UPDATED ECONOMIC IMPACT ASSESSMENT
~
PROPOSED RETAIL PROJECT DWYER'S SITE, WOLLONGONG

Prepared For:

McGRATH NICOL
RECEIVERS & MANAGERS

Prepared By:

LEYSHON CONSULTING PTY LTD
SUITE 1106 LEVEL 11
109 PITT STREET
SYDNEY NSW 2000

TELEPHONE (02) 9224 6111
FACSIMILE (02) 9224 6150

REP 1102
MARCH 2011

TABLE of CONTENTS

LIST of TABLES

LIST of FIGURES

EXECUTIVE SUMMARY

Introduction Section 1

This Report has been prepared for McGrath Nicol. The Report presents an updated assessment of the potential economic effects of a proposal to develop a major shopping centre of 19,299 sq.m. and an eight-screen cinema complex in the Wollongong City Centre (WCC) on what is known as the Dwyer's site.

Retail Context Section 2

Historically, the WCC has been the major retail centre servicing the Wollongong Region. Apart from the WCC there are three other major suburban centres in the Region—Westfield Figtree, Westfield Warrawong and the Shellharbour Town Centre.

Although the WCC remains the most dominant retail location in the Region, its primacy has been steadily eroded over the past four decades by the development of the large suburban centres noted above. The recent expansion of retail facilities at Dapto and the approved expansion of facilities at Shellharbour will exacerbate this trend.

A telephone survey of 600 households in the Wollongong Region confirmed that while the WCC is widely shopped, it faces stiff significant competition from the Shellharbour, Corrimal, Warrawong and Figtree centres.

The survey found a significant proportion of trade area residents (16% in total) in fact never shop in the WCC. A key reason for not shopping in the WCC is the difficulty of parking.

The survey also found that discount department stores (DDSs) at Warrawong, and to a lesser extent at Shellharbour, compete strongly with the two department stores in the WCC, Myer and David Jones.

Trade Area Analysis Section 3

In 2006 the Wollongong trade area had an estimated resident population of 268,480 people. This is projected to grow by around +25,240 to a total population of 308,554 in 2021.

Total available annual retail spending in the trade area in 2011 is close to $2.9 billion ($2010). It is estimated to increase by +$544.8 million to about $3.5 billion ($2010) in 2021.

The projected growth in available spending is expected to generate demand in the trade area by 2021 for a net increase in retail floorspace of about 100,000 sq.m..

EXECUTIVE SUMMARY
Cont'd

Impact Analysis Section 4

Assuming its first full year of trading is 2013, the proposed centre is estimated to achieve sales of $138.4 million ($2010) and have a potential impact of -9.1% on the WCC overall. The impact on Wollongong Central specifically is estimated at -13.6% and that on the balance of the WCC is put at -5.4%.

The estimated impacts on other major centres in the Region (Shellharbour, Dapto, Figtree and Warrawong) range between -3.1% and -8.1%.

The impact of the proposed development on the WCC essentially will involve a redistribution of retail sales within the CBD. Overall the WCC will experience a net increase in its annual retail sales–estimated at +$101.4 million in 2013 ($2010).

The majority of the impacts of the proposed development on existing centres are in the low/medium range except for the impact on Wollongong Central (-13.6%) which is at the upper end of the medium/high range.

The proposed development will not give rise to an adverse economic impact whereby facilities currently enjoyed by the public are put at risk and would not be made good by the proposal.

The proposed expansion of Wollongong Central in 2016 would have a major impact on a future centre developed on the Dwyer's site. This impact is estimated at -22.9% or -$33.0 million ($2010). Additional impacts would be experienced by centres such as Westfield Warrawong (-5.6%), Westfield Figtree (-4.9%) and Dapto (-3.0%).

Annual sales at the Dwyer's site centre would be reduced to some $5,751 per sq.m. per annum in 2016. Although at this level average sales would be below the norm, it is unlikely to result in the centre being unviable.

The net increase in employment in Wollongong arising from the proposal's retail and cinema activities is estimated to be in the order of +670 jobs of which 301 would be full-time and 369 part-time jobs.

Cinema Industry Section 5

The current demand for cinemas in the Wollongong trade area is estimated at 24.1 screens. This compares to a supply of 19 screens. The Wollongong Region therefore appears to have a shortfall of approximately five cinema screens at present. By 2021 the demand for screens in the trade area will be 27.7–that is, 8.7 screens less than the current supply.

EXECUTIVE SUMMARY
Cont'd

Cinema Industry Cont'd

The opening of an eight-screen complex in the proposed development is likely to have impacts of between -5% and -10% on suburban complexes at Warrawong and Shellharbour. The closure of the small and outdated Greater Union complex in the WCC cannot be ruled out.

Other Impacts Section 6

The proposed development incorporates 2,584 sq.m. of office space. This represents a small increment (+2.2%) in the total stock of office space in the WCC.

The project will have a positive influence on the commercial office market in the WCC and provide new opportunities to attract office-based employment to the WCC.

Conclusion Section 7

The Dwyer's project will bring major benefits to the Wollongong Region. Particularly, it will rectify a number of previously identified deficiencies in the WCC retail mix including:

- ☆ lack of a DDS
- ☆ inadequate representation of supermarkets
- ☆ no contemporary large-scale cinema complex.

The project will reinforce the role of the WCC as the dominant retail and commercial centre in the Wollongong Region.

The analysis detailed in this Report indicates the project's potential economic impacts on other relevant centres will fall within an acceptable range. For the WCC the project will be advantageous in terms of securing its longer-term economic health and vitality.

In summary, the project will produce a net community benefit generating a large number of new jobs and underpinning the economic performance of the WCC over the medium and longer term in both the retail and commercial sectors.

✤✤✤✤✤

1 INTRODUCTION

1.1 Background

This Report has been prepared for the McGrath Nicol. The Report presents updated findings of an assessment of the likely economic effects of development of a major shopping centre proposed for a site (known as Dwyer's site) within the Wollongong City Centre (WCC).

An Economic Impact Assessment (EIA) report was originally prepared in relation to this proposal by Leyshon Consulting in August 2007 for Belmorgan Property Development Pty Ltd, (trading as Wollongong City Plaza Pty Limited). This company is now in liquidation).

This Report is intended to meet the requirements of the Director General of the Department of Planning as they relate to the assessment of economic impact.

Dwyer's site is located on the corner of Crown and Corrimal Streets at the eastern end of the WCC. The project is proposed to be developed in stages with Stages 1 and 2 on the Dwyer's site. Stages 1 and 2 of the project will incorporate a significant retail component together with an hotel and conference facility. The development site is located within 200 metres of Wollongong's Indoor Entertainment Centre and the Football Stadium. A third stage of the development involves the redevelopment of an adjacent site known as the "Oxford Hotel" site. This site is located on the western side of Corrimal street.

The project (if approved) will result in the most significant change to retailing in the WCC since the (then) Crown Gateway shopping centre opened in 1986. The project will also have regional significance. As detailed later in this Report, the new centre has the capacity to alter the competitive relationship that exists between the WCC and the major suburban centres of Figtree, Warrawong and Shellharbour.

1.2 Project Details

We are advised by the proponent that the development will involve 19,299 sq.m. gross floor area (GFA) of retail and related uses. In addition, an eight-screen cinema complex of some 3,312 sq.m. GFA is also proposed. The cinema will be located on the centre's fourth level adjacent to a food court. The planned distribution of retail floorspace in the development is detailed in TABLE 1.1 below.

TABLE 1.1
PROPOSED RETAIL FLOORSPACE – DWYER'S SITE PROJECT

Level ...	**Use**	**GFA** (Sq.M.)
Basement	Mini Major (Liquor)	1,232
	Food	424
	Sub-Total	1,656
Level 1	Supermarket	3,760
	Other Retail	2,261
	Food	554
	Sub-Total	6,575
Level 2	Major Discount Store	5,390
	Food	254
	Other Retail	1,947
	Sub-Total	7,591
Level 3	Mini Major	802
	Food Court	185
	Other Retail	2,490
	Sub-Total	3,477
Total Project		**19,299**

Source: Urbis 2011.

In summary, the proposed development will contain a full-line supermarket of 3,760 sq.m., a discount department store (DDS) of 5,390 sq.m., a substantial component of food and dining functions, mini-majors of 2,034 sq.m. and specialty retail floorspace of 8,115 sq.m.. The retail floorspace will be distributed over four levels of the centre, including the basement.

It is fair to assume that a component of the specialty floorspace will be devoted to non-retail functions such as financial institutions and the like. Typically such uses might occupy about 1,000 sq.m. in such a centre.

1.3 Director General's Requirements

The Director General of the Department of Planning has issued requirements in relation to the proposed assessment of the Belmorgan proposal. In an attachment to a letter dated 20th March 2007 the Director General stipulated the following requirement:

> *"A comprehensive retail impact assessment report, specifically having regard to the Stage 1 works (as defined above) in the context of the particular controls that are recently gazetted Wollongong City Centre LEP and DCP2007*".

The Director General's requirements also refer to a review of the social and economic context of the proposal as follows:

> *"Address the social and economic context of the development in terms of infrastructure requirements and access including staging and monitoring of infrastructure*

works. An economic analysis shall include an investigation of the economic impact of the proposed development upon the hotel, tourist, retail, commercial and residential industry within the locality".

1.4 Provisions of Local Environmental Plan 2009

Wollongong City Centre Local Environmental Plan (LEP) 2009 establishes planning controls for an area known as the Wollongong City Centre. Under the LEP new land use zones have been developed for the city centre. Dwyer's site is located in the B4 Mixed Use zone. The majority of Crown Street to the west of the subject site is included in the Commercial Core zone.

The objectives for the B4 Mixed Use zone include the following:

"‣ *to provide a mixture of compatible land uses*

‣ *to integrate suitable business, office, residential, retail and other development in accessible locations so as to maximise public transport patronage and encourage walking and cycling*

‣ *to support nearby or adjacent commercial centres without adversely impacting on the viability of those centres".*

We note Section 8.7 (2) of LEP 2009 stipulates that development consent must not be granted in the B4 Mixed Use zone for shops where the total floor area of such premises exceeds 400 sq.m..

While discussed in more detail later in this Report, prima facie it would appear the proposed development is, in part, inconsistent with the provisions of Wollongong City Centre LEP 2009 as they relate to the B4 Mixed Use zone. In particular, the proposed development appears to contain retail premises, many of which exceed 400 sq.m. GFA in area–such as the supermarket, DDS and so-called mini-majors.

2 RETAIL CONTEXT

2.1 Overview of Centres

Historically, the WCC has been the major retail centre servicing the Wollongong Region. The Wollongong Region includes the Local Government Areas (LGAs) of Wollongong, Shellharbour and Kiama. Today the Region has four major centres, namely:

- Wollongong City Centre (WCC)
- Westfield Figtree
- Westfield Warrawong
- Shellharbour Town Centre.

Although the WCC has the distinction of containing two major department stores (David Jones and Myer), its most obvious weakness is that–unlike Warrawong, Stockland Shellharbour and Westfield Figtree–the centre does not have a DDS (Kmart, Big W or Target). In previous research undertaken for Council, we expressed the opinion that the absence of a DDS in the WCC was a critical deficiency in a market like Wollongong which tends to be price sensitive in terms of clothing and household goods.

TABLE 2.1 summaries the characteristics of the four major centres as well as those of three smaller but nonetheless significant centres–Corrimal, Warilla and Dapto.

TABLE 2.1
SUMMARY of KEY CHARACTERISTICS of MAJOR CENTRES in WOLLONGONG REGION, 2009

Centre ...	Major Tenants	No. Specialties	Annual Visitation (Mil. per annum)	Annual Sales, 2009 ($Mil. per annum)	GLA (Sq.m.)
Wollongong Central	Myer David Jones Rebel Sport Best & Less	159	10.5	$166.6	32,321
CBD – Balance	David Jones Woolworths ALDI	130	–	$140.0	36,100
Stockland Shellharbour	Kmart Target Coles Bi Lo	120	5.8	$206.3	33,709
Westfield Warrawong	Big W Kmart Coles Woolworths Hoyts 6-Screen	131	4.9	$205.1	45,498
Westfield Figtree	Kmart Coles Woolworths	96	3.7	$147.9	21,804
Dapto Mall	Big W Woolworths Coles	56	7.6	$146.8	20,854
Stockland Corrimal	Woolworths	44	3.3	$93.3	8,809
Warilla Grove	Woolworths Bi Lo	31	2.5	$85.0	11,839

Source: PCA *NSW & ACT Shopping Centre Directory, 2006*; *Shopping Centre News*, 2006.

As can be noted from TABLE 2.1, the WCC is the predominant centre in the Region in floorspace terms with its current retail floorspace estimated at 68,421 sq.m. GLA. In calendar 2009 the WCC's total sales were estimated to be $306.6 million ($2009).

Wollongong Central is the largest single retail entity within the WCC. Located at the intersection of Crown and Keira Streets, Wollongong

Central contains a reported 32,321 sq.m. of retail floorspace GLA. The centre is anchored by a Myer department store (12,150 sq.m.), part of the David Jones department store (1,844 sq.m.) together with two mini-majors Rebel Sport and Best & Less. It also contains 159 specialty shops. The reported annual sales of Wollongong Central in 2009 were $166.6 million ($2009).

A refurbishment of Wollongong Central was completed in 2009. This added about 20 specialty shops plus a Best & Less mini-major which occupies the space vacated by Franklins.

GPT, the owners of Wollongong Central, have received approval from the Department of Planning (under Part 3A of the Act) for the expansion of the centre to the west of Kiera Street. The expansion would increase the retail floorspace of the centre to 52,373 sq.m.–an addition of 23,548 sq.m.. The expansion is proposed to include a DDS (6,500 sq.m.) and full-line supermarket (3,715 sq.m.). Specialty retail floorspace was proposed to increase by +10,383 sq.m..

The approval of a Concept Plan and Project Application which was issued in April/May 2008 has to date not been acted upon by GPT.

Shellharbour

To the south of the WCC, Stockland Shellharbour is a major sub-regional centre of some 33,709 sq.m. of floorspace (GLA). Stockland Shellharbour is anchored by Kmart and Target DDSs, and a Coles supermarket. The reported annual sales of the centre in 2009 were $206.3 million ($2009). To the immediate west of Shellharbour Square is a development known as Shellharbour Retail Park. This contains a Bunnings (7,762 sq.m.), a Woolworths supermarket (4,370 sq.m.) together with a range of bulky goods retail tenants.

Stockland Shellharbour has received development consent to expand to about 75,000 sq.m.. The expanded centre will include a Myer department store, two DDSs, two full-line supermarkets and some 220 specialty stores. The expansion of the centre is expected to be completed in late 2013.

Warrawong

Westfield Warrawong, located some 10km to the south of the WCC, contains 38,320 sq.m. of retail floorspace GLA and is anchored by Big W and Kmart DDSs, and Coles and Woolworths supermarkets. The centre also has a Hoyts six-screen cinema complex. Westfield Warrawong's reported sales in 2009 were $205.1 million ($2009). In addition to the Westfield centre, Warrawong also contains strip retailing near the intersection of King and Cowper Streets.

To the south of Westfield Warrawong is a major bulky goods precinct fronting King Street. This precinct is anchored by Harvey Norman and Domayne stores.

Figtree

About five kilometres to the south-west of the WCC is Westfield Figtree–a smaller DDS-based centre of some 21,804 sq.m. GLA. The Figtree centre is anchored by a Kmart DDS and Coles and Woolworths supermarkets. It has approximately 96 specialty shops. Westfield Figtree's reported sales in 2009 were in the order of $147.9 million ($2009). Figtree also contains some strip retailing adjacent to the Westfield centre. The centre added some 2,000 sq.m. to its total retail floorspace in late 2008.

Corrimal/Warilla

Stockland Corrimal Court (8,809 sq.m.) and Warilla Grove (11,839 sq.m.), are significant supermarket-anchored centres which provide district-level services to residents of the north and south respectively of the Wollongong Region. As noted in TABLE 2.1, these two centres had annual sales in the range of $85.0 to $93.3 million in 2009 ($2009).

Corrimal Court is complemented by a significant component of strip retailing fronting the Princes Highway which includes a Coles supermarket. The overall Corrimal centre is estimated to have had total sales of $140.0 million per annum ($2009) in 2009.

In late 2010, Council's Independent Assessment Panel approved an application by Valad for a centre of 16,000 sq.m. at Corrimal to contain a DDS, full-line supermarket and some 50 specialty shops.

Dapto

Retail services were substantially expanded at Dapto in 2007. Dapto Mall now contains a Big W DDS (6,800 sq.m.), Woolworths and Coles supermarkets and 56 specialty shops. The total centre size is 20,854 sq.m. and the reported sales in 2009 were $146.8 million per annum ($2009).

2.2 Wollongong City Centre

Today the WCC remains the most dominant retail location in the Wollongong Region. Since the 1960s, however, development of a number of suburban centres in the surrounding region has slowly eroded the primacy of the WCC. Relevant developments in this regard have been:

- Westfield Warrawong ... 1960
- Westfield Figtree ... 1965
- Corrimal Court ... 1975
- Shellharbour Square ... 1982.

