WILTON GROWTH AREA

Commercial Centres Study

Prepared for Wollondilly Shire Council

June 2023

Cover images sourced from NSW Government - Wilton: Building a great new town

Contents

Tables

Figures

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Report Details

Job Number	P23040
Version	**Final**
File Name	Wilton Growth Area Commercial Centres Study
Date sent	June 2023

EXECUTIVE SUMMARY

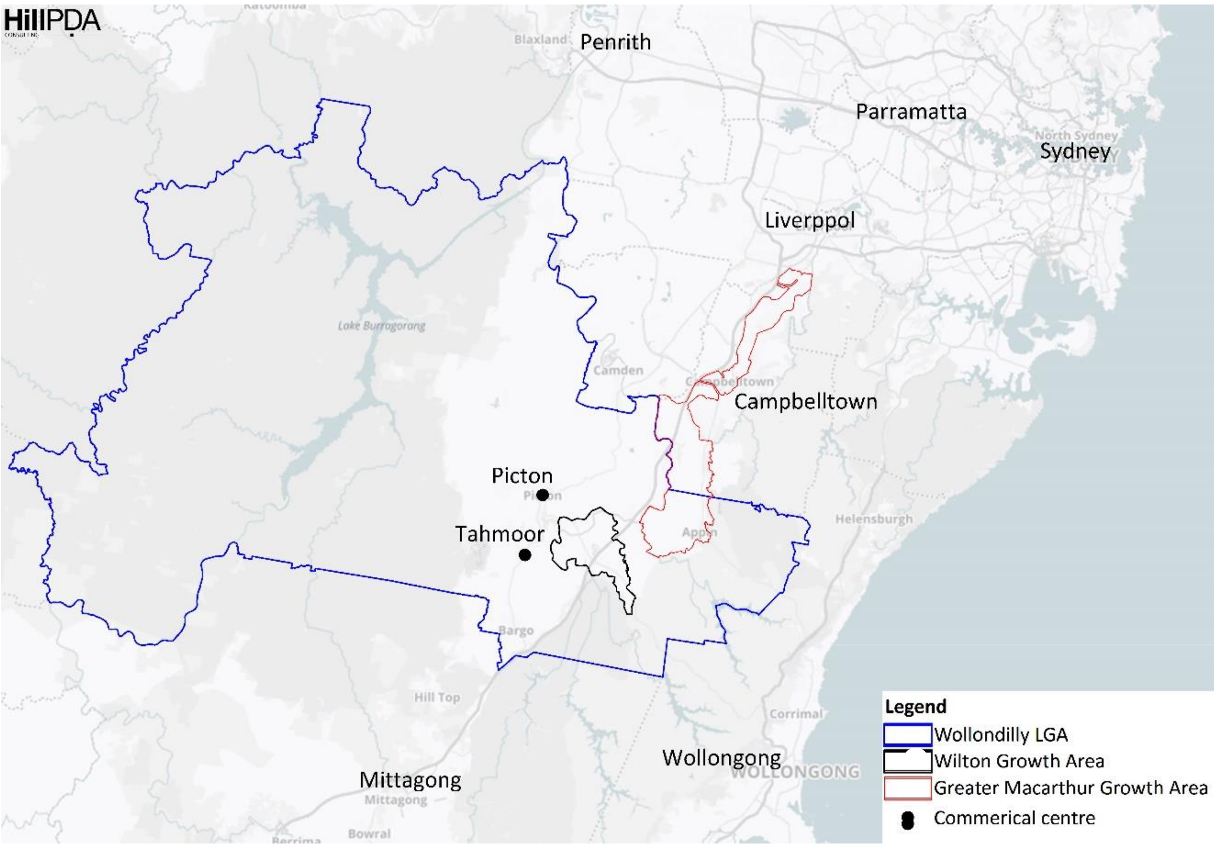
This Commercial Centres Study has been prepared for Wollondilly Council to better understand the demand, location, role and type of commercial centres required to support the future population of the Wilton Growth Area. The study:

1. Reviews the strategic and statutory planning context of the Wilton Growth Area
2. Reviews the current supply of retail space within the Wilton Growth Area
3. Forecasts the total demand for retail space in the Wilton Growth Area
4. Identifies the likely size and retail composition of Wilton Town Centre
5. Identifies the number, type, size, and retail composition for local centres
6. Considers the potential planning requirements and risks to create greater certainty around provision.

Study area

Wilton Growth Area encompasses around 4,150 hectares of land within Wollondilly LGA and is positioned at the junction of the Hume Motorway and Picton Road. There are seven sub-precincts in the Wilton Growth Area that are explored as part of the project.

Wollondilly LGA and Wilton Growth Area context



Source: HillPDA 2020

Planning context

Relevant planning legislation, strategies and documents have assisted in determining the role and function of centres, specific controls that might support that role, where the centres should sit within the hierarchy and any planning risks and issues. The structure plans for Wilton South East Precinct and North Wilton Precinct, Wilton 2040, and the Wilton Development Control Plan provide an understanding of the proposed extent of retail and centre hierarchy seeking to be achieved in the Wilton Growth Area. Broadly, the analysis highlights that:

- The provision of commercial floorspace across the strategic and local centres within Wilton 2040 seems appropriate, however development of new centres will need to align with residential growth so not to draw trade away from established centres.
- Retail caps are in place for the local centres identified in the North Wilton and South East Wilton Structure Plans.

Competing retail centre environment

A review of the surrounding competing retail hierarchy around the Wilton Growth Area has influenced the potential trade area(s) and retail expenditure capture rates for retail centres within the Growth Area.

A discussion on the relationship between Picton and Wilton determines that Picton will remain as the primary administrative centre and community, cultural and civic hub for Wollondilly. It is anticipated that some net loss in trade to Picton may occur, however it is likely that some resident expenditure from Picton residents is already escaping the LGA to go to larger centres such as Narellan and Campbelltown. This would instead be redirected to Wilton Town Centre as the diversity of shops and services in the future strategic centre grows. To counter net less in Picton it is recommended that some residential and employment growth in Picton is encouraged within Picton's primary trade catchment.

Demand modelling

The demand modelling indicates that upon development to 2051 the Wilton Town Centre (core) could consist of the following broad categories:

- 10,000sqm of supermarket provision consisting of two full-line supermarkets (~3,500-4,500sqm) and one discount supermarket (1,500-2,000sqm)
- 17,500sqm of speciality food and food catering including a possible specialist grocery store such as a Harris Farm, liquor, smaller independent grocery, speciality food cafes, restaurants and fast/take-away food
- 4,000sqm of discount department store
- 9,500sqm of non-food specialties including mini-majors, apparel, homewares and general merchandise
- 3,800sqm of personal services such as hairdressers, beauty salons, massage parlour, optometrist and the alike
- 9,000sqm of commercial office/non-retail uses like accounts, allied health, smart-office hubs, travel agents, banking and legal services
- A target vacancy rate of 5%, equal to around 2,700sqm of space.

Combined, the Wilton Local Centres could support up to 15,800sqm of employment space. Of this, around 13,700sqm would be occupied by retail uses, 1,370sqm by non-retail uses and around 750sqm of vacant space.

It is suggested that the local centres could consist of:

- Bingara Gorge | a local centre of around 1,500sqm of employment space.
- North Wilton | a local centre of up to 5,000sqm to cater for the surrounding community. This centre would be anchored by a supermarket of up to 2,000sqm.

- West Wilton | a local centre of up to 3,500sqm to cater for the surrounding community. This centre would be anchored by a supermarket of up to 1,500sqm.
- South East Wilton | a local centre of up to 5,000sqm to cater for the surrounding community. This centre would be anchored by a supermarket of up to 2,500sqm.

A detailed breakdown of each centre proposed composition is provided in the table below.

Proposed Wilton local centre size, composition and residential catchment

Broad retail type	Bingara Gorge LC	North Wilton LC	West Wilton LC	South East Wilton LC	Total
Supermarket	600	2,000	1,500	2,500	6,600
Food catering	500	1,600	1,000	1,200	4,300
Non-food specialties	100	350	250	300	1,000
Services	100	350	250	300	1,000
Commercial	125	450	300	450	1,325
Vacant	75	250	200	250	775
Total space	**1,500**	**5,000**	**3,500**	**5,000**	**15,000**

Source: HillPDA 2020

An additional Retail Demand Addendum has been prepared that considers alternate timeframes and provision of services for centres.

Other considerations:

- The demand modelling indicates there is enough supply planned, in the way of retail space and centres, to meet the future resident community of the Wilton Growth Area.
- Establishing a clear centre hierarchy would provide clarity to the market around growth expectations and the desired role and function of centres. The staging and delivery of residential and commercial development should be done so in a manner that supports the success and hierarchy of its established and proposed centres.
- While there is limited demand for additional centres, neighbourhood shops can play a role in providing local convenience services within accessible neighbourhood catchments, in new residential areas.
- The intensity and timing of dwelling delivery will be a factor that will influence the success of the centres, as commercial development is dependent on a sustained residential population. Delays in the delivery of dwellings, both within the town centre precinct and across the growth area, could effectively delay the opportunity for establishing the commercial uses within the future strategic centre. Further, the delivery of dwellings at a density less than what is proposed within the structure plans, could also undermine the capacity of centres to achieve the desired employment targets.
- Extensive mixed use areas in greenfield development can dilute retail demand and pose a risk to centre hierarchy and overall centre viability.
- Protecting commercial floorspace for future use is essential for securing jobs close to homes, maintaining the viability of the centre and stimulating the day and night time retail economy. There is a risk that adequate space will not be protected to enable more knowledge intensive and professional service outcomes in the town centre.
- Provide opportunity for bulky good and specialised retailing to cluster in a single location with comparable retailers, typically in 'business and enterprise' classified land on major arterial roads. Alternatively, some large format retailers could operate in centres on the ground floor of mixed use premises if they can provide active frontages.
- Limit shops in areas outside the centres in precinct plans, unless considered a neighbourhood shop.

INTRODUCTION

1.0 INTRODUCTION

This Commercial Centres Study has been prepared for Wollondilly Council (Council) to better understand the demand, location, role and type of commercial centres required to support the future population of the Wilton Growth Area (see Figure 1).

1.1 Study objectives

The objectives of the study are to:

- Determine a clear role and function for the centres
- Identify comparable centres to demonstrate scale
- Highlight planning issues and risks that need to be factored into future decision making around the centres
- Determine if the provision of centres is adequate to meet demand generated by 15,000 new homes
- Provide clarity around the preferred location for the future centres.
- Understand the implications on established centres.

1.2 Study approach

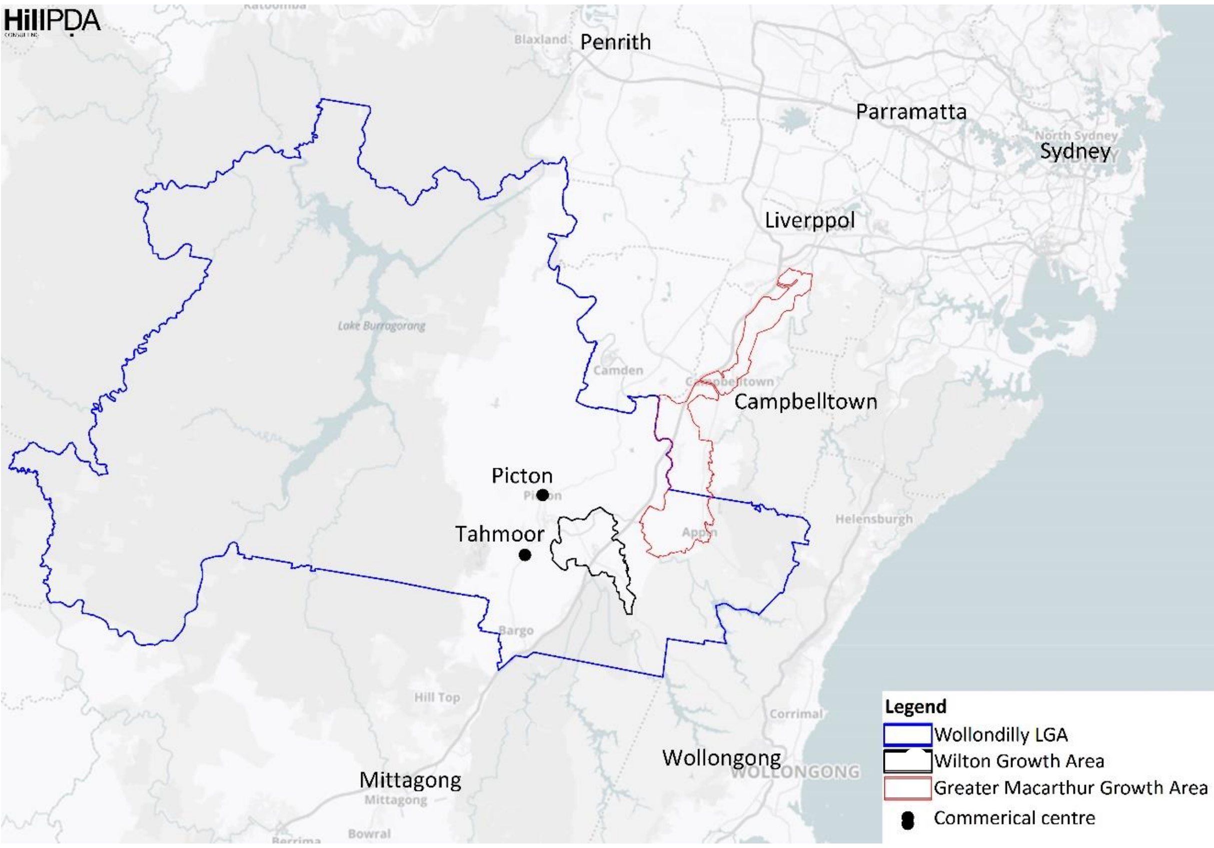
The study objectives have been met by:

1. Understanding the strategic and statutory planning context of the Wilton Growth Area
2. Reviewing the current supply of retail space within the Wilton Growth Area
3. Forecasting the total demand for retail space in the Wilton Growth Area
4. Identifying the likely size and retail composition of Wilton Town Centre
5. Identifying the number, type, size, and retail composition for local centres
6. Considering the potential planning requirements and risks to create greater certainty around provision.

1.3 Context

By 2051, the population of Wilton Growth Area is forecast to increase by around 41,870 residents. Applying high-level per capita retail provision benchmarks, this additional population could generate demand for around 92,110sqm of retail space. Although not all this space would be accommodated within the Growth Area it does highlight the need to understand the number of retail centres and the amount/type of retail space required to support this future community. Currently, the Wilton Growth Area has planned for one major town centre, three new local centres and one new neighbourhood centre, as well as two existing centres (Wilton Plaza (Bingara Gorge) and Camden Street). A key outcome of this piece of work has been to provide Council with an understanding as to whether these centres are enough to service the Wilton community and the wider locality.

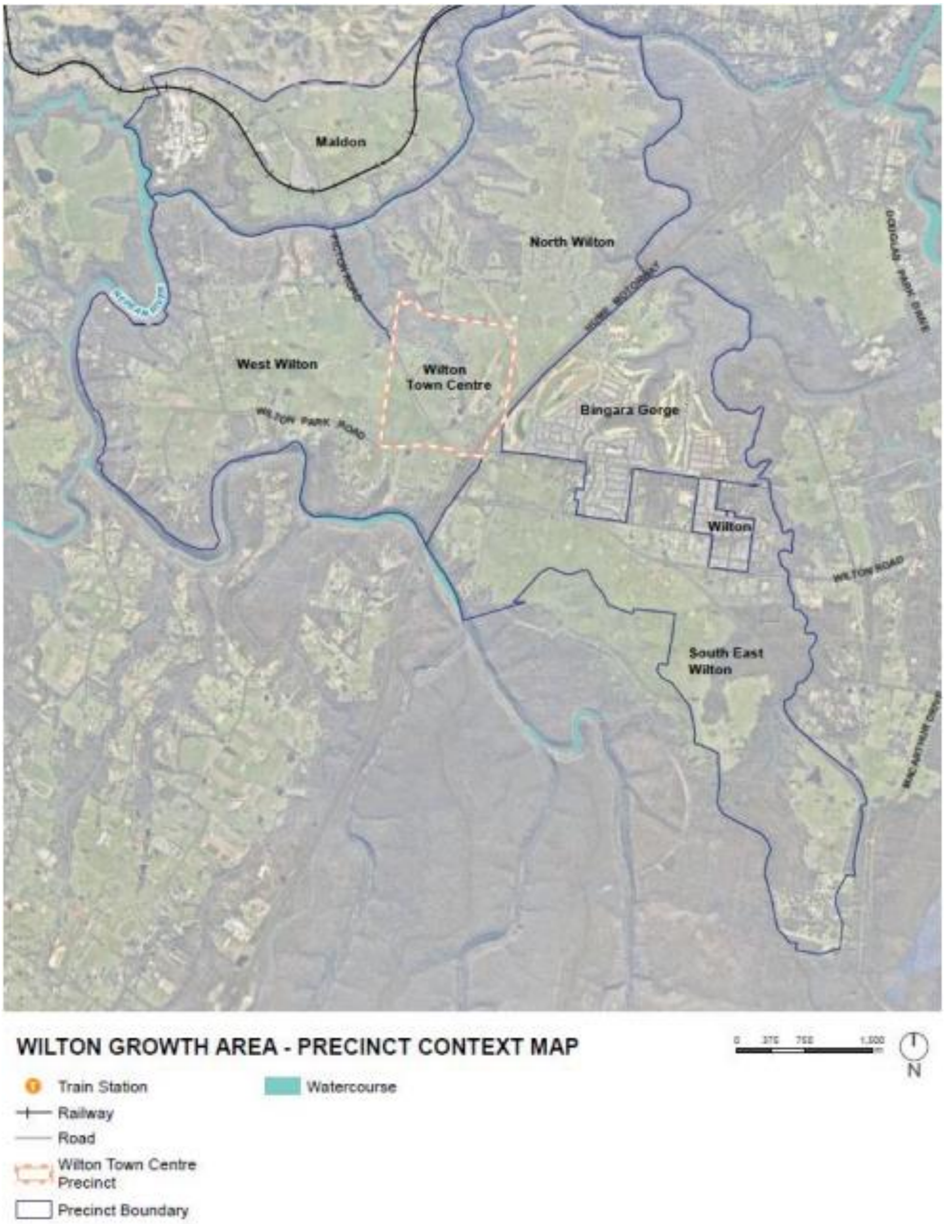
Figure 1: Wollondilly LGA and Wilton Growth Area context



Source: HillPDA 2020

Wilton Growth Area encompasses around 4,150 hectares of land within Wollondilly LGA and is positioned at the junction of the Hume Motorway and Picton Road. In total the Wilton Growth Area is forecast to provide 15,000 dwellings and a resident population of around 43,288 persons by 2051.

