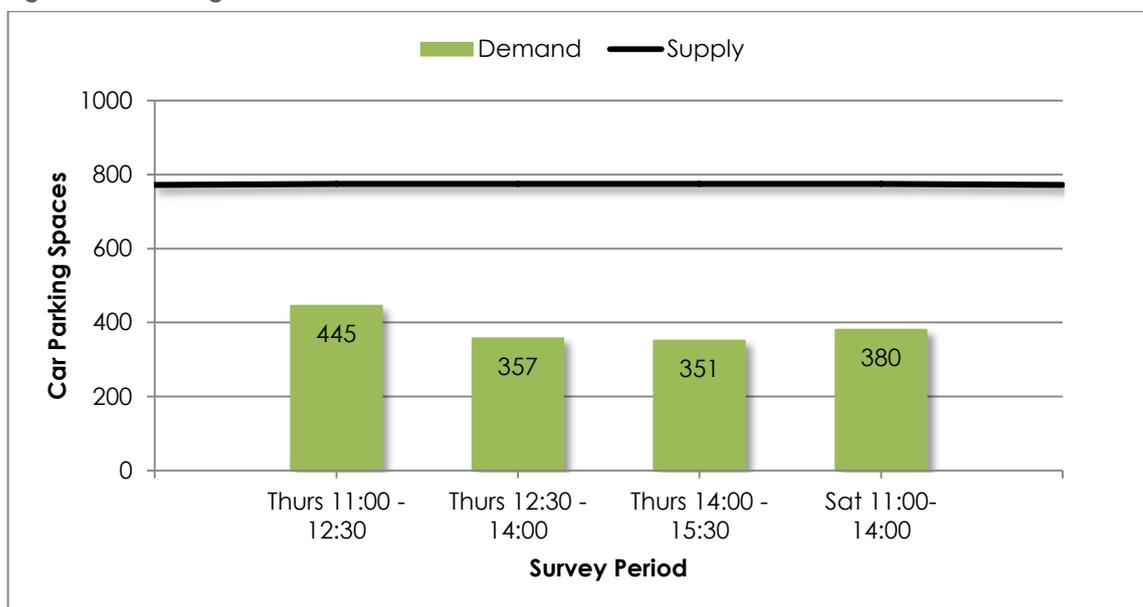
3.2.2 Car Parking Demand

An analysis of car parking demand from the surveys undertaken within Warilla Grove Town Centre indicates that car parking demand is highest around late morning to after midday Thursday, with a peak demand of 445 occupied spaces. This is 57% of the available parking in the town centre. Occupancy decreases after 12:30pm, with 351–357 occupied spaces (45% occupancy). Saturday sees relatively similar parking demands to Thursday, with a demand of 380 spaces (49% occupancy).

The primary generator of parking demand in the Warilla Grove Town Centre is retail land uses. The results reflect the impact of a typical peak shopping period between 11:00am–12:30pm.

The results of the survey are summarised in Figure 3.6.