Each of the above four centres has also undergone significant expansion and refurbishment since being first developed. The most recent such upgrade was that of Shellharbour Square (now Stockland Shellharbour) in 1999 which saw a Target DDS added to the centre together with additional specialties.

Since 2000 there has also been additional development within the overall Shellharbour Town Centre (including an Aldi supermarket) which has added to Shellharbour's strength as a retail location.

The approved expansion of Stockland Shellharbour (as noted above) to include a department store will further erode the market share of WCC in those areas to the south of Lake Illawarra.

Within the WCC itself, Crown Street has always been the focus of retail activity. The importance of Crown Street was further underwritten in 1974 with the construction of the enclosed Crown Central complex at the intersection of Crown and Keira Streets. In 1986 the Crown Street Mall opened together with the new Crown Gateway centre which contained a Grace Bros (now Myer) department store. Crown Central and Crown Gateway have since been amalgamated into a single centre by GPT which is known as Wollongong Central.

Elsewhere in the WCC there have been few other changes of any significance to the centre's retail fabric since the mid-1980s. Perhaps only the establishment of an Aldi supermarket near the intersection of Corrimal and Burelli Streets and the development of a restaurant precinct on Keira Street between Victoria and Smith Streets could be so classified.

Over time major deterioration in the quality of retailing on Crown Street between Railway Parade and Keira Street has been evident. The locus of retail activity has now shifted to the intersection of Church and Crown Streets with few quality retail tenants now found in that part of Crown Street lying to the west of Keira Street.

2.3 Shopper Survey

2.3.1 Introduction

To provide insights into the nature of shopping patterns in the Wollongong Region—especially in terms of residents' views on and patronage of the WCC and the other major centres in Wollongong—a large-scale telephone survey was undertaken in the Wollongong Region in 2004. In total, 600 residents were interviewed using the questionnaire provided at APPENDIX A. The tabular results from the survey are provided at APPENDIX B.

Data obtained from the survey has also provided an essential input to the impact assessment of the project, especially in terms of the proposed development's potential to alter shopping patterns in the Region. The key findings of the survey are discussed in detail below.

Notwithstanding the increase in retail floorspace in Dapto since the survey was undertaken, we consider its findings are still relevant in terms of understanding shopping patterns in the trade area as they relate to the WCC and other major centres.

2.3.2 WCC Shopping Patterns

As shown in TABLE 2 (APPENDIX B), not surprisingly, residents living closest to the WCC shopped there more frequently. For example, 69% of residents of postcode 2500 (Wollongong) shop in the centre at least once a week compared with only 26% of residents of postcode 2502 (Warrawong). Further away from the WCC, only 9% of Shellharbour respondents (postcode 2529) reported shopping in the WCC at least weekly.

The survey found that overall 16% of respondents **never shop in the WCC**. Certain localities reported a much higher incidence of never shopping–for instance, 35% of Berkeley 29% of Albion Park and 23% of Dapto respondents said they never shop in the CBD.

TABLE 3 (APPENDIX B) provides data on reasons why those who say they never shop in the CBD, or those who shop less frequently than once a month, do not visit the centre more often. Consistent with the strength of the suburban centres in the Wollongong Region, the main reasons for not shopping were:

- more convenient to shop more locally ... 41%
- can buy what they need locally ... 35%.

Parking (or the lack of it) in the WCC obviously is a major issue for would-be shoppers. In total, 24% of respondents (who either shop infrequently or not at all in the WCC) referred to poor parking in the CBD while a further 24% said that there was no parking available for shoppers in the WCC.

2.3.3 Shopping Patterns by Category

TABLES 4 and 5 (APPENDIX B) provide data on grocery shopping patterns in the Wollongong Region. As indicated in TABLE 4, the strongest performing suburban centres for grocery shopping are:

- Shellharbour ... 21% of total grocery shoppers
- Corrimal ... 18%
- Warrawong ... 16%
- Figtree ... 15%
- WCC/CBD ... 12%.

Woolworths clearly dominates the supermarket sector in Wollongong (TABLE 5 refers). Overall, 70% of respondents identified Woolworths as their preferred supermarket; 44% meanwhile preferred Coles.

2.3.4 Shopping Outside the Region

TABLE 6 (APPENDIX B) provides data on the frequency with which Wollongong Region residents patronise centres outside the Region. The two centres most frequently visited are the Sydney CBD and Miranda Fair. About 29% of respondents reported shopping in the Sydney CBD at least once every six months while 26% said they shopped at Miranda Fair with the same frequency. Slightly over a third (35%) reported never shopping in the Sydney CBD while 47% never shop at Miranda Fair.

The patronage of other major centres outside the Wollongong Region–for instance, Macarthur Square, Hurstville, DFO Homebush, Taren Point and the Moore Park SupaCenta is relatively infrequent as far as Wollongong Region residents are concerned.

TABLE 14 (APPENDIX B) provides data on the main reasons why respondents shop at centres outside the Wollongong Region. The predominant reasons being:

- day out ... 37%
- shopping for clothing and accessories ... 34%
- other shopping ... 15%
- shopping for gifts ... 14%
- shopping for household goods ... 13%.

2.3.5 Patronage of Suburban Centres

Summary data on the patronage of suburban centres in the Wollongong Region by frequency of visit is provided in TABLE 22 (APPENDIX B). The two most frequently visited centres are Shellharbour Square and Westfield Warrawong: only 18% of respondents say they never shop at Shellharbour Square while 16% never shop at Westfield Warrawong. **These two centres are as frequently visited as the WCC**.

TABLES 23 to 31 (APPENDIX B) provide detailed data on the frequency of visiting various centres. As would be expected, respondents living in the immediate catchments of the major centres of Shellharbour Square, Westfield Figtree and Westfield Warrawong visit these centres with a high degree of frequency (at least once a fortnight). These three centres are also attracting shoppers from more distant locations as well. For example, only 14% and 19% of Corrimal and Woonona respondents respectively said they **never visit** Westfield Warrawong while 41% and

36% of Corrimal and Woonona respondents respectively report shopping at Westfield Warrawong **at least monthly**.

The survey therefore points to a **high degree of cross-shopping of centres in the Wollongong Region**. This phenomenon is no doubt due to the limited urban scale of the Wollongong sub-region per se, the absence of significant traffic constraints and the ease of north-south movement using the Northern Wollongong bypass and the freeway.

2.3.6 Patronage of Department Stores

The two most frequently patronised stores in the department store/DDS category were:

- Big W Warrawong ... 65%
- Kmart Warrawong ... 61%.

  (TABLE 32, APPENDIX B refers).

During the past six months, Myer (formerly Grace Bros) and David Jones in the WCC were shopped respectively by 58% and 52% of respondents.

2.3.7 Shopping for Household Goods

Data on patterns of purchasing household goods are provided in TABLES 33 to 45 (APPENDIX B) inclusive. In summary, the predominant centres for purchasing electrical goods during the past 12 months were:

- Warrawong ... 19%
- Wollongong CBD ... 16%
- Shellharbour ... 11%.

The predominant locations for furniture purchasing were:

- Warrawong ... 16%
- Wollongong CBD ... 4%
- Shellharbour ... 3%.

In relation to whitegoods, Warrawong and the WCC were found to be equally important for this type of product purchasing.

2.3.8 Survey Demographics

Data on the key demographic attributes of the survey sample are provided in TABLES 46 and 47 (APPENDIX B) with respect to age and household type.

It should be noted that only persons over the age of 18 years were interviewed in the survey. Hence, the age structure of the respondent group is not directly comparable with 2001 Census data for the trade area.

In relation to household type, the sample contained a slight over-representation of couple households with children and a slight under-representation of couple only households compared with their incidence at the 2001 Census.

2.3.9 Summary

Although the WCC has a broad-based catchment drawing patronage generally from across the Wollongong/Shellharbour/Kiama region, it nonetheless faces stiff competition from other major centres particularly Warrawong, Shellharbour and, to a lesser extent, Figtree.

The improvement of retail facilities and services at Dapto (as discussed above) would only have increased the level of competition.

The survey findings highlight how a significant component of shoppers, some of whom reside relatively nearby to the Wollongong CBD, in fact never shop there. Concerns about the availability and quality of car parking in the WCC appear an important influence on WCC shopping patterns.

The survey findings also point to the (not unexpected given its demography) strength of DDSs in the Wollongong Region: the two DDSs at Warrawong are in fact shopped more frequently than either the Myer or David Jones department stores in the WCC. This underlines the importance of attracting a DDS to the WCC to provide it with a more competitive (and balanced) retail offer.

3 TRADE AREA ANALYSIS

3.1 Trade Area Definition

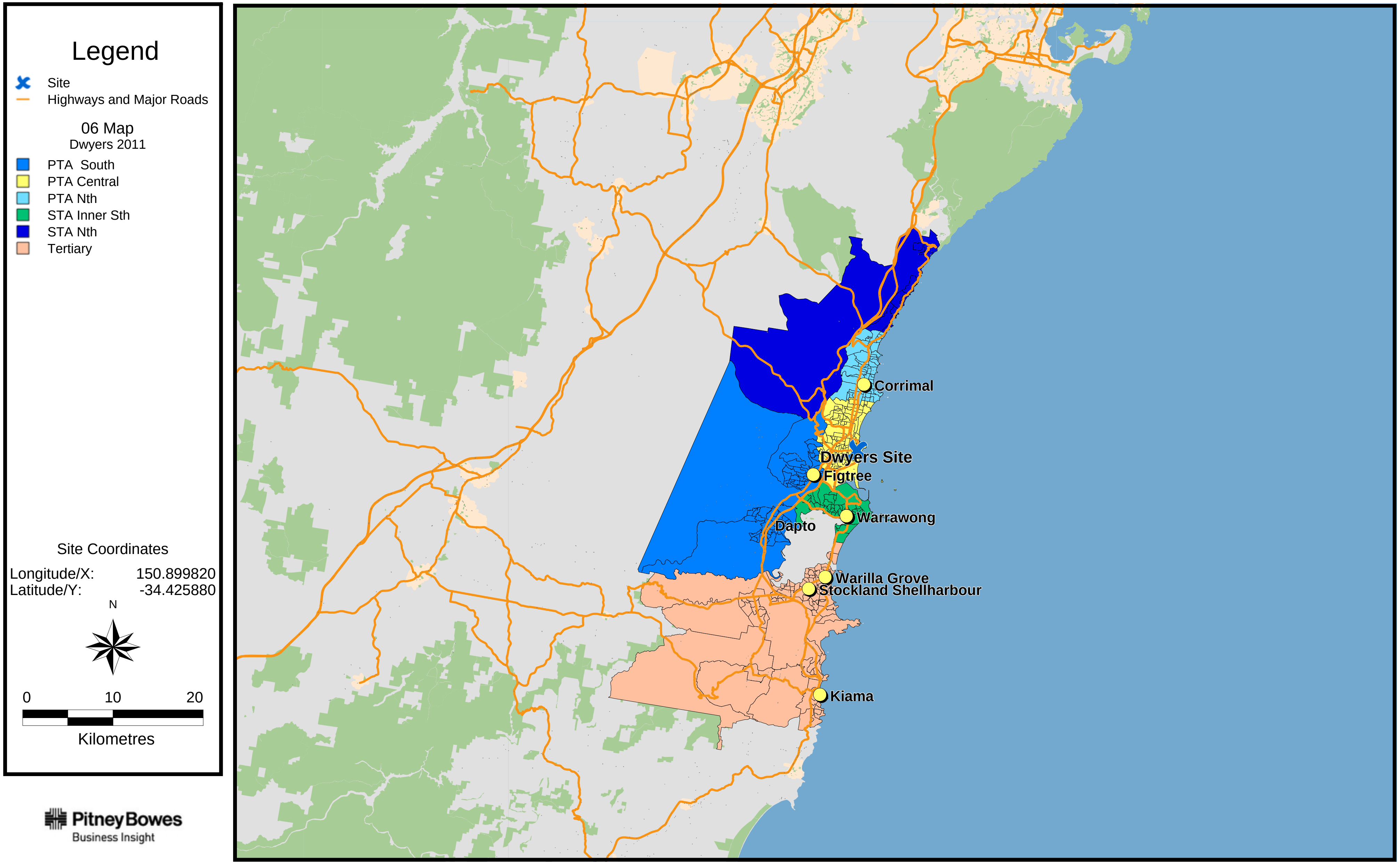
Data from the survey discussed in Section 2 above have been utilised to define a trade area for the WCC. The trade area also has been defined taking into account the location of other centres directly competitive with the WCC as well as the regional road system. Finally, the findings of previous surveys conducted in the Crown Street Mall and particularly with respect to shopper origins, have also been taken into account.

FIGURE 3.1 depicts the extent of the overall trade area and its segmentation into a series of sub-sectors. This segmentation facilitates more comprehensive (and, we believe, more insightful) demographic analysis and, consequently, preparation of more accurate retail spending estimates.

The components of the trade area are as follows:

- Primary Trade Area (PTA) Central ... includes Wollongong, Mangerton, Coniston, Balgownie, Fern Hill and Towradgi
- PTA North ... includes Corrimal, Woonona, Bellambi, Bulli and Thirroul
- PTA South ... includes Figtree, Unanderra, Dapto and Kanahooka
- Secondary Trade Area (STA) North ... includes Austinmer, Coledale, Wombarra, Scarborough

FIG 3.1: Wollongong Trade Area
And Surrounding Areas



Pitney Bowes Business Insight

Print Date: 3 March 2011

Data Source:

- STA South ... includes Berkeley, Warrawong and Port Kembla

- Tertiary Trade Area (TTA) ... includes Warilla, Shellharbour, Albion Park and Kiama.

3.2 Trade Area Demography

The demography of the Wollongong trade area is quite variable. Data from the 2006 Census for the trade area by sub-sector are provided in TABLE 3.1. For comparative purposes relevant data are also provided for the Greater Metropolitan Area (GMA) which is an amalgam of the Sydney, Wollongong and Newcastle Statistical Divisions.

TABLE 3.1:
SUMMARY of SELECTED DEMOGRAPHIC ATTRIBUTES – WOLLONGONG TRADE AREA and GMA, 2006
(% Population)

	PTA Central	PTA North	PTA South	STA North	STA South	TTA	Total	GMA
2006 Census Population Count	48,929	36,702	56,283	11,956	23,537	77,091	254,498	4,876,191
Age Structure								
0-9 years	10.0	13.2	14.2	16.0	11.8	14.0	13.0	13.0
10-19	11.5	13.7	14.6	15.6	12.9	15.2	13.9	13.2
20-29	19.9	11.4	11.3	9.0	12.1	10.9	12.8	14.3
30-39	13.2	13.5	13.6	15.1	12.2	13.1	13.3	15.2
40-49	12.8	14.9	14.7	18.1	14.3	15.1	14.6	14.7
50-59	11.4	12.2	13.0	12.8	11.9	12.7	12.4	12.3
60+	21.2	21.1	18.6	13.4	24.8	19.0	20.0	17.3
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Household Structure								
Couples & Children	24.3	31.1	40.4	47.7	29.5	37.2	33.9	35.4
Couples Only	25.1	25.2	28.2	25.5	25.3	27.8	26.6	24.8
Single Parents	10.1	13.7	11.8	9.8	16.2	13.2	12.5	11.6
Other	1.5	1.0	0.9	0.7	1.0	1.0	1.0	1.4
Total Family	61.0	71.0	81.3	83.7	72.0	79.2	74.0	73.2
Non-Family Households								
Lone Person	32.4	27.5	18.7	16.2	27.4	20.6	24.2	22.9
Group	6.6	1.5	0.0	0.1	0.6	0.2	1.7	4.0
Total Non-Family	39.0	29.0	18.7	16.3	28.0	20.8	25.9	26.9
Average Household size (persons/dwelling)	**2.28**	**2.48**	**2.75**	**2.91**	**2.53**	**2.69**	**2.58**	**2.7**
Occupational Structure								
Managers	10.8	9.8	9.8	12.2	6.0	9.9	9.9	12.7
Professionals	26.4	21.3	18.0	27.2	9.6	15.3	19.2	23.0
Technicians & Trade Workers	13.9	16.8	17.5	15.6	17.5	17.6	16.6	13.3
Community & Personal Service Workers	10.1	10.9	9.4	9.7	9.8	10.2	10.0	8.3
Clerical & Administrative Workers	14.5	14.9	15.5	14.6	12.4	13.7	14.4	16.4
Sales Workers	9.4	8.9	9.9	7.7	11.4	11.0	10.0	9.7
Machinery Operators & Drivers	5.8	7.6	8.8	5.2	12.8	9.7	8.4	6.2
Labourers	7.6	8.4	9.6	5.8	18.3	11.0	9.9	8.4

TABLE 3.1:
SUMMARY of SELECTED DEMOGRAPHIC ATTRIBUTES – WOLLONGONG TRADE AREA and GMA, 2006
(% Population)

	PTA Central	PTA North	PTA South	STA North	STA South	TTA	Total	GMA
Inadequately Described/Not Stated	1.5	1.4	1.5	2.0	2.2	1.6	1.6	2.0
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Unemployment Rate	**8.5**	**7.3**	**6.2**	**4.0**	**12.6**	**6.9**	**7.4**	**5.6**
Annual Household Income								
Nil/Negative	2.4	1.0	0.9	0.6	1.0	0.8	1.2	1.4
$0-$7,799	2.1	2.1	1.4	0.8	2.6	1.3	1.7	1.6
$7,800-$12,999	8.8	8.7	5.5	2.8	12.1	6.3	7.4	5.3
$13,000-$18,199	9.7	10.5	7.4	5.3	11.2	8.3	8.9	6.9
$18,200-$25,999	6.5	6.7	7.2	2.8	12.3	7.7	7.4	4.9
$26,000-$33,799	12.1	11.6	11.0	8.3	13.6	12.3	11.8	9.9
$33,800-$41,599	6.3	6.1	5.9	5.2	6.4	6.7	6.2	6.4
$41,600-$51,999	7.2	6.9	6.6	5.5	7.3	7.1	7.0	7.1
$52,000-$62,399	10.4	9.8	11.2	10.6	9.8	11.7	10.9	10.8
$62,400-$72,799	4.9	4.6	6.3	5.7	4.9	6.0	5.5	5.6
$72,800-$88,399	7.3	8.3	9.6	10.6	6.6	9.2	8.6	8.6
$88,400-$103,999	6.2	7.2	7.8	10.5	4.0	7.5	7.0	7.3
$104,000-$129,999	5.7	6.3	8.3	9.9	4.1	6.5	6.6	7.7
$130,000-$155,999	5.6	6.0	5.8	11.0	2.4	5.1	5.5	8.1
Above $156,000	4.8	4.2	5.1	10.4	1.7	3.5	4.3	8.4
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Average Annual Household Income ($2006)	**$57,753**	**$59,061**	**$65,136**	**$83,446**	**$45,188**	**$59,861**	**$59,976**	**$71,193**

Source: ABS Census, 2006.