Figure 2: Wilton Growth Area precinct context map



Source: NSW Government – Wilton Town Centre Precinct Rezoning – Finalisation Report, September 2021 (Figure 1)

The Wollondilly Shire Council provides an estimate of the proposed staging of dwellings across the sub-precincts in the Wilton Growth Area (Table 1).

Table 1: Wilton Growth Area estimated dwellings by sub-precinct

Precinct	Existing	2016-21	2021-26	2026-31	2031-36	2036-41	2041-46	2046-51	Total
Bingara Gorge	645	755	400						1,800
North Wilton		270	970	1,300	1,260	1,000	800		5,600
Wilton Town Centre		200	860	490	50				1,600
West Wilton			20	370	500	500	500	510	2,400
South East Wilton		200	900	820	950	730			3,600
Total	**645**	**1,425**	**3,150**	**2,980**	**2,760**	**2,230**	**1,300**	**510**	**15,000**
Cumulative total	645	2,070	5,220	8,200	10,960	13,190	14,490	15,000	

Source: Wollondilly Contributions Plan, July 2020

The proposed staging of the resulting resident population by sub-precinct is provided in Table 2.

Table 2: Wilton Growth Area estimated population by sub-precinct

Precinct	Existing	2016-21	2021-26	2026-31	2031-36	2036-41	2041-46	2046-51	Total
Bingara Gorge	1,419	1,661	880						3,960
North Wilton		810	2,910	3,900	3,780	3,000	2,400		16,800
Wilton Town Centre		536	2,305	1,313	134				4,288
West Wilton			62	1,147	1,550	1,550	1,550	1,581	7,440
South East Wilton		600	2,700	2,460	2,850	2,190			10,800
Total	**1,419**	**3,607**	**8,857**	**8,820**	**8,314**	**6,740**	**3,950**	**1,581**	**43,288**
Cumulative total	1,419	5,026	13,883	22,703	31,017	37,757	41,707	43,288	

Source: Wollondilly Contributions Plan, July 2020 and HillPDA

PLANNING CONTEXT

2.0 PLANNING CONTEXT

The following section reviews the relevant planning legislation, strategies and documents to assist in determining the role and function of centres, specific controls that might support that role, where the centres should sit within the hierarchy and any planning risks and issues.

2.1 Western City District Plan

The Western City District Plan (District Plan) is a 20-year plan to manage growth in economic, social and environmental matters. The District Plan is a guide for implementing the Greater Sydney Regional Plan, acting as a bridge between regional and local planning. The following planning priorities, information and actions are of relevance to the study.

<u>Planning priority W6</u> – Creating and renewing great places and local centres, and respecting the District's heritage

- Well-designed built environment: great places are enjoyable and attractive, they are safe, clean and flexible with a mix of sizes and functions.
- Social infrastructure and opportunity: great places are inclusive of people of all ages and abilities, with a range of authentic local experiences and opportunities for social interaction and connection.
- Fine grain urban form: great places are walkable, of human scale, with a mix of land uses including social infrastructure and local services at the heart of communities.
- Place-based planning for centres should address the following principles:
  - provide public realm and open space focus
  - deliver transit-oriented development and
  - co-locate facilities and social infrastructure
  - provide, increase or improve local infrastructure and open space
  - improve walking, cycling and public transport connections, including through the Greater Sydney Green Grid
  - protect or expand retail and/or commercial floor space
  - protect or expand employment opportunities
  - integrate and support arts and creative enterprise and expression
  - support the night-time economy
  - augment or provide community facilities and services, arts and cultural facilities
  - conserve and interpret heritage values
  - accommodate local festivals, celebrations, temporary and interim uses
  - increase residential development in, or within a walkable distance of, the centre
  - provide parking that is adaptable to future uses and takes account of access to public transport, walking and cycling connections.
- Action 19: Using a place-based and collaborative approach throughout planning, design, development and management, deliver great places by:
  a. prioritising a people-friendly public realm and open spaces as a central organising design principle
  b. recognising and balancing the dual function of streets as places for people and movement
  c. providing fine grain urban form, diverse land use mix, high amenity and walkability, in and within a 10-minute walk of centres

d. integrating social infrastructure to support social connections and provide a community hub
e. recognising and celebrating the character of a place and its people.

- Action 20: In Collaboration Areas, Planned Precincts, Growth Areas and planning for centres:
  a. investigate opportunities for precinct-based provision of adaptable car parking and infrastructure in lieu of private provision of car parking
  b. ensure parking availability takes into account the level of access by public transport
  c. consider the capacity for places to change and evolve, and accommodate diverse activities over time
  d. incorporate facilities to encourage the use of car sharing, electric and hybrid vehicles including charging stations.

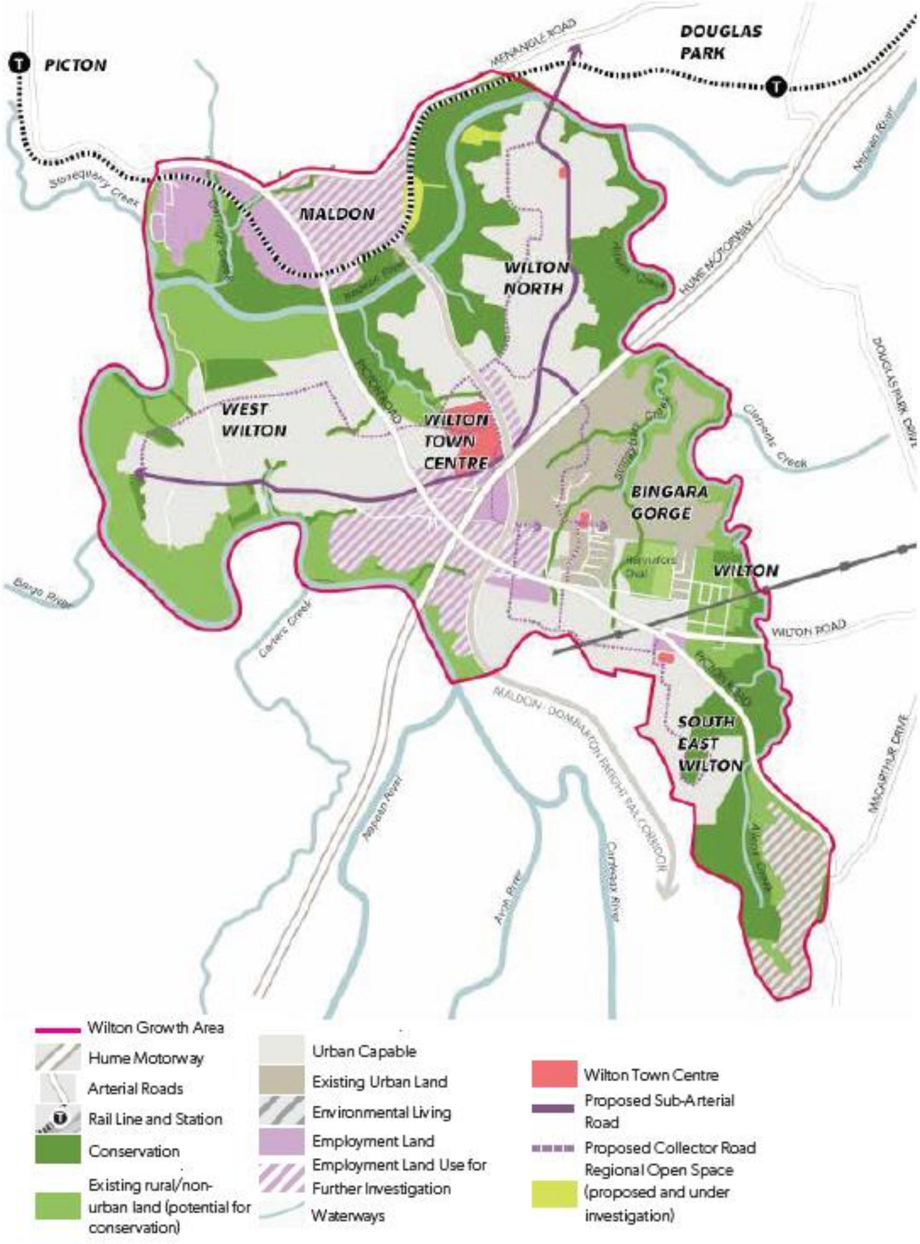
Planning priority W11 – Growing investment, business opportunities and jobs in strategic centres

- A balance must be struck in providing adequate mixed-use or residential zoned land around the commercial core zone to ensure new residential developments can benefit from access and services in centres.
- Delivering housing within a walkable distance of strategic centres encourages non-vehicle trips, which also fosters healthier communities.
- Delivery of housing should not constrain the ongoing operation and expansion of commercial and retail activities.
- Creating the opportunities to attract retail and office development locally brings jobs closer to where people live.
- Action 56: Provide access to jobs, goods and services in centres by:
  a. attracting significant investment and business activity in strategic centres to provide jobs growth
  b. diversifying the range of activities in all centres
  c. creating vibrant, safe places and a quality public realm
  d. focusing on a human-scale public realm and locally accessible open space
  e. balancing the efficient movement of people and goods with supporting the liveability of places on the road network
  f. improving the walkability within and to centres
  g. completing and improving a safe and connected cycling network to and within centres
  h. improving public transport services to all strategic centres
  i. conserving and interpreting heritage significance
  j. designing parking that can be adapted to future uses
  k. providing for a diverse and vibrant night-time economy in a way that responds to potential negative impacts
  l. creating the conditions for residential development within strategic centres and within walking distance (up to 10 minutes), but not at the expense of the attraction and growth of jobs, retailing and services; where appropriate, strategic centres should define commercial cores informed by an assessment of their need.
- Action 60: Review planning controls and create capacity to achieve the job targets for the District's strategic centres.

2.2 Wilton 2040

The Wilton 2040 document was adopted in September 2018. It provides a high-level framework for the Wilton Town Centre and the surrounding urban developable land. It identifies an objective to deliver 15,000 new dwellings and 15,000 new jobs by 2040. The Wilton Growth Area Structure Plan (see Figure 3) provides a land use and infrastructure plan for the development of the growth area.

Figure 3: Wilton Growth Area structure plan



Source: Department of Planning, Industry and Environment 2018

By 2046, Wilton Town Centre is proposed to accommodate around 50,000sqm of floorspace, providing:

- at least two full line supermarkets (3,000 – 4,000m^2)
- a discount supermarket
- speciality shops of around 20,000m^2
- cafes and food services
- offices and retail services of around 9,000m^2

- education, health facilities, leisure and civic uses
- open space.

A network of 'local centres' with capacity of up to 20,000m^2 of floorspace is also proposed to service the local population. These would comprise:

- a small supermarket (1,500m^2 to 2,500m^2)
- up to 2,000m^2 of specialty shops, cafes and food services
- education and child care
- local health services
- recreation facilities.

The local centres are identified in South-East Wilton, Bingara Gorge and Wilton North in Figure 2 of Wilton 2040.

2.3 State Environmental Planning Policy (Precincts – Western Parkland City) 2021

The State Environmental Planning Policy (Precincts – Western Parkland City) 2021 came into effect on 1st March 2022. It superseded the SEPP (Sydney Region Growth Centres) 2006.

It considers the version of the SEPP dated 2 March 2023 and does not consider amendments by *State Environmental Planning Policy (Precincts—Western Parkland City) Amendment (Wilton Town Centre Precinct) 2022 (119) (amended by State Environmental Planning Policy (Biodiversity and Conservation) Amendment (Strategic Conservation Planning) 2022 (461), State Environmental Planning Policy (Precincts—Western Parkland City) Amendment (Wilton Town Centre Precinct) (No 2) 2022 (570) and State Environmental Planning Policy Amendment (Miscellaneous) 2023 (120), Sch 3) (not commenced — to commence on 30.6.2023),* which were not available for viewing at the time of drafting.

Chapter 3 Sydney region growth centres is of relevance to the study, with the aim to:

> *(a) to co-ordinate the release of land for residential, employment and other urban development in the South West Growth Centre, the Wilton Growth Area and the Greater Macarthur Growth Area,*
> *(b) to enable the Minister from time to time to designate land in growth centres as ready for release for development,*
> *(c) to provide for comprehensive planning for growth centres,*
> *(d) to enable the establishment of vibrant, sustainable and liveable neighbourhoods that provide for community well-being and high quality local amenity,*
> *(e) to provide controls for the sustainability of land in growth centres that has conservation value,*
> *(f) to provide for the orderly and economic provision of infrastructure in and to growth centres,*
> *(g) to provide development controls in order to protect the health of the waterways in growth centres,*
> *(h) to protect and enhance land with natural and cultural heritage value,*
> *(i) to provide land use and development controls that will contribute to the conservation of biodiversity.*

As per Clause 3.11 of the SEPP, the provisions applying to developing in the Bingara Gorge Precinct are as per the Wollondilly Local Environmental Plan 2011.

Appendix 7 South East Wilton Precinct Plan and Appendix 8 North Wilton Precinct Plan are of relevance and described below.

2.3.1 Appendix 7 – South East Wilton Precinct Plan and Appendix 15 – North Wilton Precinct Plan

The aims of this Precinct Plans are as follows—

> (a) to rezone land to allow for development to occur in the manner envisaged by the structure plans,
>
> (b) to deliver housing choice and affordability by accommodating a wide range of residential dwelling types that cater for housing diversity,

(c) to guide the bulk and scale of future development within the South East Wilton Precinct consistent with the structure plans,

(d) to protect and enhance conservation areas and areas of significant native vegetation and habitat, as well as to establish development controls that require the impact of development on native flora and fauna (including koalas) to be assessed,

(e) to rezone land to allow for retail and commercial uses to meet the needs of future residents of the Precinct.

Objectives of Zone 1 Urban Development

- To manage the transition of land from non-urban uses to urban uses.
- To encourage the development of well-planned and well-serviced new urban communities in accordance with the structure plans.
- To ensure a range of uses, and uses located in a way, that are consistent with the strategic planning for the Precincts.
- To safeguard land used for non-urban purposes from development that could prejudice the use of the land for future urban purposes.
- To ensure that land adjacent to environmental conservation areas is developed in a way that enhances biodiversity outcomes for the Precinct.

<u>Part 4 Principal development standards</u>

4.3A Residential density

- South East Wilton: The consent authority must not grant development consent to development that results in more than 3,600 dwellings on the land to which this Precinct Plan applies.
- North Wilton: The consent authority must not grant development consent to development that results in more than 5,600 dwellings on the land to which this Precinct Plan applies.

4.3B Retail floor areas

- South East Wilton: Despite any other provision of this Precinct Plan, the total gross floor area used for the purposes of retail premises on land identified as “Area D” on the Wilton Growth Area Key Sites Map must not exceed 5,000 square metres.
- North Wilton: Does not have this clause.

<u>Part 5 Miscellaneous provisions</u>

5.4 Controls relating to miscellaneous permissible uses

- South East and North Wilton - (7) Neighbourhood shops - If development for the purposes of a neighbourhood shop is permitted under this Precinct Plan, the retail floor area must not exceed 400 square metres.

<u>Implication/considerations:</u>

- Most employment uses are permissible with consent under the Urban Development zone. This zone enables flexibility in delivery of employment uses. While broad land use intent is identified in the structure plan that would promote a diversity of uses.
- No more than 3,600 dwellings can be delivered in the South East Wilton area and 5,600 dwellings in the North Wilton area.
- The total gross floor area use for the purpose of retail premises on land must not exceed 5,000 square metres in South East Wilton.
- Wilton Town Centre is yet to be incorporated as an Appendix.

2.4 Wilton Growth Area Development Control Plan 2021

The Wilton Growth Area Development Control Plan 2021 (DCP) provides detailed planning controls for urban development in the Wilton Growth Area. The DCP initially applies to the rezoned South East Wilton (Schedule 1) and North Wilton Precincts (Schedule 2), which will be the first stages of development for the growing Wilton community.