Figure 3.6: Parking Demand – Warilla Grove Town Centre

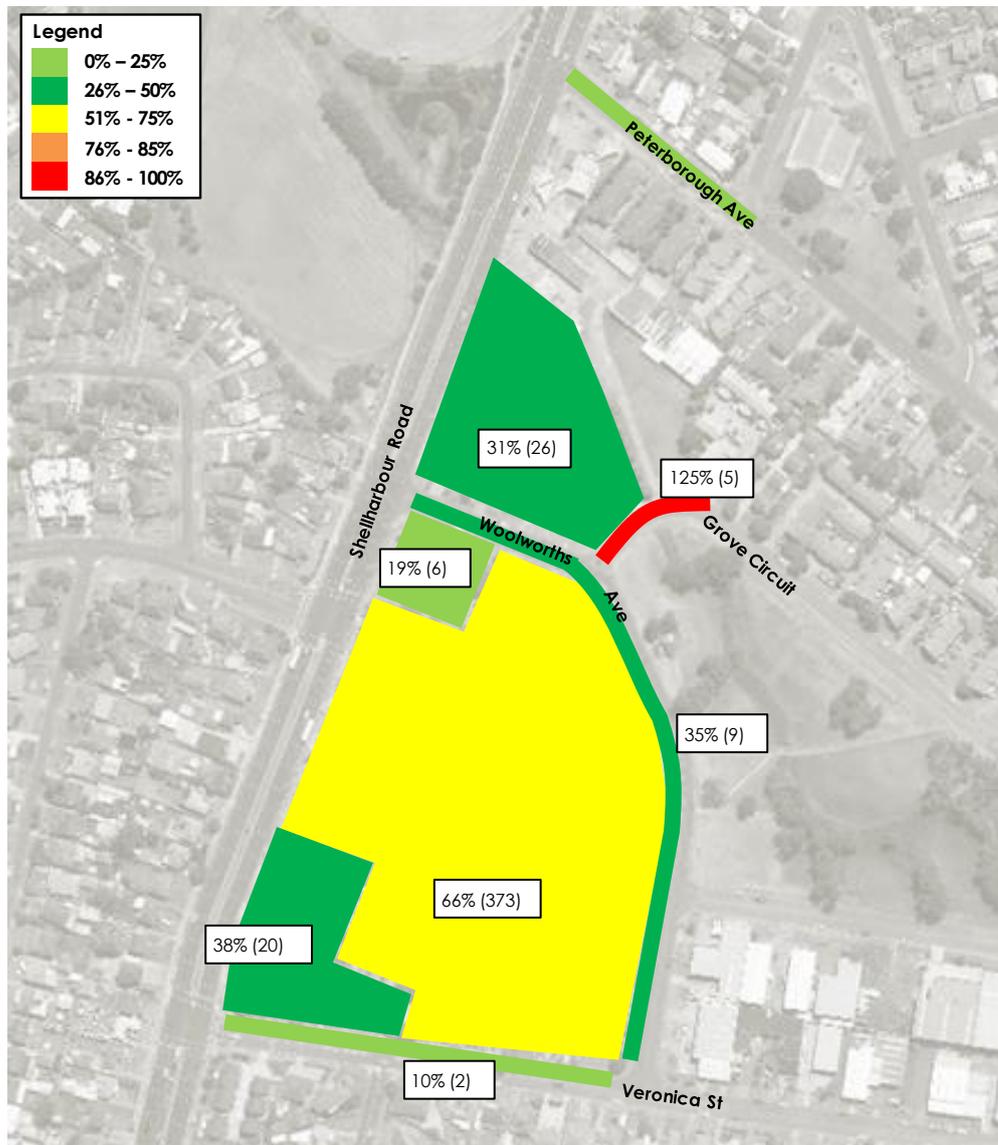


3.2.3 Peak Demand Analysis

Overall, the peak parking demand occurred on Thursday from 11:00am to 12:30pm, with an overall demand of 57%.

The peak demand (Thursday 11:00am to 12:30am) is shown in Figure 3.7, and provides percentage demand and actual number of parked cars within defined zones.