As noted in TABLE 3.1, the demography of the STA South differs significantly from the rest of the trade area. For instance, in 2006 the population of the STA South was considerably older. Almost one quarter (24.8%) of its residents were aged 60+ years in 2006. Its unemployment rate was also very high (12.6%) compared with 7.4% for the trade area as a whole. Unsurprisingly, therefore, this area's average annual household income was only $45,188 in 2006. This was 24.7% less than the average annual household income for the trade area as a whole ($59,976; $2006).

The PTA South, STA North and the TTA generally have a much younger population typified by an above-average proportion of 0-9 years and a higher proportion of traditional families (couples and dependent children) than found elsewhere in the trade area.

The highest average household incomes in 2006 were found in the STA North ($83,446 per household per annum)–some 39% above the trade area average.

Comparing the Wollongong trade area with the GMA indicates that in 2006 some distinctive features of the trade area were:

- slightly smaller households (2.58 persons per household compared with 2.65 in the GMA);

- a somewhat older population with 19.9% aged 60+ years in 2006 compared with 17.3% in the GMA;

- a much higher unemployment rate (7.4% compared with 5.6% in the GMA);

- a significantly lower proportion of residents employed in so-called upper-white-collar occupations (29.1% compared with 35.7% in the GMA); and

- an average household income that was -15.8% below the GMA average in 2006 ($59,976 compared with $71,193; $2006).

3.3 Population Growth

The defined trade area encompasses the LGAs of Wollongong and Shellharbour and part of Kiama. Since 1996 these three LGAs have been experiencing fairly consistent population growth. In this regard, we note that the estimated resident population of the three LGAs combined increased from 255,744 persons in 1996 to an estimated 288,984 persons in 2009 (TABLE 3.2 refers).

TABLE 3.2
ESTIMATED RESIDENT POPULATION – WOLLONGONG STATISTICAL SUB-DIVISION, 1996-2009P

LGA ...	1996	2001	2006	2009P
Wollongong	183,497	189,776	194,543	201,438
Shellharbour	53,873	59,862	63,434	66,905
Kiama	18,374	19,959	20,007	20,641
Total	**255,744**	**269,597**	**277,984**	**288,984**

Note: P=Preliminary.
Source: Australian Bureau of Statistics (ABS) 1996-2009.

Average annual population growth (AAG) rates during the most recent five year period (2004-09) for the three LGAs have been:

- Wollongong ... 0.9% per annum
- Shellharbour ... 1.5%
- Kiama ... 0.7%
- Overall ... 1.0%.

According to ABS estimates, the growth rate in all LGAs has accelerated since 2006. For example, between 2001-09, Wollongong LGA grew at +0.9% per annum compared with just +0.2% between 2001-06.

Significant potential for long-term population growth remains in parts of the trade area particularly Shellharbour and in West Dapto. The future residential settlement of West Dapto will be dependent on resolving significant servicing constraints. Ultimately the West Dapto area will provide 17,000 additional dwellings and have a population of 50,000 people. The Wollongong LEP (West Dapto) 2010 allows for the construction of 6,900 dwellings and 175 hectares of employment land.

It is understood that Stockland (the area's major landowner) has proposed an initial stage of 421 lots to commence subdivision in 2012–subject to the finalisation of a Planning Agreement with Council.

We have prepared a forecast of population growth in the trade area to 2021 (TABLE 3.3 refers). As indicated in TABLE 3.3, at the 2006 Census the trade area had a population of 268,480 people (estimated resident population [ERP]).

This projection takes account of LGA-level projections prepared by the Department of Planning in 2010 and the recent trend in population growth rates noted above.

The trade area population is forecast to have grown to 283,314 persons in 2011 and to reach 308,554 by 2021, a growth of +25,240 over its 2011 level.

The majority of this forecast growth will occur in the PTA South (+14,004 persons) and in the TTA (+5,863 persons). Growth in the PTA Central and North combined is forecast to be in the order of +4,284 persons between 2011-21.

TABLE 3.3
FORECAST POPULATION – WOLLONGONG TRADE AREA, 2006-21 (No. Persons)

Year ...	PTA Central	PTA North	PTA South	STA North	STA South	TTA	Total Wollongong Trade Area
Count 2006	48,929	36,702	56,283	11,956	23,537	77,091	254,498
2006 ERP	51,773	38,835	59,320	12,601	24,807	81,144	268,480
2011	54,541	40,912	62,281	13,230	26,045	86,305	283,314
2013	55,088	41,322	63,847	13,363	26,176	87,865	287,661
2016	55,919	41,945	67,755	13,483	26,412	89,991	295,505
2021	56,989	42,748	76,285	13,687	26,677	92,168	308,554
Increase 2011-21	**2,448**	**1,836**	**14,004**	**457**	**632**	**5,863**	**25,240**
Average Annual Growth 2011-21 (%)	**0.44**	**0.44**	**2.05**	**0.34**	**0.24**	**0.66**	**0.86**

Source: Leyshon Consulting Estimates, February 2011.

The trade area's overall projected population growth between 2011-21 implies an AAG of +0.86% per annum. We consider this to be generally consistent with the population growth rates recorded in Wollongong, Shellharbour and Kiama LGAs during the period 2004-09 as noted above. It is also consistent with the fact that population growth over the next seven years can be expected to slow as new "greenfields" land development declines in Shellharbour LGA. Our projections incorporate an assumption of residential development in West Dapto commencing in 2013.

3.4 Available Retail Spending

Estimates have been prepared of available retail spending in the trade area for the period 2006-21. These estimates have been prepared having regard to the following data sources:

- data on household incomes in the trade area drawn from the 2006 Census

- data from the 2003-04 ABS Household Expenditure Survey (HES) as it relates to the expenditure characteristics of households with various locational and demographic characteristics

- data from the ABS on retail sales in New South Wales for the period 2006-10

- data from the ABS on movements in the Consumer Price Index (CPI) between 2006-10

- data from the ABS on changes in average weekly earnings and household income levels during the period 2006-10.

In summary, we estimate that average annual per capita retail expenditure levels in the trade area in 2011 ($2010) by sub-sector are as follows:

- PTA Central ... $11,172 per capita per annum
- PTA North ... $10,601
- PTA South ... $10,211
- STA North ... $11,529
- STA South ... $8,971
- TTA ... $9,924.

Certain assumptions have been made about the extent of real growth in average annual per capita retail spending which might occur during the period 2011-21. In this regard we note that in the decade to 2006, retail sales in New South Wales expanded in real terms (that is, over and above inflation) in the range of +2.0% to +2.5% per annum.

For the purposes of analysis presented in this Report, we have assumed that the various trade area sectors could achieve real per capita retail spending growth during the forecast period as follows:

- PTA Central ... +0.5% per annum
- PTA North ... +1.0%
- PTA South ... +1.0%
- STA North ... +1.0%
- STA South ... +0.5%
- TTA ... +1.0%.

Since 2006, the GFC and other factors such as rising living costs, have slowed real rates of spending growth. In our opinion, real spending growth is unlikely to return to pre-GFC levels in the foreseeable future. Accordingly, we consider a conservative approach to projections of future spending growth is appropriate.

The resulting estimates of growth in available retail spending for the period 2006-21 are summarised in TABLE 3.4 below. As indicated in TABLE 3.4, total available retail spending in the trade area in 2011 is estimated at $2.922 billion per annum ($2010). By 2021 we estimate that, in real terms, this will have increased by some +$544.8 million to $3.467 billion per annum ($2010). The estimated growth in various parts of the trade area between 2006-21 is projected to be as follows:

- PTA Central ... +$90.8 million per annum
- PTA North ... +$88.9
- PTA South ... +$254.7
- STA North ... +$28.9
- STA South ... +$29.0
- TTA ... +$205.1.

TABLE 3.4
ESTIMATED AVAILABLE RETAIL SPENDING – WOLLONGONG TRADE AREA, 2006-21 ($2010; $ Mil. pa)

Year ...	PTA Central	PTA North	PTA South	STA North	STA South	TTA	Total Wollongong Trade Area
2006	$578.4	$411.7	$605.7	$145.3	$222.6	$805.3	$2,769.1
2011	$609.3	$433.7	$635.9	$152.5	$233.7	$856.5	$2,921.6
2013	$621.6	$446.9	$665.0	$157.2	$237.2	$889.5	$3,017.4
2016	$640.5	$467.4	$727.1	$163.4	$242.6	$938.7	$3,179.9
2021	$669.2	$500.6	$860.4	$174.3	$251.6	$1,010.4	$3,466.5
Increase 2006-11	$30.9	$22.0	$30.2	$7.1	$11.1	$51.2	$152.5
Increase 2011-21	$59.9	$66.9	$224.5	$21.8	$17.9	$153.9	$544.8
Increase 2006-21	$90.8	$88.9	$254.7	$28.9	$29.0	$205.1	$697.6

Source: Leyshon Consulting Estimates, February 2011.

Real annual available retail spending growth in the order of $697.6 million by 2021 will generate demand for a substantial increase in retail floorspace within the trade area. For the purposes of estimating what volume of additional floorspace such spending growth might support, we have adopted an average floorspace sales rate of $5,800 per sq.m. per annum ($2010).

Assuming average sales of $5,800 per sq.m. per annum, the Wollongong trade area theoretically would require the addition +120,276 sq.m. of retail floorspace during the period 2006-21 to meet the demand flowing from projected spending growth. In reality, however, the actual volume of extra floorspace required will be less than this figure. Some degree of so-called "escape expenditure" almost always flows out of any trade area to centres elsewhere. In the case of Wollongong/Shellharbour/Kiama, for example, approximately 16,000 residents worked in the Sydney Statistical Division (SSD) in 2006. This pattern of commuting to work in Sydney alone doubtless leads to a significant level of escape spending. The actual demand for additional retail floorspace within the Wollongong trade area up to 2021 therefore will be less than the theoretical estimate of 120,275 sq.m. noted above.

Taking into account escape spending from the trade area, we consider that the "net" demand for additional retail floorspace in the Wollongong trade area between 2006-21 will still be significant—in the order of about 100,000 sq.m..

4 IMPACT ANALYSIS

4.1 Introduction

The purpose of this section of the Report is to assess the potential impact of the proposed Dwyer's site development in the WCC on relevant existing centres. The principal focus of most impact assessments is on the possible extent of the change in retail sales of the centres affected by a proposed development. In this case, however, we consider it is also relevant to examine the **positive benefits** which will flow from the project proceeding, especially in terms of employment creation and a strengthening of the overall competitive position of the WCC.

In preparing this impact assessment we have had regard to the potential impact of the proposed development on existing centres. Any such analysis is complicated by uncertainty over the redevelopment and expansion of the Wollongong Central shopping centre located at the intersection of Crown and Keira Streets to the west of the subject site.

As previously noted, an approval has been granted under Part 3A of the Environmental Planning and Assessment Act 1979 to the GPT Group for the development of a mixed use retail, residential and commercial office project in the Wollongong CBD. The project involves the construction of a six level retail centre on land to the west of Keira Street and to the north of Crown Lane. It is proposed the mixed use complex will be interconnected by a tunnel and bridge under and over Keira Street to the existing Wollongong Central shopping centre.

As noted in our 2006 EIA plans lodged with a preliminary assessment report prepared by BBC Consulting Planners indicated that the proposed development would incorporate a supermarket, a DDS and, on the existing Crown Central site, a new eight-screen cinema. While the preliminary assessment report provides data on the total GFA of the project it did not contain detailed information on the project's potential retail components or impact. A later report prepared by consultants MapInfo Dimasi provided greater detail on both issues assuming 2009-10 was the first year of trading for the expanded Wollongong Central centre. It is now clear that the proposed expansion of Wollongong Central is substantially delayed.

In reality there is no certainty in relation to the following:

- when the proposed expansion will occur
- who will be the major tenants
- the expansion as currently envisaged may not proceed if the Dwyer's site proposal were to be approved.

In addition there are certain unknown factors which could influence the economic impact of both projects on the WCC. These include whether the Illawarra in general can support three department stores (David Jones and Myer in the WCC and Myer at Shellharbour), and whether the potential addition of two new DDS stores to the CBD may give rise to the closure of one of the existing department stores.

Given the approval of the Concept Plan and the Project Application, we have no alternative but to assume that the project will be activated as proposed. For the sake of analysis, we have assumed that the expanded centre has 2016 as its first full year of trading.

Clearly, if the project were to be undertaken ahead of this date it would have the effect of altering the conclusions we have reached regarding the combined impact of the two proposals.

4.2 Sales Potential of Dwyer's Site Centre

At the outset it is important to determine the likely trading potential of a centre of the scale being proposed for the Dwyer's site. In essence, the proposed centre will contain the two retail elements found in so-called sub-regional centres across Australia. These are a DDS and a full-line supermarket. But in this instance the centre will also have a significantly above-average component of floorspace devoted to food and dining activities. Only a comparatively small proportion of the floorspace in most sub-regional centres is usually is devoted to food courts, restaurants and the like (commonly <250 sq.m.). Past plans for the centre by contrast envisaged that it could have up to 1,378 sq.m. of "food" space.

In preparing this part of the assessment we have assumed the planned expansion to Shellharbour Square has been completed by 2013. We have also assumed the proposed DDS-anchored shopping centre in Corrimal (which has been approved by the Independent Panel), will be completed and have 2013 as its first full year of trading.

We have made no assumption in relation to the commencement of trading of the failed Belmorgan project at Fairy Meadow which was to contain a full-line supermarket as its anchor.

Taking these assumptions into account, we have prepared an assessment of the potential annual sales which the proposed centre could achieve assuming 2013 is its first full trading year (TABLE 4.1 refers). In summary, we estimate the centre could achieve annual sales of about $138.4 million per annum ($2010) in 2013 which equates to an average sales rate of $7,164 per sq.m. per annum. Such an average sales rate is somewhat above the norm for a DDS-anchored centre in Australia in 2010.

TABLE 4.1
ESTIMATE of POTENTIAL ANNUAL SALES – DWYER'S SITE PROJECT, 2013 ($2010)

Factor ...	PTA Central	PTA North	PTA South	STA North	STA South	TTA	Total Wollongong Trade Area	Non Trade Area	Total Centre
Available Food Sales ($.Mil. pa)	$295.9	$212.7	$311.8	$71.4	$116.1	$4 23.5	$1,431.4		
Centre Market Share (%)	15.0	2.5	2.0	2.0	0.5	0.5			
Sub-Total – Centre Food Sales ($.Mil. pa)	$44.4	$5.3	$6.2	$1.4	$0.6	$2.1	$60.0	$6.7	$66.7
Available Non Food Sales ($.Mil. pa)	$325.7	$234.1	$353.2	$85.7	$121.0	$4 66.1	$1,585.8		
Centre Market Share (%)	7.0	4.5	4.0	4.0	2.5	1.5			
Sub-Total – Centre Non-Food Sales ($.Mil. pa)	$22.8	$10.5	$14.1	$3.4	$3.0	$7.0	$60.8	$10.7	$71.7
Total Available Sales ($.Mil. pa)	$621.6	$446.9	$665.0	$157.2	$237.2	$8 89.5	$3,017.4		
Centre Market Share (%)	10.8	3.5	3.1	3.1	1.5	1.0	4.0		
Total Centre Sales ($.Mil. pa)	**$67.2**	**$15.9**	**$20.4**	**$4.9**	**$3.6**	**$9.1**	**$121.1**	**$17.4**	**$138.4**

Note: Errors due to rounding.
Source: Leyshon Consulting Estimates, February 2011.