2.4.1 Part 7 Other uses

The objectives of Part 7 are:

> *1. Support non-residential development consistent with the integrity of the character of each Precinct.*
>
> *2. Encourage non-residential development compatible with adjoining and nearby land uses and infrastructure.*
>
> *3. Ensure non-residential development is suitable for access and use by all members of the community.*

Part 7.4 Neighbourhood Shops

The objectives of neighbourhood shops are to:

> *1. Ensure the appropriate provision of retail uses to serve the needs of the local community.*
>
> *2. Minimise the impacts of retail activities on surrounding residential areas.*
>
> *3. Ensure that retail activities in residential areas do not detract from the function or viability of nearby centres.*
>
> *4. Ensure the appropriate location of neighbourhood shops.*

Specific relevant controls for neighbourhood shops are contained in section 7.2.4. Of relevance to size and scale is the provision that neighbourhood shops are to be sites of a property of no less than 500m^2.

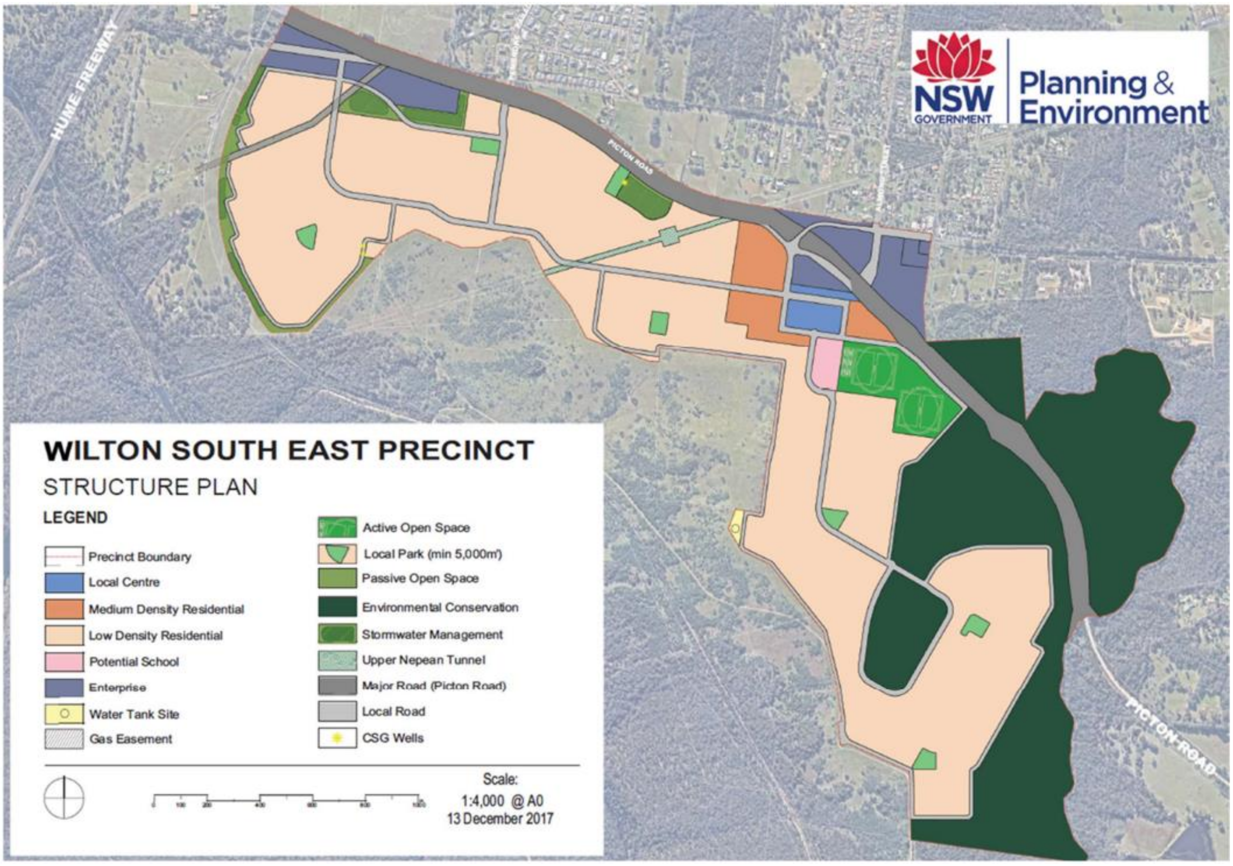
2.4.2 South East Wilton Precinct (Schedule 1)

The approved South East Wilton Structure Plan is as identified in Figure 4. The vision for the precinct specifies that:

> *The Local Centre is centrally located within the precinct accessible location near the Almond Street intersection and will support retail, commercial services, and a proposed community facility to promote community interaction.*

The indicative staging of the Local Centre is within Stage 3.

Figure 4: Approved South East Wilton approved Structure Plan



Source: South East Wilton Precinct - Schedule 1, Wilton Growth Area Development Control Plan 2021

2.4.3 North Wilton Precinct (Schedule 2)

The approved North Wilton Structure Plan is as identified in Figure 5. It indicates that the maximum retail floorspace of the local centre is 5,000sqm. The maximum retail floorspace in the mixed use area is 5,000sqm with a maximum individual tenancy size of 250sqm. These need to be considered when determining the role and function of the local centres.

The relevant components of the vision are:

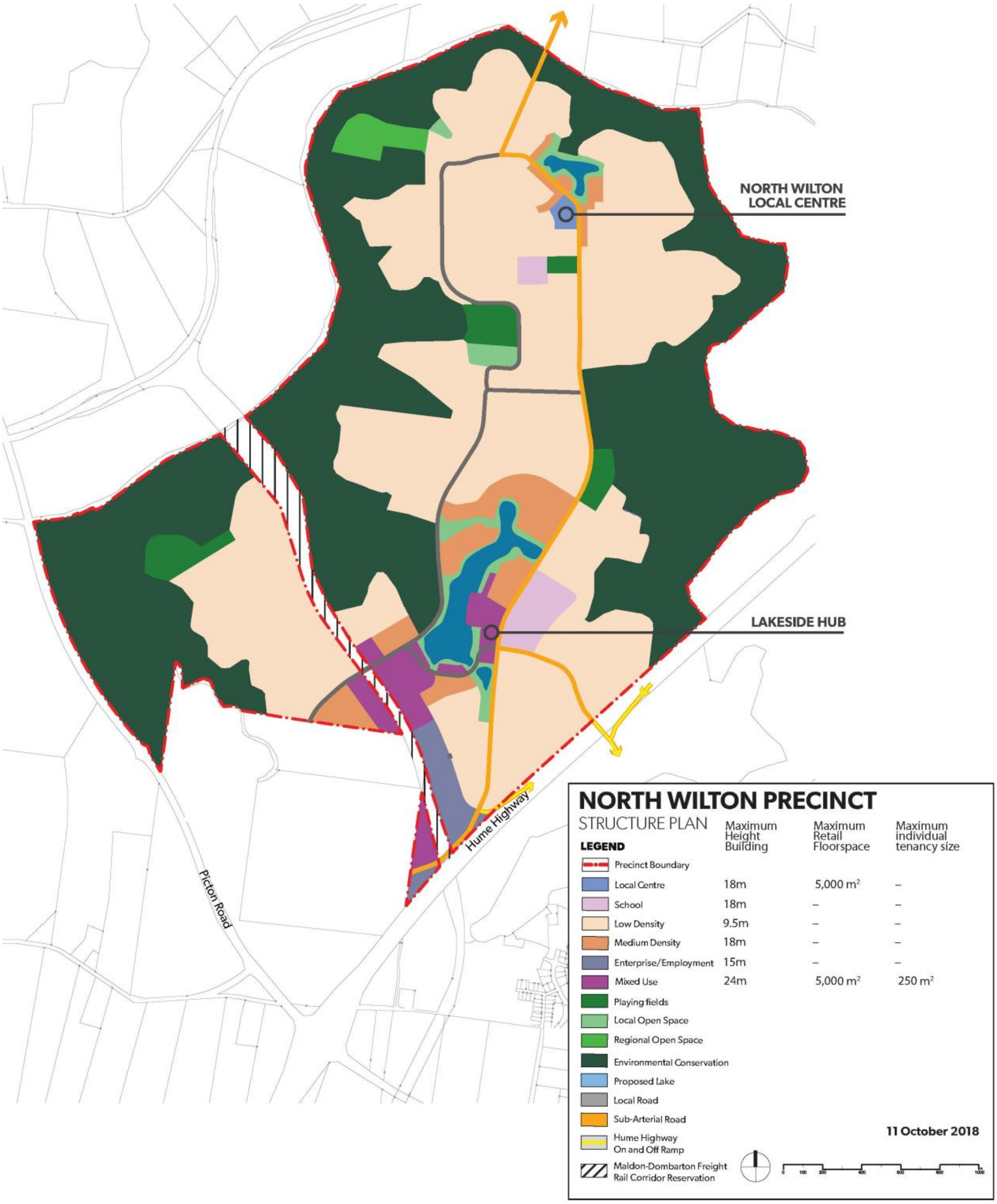
> *The North Wilton Precinct will incorporate a series of thoughtfully planned villages with high local amenity, job opportunities and connections to essential facilities.*
>
> *The Lakeside Activity Hub, adjacent to an expansive lake, will be the focus of activity and daily life for the Precinct. It has been designed to accommodate a range of land uses including commercial, residential, civic, recreation, education and social infrastructure. The amenity and direct association with the large lake will be a key attraction for people to visit and businesses to establish in the Hub.*

Two key development objective for North Wilton of relevance are to:

> *(5) To maximise opportunities for local employment and business.*
>
> *(6) To create vibrant, successful town and local centres.*

The Indicative staging of the Lakeside Hub and North Wilton Local Centre are within Stage 8 and Stage 19 respectively. Other enterprise, employment and education opportunities are also proposed in the precinct within Stage 1 to 6.

Figure 5: Approved North Wilton Precinct Structure Plan



Source: North Wilton Precinct - Schedule 2, Wilton Growth Area Development Control Plan 2021

A draft Neighbourhood Plan and a Stage 1 Development Application has been lodged with Wollondilly Shire Council by the proponent of the North Wilton Precinct. Both are currently being assessed by Council prior to public consultation.

2.5 Wilton Town Centre Precinct

The Wilton Town Centre Precinct will be the residential, retail, commercial and entertainment core of the Wilton Growth Area and the largest strategic centre in the Wollondilly Shire. The precinct has been rezoned, with a commencement date of 30 June 2023.

In its final form the Precinct will support the delivery of approximately:

- 17 hectares of employment land that supporting up to 4,700 jobs;
- The major town centre with up to 2,300 jobs and regional services and facilities;
- 36.7 hectares of environment conservation land;
- 12 hectares of open space;
- 28.9 hectares for infrastructure, including major roads and the Maldon-Dombarton rail corridor; and
- A total of 1,600 dwellings within the Precinct, providing a diverse range of housing[1].

Once the rezoning commences, the Wilton Growth Area Development Control Plan will be updated to include planning controls for the town centres and employment land.

Wilton Town Centre will develop in stages. By 2046 it is anticipated to support around 50,000m^2 of floor space, providing a full range of retail, business and community uses. This would include:

- At least two full line supermarkets (3,000 – 4,000m^2)
- A discount supermarket
- Speciality shops of around 20,000m^2
- Cafes and food services
- Offices and retail services of around 9,000m^2
- Education, health facilities, leisure and civic uses.

The gross retail floor area is of Wilton Major Town Centre is proposed to be capped at 50,000m^2.[2]

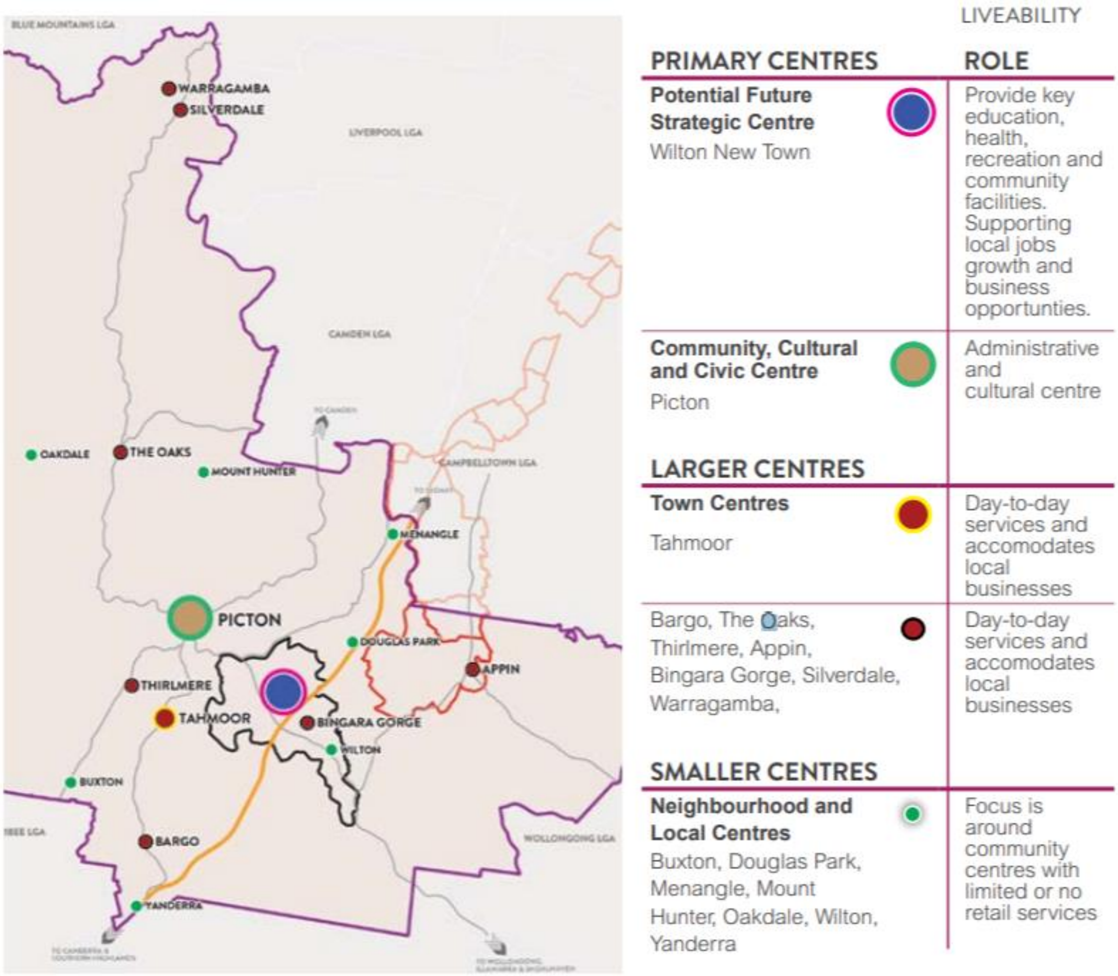
2.6 Wollondilly 2040 LSPS

Wollondilly's contribution to Greater Sydney's housing supply will predominately occur in the Wilton Growth Area. In 20 to 30 years, Wilton will transform into a major new centre with 15,000 homes and space for 15,000 jobs. A diversity of jobs and housing, new infrastructure, environmental protection, public transport, and social and community facilities is desired in Wollondilly.

- Planning Priority 3 | Establishing a framework for sustainable managed growth
  - Action 3.1| Actively participate in planning for growth areas in Wollondilly
- Planning Priority 4 | Creating vibrant, healthy and sustainable communities in our new town Wilton
  - Action 4.1| Prepare and update the Wilton DCP in collaboration with the Department of Planning, Industry and Environment
  - Action 4.2| Develop neighbourhood plans
  - Action 4.3| Prepare a sequencing and infrastructure plan in collaboration with the Department of Planning, Industry and Environment
- Planning Priority 8 | Enhancing vibrant, healthy and sustainable local towns and villages
  - Action 8.1 Prepare a Centres Strategy, including a timetable for place plans for priority towns and villages, establishes a hierarchy and supporting planning controls
  - Action 8.7| Prioritise and develop local character statements for towns and villages

[1] NSW Government – Wilton Town Centre Precinct Rezoning – Finalisation Report, September 2021
[2] NSW Department of Planning, Industry and Environment – Wilton Town Centre Precinct Rezoning Technical Background Paper

Figure 6: LSPS centre hierarchy role and function



Source: Wollondilly LSPS 2020

Note: Not all local centres that are proposed in the Wilton Growth Area are identified.

Implications

- The LSPS establishes intent in terms of the local character, size and role of centres across Wollondilly.
- The development of new centres will need to align with residential growth so not to draw trade away from established centres.

2.7 Wollondilly Contributions Plan – July 2020

The Wollondilly Contributions Plan commenced on the 1st of July 2020 and authorises Wollondilly Council to legally collect contributions towards local infrastructure within the Wilton Growth Area. Of relevance to this study is the projected timing of new homes by precinct (see Table 3), which informs the demand analysis.