Figure 3.7: Parking Demand – Thursday 11:00am to 12:30pm



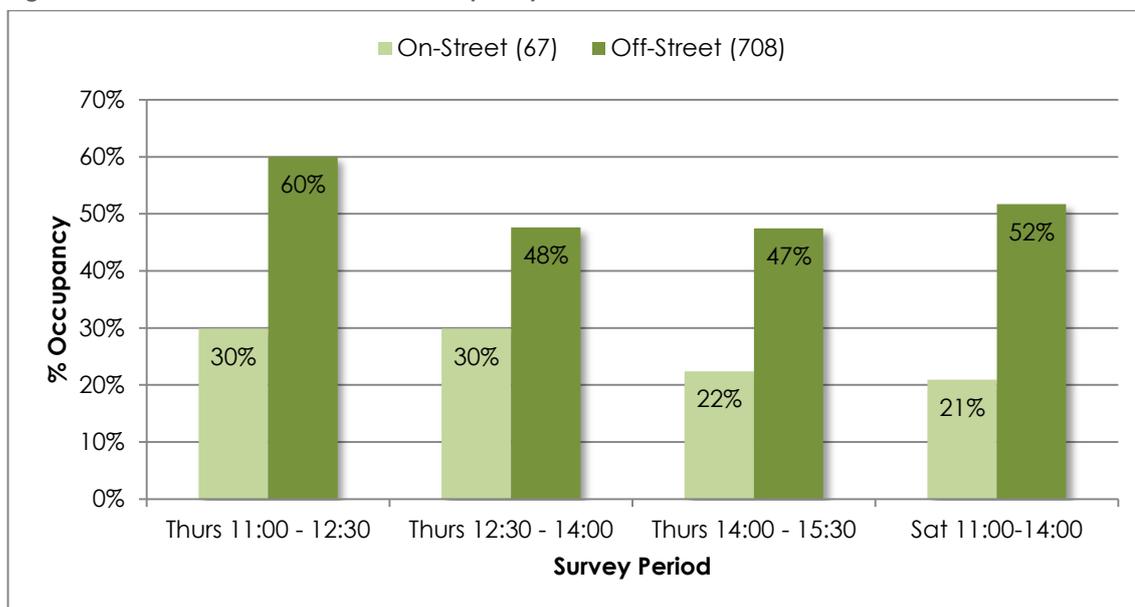
Basemap source: Land and Property Information, accessed 29/07/15

3.2.4 On-street and Off-street Comparison

The on-street and off-street car parking demands for the Thursday and Saturday survey periods are shown in Figure 3.8. The figure illustrates that off-street parking is in higher supply and is better utilised compared with on-street spaces. Most properties within the Warilla Grove Town Centre contain off-street parking for customers and staff. This may be a reflection of the limited availability of on-street parking in the area.

Site observations indicate that informal parking on road verges is common at the corner of Woolworths Avenue and Grove Circuit, where one vehicle was parked on the grass during the Saturday survey and three vehicles were observed parked during the Thursday. However, this behaviour could be more attributable to the propensity of some users to park nearest to their destination, rather than a reflection of parking deficiency in the centre, as there is spare capacity in both on-street and off-street parking in the vicinity.

Figure 3.8: On-street and Off-street Occupancy – Warilla Grove Town Centre



3.2.5 Car Parking Controls

Car parking at the Warilla Grove Town Centre was separated into four categories for analysis, as summarised in Table 3.2.

Table 3.2: Warilla Grove Town Centre Parking Controls

Restriction	General Description	Quantum	Percentage
Unrestricted	On-street parking throughout town centre and off-street customer car parking at Warilla Grove Shopping Centre	609	78.6%
Private	Staff and customer car parking throughout town centre	145	18.7%
Disabled	Within Warilla Grove Shopping Centre and Vet car park	15	1.9%
Other	Taxi Zone and a time restricted 'No Standing' area	6	0.4%
Total		775	100%

The main public parking available at the Warilla Grove Town Centre outside the shopping centre is on-street parking (67 spaces). Parking availability at Warilla Grove Town Centre is dependent upon private provision, which is currently at a peak occupancy of 67% at Warilla Grove Shopping Centre and at an occupancy of 35% within private car parks (including both customer and staff parking).

3.2.6 Future Increased Parking Demand Summary

Outside of the Warilla Grove Shopping Centre, public parking availability is low within the Warilla Grove Town Centre. However, as Warilla Grove Shopping Centre provides unrestricted free parking, it can be utilised for public parking requirements. Currently, the shopping centre has spare capacity to accommodate future growth, with 185 vacant spaces recorded during the peak. However, this future growth may be required for the shopping centre itself (also noting seasonal peak parking requirements). As such would not be pragmatic to rely on the shopping centre for future public parking.