The centre's market share within its overall trade area would be 4.0% although this would range as low as 1.0% in the TTA and up to 10.8% in the PTA Central.

As noted in TABLE 4.1, approximately $17.4 million of sales (or 12.5% of the centre's total estimated turnover of $138.4 million) would be derived from outside the trade area. That is, from spending at the centre by tourists and visitors to the Wollongong Region including shoppers attracted from areas to the south and west of the trade area such as Shoalhaven LGA and residents of the Southern Highlands. The latter are known to patronise centres in the Illawarra in general and those in the WCC in particular for higher-order shopping.

4.3 Impact Assessment

4.3.1 Dwyer's Site 2013

Our estimates of the impact of the proposed development in isolation on existing major shopping centres in the trade area are detailed in TABLE 4.2.

TABLE 4.2
ESTIMATED IMPACT on SELECTED MAJOR CENTRES of PROPOSED DWYER'S SITE PROJECT – Pre- and Post-DEVELOPMENT, 2013 ($2010)

		2013	2013	— Impact 2013 —		Sales
Centres ...	**$2,011.0**	**Pre**	**Post**	($.Mil. pa)	(%)	**2016**
Wollongong Central	$175.0	$183.9	$158.9	($25.0)	(13.6)	$165.3
WCC Balance	$220.0	$222.2	$210.2	($12.0)	(5.4)	$223.1
Dwyer's Site	$0.0	$0.0	$138.4	n.a.	n.a.	$144.0
Westfield Warrawong	$207.5	$223.5	$205.5	($18.0)	(8.1)	$215.9
Warrawong Balance	$250.0	$265.2	$261.2	($4.0)	(1.5)	$277.1
Westfield Figtree	$155.3	$164.8	$152.8	($12.0)	(7.3)	$162.1
Dapto	$148.5	$163.7	$158.7	($5.0)	(3.1)	$168.4
Stockland Shellharbour	$209.0	$487.0	$476.0	($11.0)	(2.3)	$505.0
Shellharbour Balance	$105.0	$111.4	$108.0	($3.4)	(3.1)	$114.6
Warilla Grove	$85.0	$88.4	$86.4	($2.0)	(2.3)	$89.9
Corrimal	$135.0	$251.5	$239.5	($12.0)	(4.8)	$254.1
Other Trade Area Centres	$0.0	$0.0	$0.0	($7.0)	n.a.	$0.0
Non Trade Area Centres	$0.0	$0.0	$0.0	($27.0)	n.a.	$0.0
Total	**$1,690.3**			**($138.4)**		

Source: Leyshon Consulting Estimates, February 2011.

In our opinion the attributes of the proposed centre–which will include a discount department store (DDS), supermarkets and particularly cinemas together with a wide range of national specialties–will lead to some reduction in the level of escape spending currently flowing out of the trade area to centres elsewhere particularly those in the Sydney Region. It is unlikely, however, that more than $10.0 million of the projected annual sales will be captured as a consequence of reduction in escape spending.

In assessing the impact of the proposed development, we have had regard to the results of the resident retail survey discussed earlier in this Report. We have also assumed that the main impact of the proposed development will fall on relevant centres which have a comparable retail offer and those centres most proximate to the WCC in these categories are:

- WCC Central
- Westfield Warrawong
- Westfield Figtree
- Stockland Shellharbour
- Corrimal
- Dapto.

The estimated 2011 sales being achieved by selected major centres in the trade area and their likely turnover in 2013 prior to the proposed development commencing trading are detailed in TABLE 4.2. Estimates of the likely reduction in sales attributable to the proposed development both in actual dollar and percentage terms in 2013 are also shown in TABLE 4.2.

As indicated in TABLE 4.2, we estimate the project will have widespread impacts on the sales of major centres in the Wollongong Region in 2013 immediately following its assumed opening, namely:

- Wollongong Central ... -13.6%
- Balance of WCC ... -5.4%

- Shellharbour ... -2.3%
- Figtree ... -7.3%
- Warrawong ... -8.1%
- Corrimal ... -4.8%
- Dapto ... -3.1% .

The impact on the existing retail sector in the WCC as a whole in 2013 is estimated at -$37.0 million per annum or -9.1%. Despite this impact, the retail sector in the WCC (that is, existing plus Dwyer's site) will experience a **net increase** in retail sales as a consequence of the proposed development proceeding. As can be noted from TABLE 4.3, estimated annual sales in the WCC in 2013 prior to the proposed development are put at $406.1 million but following the proposed development they are estimated at $507.5 million. Thus, even allowing for the estimated impact of the proposal, the WCC is projected to experience a net gain of +$101.4 million in total annual turnover as a result of the development–or an increase of +24.9% in total retail sales.

TABLE 4.3
SUMMARY of CHANGE in ANNUAL WCC RETAIL SALES – PRIOR and POST DWYER'S SITE DEVELOPMENT ($2010)

Centre...	2011	2013 Pre	2013 Post	Impact 2013 ($.Mil.pa)
Wollongong Central	$175.0	$183.9	$158.9	($25.0)
WCC Balance	$220.0	$222.2	$210.2	($12.0)
Dwyer's Site	$0.0	$0.0	$138.4	$138.4
Total	**$395.0**	**$406.1**	**$507.5**	**$101.4**

Source: Leyshon Consulting Estimates, February 2011.

The impact in 2013 on medium scale centres such as Corrimal, Dapto, Warilla and the like is estimated to range between -2.3% (Warilla Grove) and -4.8% (Corrimal).

Continuing population growth in the period 2013-16 (assuming no further major retail developments are undertaken in the trade area during this time-frame) will substantially modify these impacts, however. By 2016, for instance, many of the centres in the trade area will have well and truly recovered their 2013 pre-development sales levels in real terms (that is, $2010; TABLE 4.2 refers). The exceptions are Wollongong Central, Westfield Warrawong and Westfield Figtree. We anticipate that all centres will have recovered their 2013 pre-development trading levels by 2021, however.

4.3.2 Wollongong Central 2016

An assessment has been made of the potential impact of the Wollongong Central expansion in 2016. This analysis is based on the assumption that once complete the centre will contain some 52,373 sq.m. of retail floorspace as detailed in a report prepared by MapInfo Dimasi for GPT in 2007 (*Wollongong Central, New South Wales, Economic Impact Analysis*).

In their report Mapinfo Dimasi projected the centre would achieve sales in 2009-10 of $272.8 million per annum. This projection assumed that development of the Dwyer's site had already occurred. Sales of $272.8 million are equivalent to some $298.7 million per annum at current prices ($2010). We have not undertaken our own analysis of this projection but have simply accepted it for analytical purposes.

Annual sales in the order of $298.7 million represents an additional $132.1 million over the centre's current sales ($166.6 million per annum).

Mapinfo Dimasi estimated the expanded centre would capture approximately $60 million of its forecast sales from spending by either shoppers from outside the trade area or through a reduction in escape spending. We consider this assessment to be highly optimistic given the expanded centre (like that proposed on the Dwyer's site) is only providing a DDS, supermarkets and additional specialties.

TABLE 4.4 provides an estimate of the impact of the proposed expansion of Wollongong Central in 2016. The major impact will be on the Dwyer's site centre namely, -$33.0 million per annum in 2016. This is equivalent to an impact of -22.9%. This is a very similar impact, albeit off a different year base, to the impact of -20% in 2009-10identified by MapInfo Dimasi in their 2007 report.

TABLE 4.4
ESTIMATED IMPACT on SELECTED CENTRES of PROPOSED WOLLONGONG CENTRAL EXPANSION, 2016 ($2010)

	— Sales —		— Impact 2016 —	
Centres ...	**2016**	**2016 Post**	($ Mil. pa)	(%)
Wollongong Central	$165.3	$298.0	$0.0	0.0
WCC Balance	$223.1	$217.3	($5.8)	(2.6)
Dwyer's Site	$144.0	$111.0	($33.0)	(22.9)
Westfield Warrawong	$215.9	$203.9	($12.0)	(5.6)
Warrawong Balance	$277.1	$273.1	($4.0)	(1.4)
Westfield Figtree	$162.1	$154.1	($8.0)	(4.9)
Dapto	$168.4	$163.4	($5.0)	(3.0)
Stockland Shellharbour	$505.0	$495.0	($10.0)	(2.0)
Shellharbour Balance	$114.6	$112.6	($2.0)	(1.7)
Warilla Grove	$89.9	$87.9	($2.0)	(2.2)
Corrimal	$254.1	$248.1	($6.0)	(2.4)
Other Trade Area Centres			($5.0)	
Non Trade Area Centres			($40.0)	
Total	**$2,319.3**		**($132.8)**	

Source: Leyshon Consulting Estimates, February 2011.

The estimated impact on other regional centres ranges from -2.0 % (Stockland Shellharbour) up to -5.6% with respect to Westfield Warrawong.

As noted in TABLE 4.4, the estimated impact on the Dwyer's site centre would reduce that centre's sales to some $111.0 million in 2016 which is equivalent to $5,751 per sq.m. per annum. Sales of this level in a DDS-anchored centre are well below average but are unlikely to result in the centre becoming unviable.

TABLE 4.5 summaries the change in Wollongong City Centre retail sales following the expansion of Wollongong Central.

TABLE 4.5
SUMMARY of CHANGE in WCC RETAIL SALES – ASSUMING DWYER'S SITE and WOLLONGONG CENTRAL EXPANSION, 2016-10 ($2010)

Centre...	2016 Pre	2016 Post	Impact 2016 ($.Mil. pa)
Wollongong Central	$165.3	$298.0	$132.7
WCC Balance	$223.1	$217.3	($5.8)
Dwyer's Site	$144.0	$111.0	($33.0)
Total	**$532.4**	**$626.3**	**$93.9**

Source: Leyshon Consulting Estimates, February 2011.

As indicated in TABLE 4.5, the total sales in the Wollongong City Centre would increase by $93.9 million in net terms despite a loss of sales of $33.0 million for the Dwyer's site centre and a further loss of around $5.8 million in sales from the balance of retailing in the Wollongong City Centre.

4.3.3 Summary of Impact

TABLE 4.6 summarises the impacts of both the Dwyer's site development and the proposed expansion of Wollongong Central in 2013 and 2016 respectively. As indicated in TABLE 4.6, we consider some centres in the Illawarra–notably Westfield Warrawong and Westfield Figtree together with the balance of retailing in the WCC–will have lower turnovers in 2016 (post Dwyer's and Wollongong Central) than they had in 2011.

Some other centres such as Dapto, the balance of retailing in Shellharbour, and Warrawong and Warilla Grove will recover their 2011 turnovers by 2016. In the case of Stockland Shellharbour and Corrimal, they will have substantially higher turnovers in 2016 (post Dwyer's and Wollongong Central) than they had in 2011 by virtue of their substantial expansion (as detailed earlier in this Report) and strong population and spending growth in their PTAs.

TABLE 4.6
SUMMARY of IMPACTS of PROPOSED DWYER'S SITE PROJECT and WOLLONGONG CENTRAL EXPANSION, 2013-16 ($2010; $ Mil.p.a.)

Centres...	2011	2013 Pre Dwyer's	2013 Post Dwyer's	2016 Pre WC Expansion	2016 Post WC Expansion	Change 2011-16
Wollongong Central	$175.0	$183.9	$158.9	$165.3	$298.0	$123.0
WCC Balance	$220.0	$222.2	$210.2	$223.1	$217.3	($2.7)
Dwyer's Site	$0.0	$0.0	$138.4	$144.0	$111.0	$111.0
Westfield Warrawong	$207.5	$223.5	$205.5	$215.9	$203.9	($3.6)
Warrawong Balance	$250.0	$265.2	$261.2	$277.1	$273.1	$23.1
Westfield Figtree	$155.3	$164.8	$152.8	$162.1	$154.1	($1.2)
Dapto	$148.5	$163.7	$158.7	$168.4	$163.4	$14.9
Stockland Shellharbour	$209.0	$487.0	$476.0	$505.0	$495.0	$286.0
Shellharbour Balance	$105.0	$111.4	$108.0	$114.6	$112.6	$7.6
Warilla Grove	$85.0	$88.4	$86.4	$89.9	$87.9	$2.9
Corrimal	$135.0	$251.5	$239.5	$254.1	$248.1	$113.1

Source: Leyshon Consulting Estimates, February 2011.

4.4 Implications of Impact

To the best of our knowledge there is no acknowledged definition of what constitutes either an acceptable or unacceptable impact of a new retail development on existing shopping centres. This derives from the fact that no research has been able to codify what a particular percentage reduction in sales means to various types of centres. Much depends, for instance, on the competitive response of affected centres and the individual merchants within those centres, their existing profitability levels and the financial structures underpinning tenants. For example, established retailers who may own their own premises or have very low debt levels and are reasonably profitable should have the capacity to absorb a greater impact than those who may be paying high rents and/or operating on low profit margins.

Based on our experience, we classify retail impacts as follows:

- 0-5.9% ... very low
- 6-9.9% ... low/medium
- 10-14.9% ... medium/high
- 15%+ ... high/very high.

Measured in terms of the above scale, the sales impact in 2013 of the proposed centre (in isolation) on the WCC's existing retail sector (-9.1%) would be classified as being at the upper-end of the low/medium range. For the Wollongong Central centre alone, the impact would be classified as being in the middle of the medium/high range.

Based on Wollongong Central's reported sales in 2010 ($166.6 million per annum), the centre's current average sales are about $5,154 per sq.m. per annum. This is somewhat below average for an Australian department store-anchored centre.

Compared with other similar centres, the average sales level is somewhat atypically below average given the centre contains such a significant component of department store space (Myer and part of David Jones) and no supermarkets. The latter are critical to overall centre sales performance as they are large stores and often trade at rates in excess of $9,000 per sq.m. per annum.

It is also noteworthy that Wollongong Central has always achieved an above average sales rates for its specialties (above $9,000 per sq.m. per annum). This level is more typically only found in major regional centres in Australia.

Given the above, we consider it reasonable to conclude that Wollongong Central could absorb an impact of -$25 million in 2013 without threatening its overall viability.

The estimated impacts on Westfield Warrawong (-8.1%) and Westfield Figtree (-7.3%) would be classified as being in the low/medium range. The impact on Stockland Shellharbour (-2.3%) meanwhile would be classified as being in the very low range.

Given the estimated impacts discussed above, we conclude the economic effects of the Dwyer's site proposal in isolation will be acceptable in their scale. In short, if the proposed development proceeds it should not significantly disrupt the trading patterns of any of the relevant centres. In any event, it must be recognised that retail sales and the retail sector as a whole are dynamic in nature and the volume of sales can fluctuate due to changes in general economic conditions when there has been no significant alteration in the nature of retail services provided in a particular area.

In relation to the assessed impact of the proposal on the balance of the WCC, there are several important factors which should be taken into account.

First, the majority of the impact on the WCC arising from the proposed development will, in fact, fall on Wollongong Central; as noted above that centre could experience an impact over the short-term of up to -13.6% (TABLE 4.2 refers). The balance of the impact on the WCC (-5.4% in 2013) in all likelihood will be spread across major traders in the CBD including Woolworths, ALDI, and that part of David Jones not in Wollongong Central, as well as specialty retailers in Crown Street generally.

Second (as noted above), the impact on the WCC essentially will involve a **redistribution of retail sales within the WCC**. Taking into account the sales generated by the project, we estimate that there will be a net increase in WCC sales in the order of +$101.4 million per annum ($2010) in 2013 (TABLE 4.3 refers).

Third, any closure of existing retail shops in the WCC which might occur as a result of the Dwyer's site proposal proceeding should not significantly disadvantage the shopping public: that is, any shop which closes as a result of competition from proposed development effectively will be replaced by a new shop in the WCC.

Fourth, it is likely that the development will strengthen parts of the WCC—for instance, that part of Crown Street to the east of Church Street in general and particularly Crown Street to the east of Kembla Street. Currently the block of Crown Street between Kembla and Corrimal Streets is relatively 'marginal' as far as retailing activity is concerned.

Finally, although other major centres in the trade area could experience impacts ranging up to -8.1% in 2013, some mitigating factors exist such as:

- each of the major centres concerned, but particularly Westfield Figtree, Westfield Warrawong and Stockland Shellharbour, have high level management and marketing resources applied to them and are well placed to resist competition over time

- each of the major centres is anchored by national chain retailers on long leases

- many of the national chain retailers represented in the major centres will also be represented in the new centre; and

- there is unlikely to be any substantial downgrading of retail services provided by these major centres arising from the impact of the project.

In our opinion, the proposed development will pass the tests of economic impact established in a number of landmark legal cases in Australia but particularly Fabcot-v-Hawkesbury Shire Council. The Fabcot case established that an adverse economic impact exists where facilities currently enjoyed by the public in a particular location are put at risk by a proposed development and where that development does not ‘make good’ any such loss of facilities.

Based on the primary research and analysis detailed in this Report, we are of the view that the impact of the retail component of the project will pass the tests established by Fabcot.