Table 3: Projected dwelling delivery timeframes

Precinct (Residential Type)	Dwellings	Existing	2016-2021	2021-2026	2026-2031	2031-2036	2036-2041	2041-2046	2046-2051
Bingara Gorge	1,800	645	755	400					
North Wilton	5,600		270	970	1,300	1,260	1,000	800	
Wilton Town Centre	1,600		200	860	490	50			
South East Wilton	3,600		200	900	820	950	730		
West Wilton	2,400			20	370	500	500	500	510
Total	**15,000**	**645**	**1,425**	**3,150**	**2,980**	**2,760**	**2,230**	**1,300**	**510**
Cumulative Total		**645**	**2,070**	**5,220**	**8,200**	**10,960**	**13,190**	**14,490**	**15,000**

Source: AEC and WSC - Table B5 of Section B2.5 Infrastructure Staging

To note, the suggested timing of delivery is considered more conservative than the dwelling delivery timeframes identified in *Wilton 2040* and the *Wilton: Building a great new town – How critical infrastructure will be delivered in Wilton over 20 years* brochure. The annual dwelling take-up rate averages around 500 dwellings per year over 30 years, compared to the higher 750 dwellings per year over 20 years suggested by *Wilton 2040*. This is important as the rate of dwelling delivery can influence the demand for commercial and industrial floorspace.

RETAIL ANALYSIS

3.0 COMPETING RETAIL CENTRE ENVIRONMENT

The following undertakes a review of the surrounding competing retail hierarchy around the Wilton Growth Area. This includes a review of existing and planned centres of relevance that would influence potential trade area(s) and retail expenditure capture rates for retail centres within the Growth Area.

3.1 Surrounding centres of influence

The key centres that would influence the extent of a potential retail centre in Wilton Growth Area's trade area and provision of retail space are as follows:

1. **Campbelltown-Macarthur Metropolitan cluster**: is located around 26 kilometres or a 19-minute drive to the north of the proposed Wilton Town Centre location. The centre is the administrative centre for Campbelltown LGA and provides a total of around 369,115sqm of occupied employment floorspace of which 165,120sqm or 44% was retail space. Of this retail space just over 23,600sqm is supermarket space[3]. Major land uses in or near the centre include Campbelltown Hospital, Western Sydney University and TAFE NSW. Most of the retail space in the centre is provided in three enclosed shopping centres, these being Macarthur Square, Campbelltown Mall and Market Fair.
    - Macarthur Square | provides 77,635sqm of leasable retail space. Major anchor tenants includes a David Jones (12,243sqm), Big W (8,792sqm), Target (4,460sqm), Woolworths (4,185sqm), Coles (3,760sqm), King Swim (2,730sqm), Rebel Sport (1,680sqm), Dan Murphy's (1,475sqm), JB Hi Fi (1,187sqm), Best & Less (1,179sqm) and a ALDI (1,500sqm). A further 226 speciality shops are provided in the centre and 4,800sqm was vacant in 2018. The Centre had a reported annual turnover of $594 million in 2020, equating to $6,000/sqm. This turnover per square metre ranked the centre 72nd out of 92 similarly sized centres (over 50,000sqm) across Australia.
    - Campbelltown Mall | provides 39,540sqm of leasable retail space. Major anchor tenants include a Kmart (8,224sqm), Target (7,093sqm), Coles (4,080sqm), Woolworths (3,998sqm), ALDI (1,512sqm) and Best & Less (1,047sqm). An additional 102 specialty stores are in the centre and 1,046sqm of space was vacant in 2018. The centre had a reported annual turnover of $242 million in 2019, equating to around $6,450/sqm. This turnover per square metre ranked the centre 63rd out of 133 similarly sized centres (between 20-49,000sqm) across Australia. Indicating the centre is performing strongly.
    - Marketfair | provides 8,705sqm of leasable retail space, major anchor tenants include a Woolworths (3,705sqm) and TK Maxx (1,915sqm). A further 29 speciality shops were also located in the centre. The centre had a reported annual turnover of $61 million in 2020, equating to around $9,500/sqm. This turnover per square metre ranked the centre 63rd out of 133 similarly sized centres (under 20,000sqm) across Australia. Indicating the centre is performing strongly.

    The Campbelltown LSPS acknowledges that *Campbelltown-Macarthur will play an increasingly important role in serving the growing District and particularly the significant growth areas to the south, including Menangle Park, Gilead, Wilton and Appin.*

    The Western District Plan states the centre is developing into Greater Sydney's newest health and medical hubs with the potential to accommodate up to 31,000 jobs by 2036, a 52% increase over that generated in 2016. This significant forecast growth coupled with the large amount of retail and commercial space makes Campbelltown-Macarthur a primary destination for southern residents of the Western District and limits Wilton Town Centres trade catchment northward into Campbelltown LGA.

[3] HillPDA land use survey 2019

2. **Wollongong regional city** is located around 37 kilometres or a 30-minute drive to the east of the proposed Wilton Town Centre location. Wollongong is Illawarra's largest commercial centre, with major tertiary education and health facilities, strong public transport and infrastructure provision. It is estimated that it contains around 245,000sqm of commercial and retail space of which 90,000sqm is retail. The largest single provision of retail space is provided in Wollongong Central shopping centre.

    - Wollongong Central | provides a total of 55,000sqm of leasable space. Major anchor tenants include a Coles (4,079sqm), David Jones, Target (2,640sqm), H&M (2,340sqm), JB Hi Fi (1,538sqm), Anaconda (1,380sqm) and a Rebel Sport (1,285sqm). A further 132 speciality shops are provided in the centre. The Centre had a reported annual turnover of $346 million in 2020, equating to $7,900/sqm. This turnover per square metre ranked the centre 24th out of 92 similarly sized centres (over 50,000sqm) across Australia. Indicating it is performing strongly.

    Wollongong would reduce Wilton Town Centres trade area towards the south-east.

3. **Narellan Town Centre**: is located around 29 kilometres or a 22-minute drive to the north of the proposed Wilton Town Centre location. The Town Centre provides a total of around 81,500sqm of employment floorspace with the majority of retail space being provided in Narellan Town Centre shopping centre. Some medical, commercial and strip retailing also is provided along Camden Valley Road including an ALDI supermarket and Somerset Avenue.

    - Narellan Town Centre Shopping Centre | provides a total of 71,225sqm of leasable space. Major anchor tenants include a Big W (6,535sqm), Target (6,120sqm), Woolworths (4,391sqm), Coles (5,301sqm), H&M (2,190sqm), Dan Murphy's (1,426sqm), JB Hi Fi (1,650sqm), Best & Less (1,157sqm) and a Reni's Home Depot (2,000sqm). A further 171 speciality shops are provided in the centre. The Centre had a reported annual turnover of $562 million in 2020, equating to $9,088/sqm. This turnover per square metre ranked the centre 8th out of 92 similarly sized centres (over 50,000sqm) across Australia. Indicating it is performing strongly.

4. **Camden Town Centre**: is located around 27 kilometres or a 23-minute drive to the north of the proposed Wilton Town Centre location. The Town Centre provides a total of around 23,000sqm of employment floorspace and is anchored by a Coles (3,000sqm) and Woolworths (3,900sqm). The centre is predominantly focused on providing dining, grocery and other lifestyle related uses for the surrounding population.

5. **Rosemeadow Market Place**: is an enclosed shopping mall located around 32 kilometres or a 26-minute drive to the north of the proposed Wilton Town centre location. The centre provides a total of 6,250sqm and is anchored by a Woolworths supermarket 3,670sqm. A further 22 speciality shops are also located in the centre.

6. **Spring Farm**: is an enclosed shopping mall located around 32 kilometres or a 26-minute drive to the north of the proposed Wilton Town Centre location. The centre provides a total of 8,305sqm and is anchored by a Woolworths supermarket 3,580sqm. A further 12 speciality shops are also located in the centre.

7. **Picton Town Centre**: is located around 10 kilometres or a 10-minute drive to the north-west of the proposed Wilton Town Centre location. The centre is the primary administrative centre of Wollondilly and provides an estimated 21,000sqm of retail and commercial space. Picton Mall provides the largest single provision of retail space estimated at around 5,000sqm with a Coles supermarket and a country Target providing an anchor roles. A Super IGA is also located in Picton Town Centre further providing an additional anchor role.

8. **Tahmoor Town Centre**: is located around 16 kilometres or a 16-minute drive to the west of the proposed Wilton Town Centre location. The Town Centre provides an estimated 15,000sqm of employment space, of which, 12,500sqm is occupied by retail uses. Most of the space is provided in two enclosed shopping centres, these being Tahmoor Shopping Centre, which contains a Woolworths supermarket (3,500sqm)

and Food Works Shopping Centre, a standalone ALDI supermarket of around 1,500sqm is also located along Remembrance Drive.

9. **Mittagong Town Centre**: is located around 34 kilometres or a 24-minute drive to the south of the proposed Wilton Town Centre location. The centre provides an estimated 30,000sqm of commercial space with Highlands Market Place and Mittagong Shopping Village being the two largest providers of retail space. The presence of Mittagong and the amount/type of space provided restricts Wilton's trade catchment southward.
    - Highlands Marketplace | provides 16,489sqm of leasable retail space, major anchor tenants include a Woolworths (3,966sqm) and Big W (8,271sqm). A further 38 speciality shops were also located in the centre and 118sqm was vacant in 2018. The centre had a reported annual turnover of $129 million in 2020, equating to $8,540/sqm. This turnover per square metre ranked the centre 81st out of 133 similarly sized centres (over 50,000sqm) across Australia.
    - Mittagong Shopping Village: provides 2,232sqm of leasable retail space, with a Dan Murphy's providing a major anchor role to five speciality shops.

Other centres of relevance include:

1. **Appin**: is located around 16 kilometres or a 16-minute drive to the east of the proposed Wilton Town Centre location. Appin provides an estimated 6,000sqm of employment space and is anchored by a small IGA supermarket. The centre provided top-up shopping needs for the immediate surrounding community. However, weekly shopping needs would be undertaken either elsewhere in the Wollondilly or Campbelltown-Macarthur, which is a 17-minute drive to the north.
2. **Bargo**: is located around 15 kilometres or a 11-minute drive to the south of the proposed Wilton Town Centre location. Bargo provides an estimated 7,000sqm of employment space and is anchored by a 1,500sqm Super IGA. The centre provides for the needs of Bargo and Yanderra, it is likely that residents travel to either Mittagong, Tahmoor or Picton for more substantial weekly shopping.
3. **Thirlmere**: is located around 15 kilometres or a 14-minute drive to the south of the proposed Wilton Town Centre location. In total, Thirlmere provides an estimated 5,500sqm of employment space, which contains a 470sqm small IGA supermarket. The centre provides for the immediate Thirlmere community with weekly shopping trips likely being undertaken locally in Tahmoor or Picton.

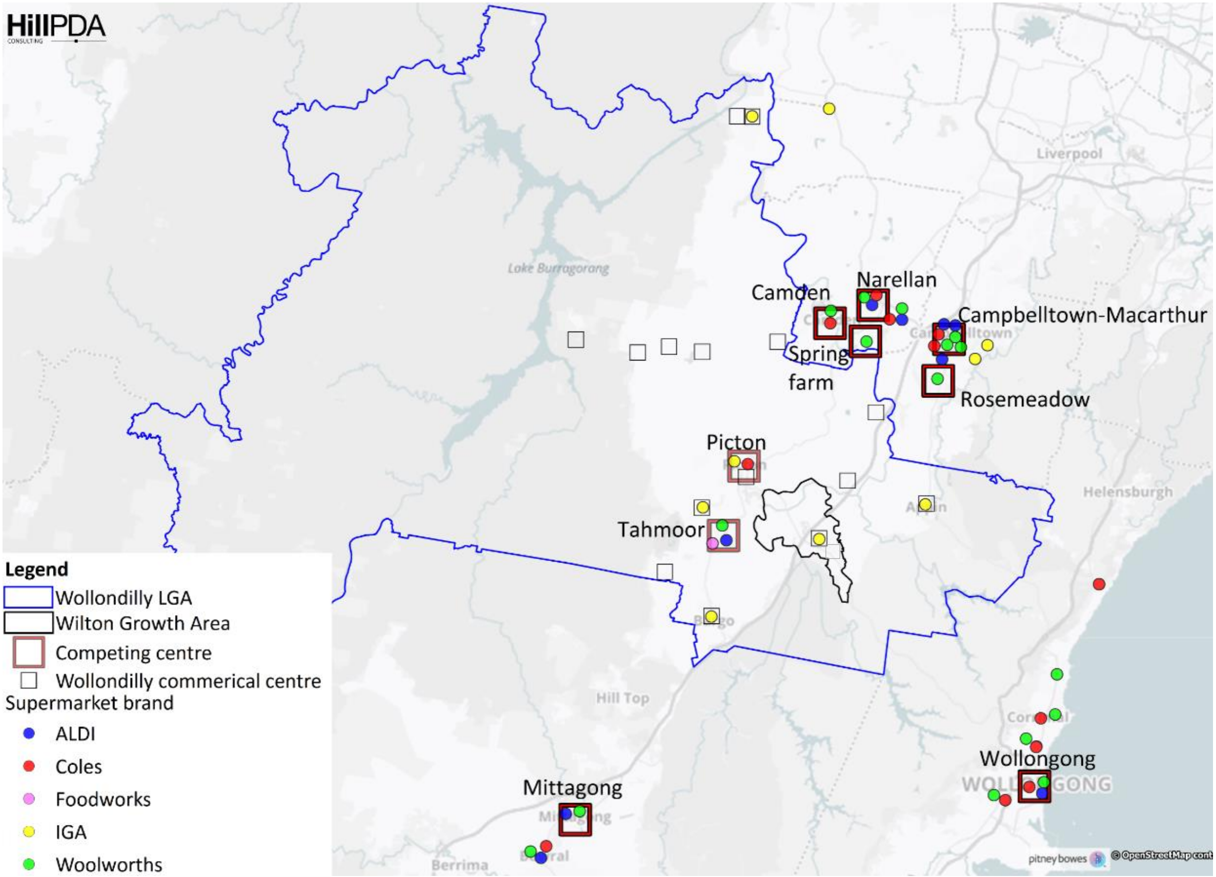
Table 4: Surrounding competing centres estimated commercial and retail space summary

Commercial centre	Total estimated space	Retail space	Major supermarkets
Campbelltown-Macarthur	369,115	165,120	Coles (2), Woolworths (3) and ALDI (2)
Wollongong	244,568	90,000	Coles, Woolworths, ALDI
Narellan town centre	84,655	81,505	ALDI, Woolworths, Coles
Mittagong town centre	30,000	21,000	Woolworths, ALDI
Camden town centre	23,025	16,118	Coles, Woolworths
Picton town centre	21,000	10,000	Coles, Supa IGA
Tahmoor town centre	15,000	12,500	Woolworths, ALDI, Foodworks
Spring farm local centre	8,305	8,305	Woolworths
Rosemeadow local centre	6,250	6,250	Woolworths
Total	**801,918**	**410,798**	

Source: Review of Illawarra retail centre 2014, PCA Shopping Centres Directory 2018, Mini/Little and Big Guns Shopping Centre News 2019-20, PCA Office Market Report 2019

The map below provides an overview of the main competing centres locations and surrounding supermarket network.

Figure 7: Surrounding competing centres and major supermarket network



Source: HillPDA

3.2 Relationship to Picton

Picton will remain the primary administrative centre and community, cultural and civic hub for Wollondilly. The development of Wilton enables the preservation of Picton's heritage and character with growth instead focussed in the Wilton Growth Area. Picton is intended to continue to operate as a primary centre offering residents, workers and visitors the opportunity to access contemporary community and cultural facilities, government services and the boutique heritage main street.

A new centre or expansion of an existing centre will nearly always take trade away from other centres; everything else being equal. As the population in Wilton is expanding, there is a clear need to establish the new Wilton Centre and other local centres in line with dwelling delivery. The impacts to existing centres will diminish over time and eventually trading levels will stabilise as the market recorrects.

The potential impacts that developing Wilton Town Centre would have upon existing centres was explored by HillPDA in an addendum to this study[4]. The Addendum assesses the commercial impacts or redirection of trade that is likely to result from development of the Wilton Town Centre. The key findings of this assessment were:

- All existing centres will enjoy growth in trade from some additional population in their respective trade areas through to 2036
- All existing centres will benefit from population growth in Wilton
- All existing centres will experience some adverse impacts from the Wilton Town Centre

[4] Please refer to Addendum: Appin Growth Area, Retail demand & impact analysis

- Population growth within each existing centre's trade catchment will more than make good for the adverse impacts from the Wilton Town Centre.

Further to the above, it is recommended that some residential and employment growth is encouraged within Picton's primary trade catchment. Defining a distinct role and function for Picton over Wilton is also encouraged and is occurring with the intended establishment of the Community, cultural and civic hub.

4.0 WILTON TOWN CENTRE DEMAND ANALYSIS

Having an understanding as to the surrounding competing retail centre network (refer to Chapter 3.0), this chapter derives trade area(s) for a potential Wilton Town Centre. On deriving these trade area(s), the Chapter projects the resident population, estimates total retail expenditure and the amount of retail floorspace this could support between 2020-51.

4.1 Wilton Town Centre trade area analysis

Trade areas are used to define the geographic area (catchment) that a centre draws from. A primary trade area generally provides around 55 – 75 per cent of a centres business and the secondary catchments provide around 15 – 20 per cent of business. The remaining is from fringe areas of discretionary visitor spending. Defining trade areas is important for understanding the potential expenditure catchment from which a centre can draw upon and what scale a centre can be. It does not necessarily mean the centre will draw trade away from another centre, particularly if in a secondary trade catchment.