Private car parking areas are provided for most developments in the town centre and generally have spare capacity to accommodate future growth. Maintaining private parking requirements

for future developments would ensure suitable future capacity and prevent reliance on on-street or shopping centre parking.

4. Development Capacity

4.1 Warilla Town Centres Plan

The Warilla Town Centres Plan is being developed by McGregor Coxall for Shellharbour City Council to guide the future development within the town centres, as well as improving connectivity within and between the town centres. The plan will, in particular, seek to encourage future development for the area north of Warilla Grove shopping centre and the area west of Shellharbour Road at Warilla Town Centre.

An overview of the Warilla Town Centres Plan is shown in Figure 4.1. The plan indicates that there would not be significant changes to the existing retail/ commercial areas at the Warilla Grove shopping centre or the areas located around George Street. However, there is potential to develop the surrounding areas, including the development of recreational and open spaces.

Figure 4.1: Warilla Town Centres Plan



Source: McGregor Coxall

4.2 Additional Development Capacity

Hill PDA has undertaken an assessment of the Warilla Town Centres and estimated the future additional retail and commercial floor area requirements through to 2031. These are reproduced in Table 4.1, and indicate that overall, the demand for parking associated with the retail land uses and future development would reduce from current levels.

It is noted however that the estimated future floor space is shown for the two town centres. The increase in demand for floor areas may vary between the two centres. For example, the highest increase in floor area occurs within the category of "Restaurants, Hotels and Clubs". As the

Warilla Grove Town Centre is largely occupied by the existing shopping centre, a large portion of this may be part of the Warilla Town Centre.

Table 4.1: Estimated Parking requirement for Additional Retail Floor Area 2031

Description	2031 Floor Area (sq.m)	Parking Requirement [1]
Supermarket & Grocery Stores	-1,632	-82
Take-away Liquor Stores	+1,204	+34
Specialty Food Stores	-1,289	-322
Fast-Food Stores	+521	+130
Restaurants, Hotels and Clubs	+2,362	+591
Departments Stores	0	0
Clothing Stores	-215	-6
Bulky Goods Stores	-486	-11
Other Personal & Household Goods Retailing	+191	+95
Selected Personal Services	-123	-4
Vacancies	-458	
Total Estimated Additional Requirement (Net)	+76	+366

Source of floorspace information: Hill PDA 2015

[1] Based on Shellharbour DCP rates (also shown in Table 2.2).

4.3 Future Parking Requirement

As discussed, Table 4.1 indicates that overall, 366 net additional car parking spaces would be required to cater for future retail development within the town centres, based on Council's current DCP requirements for parking provision

"Restaurants, Hotels and Clubs" contribute towards the highest demand for future floor space, with an increase of 2,362 sq.m. Development for this additional floor space would also need to allow for a future requirement of approximately 591 additional car parking spaces.

It is anticipated that the parking requirement for these developments would need to be provided as part of any proposed development.

While additional parking would be required for uses such as "Take-away Liquor Stores" and "Fast Food Stores" that are forecast to increase in floor area demand, this would be offset by a reduced floor area for other uses such as "Supermarket & Grocery Store" and "Specialty Food Stores".

Further, these developments would need to meet the parking provision requirements on-site, and should not affect demand for public car parking.

As such the existing car parking supply is expected to be sufficient for future parking demand assuming future developments continue to provide on-site parking as with the existing developments.

It is noted that Council-owned public car parks and on-street parking are well utilised in existing conditions. However, any increase in public car parking demand could be catered for by public car parking associated with developments, many of which are underutilised. For example the Bing Lee car park and Warilla Grove Shopping Centre, have a peak period occupancy of 17% and 66% respectively.