4.5 Employment Benefits

A major retail project of the scale of being proposed by Belmorgan will generate significant long-term employment in the Wollongong Region. Broadly, retail projects of this scale generate about one job for every 28 sq.m. of floorspace (GLA). Approximately 54% of these jobs are likely to be part- and 46% full-time. On this basis, total retail-related employment on the Belmorgan development site could be as follows:

- full-time ... 335 positions
- part-time ... 391
- total ... 726.

Some short-term contraction of jobs in other competitive centres can be expected to occur. In effect, this will reduce the "gross" retail jobs benefit identified above to an estimated +646 "net" jobs.

In addition to retail-related jobs created by the project there will be new jobs associated with operation of the cinema complex. Modern multiplex cinemas employ approximately 4.9 persons per screen with about 81% of these being part-time/casual jobs (Source: Australian Film Commission, 2003). On this basis, the proposed eight screen cinema would employ 39 persons of which seven would be full- and 32 part-time/casual. We estimate that the "net" increase in cinema jobs taking into account possible losses elsewhere would be in the order of +24 jobs.

In summary, the total "net" increase in retail and cinema-related employment resulting from the project could be in the order of +670 jobs of which approximately 301 would be full- and 369 part-time or casual in nature.

5 CINEMA INDUSTRY

5.1 Existing Supply

As noted in Section 1.2 of this Report, the Dwyer's site proposal also involves provision of an eight-screen cinema complex. The cinema will provide a stronger focus for the overall development on leisure activity and should "leverage off" other entertainment-related facilities in the precinct surrounding the site including the Indoor Entertainment Centre and the Steelers Stadium.

At present, the WCC is poorly supplied with cinemas particularly in the light of its status as a regional city. Following the closure of the Regent Cinema in Keira Street, for instance, only a small three-screen facility operated by Greater Union near the intersection of Burrelli and Church Streets exists. We would expect that this cinema has difficulty competing against the larger, more modern Hoyts cinemas at Westfield Warrawong and Greater Union at Shellharbour.

The Wollongong trade area contains 19 cinema screens at present with the majority of cinema capacity located at Warrawong (eight screens) and Shellharbour (eight screens; TABLE 5.1 refers).

TABLE 5.1
EXISTING CINEMAS – WOLLONGONG REGION, 2011

Location ...	Chain	No. Screens
Wollongong City Centre	Greater Union	3
Warrawong	Hoyts	6
Warrawong	Gala (Hoyts)	2
Shellharbour	Greater Union	8
Total Supply 2011		**19**

Source: Leyshon Consulting Research, February 2011.

5.2 Cinema Demand

Cinema attendances have been rising substantially over the past two decades in Australia. Cinema admissions in Australia have risen from some 2.93 per capita in 1991 to 4.1 per capita in 2009. Cinema admissions actually reached 4.7 per capita in 2002. They have since declined somewhat as a consequence of the increased ownership of DVD players and subscriptions to cable television. Screen Australia reported signs of stabilisation in cinema admissions in 2009-10, however.

Some commentators consider the past increases in cinema admissions were in fact “supply induced”. By this they mean the construction of new cinema complexes, particularly those in suburban centres during the period 1996-99 in particular stimulated attendances over and above what might have existed if Australia had continued to rely on older-style cinema centres often with only one or two screens. These were a significant force in the market prior to 1991.

While the Australian average annual cinema attendance rate still remains less than that achieved in the United States (4.7 admissions per capita per annum in 2005), whether supply induced or not, it has nonetheless risen strongly particularly during the period 1991-2009.

Based on an average visitation rate of 4.1 per capita per annum, the Wollongong trade area theoretically generates 1.2 million cinema visits per annum (TABLE 5.2 refers). This is forecast to rise to 1.3 million admissions per annum and to 1.3 million per annum by 2021.

TABLE 5.2
ESTIMATED ANNUAL CINEMA ADMISSIONS – WOLLONGONG TRADE AREA, 2006-21

Year ...	PTA Central	PTA North	PTA South	STA North	STA South	TTA	Total Trade Area
2006 Population	51,773	38,835	59,320	12,601	24,807	81,144	268,480
Admissions	212,269	159,225	243,212	51,665	101,709	332,692	1,100,772
2011 Population	54,541	40,912	62,281	13,230	26,045	86,305	283,314
Admissions	223,620	167,739	255,351	54,243	106,785	353,849	1,161,587
2021 Population	56,989	42,748	76,285	13,687	26,677	92,168	308,554
Admissions	233,655	175,267	312,767	56,116	109,376	377,888	1,265,069
Increase in Admissions 2006-21	**21,386**	**16,042**	**69,555**	**4,451**	**7,667**	**45,196**	**164,297**

Source: Leyshon Consulting Estimates, February 2011.

According to data published by the organisation Screen Australia, Australia had 1,989 cinema screens in 2009 while total annual admissions nationally were put at 90.7 million. This equates to a supply ratio of one screen for every 45,600 cinema admissions (1:45,600).

Based on this ratio, the notional demand for cinema screens in the Wollongong trade area in 2011 would be 24.1 screens (TABLE 5.3 refers) but the current supply, as documented in TABLE 5.1, is only 19 screens. Hence, the Region appears to have a shortfall of approximately five screens at present. By 2016 the demand for cinema screens in the Wollongong Region is estimated to be approximately 25.5 screens or a shortfall of -6.5 screens assuming no new screens are developed in the interim. By 2021 we estimate total demand will exist for 27.7 screens–some 8.7 screens more than the current supply and assuming no further screens have been developed.

Prima facie, therefore, the above demand assessment suggests that an additional eight-screen complex developed in the Wollongong CBD as is being proposed for the Dwyer's site project will be matched by demand growth to 2021.

TABLE 5.3
ESTIMATED DEMAND for CINEMA SCREENS – WOLLONGONG TRADE AREA, 2006-21

Year ...	PTA Central	PTA North	PTA South	STA North	STA South	TTA	Total Trade Area
2006	4.7	3.5	5.3	1.1	2.2	7.3	24.1
2011	4.9	3.7	5.6	1.2	2.3	7.8	25.5
2021	5.1	3.8	6.9	1.2	2.4	8.3	27.7
Growth in Demand 2006-21	**0.5**	**0.4**	**1.5**	**0.1**	**0.2**	**1.0**	**3.6**

Source: Leyshon Consulting Estimates, February 2011.

5.3 Cinema Impact

It is difficult to assess the potential impact of a new cinema complex on existing cinemas because of the significant number of variables potentially affecting attendance patterns. This is particularly so in a relatively small or isolated market such as Wollongong where there is effectively only two operators (Greater Union and Hoyts) and where one of these is almost certain to be the operator of a new cinema complex if the project proceeds.

The variables which affect cinema attendances include:

- pricing policy adopted by operators with respect to sub-markets–for example, pensioners;
- whether individual films are released at a number of locations simultaneously within the trade area;

- the quality of associated services with a cinema, particularly food dining and other entertainment facilities; and

- who the ultimate operator of the cinema is and what other cinema centres they operate in the same trade area.

In our opinion, it is likely that the suburban complexes at Warrawong and Shellharbour will be affected only moderately by any cinema developed as part of the project. By this we mean their existing admission levels could experience an impact in the order of -5% to -10%. This conclusion is based on the observation that both complexes are run by the two big operators (Hoyts and Greater Union) and they currently show–and are likely to continue to show–mostly first release movies including so-called "blockbusters". Further, both complexes appear to cater substantially to the family market (particularly Shellharbour). This is a market less likely to travel to an inner city movie complex to view movies already showing in their local area.

The potential impact on the existing WCC Greater Union complex is a different matter entirely. We anticipate this cinema will be heavily impacted and could suffer a reduction of at least 50% in its current admissions level. This could well lead to its closure within one to two years of the new cinema complex opening. This observation is based on the experience in Penrith where a Hayden four-screen complex was very heavily impacted by a new 10-screen cinema centre (Hoyts) developed at Penrith Plaza. Within a period of two years of the opening of the new Hoyts, the Hayden Group had sold the business to Hoyts and the cinema was subsequently closed by Hoyts. It remains closed today and no other cinemas have been developed in the Penrith CBD although additional cinemas have been touted for development at nearby Penrith Panthers.

In this instance, the key reasons we consider will influence the WCC Greater Union complex to close are:

- its probable inability to compete with a new cinema centre in terms of the frequency of screening of highly popular and blockbuster movies

- the lack of high quality food and dining services in close proximity to the cinema

- considerable advances in seating and sound systems which will make the proposed new cinema complex a vastly more attractive venue compared with Greater Union.

That the economic outlook for the Greater Union cinemas appears bleak is, in our opinion, not a sufficient reason for development of a new cinema complex, as is being proposed by Belmorgan, not to proceed.

The so-called Fabcot principles discussed earlier in relation to retail impact apply equally as far as cinemas are concerned. That is, in this case, the closure of a three-screen complex in the WCC would be more than compensated for by the provision of a new eight-screen complex. In terms of the impact on the operator, if Greater Union was to operate the new cinema complex, then there would be little or no economic loss to the operator in such circumstances. A new use would need to be found for the redundant Greater Union cinema complex, however.

6 OTHER IMPACTS

6.1 Office Market

Stages 1 and 2 of the proposed development on the Dwyer's site will contain some 2,584 sq.m. GFA of office space to be located on levels three and four of the centre. It is intended the offices would be of premium or A grade quality. Some of this space is likely to be used for centre administrative purposes.

According to a report prepared by consultants Hill PDA in September 2003 (latest data available) for Council (*Wollongong City Structure Plan: Economic Analysis*) the so-called "City Core" contained 125,000 sq.m. of commercial office space of which some 12,000 sq.m. or around 10% was vacant in 2002. The source of this information was a survey by the Illawarra Region Information Service (IRIS) undertaken in 2002. We understand from discussions with market observers that the current vacancy rate in the WCC in 2010 is about 12%.

Hill PDA went on to estimate annual demand for new office space in the WCC of around 2,000 sq.m. per annum. They also highlighted the lack of development of new office space in the WCC in recent years and the limited availability of sites suitable for developments with floor-plates of >1,000 sq.m..

Since 2002, however, the development of 'pure' office space at the Wollongong Innovation Park to the north of the CBD has absorbed much of the increase in demand for offices in the WCC and central parts of Wollongong.

In the context of the above we conclude that:

- the proposed addition of office space (2,584 sq.m.) as part of the Dwyer's site development is not sufficiently large to disrupt the overall office market in the WCC as it will constitute an addition of only 2.2% to total stock; and

- the development will provide space for large users who wish to occupy more than 1,000 sq.m. and provide an alternative location to the Wollongong Innovation Park.

On the basis of the above, we conclude the office space component of the proposed development will have a positive influence on the commercial office market in the WCC and provide new opportunities to attract office-based employment to WCC.

7 CONCLUSION

7.1 Overview

If brought to fruition, the proposed project for the Dwyer's site will result in some profound changes for the WCC. These will not only involve the overall retail mix of the WCC but also the spatial distribution of retail activity within the centre.

A major benefit of the project is that it will rectify a number of clearly identified long-term deficiencies in the retail mix of the CBD including:

- lack of a DDS
- inadequate representation of supermarkets
- no contemporary, large-scale cinema complex.

The project will thus reinforce the role of the WCC as the dominant retail/commercial centre in the Wollongong Region. Importantly, the development site is within the WCC boundaries albeit at its eastern end. Given this, the new centre will be a foil to Wollongong Central and should improve pedestrian activity levels along that part of Church Street lying between both centres.

7.2 Assessed Impact

Major projects like that being proposed for the Dwyer's site cannot be implemented without some impacts on the surrounding retail environment. This is especially the case in relatively mature markets like that of the Wollongong Region.

As discussed in Section 4 of this Report, however, the potential impacts of the proposal in insolation on established centres (including the WCC) should be of an acceptable level. For the larger suburban centres of Warrawong, Figtree and Shellharbour, as well as for other smaller centres like Corrimal, we do not consider the project will result in any significant reduction in retail services provided by these centres. Furthermore, we would anticipate that the impact flowing from introduction of the proposed centre largely will have dissipated within a five year period due to ongoing population growth in the trade area.

If the approved expansion of Wollongong Central occurs by 2016 the proposed Dwyer's site centre will experience a major impact. Some other centres will also take a considerable time to recover their pre-2013 Dwyer's site impact trading levels assuming both projects proceed by 2016.

This Report also outlines how legal precedent in the area of retail impacts means that any impact on the WCC arising from the project should, in fact, be discounted. This follows from the fact that the development will almost certainly make good any loss of retail services which might occur elsewhere in the centre. In effect there will be no net loss of sales as far as the WCC is concerned. Rather a net gain in sales is estimated of around +$101.4 million ($2010) during the project's first full year of trading (2013) is expected.

The above notwithstanding, it is nevertheless relevant for the Department to consider the implications of the project for the efficient functioning of the WCC as a whole. Viewed from this perspective, we maintain our assessment that the project's impacts will be acceptable and, indeed, even advantageous for the longer-term economic health and vitality of the WCC. The project's successful implementation will, for example, substantially negate many of the competitive disadvantages which have surely restrained the performance of the WCC in recent years vis-a-vis its suburban competitors.

In our view, this is a particularly important consideration as recent and approved expansion of retail activity at Dapto, Shellharbour and Corrimal will further erode the competitive position of the WCC without investment such as that proposed for the Dwyer's site.

In summary, we consider that from an economic perspective the proposed project will produce a definite net community benefit and be particularly beneficial in underpinning the economic performance of the WCC over the medium and longer term.

✤✤✤✤✤

APPENDIX A

ILLAWARRA HOUSEHOLD TELEPHONE SHOPPING SURVEY

My name is __________from __________. We are conducting some research about the shopping patterns of Illawarra residents. Could you spare me a few minutes to answer this brief survey?

1. Can you tell me about how often you shop in the Wollongong CBD? (Read out and circle response)

- More than once a week .... 1 **Go to Q.3**
- About once a week .... 2 "
- Once every 2-3 weeks .... 3 "
- About once a month .... 4 "
- Less frequently .... 5 **Go to Q.2**
- Don't shop .... 6 "

2. Is there any reason you do not shop in the CBD more often? (Write in response)

____
____
____

3. At which centre do you undertake the majority of your regular grocery shopping? (Circle response. Multiple responses accepted)

- Thirroul 1
- Corrimal 2
- Wollongong CBD 3
- Figtree 4
- Dapto 5
- Warrawong 6
- Warilla 7
- Shellharbour 8
- Albion Park 9
- Kiama 10
- Other Centre 11
- Other store 10

4. In relation to the centre(s) you have nominated, which supermarket do you usually patronise? (Circle response. Multiple responses accepted)

- Woolworths 1
- Coles 2
- Aldi 3
- Franklins 4
- Bi-Lo 5
- IGA 6
- Food-for-Less 7
- Flemings 8
- Other 9
- None in particular 10

5. About how frequently do you shop at the following centres outside of the Wollongong area? (Read out each centre and circle response)

Centre ...	About Once a Month	About Every 2-3 months	About every 6 months	At least once a year	Less often	Never shop
Sydney CBD	1	2	3	4	5	6
Macarthur Square	1	2	3	4	5	6
Hurstville	1	2	3	4	5	6
DFO Homebush	1	2	3	4	5	6
Miranda Fair	1	2	3	4	5	6
Taren Point	1	2	3	4	5	6
Moore Park	1	2	3	4	5	6

6. What was the main reason for your most recent trip to these centres? (Probe for answers. Multiple responses acceptable. Circle numbers)

- Shopping for food 1
- Shopping for clothes & accessories 2
- Shopping for household goods 3
- Shopping for gifts 4
- Other shopping 5
- Medical appointment 6
- Business appointment 7
- Attend cinema 8
- Day out 9
- Something different 10
- On way to/from other destination 11
- To compare prices 12
- Other reason 13

7. About how often do you shop at the following centres in the Wollongong Region? (Read out each centre and circle appropriate response)

Centre ...	About Once a Month	About Every 2-3 months	About every 6 months	At least once a year	Less often	Never shop
Shellharbour Square	1	2	3	4	5	6
Dapto	1	2	3	4	5	6
Westfield Figtree	1	2	3	4	5	6
Westfield Warrawong	1	2	3	4	5	6
Corrimal	1	2	3	4	5	6
Warilla Grove	1	2	3	4	5	6
Kiama	1	2	3	4	5	6
Unanderra	1	2	3	4	5	6
Thirroul	1	2	3	4	5	6

8. Have you shopped at any of the following department or discount department stores within the past six months? (Read out and circle response; multiple responses acceptable)

- Kmart Shellharbour Square 1
- Target Shellharbour Square 2
- David Jones Wollongong 3
- Grace Bros Wollongong 4
- Kmart Figtree 5
- Big W Warrawong 6
- Kmart Warrawong 7

9. In relation to household goods (furniture, floor covering, whitegoods, electrical goods etc) have you purchased any such goods in the past 12 months at the following centres? (Read out and circle response) or at another centre?