Trade area(s) have been defined for Wilton Town Centre. In defining a trade area served by a retail centre, the following has been considered:

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

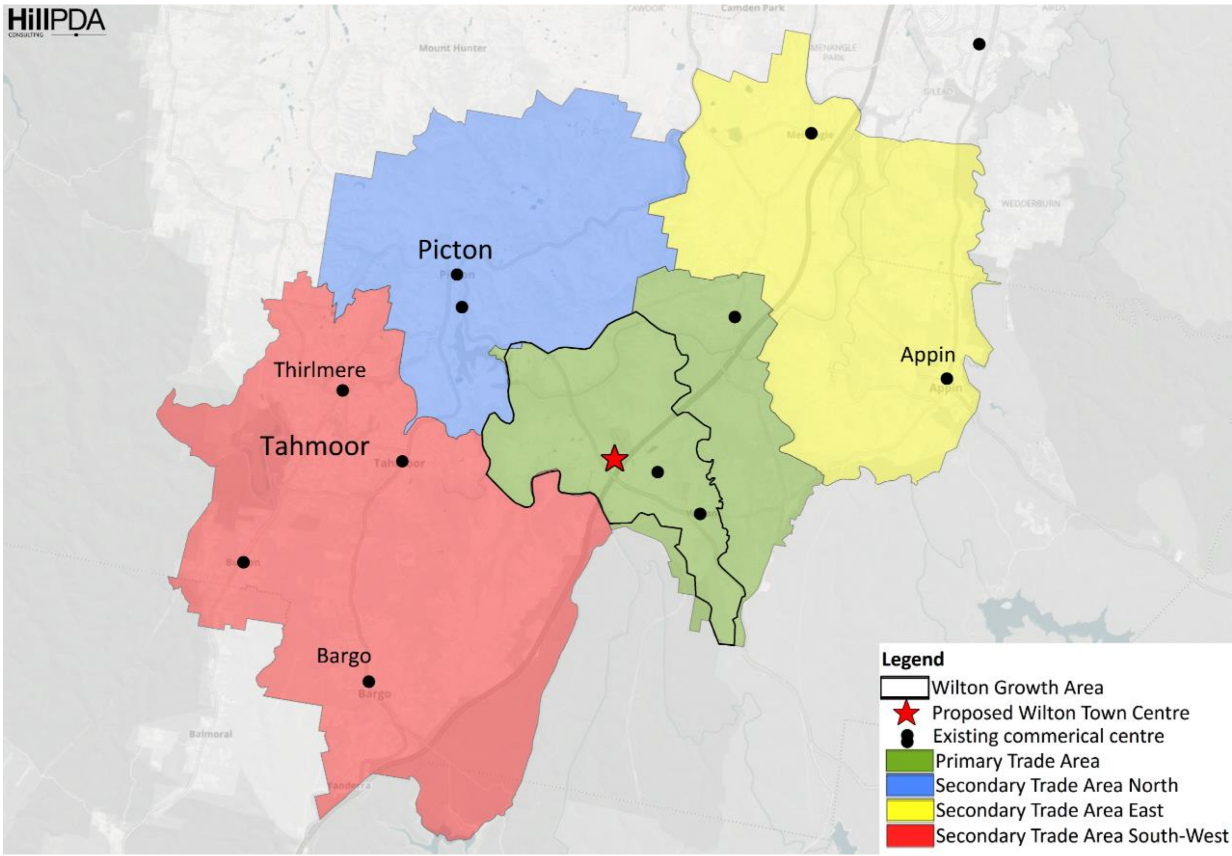
Wilton Town Centre is proposed to be a strategic centre strategically located on at the junction of Picton Road and the Hume Motorway.

Based on the surrounding retail environment, a possible composition of the centre, transport connections and the presence of artificial/natural barriers, a main trade area has been derived for the site comprising four sub-trade precincts. These are as follows:

- A **primary trade area** (PTA) – this area predominantly consists of Wilton Growth Area and Douglas Park suburb.
- A **secondary trade area north** (STAN) – this consists of Picton and Razorback suburbs
- A **secondary trade area east** (STAE) – this consists of Appin, Menangle suburbs and southern part of Gilead suburb.
- A **secondary trade area south-west** (STASW) – this consists of Bargo, Buxton, Couridjah, Pheasants Nest, Tahmoor, Thirlmere and Yanderra suburbs.

Combination of the PTA and the three STA's constitutes the main trade area (MTA).

Figure 8: Wilton Town Centre trade area



Source: HillPDA 2020

4.2 Population projections

The following population projections have been sourced from:

- The ABS 2016 Census
- Small area Forecast id population projections (Wollondilly 2019 and Campbelltown 2017 releases)
- Wollondilly Contributions Plan, July 2020.

It is estimated that around 34,340 residents currently live within the MTA. Over the next 31 years, this population is forecast to reach just under 108,525 residents by 2051. This represents an increase of 74,175 persons or 216% over the period. Most of this growth (40,460 residents or 55%) is projected to occur within the PTA. Its population is forecast to increase from its current population of 5,955 residents to 46,415 residents by 2051, representing an increase of 46,460 residents or 680% over the period.

Table 5: Wilton Town Centre MTA population projections by sub-trade area

Sub-trade area	2020	2021	2026	2031	2036	2041	2046	2051	Growth 2020-56	% growth	ACGR
PTA	5,954	8,152	17,009	25,829	34,143	40,883	44,833	46,414	40,460	679.5%	6.8%
STAN	4,947	5,041	6,134	10,067	14,064	18,052	18,594	19,179	14,232	287.7%	4.5%
STAE	5,235	5,465	6,540	10,202	13,848	17,509	17,973	18,471	13,236	252.9%	4.2%
STASW	18,211	18,401	19,597	20,632	21,428	22,118	23,249	24,458	6,247	34.3%	1.0%
Total	**34,347**	**37,059**	**49,281**	**66,730**	**83,483**	**98,562**	**104,649**	**108,523**	**74,175**	**216.0%**	**3.8%**

Source: ABS, Forecast id, Wollondilly Contributions Plan 2020, HillPDA 2020

4.3 Resident retail expenditure

This Section examines the projected growth in household retail expenditure within the MTA between 2020 and 2031. Household expenditure was sourced from:

- ABS Household Expenditure Survey 2003-04 (updated to 2009) which provides household expenditure by broad commodity type by household income quintile; and
- Marketinfo 2017 database which is generated by combining and updating data from the Population Census and the ABS Household Expenditure Survey (HES) using "microsimulation modelling techniques".

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.

The MTA residents generated an estimated $498 million in retail expenditure in 2020. This figure is forecast to increase to approximately $1.93 billion by 2051. This represents an increase of around $1.43 billion or 288% over the 31-year period.

Of total retail expenditure in 2020, approximately $163 million, or about 32%, was spent in supermarkets and grocery stores. Expenditure in this retail subcategory is forecast to almost increase by around $502 million by 2051, representing around 35% of total retail expenditure growth across the MTA.

For a detailed breakdown by the main trade areas sub-trade area precincts, please refer to Appendix A.

Table 6: Wilton Town Centre MTA resident retail expenditure ($m)

MTA	2020	2021	2026	2031	2036	2041	2046	2051	Change
Supermarkets & Grocery Stores	163	177	246	348	453	557	616	665	502
Specialty Food Stores	35	38	52	73	94	113	124	131	96
Fast-Food Stores	36	39	54	75	97	117	128	136	100
Restaurants, Hotels and Clubs*	37	40	56	79	102	124	135	144	107
Department Stores	28	31	42	59	76	92	100	106	78
Apparel Stores	40	43	59	82	106	129	140	149	110
Bulky Goods Stores**	81	88	121	169	218	264	288	306	226
Other Personal & Household Goods	66	71	97	135	174	211	229	244	178
Selected Personal Services***	13	14	19	27	35	42	46	49	36
Total Retailing ($m)	**498**	**542**	**747**	**1,047**	**1,354**	**1,650**	**1,806**	**1,929**	**1,432**

* Turnover relating only to consumption of food and liquor (excludes all other types of revenue such as accommodation, gaming and gambling)
** Bulky Goods includes fabrics, soft goods, furniture, floor coverings, hardware, houseware, electrical appliances, sports and camping stores.*** Selected Personal Services includes hair and beauty, laundry, clothing hire and alterations, shoe repair, optical dispensing, photo processing and hire of videos

4.4 Retail capture rates by broad store type

The previous analysis identified the total volume of retail expenditure in the MTA. However, not all of this expenditure will be captured by retailers in Wilton Town Centre. Reasons for this include:

- The proximity of surrounding centres which provide a greater range and quantum of retail floorspace
- Presence of small neighbourhood and village centres in the MTA, which would capture some trade
- Residents leaving the locality to, predominantly, undertake leisure and discretionary shopping (in department stores, apparel stores and bulky goods stores elsewhere – such as Campbelltown

- Working residents spending a portion of annual retail expenditure close to their place of work (approximately 15-25%)
- Expenditure from residents who are on holidays/business trips or are away for other reasons for any extended period. This is counterbalanced to some extent by residents from outside the MTA visiting the town centre as they visit the area.

Capture rates (i.e. the proportion of expenditure captured by the site) have been adopted, considering the above factors. These market share assumptions are outlined in the following table and are indicative of retail services that appropriately provide for its surrounding community – in this case, the MTA, reducing their need to travel further to access essential services.

Please note expenditure for bulky goods has not been captured in the Wilton Town Centre (core). This was assumed as bulky goods space is to be located within employment lands, which has good frontage to the Hume Motorway and Picton Road. This location has good access, visibility and will allow clustering of bulky goods uses. Typically, this type of use requires a clustering of around 20,000sqm to achieve critical mass[5], this would not be possible in the town centre.

Additionally, the vision for Wilton Town Centre is for a fine grain centre with a focus on connectivity, pedestrian activity/amenity, traditional retail uses and eateries. The provision of a large quantum of bulky goods space was not seen as supporting this vision.

Table 7: Wilton Town Centre capture rates

Retail sub-category	PTA	STAN	STAE	STASW
Supermarkets & Grocery Stores	50%	15%	10%	10%
Specialty Food Stores	50%	20%	15%	15%
Fast-Food Stores	40%	10%	10%	10%
Restaurants, Hotels and Clubs	50%	20%	20%	25%
Department Stores	20%	15%	10%	10%
Apparel Stores	20%	10%	10%	10%
Bulky Goods Stores	0%	0%	0%	0%
Other Personal & Household Goods Retailing	30%	5%	5%	5%
Selected Personal Services	65%	15%	20%	20%

4.5 Wilton Town Centre's impact on existing Wollondilly centres

If Wilton Town Centre were to capture the amount of trade identified in Table 7 there would still be sufficient expenditure remaining across the MTA and within each of the four sub-trade precincts to ensure:

1. Existing commercial centres capture sufficient trade to ensure their viability and
2. There is demand for additional neighbourhood centres to be provided in Wilton Growth Area to ensure residents are appropriately and conveniently serviced.

For example, by applying the above capture rates by 2051, around 25 per cent of all expenditure generated by residents in the MTA could be captured by retailers in Wilton Town Centre. This leaves 75 per cent of expenditure being directed to smaller centres located in the MTA or surrounding larger centres outside the MTA such as Picton, Tahmoor, Campbelltown, Mittagong, and Camden.

[5] Taking Control of Bulky Goods Retail in Sydney

Having a closer look at each sub-trade precinct, Wilton Town Centre could potentially capture:

- 35% of the PTA's total resident expenditure, leaving a residual 65% to be directed to local centres within the Growth Area and/or surrounding centres
- 11% of the STAN's total resident expenditure, leaving a residual 89% to be directed to other centres within the sub-trade area (such as Picton) and/or surrounding centres
- 9% of the STAE's total resident expenditure, leaving a residual 91% to be directed to other centres within the sub-trade area and/or surrounding centres
- 9% of the STAW's total resident expenditure, leaving a residual 91% to be directed to other centres within the sub-trade area (such as Tahmoor and Thirlmere) and/or surrounding centres.

Table 8: Proportion of retail expenditure directed to Wilton Town Centre by trade segment

Sub-trade precinct	Directed to Wilton TC	Residual expenditure
PTA	35%	65%
STAN	11%	89%
STAE	9%	91%
STASW	9%	91%
MTA	**25%**	**75%**

Source: HillPDA 2020

4.6 Potential expenditure captured by Wilton Town Centre

From the above assumptions, and an additional 20 per cent of capture of trade from beyond the MTA, retailers in Wilton Town Centre could potentially achieve total retail sales of around $37 million in 2020, increasing to around $483 million by 2051. This represents an increase of around $445 million over the period, of which, around $205 million or 46 per cent is attributed to supermarket and grocery store expenditure.

Table 9: Wilton Town Centre potential capture of MTA expenditure ($m)

Retail sub-category	2020	2021	2026	2031	2036	2041	2046	2051	Change
Supermarkets & Grocery Stores	17	24	72	110	148	184	207	224	206
Specialty Food Stores	4	5	18	26	34	42	46	49	45
Fast-Food Stores	3	4	13	20	26	32	36	38	35
Restaurants, Hotels and Clubs	4	6	22	32	42	51	56	59	55
Department Stores	1	2	7	10	14	17	18	19	18
Apparel Stores	2	2	10	14	18	22	24	26	24
Other Personal & Household Goods Retailing	4	6	16	24	32	39	43	46	42
Selected Personal Service	2	2	8	12	16	19	21	22	20
Total Retailing ($m)	**37**	**51**	**166**	**247**	**330**	**405**	**452**	**483**	**446**

Source: HillPDA 2020, MarketInfo 2017, includes an additional 20% capture of expenditure form beyond the MTA

4.7 Demand for employment floorspace

In order to determine the demand for retail floorspace within the MTA, target turnover rates ($/sqm of retail floorspace, and otherwise known as Retail Turnover Densities (RTDs)) have been applied to projected retail expenditure captured in the MTA. These RTD rates broadly represent industry averages.

By applying standard RTDs, the MTA potentially could support up to 4,000sqm Net Leasable Area (NLA) of retail floorspace in 2020, increasing to around 45,000sqm NLA by 2051.

Typically, a town centre would have additional demand from non-retail commercial businesses providing commercial office, financial, childcare, travel, medical and real estate services. This space occupied by non-retail uses ranges from 10 to 30 per cent. A conservative additional 20 per cent demand for non-retail occupiers has been applied. Some level of vacant space should also be planned for; a target vacancy rate of 5 per cent has been applied.

Accounting for non-retail uses and some level of vacancy across the centre, it is estimated that the Town Centre could support up to 5,000sqm NLA of employment floorspace in 2020, increasing to 56,500sqm NLA by 2051.

Table 10: Potential employment floorspace demand– Wilton Town Centre (sqm, NLA)

Year	2020	2021	2026	2031	2036	2041	2046	2051
Supermarkets & Grocery Stores	1,118	1,537	4,593	6,789	8,944	10,843	11,905	12,515
Specialty Food Stores	337	462	1,524	2,187	2,819	3,360	3,622	3,752
Fast-Food Stores	309	426	1,280	1,848	2,387	2,843	3,075	3,186
Restaurants, Hotels and Clubs	695	951	3,520	4,942	6,296	7,462	8,024	8,317
Discount Department Store	295	405	1,701	2,403	3,076	3,668	3,923	4,064
Clothing Stores	254	348	1,399	1,964	2,504	2,975	3,189	3,304
Other Personal & Household Goods	625	856	2,343	3,420	4,440	5,293	5,745	5,950
Selected Personal Services	343	469	1,535	2,188	2,808	3,336	3,600	3,730
Total occupied retail space (sqm)	**3,976**	**5,454**	**17,895**	**25,741**	**33,274**	**39,780**	**43,082**	**44,820**
Commercial space	795	1,091	3,579	5,148	6,655	7,956	8,616	8,964
Vacancy rate (say 5% target)	239	327	1,074	1,544	1,996	2,387	2,585	2,689
Total retail demand (sqm)	**5,010**	**6,872**	**22,547**	**32,433**	**41,926**	**50,123**	**54,284**	**56,473**

* Sources: ABS Retail Survey 1998-99 (escalated to 2020 dollars), Urbis Retail Averages, Shopping Centre News, HillPDA and various consultancy studies.

Having identified the above retail provision by specific retail categories, it is important to allow for flexibility within retail and commercial floorspace provision. This ensures businesses can effectively respond to market/external influences and changes in operations. With this in mind, a centre of around 56,500sqm NLA could be supported at Wilton Town Centre by 2051.

Wilton 2040 identifies that Wilton Town Centre could support around 50,000sqm of occupied space by 2046. Our demand modelling suggests the Town Centre would support around 54,285sqm of space by 2046. Our modelling includes an allowance for vacant space which is not in Wilton 2040's estimate. Subtracting this, the two estimates are in accordance with each other.

Upon total development (2051) our modelling indicates that Wilton Town Centre could consist of the following broad categories:

- 10,000sqm of supermarket provision consisting of two full-line supermarkets (~3,500-4,500sqm) and one discount supermarket (1,500-2,000sqm)
- 17,500sqm of speciality food and food catering including a possible specialist grocery store such as a Harris Farm, liquor, smaller independent grocery, speciality food cafes, restaurants and fast/take-away food
- 4,000sqm of discount department store
- 9,500sqm of non-food specialties including mini-majors, apparel, homewares and general merchandise
- 3,800sqm of personal services such as hairdressers, beauty salons, massage parlour, optometrist and the alike
- 9,000sqm of commercial office/non-retail uses like accounts, allied health, smart-office hubs, travel agents, banking and legal services
- A target vacancy rate of 5%, equal to around 2,700sqm of space.

Please note: the demand for larger format retail, that is typically associated with employment lands, has been considered in the Wollondilly Employment Land Strategy.