5. Conclusion

Based on the analysis and discussions presented within this report, the following conclusions are made:

- A parking survey of the Warilla and Warilla Grove Town Centres was conducted to assess existing demand and identify the likely parking requirements associated with the future development of the town centres.
- The Warilla Town Centre currently contains approximately 560 car parking spaces in a range of on-street, off-street and private off-street areas.
- The Warilla Grove Town Centre currently contains approximately 775 car parking spaces. Approximately 72% of these spaces are within the Warilla Grove Shopping Centre and 8% is on-street parking. The remaining parking within Warilla Grove Town Centre is predominantly private car parking.
- The peak parking demand was recorded as 11:00am – 12:30pm for both town centres. This corresponds occupancies of 57% at Warilla Grove Town Centre and 64% at Warilla Town Centre.
- On-street parking within the Warilla Town Centre experiences high demand in servicing the adjacent retail land uses. At Warilla Grove Town Centre, on-street parking is of low supply and demand, with most properties providing customer car parking.
- There is spare capacity in the town centres for future growth. However, it is noted that future developments would be required to maintain private parking areas to prevent adverse impacts on public parking and overall town centre parking supply.

Appendix A

Car Parking Inventory

Street	On-street (\$)		Between		Restriction			Demand					
	Off-street (O)	Side (S)		To	Private (P)/Public (B)	Type	Hours	Supply	Sat 11am-12pm	Thurs 12:00-12:30	Thurs 1:30-2:00	Thurs 3:00-3:30	
Warrilla Grove Shopping centre	O	S	Southen section		B	Unrestricted		251	143		166	127	116
Warrilla Grove Shopping centre	O	S	Southen section		B	Accessible		2	0		2	1	1
Warrilla Grove Shopping centre	O	S	Southen section		B	Taxi Zone		3	0		2	1	0
Warrilla Grove Shopping centre	O	I	Inside		B	Unrestricted		118	86		98	63	70
Warrilla Grove Shopping centre	O	I	Inside		B	Accessible		6	6		5	5	5
Warrilla Grove Shopping centre	O	I	Northern section		B	Unrestricted		176	92		95	86	88
Warrilla Grove Shopping centre	O	I	Northern section		B	Accessible		5	0		5	5	5
39 Shellharbour Rd Vet	O	I			P	Unrestricted		31	4		6	5	5
61-67 Shellharbour Rd Celebrations customer	O	I	east Car Park		P	Unrestricted		23	16		13	12	15
61-67 Shellharbour Rd Celebrations Private	O	I	north Car Park		P	Unrestricted		10	2		7	6	5
59 Shellharbour Rd	O	I	Car Park with Shed		P	Unrestricted		20	0		0	0	0
37 Shellharbour Rd	O	I	Caltex Service Station Beside Caltex		P	Unrestricted		6	2		2	3	1
37 Shellharbour Rd Dog Depot+	O	I			P	Unrestricted		7	3		2	1	1
10 Woolworths Ave Funeral Director	O	I			P	Unrestricted		10	0		0	0	0
10 Woolworths Ave Funeral Director	O	I			P	Accessible		2	0		0	0	0
27 Grove Circuit	O	I			P	Unrestricted		8	6		3	5	8
35 Shellharbour Rd CWP Distributors	O	I			P	Unrestricted		20	1		13	12	11
33 Shellharbour Rd Think Pink	O	I			P	Unrestricted		10	5		6	5	5
31 Shellharbour Rd			DEVELOPMENT SITE										
2 Petersborough			CONSTRUCTION WORKS										
25 Grove Circuit	O	I	FOR SALE - CLOSED SITE			Unrestricted							
Petersborough Ave	S	N	Shellharbour	to View Street	B	Unrestricted		7	2		1	1	0
Petersborough Ave	S	S	Shellharbour	to View Street	B	Unrestricted		9	2		3	3	1
Woolworths Ave	S	N	Shellharbour	to Grove Circuit	B	Unrestricted		4	2		3	1	1
Woolworths Ave	S	S	Shellharbour	to Grove Circuit	B	Unrestricted		3	0		0	0	0
Woolworths Ave	S	E	Grove Circuit	to Commerce	B	Unrestricted		1	0		0	0	0
Woolworths Ave	S	W	Grove Circuit	to Commerce	B	Unrestricted		2	0		0	0	0
Woolworths Ave	S	E	Commerce	to Veronica	B	Unrestricted		5	4		3	3	3
Woolworths Ave	S	W	Commerce	to Veronica	B	Unrestricted		11	2		3	5	5
Veronica Street	S	N	Shellharbour	to Woolworths Ave	B	Unrestricted		9	0		1	0	0
Veronica Street	S	S	Shellharbour	to Woolworths Ave	B	Unrestricted		9	1		1	3	2
Veronica Street	S	S	Shellharbour	to Woolworths Ave	B	No Standing	3-6pm M-F 9am - 12.30pm Sat	3	0		0	0	0
Grove Circuit	S	N	Woolworths Ave	to 19 Grove Circuit	B	Unrestricted		4	1		5	4	3
Total								775	380		445	357	351