Centre ...	Furniture	Floor Coverings	White-goods	Electrical Goods
Shellharbour	1	2	3	4
Warrawong	1	2	3	4
Wollongong CBD	1	2	3	4
Taren Point	1	2	3	4
Moore Park	1	2	3	4
Other	1	2	3	4

10. We would like to obtain some brief details on your age group, household type and the postcode of the suburb where you live (Read out age groups and household types and circle appropriate number. Write in postcode)

Age of Respondent (Please circle)

- 18-29 years 1
- 30-39 years 2
- 40-49 years 3
- 50-59 years 4
- 60 years 5

Respondent Household Type (Please Circle)

- Couple + Dependents 1
- Couple Only 2
- Couple + Non-Dependents 3
- Single Parent 4
- Single Person 5
- Group household 6
- Other 7

Respondent Postcode (Write in)

____

APPENDIX B

ILLAWARRA SHOPPING SURVEY - 07/07/2004

TABLE 1 PANEL *BY* POSTCODE QUOTA

	Total	REGION															
		2500-Wollongong	2502-Warrawong	2505-Port Kembla	2506-Berkeley	2515-Thirroul	2516-Bulli	2517-Woonoona	2518-Corrimal	2519-Fairy Meadow	2525-Figtree	2526-Unanderra	2527-Albion Park	2528-Warilla	2529-Shell -harbour	2530-Dapto	2533-Kiama / Bombo
RESPONDENTS	600	109	39	17	17	7	18	36	58	52	32	15	31	67	57	26	19
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
POSTCODE QUOTA																	
2500 - Wollongong	109	109															
	18%	100%															
2502 - Warrawong	39		39														
	7%		100%														
2505 - Port Kembla	17			17													
	3%			100%													
2506 - Berkeley	17				17												
	3%				100%												
2515 - Thirroul	7					7											
	1%					100%											
2516 - Bulli	18						18										
	3%						100%										
2517 - Woonoona	36							36									
	6%							100%									
2518 - Corrimal	58								58								
	10%								100%								
2519 - Fairy Meadow	52									52							
	9%									100%							
2525 - Figtree	32										32						
	5%										100%						
2526 - Unanderra	15											15					
	3%											100%					
2527 - Albion Park	31												31				
	5%												100%				
2528 - Warilla	67													67			
	11%													100%			

	Total	REGION															
		2500- Wollongong	2502- Warrawong	2505- Port Kembla	2506- Berkeley	2515- Thirroul	2516- Bulli	2517- Woonoona	2518- Corrimal	2519- Fairy Meadow	2525- Figtree	2526- Unanderra	2527- Albion Park	2528- Warilla	2529- Shell -harbour	2530- Dapto	2533- Kiama / Bombo
RESPONDENTS	600 100%	109 100%	39 100%	17 100%	17 100%	7 100%	18 100%	36 100%	58 100%	52 100%	32 100%	15 100%	31 100%	67 100%	57 100%	26 100%	19 100%
POSTCODE QUOTA																	
2529 - Shellharbour	57 10%														57 100%		
2530 - Dapto	26 4%															26 100%	
2533 - Kiama/Bombo	19 3%																19 100%

	Total	REGION															
		2500-Wollongong	2502-Warrawong	2505-Port Kembla	2506-Berkeley	2515-Thirroul	2516-Bulli	2517-Woonoona	2518-Corrimal	2519-Fairy Meadow	2525-Figtree	2526-Unanderra	2527-Albion Park	2528-Warilla	2529-Shell -harbour	2530-Dapto	2533-Kiama / Bombo
RESPONDENTS	600	109	39	17	17	7	18	36	58	52	32	15	31	67	57	26	19
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Q1.FREQUENCY SHOP IN WOLLONGONG CBD																	
More than once a week (6)	91	40	5	2	1		2	5	6	8	3	2	6	7		4	
	15%	37%	13%	12%	6%		11%	14%	10%	15%	9%	13%	19%	10%		15%	
About once a week (4)	87	35	5	3	2	1	4	2	8	9	3	2	2	2	5	2	2
	15%	32%	13%	18%	12%	14%	22%	6%	14%	17%	9%	13%	6%	3%	9%	8%	11%
Once every 2-3 weeks (1.5)	86	19	2	1	2	2	3	4	17	9	6	3	2	8	5	2	1
	14%	17%	5%	6%	12%	29%	17%	11%	29%	17%	19%	20%	6%	12%	9%	8%	5%
About once a month (1)	123	8	9	1	4	2	5	12	12	11	12	4	9	12	10	6	6
	21%	7%	23%	6%	24%	29%	28%	33%	21%	21%	38%	27%	29%	18%	18%	23%	32%
Less frequently (0.5)	116	4	8	5	2	2	3	8	9	7	4	2	3	23	24	6	6
	19%	4%	21%	29%	12%	29%	17%	22%	16%	13%	13%	13%	10%	34%	42%	23%	32%
Don't shop in Wollongong CBD (0)	97	3	10	5	6		1	5	6	8	4	2	9	15	13	6	4
	16%	3%	26%	29%	35%		6%	14%	10%	15%	13%	13%	29%	22%	23%	23%	21%
MEANS	2.01	3.84	1.69	1.71	1.29	1.43	2.17	1.67	1.90	2.15	1.66	1.97	1.85	1.28	0.87	1.69	0.97
STD. DEVIATION	2.08	2.03	2.08	2.17	1.74	1.21	1.94	1.96	1.82	2.09	1.75	2.02	2.28	1.79	1.07	2.13	1.15

TABLE 3 PANEL *BY* Q2.REASONS FOR NOT SHOPPING IN WOLLONGONG CBD
FILTERS: Q1.FREQUENCY SHOP IN WOLLONGONG CBD(Less frequently *TO* Don't shop in Wollongong CBD)

		REGION															
	Total	2500-Wollongong	2502-Warrawong	2505-Port Kembla	2506-Berkeley	2515-Thirroul	2516-Bulli	2517-Woonoona	2518-Corrimal	2519-Fairy Meadow	2525-Figtree	2526-Unanderra	2527-Albion Park	2528-Warilla	2529-Shell-harbour	2530-Dapto	2533-Kiama / Bombo
RESPONDENTS	213	7	18	10	8	2	4	13	15	15	8	4	12	38	37	12	10
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Q2.REASONS FOR NOT SHOPPING IN WOLLONGONG CBD																	
More convenient to shop elsewhere/ prefer local shops/ easier/quicker/ closer	87	5	8	4	1	1	3	6	5	9	3	1	6	12	13	8	2
	41%	71%	44%	40%	13%	50%	75%	46%	33%	60%	38%	25%	50%	32%	35%	67%	20%
Can buy what I need locally/no need to go to CBD	75	3	7	4	3	1	2	5	3	2	2	1	1	16	18	3	4
	35%	43%	39%	40%	38%	50%	50%	38%	20%	13%	25%	25%	8%	42%	49%	25%	40%
Too far away/long distance	33		2		2				1				3	11	8	2	4
	15%		11%		25%				7%				25%	29%	22%	17%	40%
NETT - POOR PARKING RESPONDENTS	51		7	2		1		4	3	5	1	1	3	10	7	6	1
	24%		39%	20%		50%		31%	20%	33%	13%	25%	25%	26%	19%	50%	10%
No parking available	51		7	2		1		4	3	5	1	1	3	10	7	6	1
	24%		39%	20%		50%		31%	20%	33%	13%	25%	25%	26%	19%	50%	10%
Parking too far away from shops	5		1									1			1	2	
	2%		6%									25%			3%	17%	
Public transport problems/don't own a car	18		5	1	1					1	1	2	1	3	2		1
	8%		28%	10%	13%					7%	13%	50%	8%	8%	5%		10%
Elderly/disabled/ too hard to get around	16	2	2	1					4	1	1	1			1	1	2
	8%	29%	11%	10%					27%	7%	13%	25%			3%	8%	20%
Only go to CBD if looking for specific item or appointment	16		1					3	2	1	1		2	3		1	2
	8%		6%					23%	13%	7%	13%		17%	8%		8%	20%

		REGION															
	Total	2500- Wollongong	2502- Warrawong	2505- Port Kembla	2506- Berkeley	2515- Thirroul	2516- Bulli	2517- Woonoona	2518- Corrimal	2519- Fairy Meadow	2525- Figtree	2526- Unanderra	2527- Albion Park	2528- Warilla	2529- Shell -harbour	2530- Dapto	2533- Kiama / Bombo
RESPONDENTS	213	7	18	10	8	2	4	13	15	15	8	4	12	38	37	12	10
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Q2.REASONS FOR NOT SHOPPING IN WOLLONGONG CBD																	
Lack of variety/ range of shops	12					1		1		2			1	3	2	1	1
	6%					50%		8%		13%			8%	8%	5%	8%	10%
Too crowded/too many people	11		3					1	1		1	1		1	3		
	5%		17%					8%	7%		13%	25%		3%	8%		
Too busy/no time	5			1										1	2	1	
	2%			10%										3%	5%	8%	
No reason/don't want to	5									2				2	1		
	2%									13%				5%	3%		
Other	14		3	1	1	1		1		2				4			1
	7%		17%	10%	13%	50%		8%		13%				11%			10%
TOTALS	348	10	39	14	8	5	5	21	19	25	10	8	17	66	58	25	18
	163%	143%	217%	140%	100%	250%	125%	162%	127%	167%	125%	200%	142%	174%	157%	208%	180%

	Total	REGION															
		2500- Wollongong	2502- Warrawong	2505- Port Kembla	2506- Berkeley	2515- Thirroul	2516- Bulli	2517- Woonoona	2518- Corrimal	2519- Fairy Meadow	2525- Figtree	2526- Unanderra	2527- Albion Park	2528- Warilla	2529- Shell -harbour	2530- Dapto	2533- Kiama / Bombo
RESPONDENTS	600	109	39	17	17	7	18	36	58	52	32	15	31	67	57	26	19
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Q3.CENTRE FOR MAJORITY OF GROCERY SHOPPING																	
Shellharbour	125	2	1	2	1							1	22	31	52	4	9
	21%	2%	3%	12%	6%							7%	71%	46%	91%	15%	47%
Corrimal	107	5	1			3	7	21	47	23							
	18%	5%	3%			43%	39%	58%	81%	44%							
Warrawong	94	3	36	14	11	1	1	3	3	3	1	4	4	2	4	4	
	16%	3%	92%	82%	65%	14%	6%	8%	5%	6%	3%	27%	13%	3%	7%	15%	
Figtree	88	42	1				1	1	1	3	29	7	1			2	
	15%	39%	3%				6%	3%	2%	6%	91%	47%	3%			8%	
Wollongong CBD	73	51	1	1		2	1	1	2	4	3		2	1	1	2	1
	12%	47%	3%	6%		29%	6%	3%	3%	8%	9%		6%	1%	2%	8%	5%
Warilla	61	2	1	1					1					40	14		2
	10%	2%	3%	6%					2%					60%	25%		11%
Fairy Meadow	42	5					1	5	5	26							
	7%	5%					6%	14%	9%	50%							
Dapto	32	1			4				1				2	1	1	22	
	5%	1%			24%				2%				6%	1%	2%	85%	
Woonona	18						5	12	1								
	3%						28%	33%	2%								
Unanderra	17				2						2	13					
	3%				12%						6%	87%					
Kiama	17	1			1										1		14
	3%	1%			6%										2%		74%
Albion Park	14												12				2
	2%												39%				11%
Thirroul	8					6	2										
	1%					86%	11%										

TABLE 4 (CONT.) PANEL *BY* Q3.CENTRE FOR MAJORITY OF GROCERY SHOPPING

	Total	REGION															
		2500-Wollongong	2502-Warrawong	2505-Port Kembla	2506-Berkeley	2515-Thirroul	2516-Bulli	2517-Woonoona	2518-Corrimal	2519-Fairy Meadow	2525-Figtree	2526-Unanderra	2527-Albion Park	2528-Warilla	2529-Shell-harbour	2530-Dapto	2533-Kiama / Bombo
RESPONDENTS	600 100%	109 100%	39 100%	17 100%	17 100%	7 100%	18 100%	36 100%	58 100%	52 100%	32 100%	15 100%	31 100%	67 100%	57 100%	26 100%	19 100%
Q3.CENTRE FOR MAJORITY OF GROCERY SHOPPING																	
Crown Central	7 1%	7 6%															
Berkeley	5 1%		1 3%		4 24%												
Other Shopping Centre	11 2%	4 4%	1 3%						3 5%	1 2%				2 3%			
Other Store	11 2%	6 6%					1 6%			1 2%				1 1%	1 2%		1 5%
TOTALS	730 122%	129 118%	43 110%	18 106%	23 135%	12 171%	19 106%	43 119%	64 110%	61 117%	35 109%	25 167%	43 139%	78 116%	74 130%	34 131%	29 153%

		REGION															
	Total	2500-Wollongong	2502-Warrawong	2505-Port Kembla	2506-Berkeley	2515-Thirroul	2516-Bulli	2517-Woonoona	2518-Corrimal	2519-Fairy Meadow	2525-Figtree	2526-Unanderra	2527-Albion Park	2528-Warilla	2529-Shell -harbour	2530-Dapto	2533-Kiama / Bombo
RESPONDENTS	600 100%	109 100%	39 100%	17 100%	17 100%	7 100%	18 100%	36 100%	58 100%	52 100%	32 100%	15 100%	31 100%	67 100%	57 100%	26 100%	19 100%
Q4.SUPERMARKET FOR MAJORITY OF GROCERY SHOPPING																	
Woolworths	418 70%	79 72%	22 56%	10 59%	13 76%	4 57%	5 28%	17 47%	41 71%	51 98%	13 41%	14 93%	21 68%	52 78%	42 74%	16 62%	18 95%
Coles	261 44%	41 38%	35 90%	11 65%	9 53%	1 14%	5 28%	11 31%	25 43%	13 25%	25 78%	8 53%	15 48%	24 36%	26 46%	10 38%	2 11%
Aldi	74 12%	16 15%	4 10%	4 24%	2 12%	1 14%	3 17%	6 17%	4 7%	9 17%	3 9%	1 7%	5 16%	4 6%	7 12%	5 19%	
Franklins	55 9%	12 11%	1 3%			6 86%	8 44%	19 53%	2 3%	2 4%	1 3%	1 7%	1 3%	1 1%	1 2%		
Bi-Lo	50 8%			1 6%		4 57%	1 6%	3 8%				1 7%	6 19%	19 28%	12 21%	1 4%	2 11%
IGA	12 2%	1 1%	1 3%		3 18%									1 1%	3 5%		3 16%
Flemings	2 0%														2 4%		
Food-for-Less	2 0%												1 3%		1 2%		
Other	7 1%	1 1%	1 3%		1 6%			1 3%			1 3%			2 3%			
TOTALS	881 147%	150 138%	64 164%	26 153%	28 165%	16 229%	22 122%	57 158%	72 124%	75 144%	43 134%	25 167%	49 158%	103 154%	94 165%	32 123%	25 132%

TABLE 6 Q5.SHOPPING CENTRES OUTSIDE REGION *BY* Q5.FREQUENCY VISIT SHOPPING CENTRES OUTSIDE REGION

	Q5.SHOPPING CENTRES OUTSIDE REGION						
	Sydney CBD	Macarthur Square	Hurstville	DFO Homebush	Miranda Fair	Taren Point	Moore Park
RESPONDENTS	600 100%	600 100%	600 100%	600 100%	600 100%	600 100%	600 100%
Q5.FREQUENCY VISIT SHOPPING CENTRES OUTSIDE REGION							
About once a month (12)	54 9%	10 2%	13 2%	5 1%	25 4%	2 0%	1 0%
About every 2-3 months (5)	47 8%	12 2%	7 1%	2 0%	59 10%	1 0%	3 1%
About every 6 months (2)	71 12%	19 3%	16 3%	15 3%	71 12%	4 1%	7 1%
At least once a year (1)	122 20%	31 5%	24 4%	29 5%	90 15%	9 2%	19 3%
Less often (0.5)	94 16%	46 8%	30 5%	38 6%	74 12%	23 4%	20 3%
Never shop (0)	212 35%	482 80%	510 85%	511 85%	281 47%	561 94%	550 92%
MEANS	1.99	0.45	0.44	0.25	1.44	0.10	0.12
STD. DEVIATION	3.42	1.70	1.84	1.18	2.66	0.75	0.66

	Total	REGION															
		2500-Wollongong	2502-Warrawong	2505-Port Kembla	2506-Berkeley	2515-Thirroul	2516-Bulli	2517-Woonoona	2518-Corrimal	2519-Fairy Meadow	2525-Figtree	2526-Unanderra	2527-Albion Park	2528-Warilla	2529-Shell -harbour	2530-Dapto	2533-Kiama / Bombo
RESPONDENTS	600	109	39	17	17	7	18	36	58	52	32	15	31	67	57	26	19
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Sydney CBD																	
About once a month (12)	54	18	4	2	1	1	2	4	6	4	2	1	1	3	3	1	1
	9%	17%	10%	12%	6%	14%	11%	11%	10%	8%	6%	7%	3%	4%	5%	4%	5%
About every 2-3 months (5)	47	12	2		1	1	3	3	2	3	4		4	4	2	3	3
	8%	11%	5%		6%	14%	17%	8%	3%	6%	13%		13%	6%	4%	12%	16%
About every 6 months (2)	71	11	6		4	2	2	5	10	5	1		3	8	9		5
	12%	10%	15%		24%	29%	11%	14%	17%	10%	3%		10%	12%	16%		26%
At least once a year (1)	122	25	6	5	4	2	4	8	11	12	5	5	7	14	7	5	2
	20%	23%	15%	29%	24%	29%	22%	22%	19%	23%	16%	33%	23%	21%	12%	19%	11%
Less often (0.5)	94	12	9	4	3	1	1	5	5	7	11	2	5	9	14	3	3
	16%	11%	23%	24%	18%	14%	6%	14%	9%	13%	34%	13%	16%	13%	25%	12%	16%
Never shop (0)	212	31	12	6	4		6	11	24	21	9	7	11	29	22	14	5
	35%	28%	31%	35%	24%		33%	31%	41%	40%	28%	47%	35%	43%	39%	54%	26%
MEANS	1.99	3.02	2.06	1.82	1.79	3.36	2.64	2.32	1.99	1.70	1.77	1.20	1.53	1.35	1.37	1.29	2.13
STD. DEVIATION	3.42	4.27	3.60	3.85	2.91	4.09	3.83	3.73	3.59	3.24	3.11	3.02	2.53	2.63	2.74	2.70	2.94