4.8 Wilton town centre timing

The following table provides an indicative development timeframe for key retail elements within the Town Centre. This has been based on typical population thresholds and a typical trading environment. Please note, the below dates are theoretical and are based on several variables including indicative development yields and timeframes identified in the Wollondilly Contributions Plan July 2021 and a pre-COVID environment. As such, these should be used as a guide as timing would depend on several variables.

It is noted that development patterns within the Wilton Growth Area have not occurred in accordance with the timeframes identified in the Wollondilly Contributions Plan July 2021. As such, population thresholds have been provided for the development of key retail elements in the Town Centre. Please note, that the Town Centre would source a proportion of its trade from beyond the immediate Wilton Growth Area or PTA. Given that the vision is for residential precinct to be serviced by a local centre, the overall MTA population thresholds should considered when guiding the indicative delivery of each milestone.

Table 11: Proposed Wilton Town Centre timing

Population thresholds		Milestone	Total retail space	Total commercial	Vacant space	Total centre size
PTA	MTA					
15,500	46,837	Supermarket 1	12,919	2,584	775	16,277
24,500	63,240	Supermarket 2	24,172	4,834	1,450	30,456
42,000	89,515	Supermarket 3	35,877	7,175	2,153	45,205
45,000	98,562	Discount department store	43,082	8,616	2,585	54,284
46,500	**108,523**	**Total development**	**44,820**	**8,964**	**2,689**	**56,473**

Source: HillPDA 2020

4.9 Wilton Town Centre employment potential

Based on indicative land uses, it is estimate that Wilton Town Centre could generate around 2,365 jobs upon full development and occupation. To note, these jobs are for broad retail types. It does not calculate jobs from other industry sectors such as education and community services.

Table 12: Wilton Town Centre indicative jobs (sqm)

Broad retail type	Floorspace (NLA)	Employment density	Jobs
Supermarket/grocery	10,000sqm	25 per sqm	400
Food catering	17,500sqm	18 per sqm	972
Discount department store	4,000sqm	40 per sqm	100
Non-food specialties	9,500sqm	30 per sqm	317
Services	3,800sqm	30 per sqm	127
Commercial	9,000sqm	20 per sqm	450
Total occupied floorspace	**53,800sqm**		**2,366**
Vacant space	2,700sqm		0
Total floorspace	**56,500sqm**		**2,366**

Source: HillPDA 2020

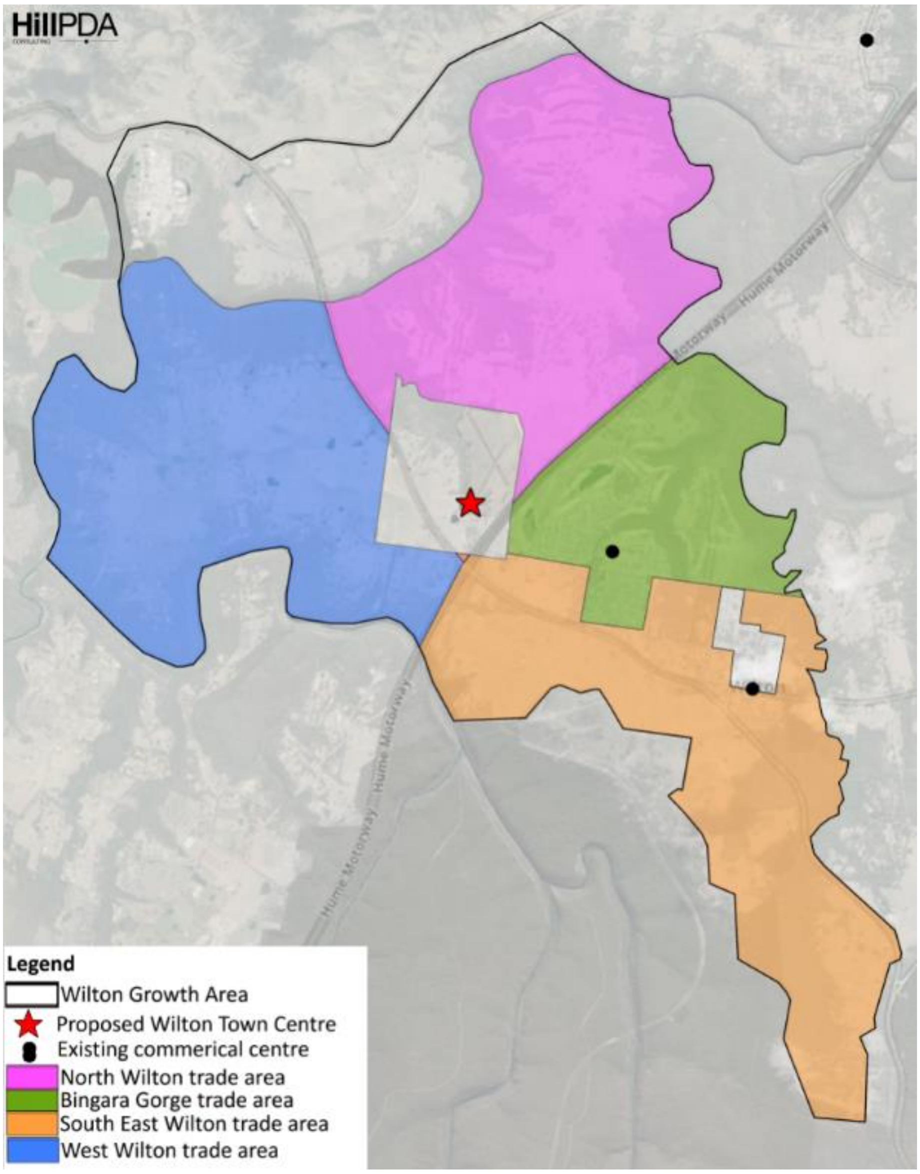
5.0 WILTON LOCAL CENTRE DEMAND ANALYSIS

This Chapter assesses if the proposed size and mixture of each local centres is sufficient to service the population of its respective residential precinct. As instructed, population and development patterns/staging for each residential precinct was sourced from the Wollondilly Contributions Plan 2020. If population yields, development patterns, delivery timeframes or the number of proposed centres differ, then the results of this chapter would differ accordingly.

5.1 Wilton local centre trade area analysis

The trade area for each local centre corresponds to its residential precinct (refer to Figure 9). This ensures that each residential precinct is serviced by an accessible neighbourhood retail centre that serves the local needs of its population and that development promotes a sense of place and focal point for the community.

Figure 9: Wilton Growth Area residential precinct trade areas



Source: HillPDA 2020

5.2 Wilton Growth Area's residential precinct population projections

The table below provides a summary of population projections and timing for each residential precinct. Combined the resident population is forecast to increase from its current 3,000 residents to around 39,000 residents by 2051, an increase of 36,000 residents.

North Wilton is expected to have the largest residential population upon completion at 16,800 persons by 2046. This is followed by South East Wilton with an expected population of 10,800 persons by 2041. While West Wilton is forecast to have a population of just under 7,450 residents by 2046. Bingara Gorge is forecast to have a population of 3,960 residents by 2026. It is the only precinct to have a current population, at around 3,000, and an existing retail centre.

Table 13: Wilton Growth Area's residential precinct population projections

Sub-precinct	Existing	2016-21	2021-26	2026-31	2031-36	2036-41	2041-46	2046-51	Total
Bingara Gorge	1,419	1,661	880						**3,960**
North Wilton		810	2,910	3,900	3,780	3,000	2,400		**16,800**
West Wilton			62	1,147	1,550	1,550	1,550	1,581	**7,440**
South East Wilton		600	2,700	2,460	2,850	2,190			**10,800**
Total persons	**1,419**	**3,071**	**6,552**	**7,507**	**8,180**	**6,740**	**3,950**	**1,581**	**39,000**

Source: ABS, Forecast id, Wollondilly Contributions Plan 2020, HillPDA

5.3 Resident retail expenditure

The table below provides a summary of total retail expenditure for each residential precinct. Expenditure is directly related to the number of residents present in each precinct, hence precincts with larger populations will have greater levels of expenditure. Precincts that develop earlier will have the need for retail services sooner than those which developer later.

For a detailed breakdown of household expenditure by retail category please refer to Appendix B, Section B1.

Table 14: Wilton Growth Area total retail expenditure by residential precinct ($m)

Residential precinct	2020	2021	2026	2031	2036	2041	2046	2051	Growth
Bingara Gorge	45	46	62	63	65	67	69	71	26
North Wilton	0	12	58	122	188	245	294	303	303
West Wilton	0	0	1	19	46	73	103	134	134
South East Wilton	5	9	51	92	142	184	189	195	190
Combined total ($m)	**50**	**68**	**172**	**297**	**441**	**569**	**656**	**704**	**654**

Source: HillPDA 2020

5.4 Retail capture rates and potential expenditure captured by precinct

A local centre would not be expected to capture the above identified total volume of retail expenditure generated in its respective precinct, for reasons identified in Section 4.4. The below table provides a summary of the applied capture rates for each precinct and retail category. Please note, the rates applied in Wilton North are slightly lower resulting from the presence, proximity, and accessibility to Wilton Town Centre. While it will be important for North Wilton to have some provision of retail to serve the immediate catchment, an over-capture of retail in this area will potentially undermine the delivery timeframes and performance of the Wilton Town Centre.

The below capture rates (Table 15) have been applied to the retail expenditure by store type for each precinct as identified in Table 14.

Table 15: Wilton residential precinct capture rates by retail store type

Retail category	Bingara Gorge	North Wilton	West Wilton	South East Wilton
Supermarkets & Grocery Stores	25%	20%	30%	30%
Specialty Food Stores	25%	20%	25%	25%
Fast-Food Stores	25%	20%	25%	25%
Restaurants, Hotels and Clubs*	25%	20%	25%	30%
Department Stores	0%	0%	0%	0%
Apparel Stores	0%	0%	0%	0%
Bulky Goods Stores	0%	0%	0%	0%
Other Personal & Household Goods Retailing	5%	5%	5%	5%
Selected Personal Services	25%	20%	25%	25%

Source: HillPDA 2020

By applying the above capture rates, the below table provides an estimate as to the total amount of retail expenditure captured by a potential local centre within the identified precinct.

It is estimated that retailers in North Wilton could capture around 13 per cent of the total amount of expenditure generated within the precinct. Retailers in Bingara Gorge are likely to capture 16 per cent, while retailers in West Wilton and South East Wilton could capture around 18 per cent of the total amount of expenditure generated within the respective precinct.

For a detailed breakdown of the amount of expenditure captured by retail category please refer to Appendix B, Section B2.

Table 16: Estimated retail expenditure captured by retailers within individual residential precinct ($m)

Precinct	2020	2021	2026	2031	2036	2041	2046	2051
Bingara Gorge	7.1	7.3	9.6	10.0	10.3	10.7	11.0	11.4
North Wilton	0.0	1.5	7.3	15.5	24.0	31.3	37.8	39.0
West Wilton	0.0	0.0	0.2	3.4	8.0	12.9	18.1	23.8
South East Wilton	0.8	1.6	9.1	16.5	25.4	33.0	34.1	35.3

Source: HillPDA, includes an allowance for an additional 5% of expenditure captured from beyond TA

5.5 Demand for employment floorspace by local centre

The table below provides a summary of the potential employment space that could be supported within a local centre located within the respective residential precinct. In summary:

- **Bingara Gorge |** demand modelling suggests that the community of Bingara Gorge could support around 1,500sqm of employment space. Of this, 1,250sqm is retail associated and includes a small supermarket of up to 600sqm. Currently, this precinct contains Wilton Plaza that provides an estimated 1,500sqm of employment space and is anchored by a 600sqm IGA Xpress supermarket. There is also a small café near the centre, however its floorspace is likely to oversupply the locality. Based on the precinct population defined in the Development Contribution Plan, the precinct is considered sufficiently provisioned to service its community and no further development is required.
- **North Wilton |** demand modelling suggests that the community of North Wilton supports just over 5,200sqm employment space. Of this 4,500sqm is retail associated, of which up to 2,000sqm is supermarket space. **The indicative provision of floorspace in the local centre (up to 5,000sqm) and the mixed use and Lakeside Hub (up to 5,000sqm) means that retail demand could be diluted and could affect the viability of centre performance, including the performance of Wilton Town Centre.** Retail and commercial provision in this location should generally be discouraged. Any provision should be limited to a few café's/restaurants and some small-scale convenience retail located around the possible lake. Assuming the lake progresses, this would create an "eat street" opportunity that leverages the amenity

and provides an alternate dining options for local residents. Supermarkets and boutique retailing should be discouraged. Alternate employment forms could be provided on the ground floor in the mixed use area such as light industry, bulky goods and office or business space.

- **West Wilton |** demand modelling suggests that the community of West Wilton could support up to 3,650sqm employment space. Of this around 3,150sqm is retail associated, of which up to 1,600sqm is supermarket space.
- **South East Wilton |** demand modelling suggests that the community of South East Wilton could support up to 5,450sqm employment space in a local centre. Of this 4,720sqm is retail associated, of which up to 2,300sqm is supermarket space.

Combined the precincts could support up to 15,800sqm of employment space within their respective local centres. Of this, around 13,700sqm would be occupied by retail uses, 1,370sqm by non-retail uses and around 750sqm of vacant space. This supply of floorspace is recommended to support a healthy centre hierarchy. This is generally consistent with that outlined in the 20,000sqm cap outlined in the Development Control Plan and Wilton 2040 as it does not factor in floorspace for uses such as education, health and civic uses.

For a detailed breakdown of the amount employment floorspace that could be supported within each local centre by category and year, refer to Appendix B, Section B3.

Table 17: Total employment space demand by category and residential catchment (sqm NLA)

Employment space category	Bingara Gorge	North Wilton	West Wilton	South East Wilton	Total
Supermarkets & Grocery Stores	607	2,061	1,598	2,320	6,585
Specialty Food Stores	125	425	275	399	1,224
Fast-Food Stores	144	489	316	459	1,409
Restaurants, Hotels and Clubs	258	875	565	985	2,683
Other Personal & Household Goods	77	328	170	246	821
Selected Personal Services	98	332	215	311	956
Total occupied retail space (Sqm)	**1,310**	**4,510**	**3,138**	**4,720**	**13,678**
Commercial space	131	451	314	472	1,368
Vacancy rate (say 5% target)	72	248	173	260	752
Total retail demand (sqm)	**1,513**	**5,210**	**3,625**	**5,451**	**15,798**

Source: HillPDA

5.6 Proposed Wilton Growth Area local and neighbourhood centre sizes

From the above demand modelling and any other existing space within each precinct, it is suggested that each local centre could consist of:

- **Bingara Gorge |** a local centre of around 1,500sqm of employment space.
- **North Wilton |** a local centre of up to 5,000sqm is enough to cater for the surrounding community. This centre would be anchored by a supermarket of up to 2,000sqm.
- **West Wilton |** a local centre of up to 3,500sqm is enough to cater for the surrounding community. This centre would be anchored by a supermarket of up to 1,500sqm.
- **South East Wilton |** a local centre of up to 5,000sqm is enough to cater for the surrounding community. This centre would be anchored by a supermarket of up to 2,500sqm

  South East Wilton could also support an additional 500sqm in neighbourhood shops. This would likely be beneficial away from the local centre in a locality which increases the walkability of the precinct to essential services (see section 6.3).

The modelling did not suggest sufficient residential demand to support a neighbourhood centre at Maldon, however it is important that workers have access to services, convenience retail and food close to their place of work. Generally, employees will spend money locally if they have the option, rather than travelling to other locations. Demand generated by workers and what it would mean for centre demand has not been calculated as there is limited visibility over the likely employment densities that could be achieved in the catchment.

A detailed breakdown of each centre proposed composition is provided in the table below.

Table 18: Proposed Wilton local centre size, composition and residential catchment

Broad retail type	Bingara Gorge LC	North Wilton LC	West Wilton LC	South East Wilton LC	Total
Supermarket	600	2,000	1,500	2,500	**6,600**
Food catering	500	1,600	1,000	1,200	**4,300**
Non-food specialties	100	350	250	300	**1,000**
Services	100	350	250	300	**1,000**
Commercial	125	450	300	450	**1,325**
Vacant	75	250	200	250	**775**
Total space	**1,500**	**5,000**	**3,500**	**5,000**	**15,000**

Source: HillPDA

5.7 Proposed Wilton local centre timing

The timing and staging of residential and commercial development can be critical to delivering successful centres. A staged release of commercial lands, in line with residential development, generally is the most effective. Where multiple centres are being delivered relatively close together, this dilutes demand in the trade catchments. Generally, the supply of centres proposed in the structure plan is sufficient to meet the future residential population, however the timing of centre delivery will need to be staged in line with residential releases.

The following table provides an indicative development timeframe for the delivery of a local centre within each of Wilton's sub-residential precincts. This has been based on typical population thresholds, proposed spatial development patterns and a typical trading environment. The development timeframes are indicative and would be guided by market considerations.

Please note, the below dates are theoretical and are based on several variables including indicative development yields provided in a pre-COVID environment. As such, these should be used as a guide, as timing would depend on several variables.

Table 19: Proposed Wilton local centres timing

Centre	Timeframe
Bingara Gorge	Developed
North Wilton	2036-41
West Wilton	2041-46
South East Wilton	2031-36

Source: HillPDA 2020

5.8 Wilton commercial centres employment potential

Based on the indicative land uses for each local centre, it is estimate that combined these local centres could generate around 635 jobs upon full development and occupation.