Street/ Location	On-street (S) Off-street (O)		Side		Between		Restriction			Demand				
	On-street (S) Off-street (O)	Side		To	Private (P)/Public (B)	Type	Hours	Supply	Sat 1-2pm	Thurs 11:00-12:00	Thurs 12:30-1:30	Thurs 2:00-3:00		
Beverly Ave Car Park	O				B	Unrestricted		121	26		83	91	98	
Beverly Ave Car Park	O				B	Accessible		3	2		3	2	3	
97 Shellharbour Rd	O				P	Unrestricted		11	1		8	9	8	
99 Shellharbour Rd	O				P	Unrestricted		3	0		5	3	2	
101 Shellharbour Rd	O				P	Unrestricted		4	0		3	3	4	
103 Shellharbour Rd	O				P	Unrestricted		7	1		0	2	2	
103 Shellharbour Rd	O				P	Accessible		1	0		0	0	0	
105 Shellharbour Rd	O				P	Unrestricted		1	0		1	1	1	
107 Shellharbour Rd	O				P	Unrestricted		5	0		0	0	0	
109C Shellharbour Rd	O				P	Unrestricted		7	0		2	1	1	
111 Shellharbour Rd	O				P	Unrestricted		6	0		1	0	1	
111 Shellharbour Rd	O				P	Accessible		1	0		0	0	0	
113 Shellharbour Rd	O				P	Unrestricted		4	0		1	1	1	
119 Shellharbour Rd	O				P	Unrestricted		4	3		2	3	3	
Hall Lane	S	N			B	1P		2	2		1	1	2	
Hall Lane	S	W			B	Unrestricted		3	3		3	3	1	
1 George Street	O				B	Unrestricted		2	1		1	0	1	
3 George Street	O				B	Unrestricted		2	1		1	1	2	
Beverley Ave	S	W	Woodford Ave	to	George St	B	Unrestricted	14	6		9	8	9	
Beverley Ave	S	W	Woodford Ave	to	George St	B	1P 8:30am-6pm M-F 8:30am-12.30pm Sat	1	1		1	1	0	
Beverley Ave	S	E	Woodford Ave	to	George St	B	1P 8:30am-6pm M-F 8:30am-12.30pm Sat	14	12		16	13	14	
12 Beverley Ave	O				P	Unrestricted		6	0		2	2	2	
10 Beverley Ave	O				P	Unrestricted		6	1		1	1	1	
8 Beverley Ave	O				P	Unrestricted		2	2		1	0	1	
6 Beverley Ave	O				P	Unrestricted		6	1		2	2	3	
4 Beverley Ave	O				P	Unrestricted		11	4		4	2	2	
Hicks Lane	O	N	Beverley Ave		Susan Ave	B	Unrestricted	5	2		1	0	0	
9 George Street	O				B	Unrestricted		1	1		1	1	1	
11A George Street	O				B	Unrestricted		3	3		2	3	0	
13 George Street	O				B	Unrestricted		8	1		3	3	1	
15 George Street	O				B	Unrestricted		2	1		2	2	2	
17A George Street	O				B	Unrestricted		2	0		5	4	4	
17B George Street	O				B	Unrestricted		2	2		2	2	1	
21 George Street	O				B	Accessible		2	1		3	2	1	
Susan Ave	S	E	Hicks Lane		George St	B	Unrestricted	4	1		4	3	2	
Susan Ave	S	W	Hicks Lane		George St	B	1P 8:30am-6pm M-F 8:30am-12.30pm Sat	3	0		3	2	2	
George Street	S	N	Susan Ave		Beverley Ave	B	1P 8:30am-6pm M-F 8:30am-12.30pm Sat	8	8		7	7	7	
George Street	S	S	Susan Ave		Beverley Ave	B	1P 8:30am-6pm M-F 8:30am-12.30pm Sat	6	6		6	7	5	
George Street	S	N	Beverley Ave		Shellharbour Rd	B	1P 8:30am-6pm M-F 8:30am-12.30pm Sat	5	4		6	3	4	