TABLE 8 PANEL *BY* Q5.FREQUENCY VISIT SHOPPING CENTRES OUTSIDE REGION

	Total	REGION															
		2500- Wollongong	2502- Warrawong	2505- Port Kembla	2506- Berkeley	2515- Thirroul	2516- Bulli	2517- Woonoona	2518- Corrimal	2519- Fairy Meadow	2525- Figtree	2526- Unanderra	2527- Albion Park	2528- Warilla	2529- Shell -harbour	2530- Dapto	2533- Kiama / Bombo
RESPONDENTS	600 100%	109 100%	39 100%	17 100%	17 100%	7 100%	18 100%	36 100%	58 100%	52 100%	32 100%	15 100%	31 100%	67 100%	57 100%	26 100%	19 100%
Macarthur Square																	
About once a month (12)	10 2%	1 1%	1 3%					1 3%	2 3%							3 12%	2 11%
About every 2-3 months (5)	12 2%	1 1%	1 3%				2 11%	3 8%		1 2%			2 6%	1 1%	1 2%		
About every 6 months (2)	19 3%	1 1%	2 5%	1 6%	1 6%		1 6%	2 6%	4 7%	1 2%	1 3%		1 3%		4 7%		
At least once a year (1)	31 5%	6 6%				2 29%	2 11%	5 14%	2 3%	3 6%	1 3%	2 13%	3 10%	2 3%	1 2%	1 4%	1 5%
Less often (0.5)	46 8%	5 5%	5 13%	1 6%	2 12%		2 11%	1 3%	7 12%	1 2%	6 19%		2 6%	4 6%	6 11%	2 8%	2 11%
Never shop (0)	482 80%	95 87%	30 77%	15 88%	14 82%	5 71%	11 61%	24 67%	43 74%	46 88%	24 75%	13 87%	23 74%	60 90%	45 79%	20 77%	14 74%
MEANS STD. DEVIATION	0.45 1.70	0.25 1.27	0.60 2.08	0.15 0.49	0.18 0.50	0.29 0.49	0.83 1.61	1.01 2.36	0.65 2.23	0.20 0.77	0.19 0.42	0.13 0.35	0.52 1.28	0.13 0.64	0.30 0.83	1.46 3.89	1.37 3.76

	Total	REGION															
		2500-Wollongong	2502-Warrawong	2505-Port Kembla	2506-Berkeley	2515-Thirroul	2516-Bulli	2517-Woonoona	2518-Corrimal	2519-Fairy Meadow	2525-Figtree	2526-Unanderra	2527-Albion Park	2528-Warilla	2529-Shell -harbour	2530-Dapto	2533-Kiama / Bombo
RESPONDENTS	600 100%	109 100%	39 100%	17 100%	17 100%	7 100%	18 100%	36 100%	58 100%	52 100%	32 100%	15 100%	31 100%	67 100%	57 100%	26 100%	19 100%
Hurstville																	
About once a month (12)	13 2%	3 3%	2 5%					1 3%	2 3%				1 3%	1 1%	2 4%		1 5%
About every 2-3 months (5)	7 1%	1 1%	1 3%						1 2%	1 2%		1 7%	1 3%	1 1%			
About every 6 months (2)	16 3%	4 4%	1 3%	1 6%				1 3%	1 2%		3 9%			3 4%	2 4%		
At least once a year (1)	24 4%	3 3%	5 13%		2 12%		2 11%	1 3%	3 5%	4 8%	1 3%		1 3%	1 1%		1 4%	
Less often (0.5)	30 5%	4 4%	1 3%	1 6%	1 6%	2 29%		2 6%	4 7%	1 2%	5 16%			2 3%	3 5%	2 8%	2 11%
Never shop (0)	510 85%	94 86%	29 74%	15 88%	14 82%	5 71%	16 89%	31 86%	47 81%	46 88%	23 72%	14 93%	28 90%	59 88%	50 88%	23 88%	16 84%
MEANS	0.44	0.50	0.94	0.15	0.15	0.14	0.11	0.44	0.62	0.18	0.30	0.33	0.58	0.37	0.52	0.08	0.68
STD. DEVIATION	1.84	2.04	2.75	0.49	0.34	0.24	0.32	2.02	2.29	0.73	0.61	1.29	2.31	1.62	2.24	0.23	2.74

	Total	REGION															
		2500-Wollongong	2502-Warrawong	2505-Port Kembla	2506-Berkeley	2515-Thirroul	2516-Bulli	2517-Woonoona	2518-Corrimal	2519-Fairy Meadow	2525-Figtree	2526-Unanderra	2527-Albion Park	2528-Warilla	2529-Shell-harbour	2530-Dapto	2533-Kiama / Bombo
RESPONDENTS	600	109	39	17	17	7	18	36	58	52	32	15	31	67	57	26	19
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
DFO Homebush																	
About once a month (12)	5		1				1			1					2		
	1%		3%				6%			2%					4%		
About every 2-3 months (5)	2									2							
	0%									4%							
About every 6 months (2)	15	2	1	1				2	1	1			2	4	1		
	3%	2%	3%	6%				6%	2%	2%			6%	6%	2%		
At least once a year (1)	29	5	1	1	3	1	1	2	1	2	2	1	1	2	4	1	1
	5%	5%	3%	6%	18%	14%	6%	6%	2%	4%	6%	7%	3%	3%	7%	4%	5%
Less often (0.5)	38	8	3	1	2		1	3	3	3	2	1		2	5	2	2
	6%	7%	8%	6%	12%		6%	8%	5%	6%	6%	7%		3%	9%	8%	11%
Never shop (0)	511	94	33	14	12	6	15	29	53	43	28	13	28	59	45	23	16
	85%	86%	85%	82%	71%	86%	83%	81%	91%	83%	88%	87%	90%	88%	79%	88%	84%
MEANS	0.25	0.12	0.42	0.21	0.24	0.14	0.75	0.21	0.08	0.53	0.09	0.10	0.16	0.16	0.57	0.08	0.11
STD. DEVIATION	1.18	0.35	1.94	0.53	0.40	0.38	2.82	0.51	0.31	1.91	0.27	0.28	0.52	0.50	2.23	0.23	0.27

TABLE 11 PANEL *BY* Q5.FREQUENCY VISIT SHOPPING CENTRES OUTSIDE REGION

	Total	REGION															
		2500-Wollongong	2502-Warrawong	2505-Port Kembla	2506-Berkeley	2515-Thirroul	2516-Bulli	2517-Woonoona	2518-Corrimal	2519-Fairy Meadow	2525-Figtree	2526-Unanderra	2527-Albion Park	2528-Warilla	2529-Shell -harbour	2530-Dapto	2533-Kiama / Bombo
RESPONDENTS	600	109	39	17	17	7	18	36	58	52	32	15	31	67	57	26	19
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Miranda Fair																	
About once a month (12)	25	2	3	1		1	1	3	2	2			3	3	1	2	1
	4%	2%	8%	6%		14%	6%	8%	3%	4%			10%	4%	2%	8%	5%
About every 2-3 months (5)	59	17	3	1		2	5	2	7	5	4	3	2	3	2		3
	10%	16%	8%	6%		29%	28%	6%	12%	10%	13%	20%	6%	4%	4%		16%
About every 6 months (2)	71	13	6		3	1	1	6	10	7	6	2	3	5	4	3	1
	12%	12%	15%		18%	14%	6%	17%	17%	13%	19%	13%	10%	7%	7%	12%	5%
At least once a year (1)	90	19	6	2	6	1	4	5	8	8	3	1	7	10	6		4
	15%	17%	15%	12%	35%	14%	22%	14%	14%	15%	9%	7%	23%	15%	11%		21%
Less often (0.5)	74	13	1	3	2	1	2	5	8	2	8	2	3	6	10	6	2
	12%	12%	3%	18%	12%	14%	11%	14%	14%	4%	25%	13%	10%	9%	18%	23%	11%
Never shop (0)	281	45	20	10	6	1	5	15	23	28	11	7	13	40	34	15	8
	47%	41%	51%	59%	35%	14%	28%	42%	40%	54%	34%	47%	42%	60%	60%	58%	42%
MEANS	1.44	1.47	1.78	1.21	0.76	3.64	2.44	1.82	1.57	1.38	1.22	1.40	1.95	1.10	0.72	1.27	1.79
STD. DEVIATION	2.66	2.26	3.30	3.03	0.73	4.21	3.16	3.35	2.55	2.62	1.62	1.98	3.58	2.63	1.84	3.22	3.04

TABLE 12 PANEL *BY* Q5.FREQUENCY VISIT SHOPPING CENTRES OUTSIDE REGION

	Total	REGION															
		2500- Wollongong	2502- Warrawong	2505- Port Kembla	2506- Berkeley	2515- Thirroul	2516- Bulli	2517- Woonoona	2518- Corrimal	2519- Fairy Meadow	2525- Figtree	2526- Unanderra	2527- Albion Park	2528- Warilla	2529- Shell -harbour	2530- Dapto	2533- Kiama / Bombo
RESPONDENTS	600	109	39	17	17	7	18	36	58	52	32	15	31	67	57	26	19
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Taren Point																	
About once a month (12)	2		1							1							
	0%		3%							2%							
About every 2-3 months (5)	1								1								
	0%								2%								
About every 6 months (2)	4					1		1	1	1							
	1%					14%		3%	2%	2%							
At least once a year (1)	9	2	1								4		1	1			
	2%	2%	3%								13%		3%	1%			
Less often (0.5)	23	1	4	1		1	1		2	1	4	1		1	3	2	1
	4%	1%	10%	6%		14%	6%		3%	2%	13%	7%		1%	5%	8%	5%
Never shop (0)	561	106	33	16	17	5	17	35	54	49	24	14	30	65	54	24	18
	94%	97%	85%	94%	100%	71%	94%	97%	93%	94%	75%	93%	97%	97%	95%	92%	95%
MEANS	0.10	0.02	0.38	0.03	0.00	0.36	0.03	0.06	0.14	0.28	0.19	0.03	0.03	0.02	0.03	0.04	0.03
STD. DEVIATION	0.75	0.14	1.92	0.12	0.00	0.75	0.12	0.33	0.71	1.68	0.35	0.13	0.18	0.14	0.11	0.14	0.11

	Total	REGION															
		2500- Wollongong	2502- Warrawong	2505- Port Kembla	2506- Berkeley	2515- Thirroul	2516- Bulli	2517- Woonoona	2518- Corrimal	2519- Fairy Meadow	2525- Figtree	2526- Unanderra	2527- Albion Park	2528- Warilla	2529- Shell -harbour	2530- Dapto	2533- Kiama / Bombo
RESPONDENTS	600	109	39	17	17	7	18	36	58	52	32	15	31	67	57	26	19
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Moore Park																	
About once a month (12)	1		1														
	0%		3%														
About every 2-3 months (5)	3							2									1
	1%							6%									5%
About every 6 months (2)	7	3												1	3		
	1%	3%												1%	5%		
At least once a year (1)	19	4	1			1		2	2	3	3			1	2		
	3%	4%	3%			14%		6%	3%	6%	9%			1%	4%		
Less often (0.5)	20	2	2		1		1	1	1	1	5			2	1	1	2
	3%	2%	5%		6%		6%	3%	2%	2%	16%			3%	2%	4%	11%
Never shop (0)	550	100	35	17	16	6	17	31	55	48	24	15	31	63	51	25	16
	92%	92%	90%	100%	94%	86%	94%	86%	95%	92%	75%	100%	100%	94%	89%	96%	84%
MEANS	0.12	0.10	0.36	0.00	0.03	0.14	0.03	0.35	0.04	0.07	0.17	0.00	0.00	0.06	0.15	0.02	0.32
STD. DEVIATION	0.66	0.38	1.92	0.00	0.12	0.38	0.12	1.17	0.19	0.24	0.33	0.00	0.00	0.28	0.48	0.10	1.15

TABLE 14 PANEL *BY* Q6.MAIN REASONS FOR VISIT TO CENTRES OUTSIDE REGION - TOTAL CENTRES

	Total	REGION															
		2500-Wollongong	2502-Warrawong	2505-Port Kembla	2506-Berkeley	2515-Thirroul	2516-Bulli	2517-Woonoona	2518-Corrimal	2519-Fairy Meadow	2525-Figtree	2526-Unanderra	2527-Albion Park	2528-Warilla	2529-Shell -harbour	2530-Dapto	2533-Kiama / Bombo
RESPONDENTS	600	109	39	17	17	7	18	36	58	52	32	15	31	67	57	26	19
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Q6.MAIN REASONS FOR VISIT TO CENTRES OUTSIDE REGION - TOTAL CENTRES																	
Day out	222	40	20	8	9	4	6	12	18	10	10	6	14	27	25	5	8
	37%	37%	51%	47%	53%	57%	33%	33%	31%	19%	31%	40%	45%	40%	44%	19%	42%
Shopping for clothes & accessories	206	42	14	6	8	4	12	18	19	18	10	6	10	14	14	5	6
	34%	39%	36%	35%	47%	57%	67%	50%	33%	35%	31%	40%	32%	21%	25%	19%	32%
Other shopping	89	16	6	1	3	4	2	3	9	8	5	1	3	12	6	5	5
	15%	15%	15%	6%	18%	57%	11%	8%	16%	15%	16%	7%	10%	18%	11%	19%	26%
Shopping for gifts	82	13	5	1	2	2	5	5	7	5	6	2	7	6	11	2	3
	14%	12%	13%	6%	12%	29%	28%	14%	12%	10%	19%	13%	23%	9%	19%	8%	16%
Shopping for household goods	75	10	3	1	2	4	5	9	9	7	10	1	3	2	4	1	4
	13%	9%	8%	6%	12%	57%	28%	25%	16%	13%	31%	7%	10%	3%	7%	4%	21%
On the way to/from other destination	51	14	3	2	2		2	6	4	4	2		2	3	6		1
	9%	13%	8%	12%	12%		11%	17%	7%	8%	6%		6%	4%	11%		5%
Medical appointment	38	4	2		2	1	1	3	2	4	3	1	1	6	2	1	5
	6%	4%	5%		12%	14%	6%	8%	3%	8%	9%	7%	3%	9%	4%	4%	26%
Visit/meet family/ friends	35	6	2	1	1	1			2	4	2			6	5	2	3
	6%	6%	5%	6%	6%	14%			3%	8%	6%			9%	9%	8%	16%
Something different	34	7			2	1	3	6	5	1	3			3	2	1	
	6%	6%			12%	14%	17%	17%	9%	2%	9%			4%	4%	4%	
Business appointment	25	6		1			2		1	7	1			2		2	3
	4%	6%		6%			11%		2%	13%	3%			3%		8%	16%
Shopping for food	23	6	3	1		2	1	1	3	2				2	1		1
	4%	6%	8%	6%		29%	6%	3%	5%	4%				3%	2%		5%
Visit theatre/show/ gallery	20	4	1		1				4	3				1	1	2	3
	3%	4%	3%		6%				7%	6%				1%	2%	8%	16%

	Total	REGION															
		2500-Wollongong	2502-Warrawong	2505-Port Kembla	2506-Berkeley	2515-Thirroul	2516-Bulli	2517-Woonoona	2518-Corrimal	2519-Fairy Meadow	2525-Figtree	2526-Unanderra	2527-Albion Park	2528-Warilla	2529-Shell -harbour	2530-Dapto	2533-Kiama / Bombo
RESPONDENTS	600	109	39	17	17	7	18	36	58	52	32	15	31	67	57	26	19
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Q6.MAIN REASONS FOR VISIT TO CENTRES OUTSIDE REGION - TOTAL CENTRES																	
To compare prices	17	6	1		2			1		2		1		3			1
	3%	6%	3%		12%			3%		4%		7%		4%			5%
Browse	14	4							1	2	3		1	1	1		1
	2%	4%							2%	4%	9%		3%	1%	2%		5%
Meal/drink	13	5				2		1	2		1				2		
	2%	5%				29%		3%	3%		3%				4%		
Attend cinema	10	1	1			1		3	2	1	1						
	2%	1%	3%			14%		8%	3%	2%	3%						
Visit sydney/ tourist landmarks/ harbour cruise	9	2							3			1	1	1			1
	2%	2%							5%			7%	3%	1%			5%
Work	9	2					1			1	1	1	2	1			
	2%	2%					6%			2%	3%	7%	6%	1%			
Holiday/weekend away	6	1						1							2	1	1
	1%	1%						3%							4%	4%	5%
Other special activity (wedding,dancing)	5	2							2	1							
	1%	2%							3%	2%							
Other	21	6				2	1		1	1	5	1	1	1	2		
	4%	6%				29%	6%		2%	2%	16%	7%	3%	1%	4%		
Don't remember	3				1										1	1	
	1%				6%										2%	4%	
Have not vistied centres outside region	153	23	11	4	3		2	5	15	17	6	4	9	23	16	11	4
	26%	21%	28%	24%	18%		11%	14%	26%	33%	19%	27%	29%	34%	28%	42%	21%
TOTALS	1160	220	72	26	38	28	43	74	109	98	69	25	54	114	101	39	50
	193%	202%	185%	153%	224%	400%	239%	206%	188%	188%	216%	167%	174%	170%	177%	150%	263%