A breakdown of employment generate by land use and centre is provided below.

Table 20: Wilton local centre indicative jobs by centre

Broad retail type	Bingara Gorge	North Wilton	West Wilton	South East Wilton	Total	Job density job/sqm	Bingara Gorge	North Wilton	West Wilton	South East Wilton	Total
Supermarket	600	2,000	1,500	2,500	6,600	25	24	80	60	100	**264**
Food catering	500	1,600	1,000	1,200	4,300	18	28	89	56	67	**239**
Non-food specialties	100	350	250	300	1,000	30	3	12	8	10	**33**
Services	100	350	250	300	1,000	30	3	12	8	10	**33**
Commercial	125	450	300	450	1,325	20	6	23	15	23	**66**
Vacant	75	250	200	250	775	0	0	0	0	0	**0**
Total	**1,500**	**5,000**	**3,500**	**5,000**	**15,000**		**64**	**213**	**146**	**208**	**636**

Source: HillPDA 2020

KEY CONSIDERATIONS

6.0 KEY CONSIDERATIONS

The following centre identifies several elements for consideration by Council when determining the preferred role, function and size of the centres.

6.1 Meeting future demand for 15,000 homes

The demand modelling indicates there is enough supply planned, in the way of retail space and centres, to meet the future resident community of the Wilton Growth Area. That is:

- A strategic centre of around 56,500sqm NLA of retail/commercial space by 2051
- Four local centres equating to around 15,000sqm NLA of retail space
- There will probably be a requirement for smaller clusters of local shops to service the 800m walking catchment. This would be in South East Wilton and West Wilton. This would be in the form of neighbourhood shops to serve local convenience uses. The business enterprise areas could support some form of service retail instead in of neighbourhood shops in South East Wilton
- The modelling does not indicate residential demand is sufficient to support a viable neighbourhood centre at Maldon. Modelling based on worker expenditure has not been undertaken but considering the potential land use constraints identified in the Employment Land Strategy, the employment densities may not be realised. Saying this however, best practice employment lands provide workers with access to convenience retail, services and food options.

Land designated within the Urban Development Zone, and more specifically within the defined local centres and town centre areas on the structure plans, is sufficient to accommodate retail and commercial uses.

6.2 Proposed centre role and function

Establishing a clear centre hierarchy provides clarity to the market around growth expectations and the desired role and function of centres. It aims to prevent the over delivery and dilution of commercial floorspace before catchments have reached a residential density to support viable centres. The staging and delivery of residential and commercial development should be done so in a manner that supports the success and hierarchy of its established and proposed centres. Table 21 outlines the proposed centre role function and characteristics.

Table 21: Proposed centre role and function

Strategic centre	
Role	Provide a wide range of services and facilities to serve the surrounding sub-region, with a strong focus on the retail and commercial sector.
Employment	High concentration and diversity of employment.
Commercial	• Primary location for commercial including offices, professional services, health, education and speciality shops in a main street format. • Urban public spaces provide focus for community events. • Commercial uses consolidated in the centre core. • Two to three supermarkets.
Entertainment	A range of dining and entertaining uses including night-time activities.
Trade catchment	Broader Local Government Area and parts of Southern Highlands.
Specific SEPP or DCP planning controls	The controls identified in the DCP are appropriate, with consideration of suggestions identified in Section 2.5.2.
Location	Wilton Town Centre
Similar to	Rouse Hill Town Centre

Town centres	
Role	To serve the surrounding district and provide a range of convenience goods and services as well as some community facilities.
Cultural and community	Picton operates as a primary centre and contains the only Community, Civic and Cultural Precinct that will serve the LGA and beyond. This sets it above Tahmoor in terms of the retail hierarchy.
Employment	Provides a focus for employment at the LGA level, primarily in retailing, but complemented by a range of small-scale, population servicing office spaces and some government and community services.
Commercial	Offers one or two full-line supermarkets or a combination of independent supermarkets and a range of speciality shops. In the case of Picton, includes offices and government functions and should offer a range of community services and facilities.
Entertainment	Hotel(s), restaurant and dining facilities with other entertainment. Local sports facilities and clubs. In the case of Picton, the centre maintains its heritage feel and is able to shift to offer a boutique retailing and dining experience. Leverages tourism opportunities by being the primary location for LGA events and heritage walks.
Trade catchment	Serves a number of suburbs but may attract people from a wider catchment on an occasional basis.
Location	Picton (Higher order) Tahmoor
Similar to	Camden, Bowral and Moss Vale
Local centre / village	
Role	To serve daily needs of surrounding residents and workers and provide a focus for day-to-day life within a community.
Employment	Includes a mix of retail, community, and health services (such as GP) and small scale office-based employment servicing the local area.
Commercial	Offers one supermarket (up to 2,300sqm) and a range of specialty retail shops and community services (i.e. childcare). Contains up to 5,000 sqm of retail.
Entertainment	Includes some night-time activities, focussed on dining.
Trade catchment	Immediate surrounding suburbs.
Specific SEPP or DCP planning controls	A cap of 5,000sqm of retail space should be adopted in the SEPP in line with the intent of the DCP.
Location	West Wilton, North Wilton, South-east Wilton
Similar to	The new centres are going to be larger than the size and scale of the existing local centres of Thirlmere, Appin, The Oaks and Silverdale. As population increases around the established centres, it is likely they will become more comparable.
Neighbourhood centre	
Role	To provide for the day to day convenience needs of workers or residents.
Commercial	Offers a convenience store and small range of specialty shops (i.e. newsagency, post office, bakery, deli). Provides up to 2,000 sqm of commercial space and enables neighbourhood supermarket (under 1,000sqm).
Entertainment	Limited. May have a couple of dining opportunities or a small bar.
Trade catchment	Walkable catchment
Specific SEPP or DCP planning controls	• Cap supermarket space in line with a Neighbourhood Supermarket use (less than 1,000sqm) • Limit retail to 2,500sqm
Location	Maldon, Wilton existing centre
Similar to	Oakdale, Menangle, Douglas Park

6.3 Location of centres

Centres located on main access routes and central to the residential catchment generally perform the most successfully. Ensuring all residential areas have nearby access to local shops is important as it provides quick top-up shopping and opportunities for informal social contact/meeting points.

An analysis of the 800 metre catchments around proposed town and local centre locations highlights locations that may potentially lack in retail services. These areas may be appropriate for limited 'neighbourhood shops' to service the local convenience needs of residents.

Other location considerations include:

- Wilton Town Centre | the location of the town centre in proximity to two major arterial roads increases its connectivity and accessibility not only to residential and business areas within the Growth Area but across Wollondilly and beyond.
- North Wilton | the location of North Wilton's local centre is appropriate as it provides essential services to residents in the northern extent of the precinct.

  There is an identified gap for residents between North Wilton local centre and Wilton Town Centre. However, there is a significant amount of mixed-use zoning around the lakeside. This would allow for upwards of 5,000sqm of retail space to be provided. This space should not compete and erode the viability of the proposed or established centres.

- South East Wilton | the proposed location of the local centre is supported. Its location at the entry point to the south proportion of the South East Growth Area increases its appropriateness and accessibility to residents.

  There are two gaps in this sub-growth precinct. The southern one given its low-density zoning is unlikely to support any significant retail space and residents would likely travel to the local centre especially when travelling in and out of the precinct. The north west "gap" has some business zoned land which may permit the provision of small retail shops. There could be opportunity for a small cluster of neighbourhood shops on the local collector road to the north in this area. It is recommended that any retail provision in this location to increase walkability be of a neighbourhood shops size and be focused on the surrounding resident and worker community in this locality.

- West Wilton | the location of the proposed local centre at the junction of two roads increases its connectivity across this sub-precinct while its accessible neighbourhood catchment captures a significant proportion of the resident population. There is one perceived gap however this is likely insignificant given the area is surrounded by retail centres. There could be opportunity for a small cluster of neighbourhood shops on the local collector road in this area.
- Maldon | viability would be dependent on the density of workers achieved in the surrounding employment precinct.

It would generally not be recommended to specify exact locations for neighbourhood shops and instead let the market dictate the need. The priority should be supporting the growth of the local centres and strategic centre before the establishment of retail out of these areas. Good place planning would also encourage neighbourhood shops to be clustered with community infrastructure such as a school or a park.

If it is desirable to be more specific regarding the provision of neighbourhood shops, there is opportunity to incorporate a clause within the Development Control Plan that suggests something similar to:

Future neighbourhood plans should demonstrate that the community and convenience needs of surrounding residents can be met within the accessible neighbourhood catchment and are compatible with the local character.

6.4 Securing sufficient demand

The intensity and timing of dwelling delivery will be a factor that will influence the success of the centres, as commercial development is dependent on a sustained residential population. The demand modelling assumes the estimated staging of dwellings and population as specified in the Wollondilly Development Contributions Plan.

Delays in the delivery of dwellings, both within the town centre precinct and across the growth area, would effectively delay the opportunity for establishing the commercial uses within the future strategic centre. Further, the delivery of dwellings at a density less than what is proposed within the structure plans, could also undermine the capacity of centres to achieve the desired employment targets.

The town centre precinct proposes development at a density that might not be viable during the initial growth area release. While the DCP effectively plans for a strong end state outcome, it does not necessarily consider the staged approach that would be required to respond to residential demand. For instance, the design provisions in relation to basement car parking and sleeving larger format retail may not be a viable option in early stages.

For the major centre to operate as envisioned within the DCP there are options that could be explored:

1. The staging of development across the growth area is undertaken in a way that enables the market to mature to a point where shop top housing and residential flat buildings become viable in the town centre. This could mean that the major town centre is delayed until the North Wilton, South-East Wilton and parts of West Wilton residential areas are more established.
2. Development of the town centre is staged with the retail core progressively released over time. This acknowledges that early development of the town centre at a lower density, could effectively sterilise the land for future opportunities.

   4.1B Residential density

   (1) The objectives of this clause are as follows—

   > *(a) to establish minimum density requirements for residential development within the Wilton Town Centre Precinct,*
   >
   > *(b) to ensure that residential development makes efficient use of land and infrastructure, and contributes to the availability of new housing,*
   >
   > *(c) to ensure that the scale of residential development is compatible with the character of the precincts and adjoining land.*

6.5 Protecting the retail hierarchy

Extensive mixed use areas in greenfield development can dilute retail demand and pose a risk to centre hierarchy and overall centre viability.

In particular, the designation of land as mixed use in the 'Lakeside Activity Hub' identified in the North Wilton Structure Plan represents a viability risk to Wilton Major Centre. While the controls suggest the centre is capped at 5,000sqm of retail floorspace and tenancies of 250sqm, this extent of development is over and above what demand projections indicate for the North Wilton area and could delay the establishment of the Wilton Town Centre. While there is obvious merit in leveraging the scenic amenity of the lake for a small component of commercial uses, the significant extent of land identified for mixed use development poses a risk to the centre hierarchy. The cap on tenancy sizes, while understandably to limit supermarket opportunity, also limits the type of floorspace that can be achieved on the ground floor and could result in extensive vacancy.

Options:

- Reduce the extent of mixed use development to a more refined area immediately adjoining the lake

- Gain further clarification regarding the types of uses intended in the mixed use area and where possible, provide guidance as to what is desirable avoiding tradition retail uses. This could include smart community hubs that provide co-sharing space and meeting rooms that enable greater working from home and satellite office initiatives
- Suggest the delivery of the mixed use area is delayed until after the initial establishment of the future strategic centre.

6.6 Securing commercial floorspace for long term demand

Protecting commercial floorspace for future use is essential for securing jobs close to homes, maintaining the viability of the centre and stimulating the day and night time retail economy.

Planning controls in the Town Centre DCP currently secure commercial floorspace on ground level only. While there is unlikely significant demand in the shorter term for office and business floorspace, there is a risk that adequate space will not be protected to enable more knowledge intensive and professional service outcomes in the town centre. Saying this however, specifying a specific minimum non-residential control would likely affect the viability of development and would not be encouraged.

There is opportunity that land can be 'quarantined' for higher density residential and commercial development. This enables time for the market to mature, while not jeopardising the longer term opportunity for higher density development. This would be consistent with the approach in a number of other growth areas such as Oran Park Town and North Penrith Defence Redevelopment.

Options:

- Adopt a staging plan that sets aside land parcels for commercial development once the market matures
- Government purchases a proportion of land within the town centre to designate for future commercial uses
- Land is effective quarantined for future higher order uses through development incentives. The land can be utilised in the shorter term for a less intensive use that would not affect redevelopment potential (i.e. car parking, open space, surface bus interchange) but is set aside for more substantial redevelopment, that incorporates a commercial component in the future that is potentially of a scale above what is proposed as part of the plan (i.e. building height).

The residential development pipeline will need to be actively monitored and the timing of local centre delivery proactively managed so not to dilute and undermine the retail hierarchy.

6.7 Out of centre and bulky goods retail

There has been a growing trend for home-make centres to co-locate with small out of centre retail shopping centres or bulky-good retail areas to clusters to attract additional uses that see them transforming to centres. These developments are generally located along arterial roads with high visibility and strong accessibility. The diversification of uses in these locations makes them more competitive convenience retail locations, potentially attracting larger anchor retailers such as supermarkets. This draws trade and investment away from centres and provides an inconsistent approach with standard planning policy. The demand for specialised retail and home-maker centres generally increases in line with growth in the housing market. This means that the planning for these types of uses will need to occur in parallel with centres and housing delivery to ensure they are in the correct locations and contain uses that do not directly compete with the centres.

Fuel retailers are also emerging as category killers that are disrupting local centre convenience retail performance. The diversification of products sold at the service stations sees them operating as mini-supermarkets and cafes with the sale of grocery items and take-away food. This can be in direct competition with neighbourhood convenience shops such as local bakeries, mini-grocery stores and newsagencies.

In principle, out-of-centre shops and standalone supermarkets should generally be discouraged to prevent undermining the viability of existing and future centres. New supermarkets should be integrated with centres and be supported by other speciality retail. Considering Wilton is a greenfield location, supermarkets should not need to locate outside the centres.

To reduce competition with the centres, ideally:

- Provide opportunity for bulky good and specialised retailing to cluster in a single location with comparable retailers, typically in 'business and enterprise' classified land on major arterial roads. Alternatively, some large format retailers could operate on the ground floor of mixed use premises if they can provide active frontages.
- Limit shops in areas outside the centres in precinct plans
- Require development proponents for out of centre retail developments, which are inconsistent with current planning controls, to demonstrate that there will be minimal impacts on the retail operation of the future Wilton Town Centre and proposed local centres.

APPENDICES

APPENDIX A : WILTON TOWN CENTRE TOTAL HOUSEHOLD EXPENDITURE

A.1 Wilton Town Centre MTA forecast household expenditure by sub-trade area

The following are forecast household expenditure tables for the sub-trade areas that constitute Wilton Town Centres MTA expenditure discussed in Chapter 4.0.