Street/ Location	On-street (S) Off-street (O)	Side	Between		Restriction			Demand					
				To	Private (P)/Public (B)	Type	Hours	Supply	Sat 1-2pm	Thurs 11:00-12:00	Thurs 12:30-1:30	Thurs 2:00-3:00	
George Street	S	S	Beverley Ave	Shellharbour Rd	B	Taxi Zone		2	0		3	0	2
Brian Ave	S	W	George St	McKeon Ln	B	P15min	6am - 6pm	2	1		2	1	1
Brian Ave	S	E	George St	McKeon Ln	B	1P	8:30am-6pm M-F 8:30am-12pm Sat	3	1		3	3	3
Terry Avenue	S	E	George St	McKeon Ln	B	Unrestricted		4	0		4	4	3
Terry Avenue	S	W	George St	McKeon Ln	B	1P		2	2		2	2	1
Terry Avenue	S	W	George St	McKeon Ln	B	Accessible		2	0		2	0	2
12 George St	O		Terry Ave	Brian Ave	P	Unrestricted		3	2		3	3	3
8-10 George St	O		Terry Ave	Brian Ave	P	Unrestricted		21	6		19	14	13
6 George St	O		Terry Ave	Brian Ave	P	Unrestricted		7	6		7	7	5
Harrods 4 George St	O		George St	McKeon Ln	P	Unrestricted		9	2		7	8	7
Telstra Car Park 1 George St	O		Shellharbour Rd	Brian Ave	P	Unrestricted		8	0		4	4	0
One Agency 125 Shellharbour Rd	O		Shellharbour Rd	Brian Ave	P	Unrestricted		4	0		4	4	3
Blockbuster 174-176 Shellharbour Rd	O				B	Unrestricted		22	14		9	8	16
McDonalds 158-160 Shellharbour Rd	O				B	Unrestricted		33	33		25	28	14
McDonalds 158-160 Shellharbour Rd	O				B	Accessible		2	0		0	1	1
McDonalds 158-160 Shellharbour Rd	O				B	Hold Bay		3	0		0	0	0
Warrilla Library 162-172 Shellharbour Rd	O				B	Unrestricted		36	3		31	20	14
Warrilla Library 162-172 Shellharbour Rd	O				B	2P		20	3		18	13	14
Warrilla Library 162-172 Shellharbour Rd	O				B	Staff Only		2	0		2	2	1
Warrilla Library 162-172 Shellharbour Rd	O				B	Accessible		3	0		3	2	1
Warrilla Library 162-172 Shellharbour Rd	O				P	Unrestricted		4	0		2	1	1
Bing Lee 144 Shellharbour Rd	O				B	Unrestricted		38	11		6	8	8
Bing Lee 144 Shellharbour Rd	O				B	Accessible		4	0		1	0	1
Bing Lee 144 Shellharbour Rd	O				P	Unrestricted		28	5		6	7	7
Total								560	186		359	329	313

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