Table 22: Wilton Town Centre MTA forecast household expenditure by sub-trade area

PTA	2020	2021	2026	2031	2036	2041	2046	2051
Supermarkets & Grocery Stores	29	39	86	135	186	232	264	284.8
Specialty Food Stores	6	9	19	29	39	48	54	57.5
Fast-Food Stores	7	9	19	30	41	50	57	60.1
Restaurants, Hotels and Clubs*	7	10	21	32	44	54	61	64.5
Department Stores	5	7	15	23	31	38	43	45.7
Apparel Stores	7	10	21	32	44	54	60	64.0
Bulky Goods Stores**	15	21	44	69	93	114	128	136.1
Other Personal & Household Goods Retailing	12	16	34	53	72	88	99	104.7
Selected Personal Services***	2	3	7	10	14	17	19	20.4
Total Retailing	**89**	**123**	**264**	**414**	**563**	**695**	**785**	**837.9**
STAN	**2020**	**2021**	**2026**	**2031**	**2036**	**2041**	**2046**	**2051**
Supermarkets & Grocery Stores	23.8	24.4	30.9	52.8	76.8	102.6	109.9	118.0
Specialty Food Stores	5.1	5.2	6.5	10.9	15.6	20.6	21.7	23.0
Fast-Food Stores	5.3	5.4	6.7	11.4	16.3	21.4	22.6	23.9
Restaurants, Hotels and Clubs*	5.9	6.0	7.5	12.7	18.1	23.8	25.2	26.6
Department Stores	4.2	4.3	5.4	9.1	13.1	17.2	18.1	19.2
Apparel Stores	6.2	6.3	7.9	13.3	19.0	25.0	26.4	27.9
Bulky Goods Stores**	12.3	12.6	15.7	26.4	37.8	49.7	52.5	55.5
Other Personal & Household Goods Retailing	9.5	9.8	12.2	20.5	29.3	38.6	40.7	43.1
Selected Personal Services***	2.1	2.1	2.6	4.4	6.4	8.4	8.8	9.3
Total Retailing	**74.2**	**76.1**	**95.5**	**161.4**	**232.3**	**307.2**	**326.1**	**346.6**
STAE	**2020**	**2021**	**2026**	**2031**	**2036**	**2041**	**2046**	**2051**
Supermarkets & Grocery Stores	25.6	26.9	33.5	54.4	76.9	101.2	108.1	115.6
Specialty Food Stores	5.3	5.6	6.9	11.0	15.4	19.9	21.0	22.1
Fast-Food Stores	5.5	5.8	7.1	11.4	15.8	20.5	21.6	22.7
Restaurants, Hotels and Clubs*	5.8	6.1	7.4	11.9	16.6	21.5	22.6	23.8
Department Stores	4.4	4.6	5.7	9.1	12.6	16.4	17.2	18.2
Apparel Stores	6.2	6.5	8.0	12.8	17.9	23.1	24.4	25.7
Bulky Goods Stores**	12.1	12.7	15.6	25.0	34.8	45.1	47.4	50.0
Other Personal & Household Goods Retailing	10.2	10.7	13.1	20.9	29.1	37.8	39.7	41.9
Selected Personal Services***	2.1	2.2	2.7	4.3	6.0	7.8	8.2	8.7
Total Retailing	**77.2**	**81.2**	**100.1**	**160.9**	**225.1**	**293.3**	**310.2**	**328.6**

STASW	2020	2021	2026	2031	2036	2041	2046	2051
Supermarkets & Grocery Stores	84.9	86.6	96.0	105.1	113.6	122.0	133.5	146.2
Specialty Food Stores	18.3	18.6	20.4	22.0	23.4	24.8	26.7	28.8
Fast-Food Stores	18.4	18.8	20.5	22.1	23.5	24.9	26.9	29.0
Restaurants, Hotels and Clubs*	18.3	18.6	20.3	21.9	23.3	24.7	26.6	28.7
Department Stores	14.6	14.8	16.2	17.5	18.6	19.7	21.2	22.9
Apparel Stores	20.1	20.5	22.3	24.1	25.7	27.2	29.3	31.6
Bulky Goods Stores**	41.2	41.8	45.7	49.3	52.5	55.6	59.9	64.6
Other Personal & Household Goods Retailing	34.5	35.1	38.3	41.3	44.0	46.6	50.2	54.1
Selected Personal Services***	6.8	6.9	7.5	8.1	8.6	9.1	9.8	10.6
Total Retailing	**257.1**	**261.6**	**287.1**	**311.4**	**333.3**	**354.5**	**384.0**	**416.3**
MTA	**2020**	**2021**	**2026**	**2031**	**2036**	**2041**	**2046**	**2051**
Supermarkets & Grocery Stores	163	177	246	348	453	557	616	665
Specialty Food Stores	35	38	52	73	94	113	124	131
Fast-Food Stores	36	39	54	75	97	117	128	136
Restaurants, Hotels and Clubs*	37	40	56	79	102	124	135	144
Department Stores	28	31	42	59	76	92	100	106
Apparel Stores	40	43	59	82	106	129	140	149
Bulky Goods Stores**	81	88	121	169	218	264	288	306
Other Personal & Household Goods Retailing	66	71	97	135	174	211	229	244
Selected Personal Services***	13	14	19	27	35	42	46	49
Total Retailing	**498**	**542**	**747**	**1,047**	**1,354**	**1,650**	**1,806**	**1,929**

* Turnover relating only to consumption of food and liquor (excludes all other types of revenue such as accommodation, gaming and gambling)
** Bulky Goods includes fabrics, soft goods, furniture, floor coverings, hardware, houseware, electrical appliances, sports and camping stores.*** Selected Personal Services includes hair and beauty, laundry, clothing hire and alterations, shoe repair, optical dispensing, photo processing and hire of videos

APPENDIX B : WILTON LOCAL CENTRES

B.1 Wilton Growth Area household expenditure by residential precinct

The following are forecast household expenditure tables for the trade areas for Wilton Growth Areas local centres expenditure discussed in Chapter 5.0.

Table 23: Wilton Growth Areas local centres forecast household expenditure by residential precinct

Wilton North	2020	2021	2026	2031	2036	2041	2046	2051
Supermarkets & Grocery Stores	0.0	3.9	18.7	39.9	62.1	81.6	99.1	103.1
Specialty Food Stores	0.0	0.9	4.1	8.5	13.1	17.0	20.3	20.8
Fast-Food Stores	0.0	0.9	4.3	8.9	13.7	17.7	21.2	21.8
Restaurants, Hotels and Clubs*	0.0	1.0	4.6	9.6	14.7	19.0	22.8	23.3
Department Stores	0.0	0.7	3.2	6.8	10.4	13.5	16.1	16.6
Apparel Stores	0.0	1.0	4.5	9.5	14.6	18.9	22.6	23.2
Bulky Goods Stores**	0.0	2.0	9.6	20.2	31.0	40.2	48.1	49.3
Other Personal & Household Goods Retailing	0.0	1.6	7.4	15.6	23.9	30.9	37.0	37.9
Selected Personal Services***	0.0	0.3	1.4	3.0	4.6	6.0	7.2	7.4
Total Retailing	**0.0**	**12.2**	**57.8**	**122.0**	**188.1**	**244.8**	**294.3**	**303.3**
Bingara Gorge	**2020**	**2021**	**2026**	**2031**	**2036**	**2041**	**2046**	**2051**
Supermarkets & Grocery Stores	14.5	14.9	19.9	20.7	21.6	22.4	23.4	24.3
Specialty Food Stores	3.2	3.3	4.3	4.4	4.5	4.7	4.8	4.9
Fast-Food Stores	3.3	3.4	4.5	4.6	4.8	4.9	5.0	5.1
Restaurants, Hotels and Clubs*	3.6	3.7	4.9	5.0	5.1	5.2	5.4	5.5
Department Stores	2.6	2.6	3.4	3.5	3.6	3.7	3.8	3.9
Apparel Stores	3.6	3.7	4.8	4.9	5.1	5.2	5.3	5.5
Bulky Goods Stores**	7.6	7.8	10.3	10.5	10.8	11.0	11.3	11.6
Other Personal & Household Goods Retailing	5.9	6.0	7.9	8.1	8.3	8.5	8.7	8.9
Selected Personal Services***	1.1	1.2	1.5	1.6	1.6	1.7	1.7	1.7
Total Retailing	**45.4**	**46.5**	**61.6**	**63.4**	**65.3**	**67.3**	**69.4**	**71.5**
Wilton West	**2020**	**2021**	**2026**	**2031**	**2036**	**2041**	**2046**	**2051**
Supermarkets & Grocery Stores	0.0	0.0	0.3	6.3	15.0	24.4	34.5	45.7
Specialty Food Stores	0.0	0.0	0.1	1.4	3.2	5.1	7.1	9.2
Fast-Food Stores	0.0	0.0	0.1	1.4	3.3	5.3	7.4	9.6
Restaurants, Hotels and Clubs*	0.0	0.0	0.1	1.5	3.6	5.7	7.9	10.3
Department Stores	0.0	0.0	0.1	1.1	2.5	4.0	5.6	7.3
Apparel Stores	0.0	0.0	0.1	1.5	3.5	5.7	7.9	10.3
Bulky Goods Stores**	0.0	0.0	0.2	3.2	7.5	12.0	16.8	21.8
Other Personal & Household Goods Retailing	0.0	0.0	0.1	2.5	5.8	9.3	12.9	16.8
Selected Personal Services***	0.0	0.0	0.0	0.5	1.1	1.8	2.5	3.3
Total Retailing	**0.0**	**0.0**	**1.0**	**19.4**	**45.5**	**73.3**	**102.6**	**134.3**

Wilton South	2020	2021	2026	2031	2036	2041	2046	2051
Supermarkets & Grocery Stores	1.5	2.9	16.6	30.1	46.9	61.2	63.7	66.3
Specialty Food Stores	0.3	0.6	3.6	6.5	9.9	12.7	13.0	13.4
Fast-Food Stores	0.3	0.7	3.8	6.8	10.3	13.3	13.6	14.0
Restaurants, Hotels and Clubs*	0.4	0.7	4.0	7.2	11.1	14.3	14.6	15.0
Department Stores	0.3	0.5	2.9	5.1	7.9	10.1	10.4	10.6
Apparel Stores	0.4	0.7	4.0	7.2	11.0	14.2	14.5	14.9
Bulky Goods Stores**	0.8	1.5	8.5	15.3	23.4	30.1	30.9	31.7
Other Personal & Household Goods Retailing	0.6	1.2	6.6	11.8	18.0	23.2	23.8	24.4
Selected Personal Services***	0.1	0.2	1.3	2.3	3.5	4.5	4.6	4.7
Total Retailing	**4.7**	**9.1**	**51.3**	**92.3**	**142.1**	**183.6**	**189.2**	**195.0**

* Turnover relating only to consumption of food and liquor (excludes all other types of revenue such as accommodation, gaming and gambling) ** Bulky Goods includes fabrics, soft goods, furniture, floor coverings, hardware, houseware, electrical appliances, sports and camping stores.*** Selected Personal Services includes hair and beauty, laundry, clothing hire and alterations, shoe repair, optical dispensing, photo processing and hire of videos

B.2 Wilton local centres capture of trade area expenditure by retail category

The following estimates the amount of retail expenditure potentially captured by a local centre within the identified residential precinct.

Table 24: Wilton local centres capture of trade area expenditure by retail category

North Wilton	2020	2021	2026	2031	2036	2041	2046	2051
Supermarkets & Grocery Stores	4.2	0.0	0.8	3.9	8.4	13.0	17.1	20.8
Specialty Food Stores	1.0	0.0	0.2	0.9	1.8	2.7	3.6	4.3
Fast-Food Stores	0.9	0.0	0.2	0.9	1.9	2.9	3.7	4.5
Restaurants, Hotels and Clubs	1.0	0.0	0.2	1.0	2.0	3.1	4.0	4.8
Department Stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Apparel Stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Bulky Goods Stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Personal & Household Goods Retailing	0.4	0.0	0.1	0.4	0.8	1.3	1.6	1.9
Selected Personal Services	0.3	0.0	0.1	0.3	0.6	1.0	1.3	1.5
Total Retailing	**8.0**	**0.0**	**1.5**	**7.3**	**15.5**	**24.0**	**31.3**	**37.8**
Bingara Gorge	**2016**	**2020**	**2021**	**2026**	**2031**	**2036**	**2041**	**2046**
Supermarkets & Grocery Stores	5.3	3.8	3.9	5.2	5.4	5.7	5.9	6.1
Specialty Food Stores	1.2	0.8	0.9	1.1	1.2	1.2	1.2	1.3
Fast-Food Stores	1.1	0.9	0.9	1.2	1.2	1.2	1.3	1.3
Restaurants, Hotels and Clubs	1.3	0.9	1.0	1.3	1.3	1.3	1.4	1.4
Department Stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Apparel Stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Bulky Goods Stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Personal & Household Goods Retailing	0.4	0.3	0.3	0.4	0.4	0.4	0.4	0.5
Selected Personal Services	0.4	0.3	0.3	0.4	0.4	0.4	0.4	0.4
Total Retailing	**9.8**	**7.1**	**7.3**	**9.6**	**10.0**	**10.3**	**10.7**	**11.0**

West Wilton	2016	2020	2021	2026	2031	2036	2041	2046
Supermarkets & Grocery Stores	6.4	0.0	0.0	0.1	2.0	4.7	7.7	10.9
Specialty Food Stores	1.2	0.0	0.0	0.0	0.4	0.8	1.3	1.9
Fast-Food Stores	1.1	0.0	0.0	0.0	0.4	0.9	1.4	1.9
Restaurants, Hotels and Clubs	1.3	0.0	0.0	0.0	0.4	0.9	1.5	2.1
Department Stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Apparel Stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Bulky Goods Stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Personal & Household Goods Retailing	0.4	0.0	0.0	0.0	0.1	0.3	0.5	0.7
Selected Personal Services	0.4	0.0	0.0	0.0	0.1	0.3	0.5	0.7
Total Retailing	**10.9**	**0.0**	**0.0**	**0.2**	**3.4**	**8.0**	**12.9**	**18.1**
South East Wilton	**2016**	**2020**	**2021**	**2026**	**2031**	**2036**	**2041**	**2046**
Supermarkets & Grocery Stores	6.4	0.5	0.9	5.2	9.5	14.8	19.3	20.1
Specialty Food Stores	1.2	0.1	0.2	0.9	1.7	2.6	3.3	3.4
Fast-Food Stores	1.1	0.1	0.2	1.0	1.8	2.7	3.5	3.6
Restaurants, Hotels and Clubs	1.6	0.1	0.2	1.3	2.3	3.5	4.5	4.6
Department Stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Apparel Stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Bulky Goods Stores	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Personal & Household Goods Retailing	0.4	0.0	0.1	0.3	0.6	0.9	1.2	1.2
Selected Personal Services	0.4	0.0	0.1	0.3	0.6	0.9	1.2	1.2
Total Retailing	**11.2**	**0.8**	**1.6**	**9.1**	**16.5**	**25.4**	**33.0**	**34.1**

B.3 Employment floorspace demand by residential precinct

The following provides an estimate to the amount and type of employment floorspace that could be supported in a local centre by year and residential precinct.

Table 25: Employment floorspace demand by category and residential precinct

North Wilton	2020	2021	2026	2031	2036	2041	2046	2051
Supermarkets & Grocery Stores	0	91	424	881	1,337	1,715	2,030	2,061
Specialty Food Stores	0	20	94	193	289	364	425	425
Fast-Food Stores	0	24	108	222	332	420	489	489
Restaurants, Hotels and Clubs	0	42	194	397	594	750	875	875
Other Personal & Household Goods	0	16	73	149	223	281	328	328
Selected Personal Services	0	16	74	151	225	285	332	332
Total occupied retail space	**0**	**209**	**966**	**1,992**	**3,000**	**3,814**	**4,480**	**4,510**
Commercial space	0	21	97	199	300	381	448	451
Vacancy rate (say 5% target)	0	11	53	110	165	210	246	248
Total retail demand	**0**	**241**	**1,116**	**2,300**	**3,464**	**4,405**	**5,174**	**5,210**

Bingara Gorge	2020	2021	2026	2031	2036	2041	2046	2051
Supermarkets & Grocery Stores	424	432	564	572	581	589	598	607
Specialty Food Stores	96	97	125	125	125	125	125	125
Fast-Food Stores	110	112	144	144	144	144	144	144
Restaurants, Hotels and Clubs	197	201	258	258	258	258	258	258
Other Personal & Household Goods	59	60	77	77	77	77	77	77
Selected Personal Services	75	76	98	98	98	98	98	98
Total occupied retail space	**961**	**978**	**1,266**	**1,275**	**1,283**	**1,292**	**1,301**	**1,310**
Commercial space	96	98	127	127	128	129	130	131
Vacancy rate (say 5% target)	53	54	70	70	71	71	72	72
Total retail demand	**1,109**	**1,130**	**1,462**	**1,472**	**1,482**	**1,492**	**1,502**	**1,513**
West Wilton	**2020**	**2021**	**2026**	**2031**	**2036**	**2041**	**2046**	**2051**
Supermarkets & Grocery Stores	0	0	11	221	526	855	1,209	1,598
Specialty Food Stores	0	0	2	40	95	151	211	275
Fast-Food Stores	0	0	2	47	109	174	243	316
Restaurants, Hotels and Clubs	0	0	4	83	195	312	434	565
Other Personal & Household Goods	0	0	1	25	58	93	130	170
Selected Personal Services	0	0	2	32	74	118	165	215
Total occupied retail space	**0**	**0**	**22**	**448**	**1,056**	**1,703**	**2,392**	**3,138**
Commercial space	0	0	2	45	106	170	239	314
Vacancy rate (say 5% target)	0	0	1	25	58	94	132	173
Total retail demand	**0**	**0**	**26**	**517**	**1,220**	**1,967**	**2,763**	**3,625**
South East Wilton	**2020**	**2021**	**2026**	**2031**	**2036**	**2041**	**2046**	**2051**
Supermarkets & Grocery Stores	53	101	581	1,055	1,641	2,142	2,229	2,320
Specialty Food Stores	10	19	108	192	295	379	389	399
Fast-Food Stores	11	22	124	222	340	437	448	459
Restaurants, Hotels and Clubs	25	47	266	475	729	937	961	985
Other Personal & Household Goods	6	12	66	119	182	234	240	246
Selected Personal Services	8	15	84	150	230	296	304	311
Total occupied retail space	**113**	**216**	**1,228**	**2,213**	**3,416**	**4,425**	**4,570**	**4,720**
Commercial space	11	22	123	221	342	443	457	472
Vacancy rate (say 5% target)	6	12	68	122	188	243	251	260
Total retail demand	**131**	**250**	**1,419**	**2,557**	**3,946**	**5,111**	**5,278**	**5,451**
Combined centres	**2020**	**2021**	**2026**	**2031**	**2036**	**2041**	**2046**	**2051**
Supermarkets & Grocery Stores	477	624	1,579	2,729	4,085	5,300	6,067	6,585
Specialty Food Stores	106	137	329	551	803	1,020	1,150	1,224
Fast-Food Stores	121	158	379	634	925	1,175	1,324	1,409
Restaurants, Hotels and Clubs	222	290	721	1,213	1,775	2,257	2,528	2,683
Other Personal & Household Goods	65	88	218	370	540	686	775	821
Selected Personal Services	83	107	257	430	627	797	898	956
Total occupied retail space	**1,074**	**1,404**	**3,482**	**5,928**	**8,755**	**11,235**	**12,743**	**13,678**
Commercial space	107	140	348	593	875	1,123	1,274	1,368
Vacancy rate (say 5% target)	59	77	192	326	482	618	701	752
Total retail demand	**1,240**	**1,621**	**4,022**	**6,846**	**10,112**	**12,976**	**14,718**	**15,798**

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