TABLE 15 PANEL *BY* Q6.MAIN REASONS FOR VISIT TO CENTRES OUTSIDE REGION

	Total	REGION															
		2500-Wollongong	2502-Warrawong	2505-Port Kembla	2506-Berkeley	2515-Thirroul	2516-Bulli	2517-Woonoona	2518-Corrimal	2519-Fairy Meadow	2525-Figtree	2526-Unanderra	2527-Albion Park	2528-Warilla	2529-Shell -harbour	2530-Dapto	2533-Kiama / Bombo
RESPONDENTS	388	78	27	11	13	7	12	25	34	31	23	8	20	38	35	12	14
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Sydney CBD																	
Day out	154	24	14	4	5	4	5	9	12	5	7	5	12	20	21	2	5
	40%	31%	52%	36%	38%	57%	42%	36%	35%	16%	30%	63%	60%	53%	60%	17%	36%
Shopping for clothes & accessories	93	27	8	1	5	1	4	6	6	8	2	1	8	3	6	3	4
	24%	35%	30%	9%	38%	14%	33%	24%	18%	26%	9%	13%	40%	8%	17%	25%	29%
On the way to/from other destination	28	7	3	2	1		2	2		2	2		2	2	3		
	7%	9%	11%	18%	8%		17%	8%		6%	9%		10%	5%	9%		
Other shopping	28	6	2		1	2	1	1	1	2	3			3	3	1	2
	7%	8%	7%		8%	29%	8%	4%	3%	6%	13%			8%	9%	8%	14%
Medical appointment	26	3	1		1	1	1	2	2	2	2	1		4	2	1	3
	7%	4%	4%		8%	14%	8%	8%	6%	6%	9%	13%		11%	6%	8%	21%
Business appointment	22	5		1			2		1	7	1			2			3
	6%	6%		9%			17%		3%	23%	4%			5%			21%
Shopping for household goods	20	5	2		2	1		4	1	1	1	1	1	1			
	5%	6%	7%		15%	14%		16%	3%	3%	4%	13%	5%	3%			
Visit theatre/show/ gallery	19	4	1		1				4	2				1	1	2	3
	5%	5%	4%		8%				12%	6%				3%	3%	17%	21%
Visit/meet family/ friends	18	2		1	1	1				4	1			2	2	2	2
	5%	3%		9%	8%	14%				13%	4%			5%	6%	17%	14%
Shopping for gifts	17	3	2	1	1		1	2	1	1			1	2	2		
	4%	4%	7%	9%	8%		8%	8%	3%	3%			5%	5%	6%		
Something different	13	3					1	3	2	1	2			1			
	3%	4%					8%	12%	6%	3%	9%			3%			
Meal/drink	11	4				2		1	2		1				1		
	3%	5%				29%		4%	6%		4%				3%		

	Total	REGION															
		2500-Wollongong	2502-Warrawong	2505-Port Kembla	2506-Berkeley	2515-Thirroul	2516-Bulli	2517-Woonoona	2518-Corrimal	2519-Fairy Meadow	2525-Figtree	2526-Unanderra	2527-Albion Park	2528-Warilla	2529-Shell-harbour	2530-Dapto	2533-Kiama / Bombo
RESPONDENTS	388	78	27	11	13	7	12	25	34	31	23	8	20	38	35	12	14
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Sydney CBD																	
Visit sydney/ tourist landmarks/ harbour cruise	9	2							3			1	1	1			1
	2%	3%							9%			13%	5%	3%			7%
Attend cinema	8	1	1			1		2	2		1						
	2%	1%	4%			14%		8%	6%		4%						
Work	8	1					1			1	1	1	2	1			
	2%	1%					8%			3%	4%	13%	10%	3%			
Shopping for food	6	3				1								1	1		
	2%	4%				14%								3%	3%		
Holiday/weekend away	6	1						1							2	1	1
	2%	1%						4%							6%	8%	7%
Other special activity (wedding,dancing)	5	2							2	1							
	1%	3%							6%	3%							
To compare prices	3				1			1						1			
	1%				8%			4%						3%			
Browse	1	1															
	0%	1%															
Other	12	4				2				1	3		1	1			
	3%	5%				29%				3%	13%		5%	3%			
Don't remember	10	2	1	2	1			1			2					1	
	3%	3%	4%	18%	8%			4%			9%					8%	
TOTALS	517	110	35	12	20	16	18	35	39	38	29	10	28	46	44	13	24
	133%	141%	130%	109%	154%	229%	150%	140%	115%	123%	126%	125%	140%	121%	126%	108%	171%

TABLE 16 PANEL *BY* Q6.MAIN REASONS FOR VISIT TO CENTRES OUTSIDE REGION

	Total	REGION															
		2500- Wollongong	2502- Warrawong	2505- Port Kembla	2506- Berkeley	2515- Thirroul	2516- Bulli	2517- Woonoona	2518- Corrimal	2519- Fairy Meadow	2525- Figtree	2526- Unanderra	2527- Albion Park	2528- Warilla	2529- Shell -harbour	2530- Dapto	2533- Kiama / Bombo
RESPONDENTS	118 100%	14 100%	9 100%	2 100%	3 100%	2 100%	7 100%	12 100%	15 100%	6 100%	8 100%	2 100%	8 100%	7 100%	12 100%	6 100%	5 100%
Macarthur Square																	
Day out	28 24%	4 29%	6 67%	1 50%			1 14%	2 17%	3 20%				3 38%	3 43%	3 25%	1 17%	1 20%
Shopping for clothes & accessories	27 23%	3 21%	2 22%	1 50%	1 33%		3 43%	3 25%	4 27%	2 33%		1 50%	3 38%	1 14%	2 17%		1 20%
Other shopping	13 11%	2 14%	1 11%						2 13%	1 17%		1 50%		1 14%		1 17%	4 80%
Shopping for household goods	13 11%		1 11%				2 29%	2 17%	1 7%	2 33%	1 13%		2 25%		1 8%		1 20%
Shopping for gifts	12 10%					1 50%	2 29%		2 13%		2 25%				4 33%	1 17%	
On the way to/from other destination	10 8%	4 29%						3 25%	1 7%	1 17%			1 13%				
Something different	9 8%	2 14%			1 33%	1 50%	1 14%	3 25%							1 8%		
Visit/meet family/ friends	6 5%								2 13%					2 29%		1 17%	1 20%
Shopping for food	6 5%	1 7%		1 50%				1 8%	1 7%	1 17%							1 20%
Medical appointment	3 3%		1 11%					1 8%					1 13%				
Business appointment	2 2%									2 33%							
Browse	1 1%										1 13%						

	Total	REGION															
		2500-Wollongong	2502-Warrawong	2505-Port Kembla	2506-Berkeley	2515-Thirroul	2516-Bulli	2517-Woonoona	2518-Corrimal	2519-Fairy Meadow	2525-Figtree	2526-Unanderra	2527-Albion Park	2528-Warilla	2529-Shell-harbour	2530-Dapto	2533-Kiama / Bombo
RESPONDENTS	118 100%	14 100%	9 100%	2 100%	3 100%	2 100%	7 100%	12 100%	15 100%	6 100%	8 100%	2 100%	8 100%	7 100%	12 100%	6 100%	5 100%
Macarthur Square																	
Meal/drink	1 1%														1 8%		
Attend cinema	1 1%							1 8%									
Other	1 1%														1 8%		
Don't remember	15 13%	1 7%			1 33%		1 14%		2 13%	1 17%	4 50%			1 14%	2 17%	2 33%	
TOTALS	148 125%	17 121%	11 122%	3 150%	3 100%	2 100%	10 143%	16 133%	18 120%	10 167%	8 100%	2 100%	10 125%	8 114%	15 125%	6 100%	9 180%

	Total	REGION															
		2500-Wollongong	2502-Warrawong	2505-Port Kembla	2506-Berkeley	2515-Thirroul	2516-Bulli	2517-Woonoona	2518-Corrimal	2519-Fairy Meadow	2525-Figtree	2526-Unanderra	2527-Albion Park	2528-Warilla	2529-Shell -harbour	2530-Dapto	2533-Kiama / Bombo
RESPONDENTS	90	15	10	2	3	2	2	5	11	6	9	1	3	8	7	3	3
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Hurstville																	
Shopping for clothes & accessories	24	2	4	1				4	3	3	3				1	1	2
	27%	13%	40%	50%				80%	27%	50%	33%				14%	33%	67%
Day out	21	4	5	1		1			2				3	2	3		
	23%	27%	50%	50%		50%			18%				100%	25%	43%		
Visit/meet family/ friends	11	3	1							1	1			3	2		
	12%	20%	10%							17%	11%			38%	29%		
Medical appointment	10				1			1		1	2			2			3
	11%				33%			20%		17%	22%			25%			100%
Other shopping	8		2			1	1		2					1			1
	9%		20%			50%	50%		18%					13%			33%
On the way to/from other destination	7	2			1				2	1				1			
	8%	13%			33%				18%	17%				13%			
Shopping for food	6	3	1				1		1								
	7%	20%	10%				50%		9%								
Shopping for gifts	5	1	1		1				1							1	
	6%	7%	10%		33%				9%							33%	
Something different	2	1							1								
	2%	7%							9%								
Browse	2	1							1								
	2%	7%							9%								
To compare prices	1													1			
	1%													13%			
Business appointment	1	1															
	1%	7%															

	Total	REGION															
		2500-Wollongong	2502-Warrawong	2505-Port Kembla	2506-Berkeley	2515-Thirroul	2516-Bulli	2517-Woonoona	2518-Corrimal	2519-Fairy Meadow	2525-Figtree	2526-Unanderra	2527-Albion Park	2528-Warilla	2529-Shell-harbour	2530-Dapto	2533-Kiama / Bombo
RESPONDENTS	90	15	10	2	3	2	2	5	11	6	9	1	3	8	7	3	3
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Hurstville																	
Shopping for household goods	1								1								
	1%								9%								
Other	2											1			1		
	2%											100%			14%		
Don't remember	11	2	1	1					2		3				1	1	
	12%	13%	10%	50%					18%		33%				14%	33%	
TOTALS	112	20	15	3	3	2	2	5	16	6	9	1	3	10	8	3	6
	124%	133%	150%	150%	100%	100%	100%	100%	145%	100%	100%	100%	100%	125%	114%	100%	200%

	Total	REGION															
		2500- Wollongong	2502- Warrawong	2505- Port Kembla	2506- Berkeley	2515- Thirroul	2516- Bulli	2517- Woonoona	2518- Corrimal	2519- Fairy Meadow	2525- Figtree	2526- Unanderra	2527- Albion Park	2528- Warilla	2529- Shell -harbour	2530- Dapto	2533- Kiama / Bombo
RESPONDENTS	89 100%	15 100%	6 100%	3 100%	5 100%	1 100%	3 100%	7 100%	5 100%	9 100%	4 100%	2 100%	3 100%	8 100%	12 100%	3 100%	3 100%
DFO Homebush																	
Shopping for clothes & accessories	39 44%	7 47%	2 33%	1 33%	2 40%	1 100%	1 33%	5 71%	3 60%	6 67%	2 50%	2 100%	3 100%	1 13%	1 8%	2 67%	
Day out	22 25%	5 33%	2 33%	2 67%	1 20%		1 33%	1 14%	1 20%	2 22%				3 38%	4 33%		
Shopping for gifts	8 9%	1 7%					1 33%		1 20%	1 11%				1 13%	2 17%		1 33%
Other shopping	7 8%	1 7%	1 17%		1 20%									2 25%	2 17%		
To compare prices	6 7%	2 13%	1 17%							2 22%				1 13%			
Browse	4 4%									1 11%	1 25%			1 13%			1 33%
On the way to/from other destination	3 3%				1 20%			1 14%							1 8%		
Shopping for household goods	1 1%									1 11%							
Visit/meet family/ friends	1 1%														1 8%		
Something different	1 1%															1 33%	
Shopping for food	1 1%					1 100%											
Visit theatre/show/ gallery	1 1%									1 11%							

TABLE 18 (CONT.) PANEL *BY* Q6.MAIN REASONS FOR VISIT TO CENTRES OUTSIDE REGION

		REGION															
	Total	2500-Wollongong	2502-Warrawong	2505-Port Kembla	2506-Berkeley	2515-Thirroul	2516-Bulli	2517-Woonoona	2518-Corrimal	2519-Fairy Meadow	2525-Figtree	2526-Unanderra	2527-Albion Park	2528-Warilla	2529-Shell-harbour	2530-Dapto	2533-Kiama / Bombo
RESPONDENTS	89 100%	15 100%	6 100%	3 100%	5 100%	1 100%	3 100%	7 100%	5 100%	9 100%	4 100%	2 100%	3 100%	8 100%	12 100%	3 100%	3 100%
DFO Homebush																	
Don't remember	6 7%	1 7%							2 40%		1 25%				1 8%		1 33%
TOTALS	100 112%	17 113%	6 100%	3 100%	5 100%	2 200%	3 100%	7 100%	7 140%	14 156%	4 100%	2 100%	3 100%	9 113%	12 100%	3 100%	3 100%

	Total	REGION															
		2500- Wollongong	2502- Warrawong	2505- Port Kembla	2506- Berkeley	2515- Thirroul	2516- Bulli	2517- Woonoona	2518- Corrimal	2519- Fairy Meadow	2525- Figtree	2526- Unanderra	2527- Albion Park	2528- Warilla	2529- Shell -harbour	2530- Dapto	2533- Kiama / Bombo
RESPONDENTS	319 100%	64 100%	19 100%	7 100%	11 100%	6 100%	13 100%	21 100%	35 100%	24 100%	21 100%	8 100%	18 100%	27 100%	23 100%	11 100%	11 100%
Miranda Fair																	
Shopping for clothes & accessories	137 43%	25 39%	10 53%	3 43%	6 55%	2 33%	8 62%	13 62%	15 43%	12 50%	8 38%	4 50%	4 22%	10 37%	10 43%	3 27%	4 36%
Day out	84 26%	19 30%	7 37%	3 43%	6 55%		2 15%	4 19%	8 23%	5 21%	3 14%	2 25%	3 17%	12 44%	4 17%	3 27%	3 27%
Shopping for gifts	52 16%	9 14%	3 16%		1 9%	2 33%	2 15%	3 14%	4 11%	3 13%	4 19%	2 25%	6 33%	3 11%	7 30%	1 9%	2 18%
Other shopping	42 13%	7 11%	2 11%	1 14%	1 9%	1 17%	1 8%	2 10%	5 14%	5 21%	1 5%		3 17%	6 22%	3 13%	3 27%	1 9%
Shopping for household goods	26 8%	3 5%	2 11%	1 14%		1 17%	3 23%	1 5%	2 6%	3 13%	4 19%		2 11%		2 9%		2 18%
Something different	12 4%	3 5%			1 9%		1 8%	1 5%	3 9%		1 5%			1 4%	1 4%		
On the way to/from other destination	10 3%	4 6%	1 5%						1 3%				1 6%		1 4%		2 18%
To compare prices	9 3%	6 9%			1 9%							1 13%					1 9%
Shopping for food	8 3%	2 3%	2 11%			1 17%			1 3%	1 4%				1 4%			
Medical appointment	7 2%	1 2%				1 17%				1 4%			1 6%	1 4%			2 18%
Browse	4 1%	2 3%											1 6%		1 4%		
Visit/meet family/ friends	3 1%	1 2%	1 5%								1 5%						

	Total	REGION															
		2500-Wollongong	2502-Warrawong	2505-Port Kembla	2506-Berkeley	2515-Thirroul	2516-Bulli	2517-Woonoona	2518-Corrimal	2519-Fairy Meadow	2525-Figtree	2526-Unanderra	2527-Albion Park	2528-Warilla	2529-Shell-harbour	2530-Dapto	2533-Kiama / Bombo
RESPONDENTS	319 100%	64 100%	19 100%	7 100%	11 100%	6 100%	13 100%	21 100%	35 100%	24 100%	21 100%	8 100%	18 100%	27 100%	23 100%	11 100%	11 100%
Miranda Fair																	
Business appointment	2 1%															2 18%	
Meal/drink	1 0%	1 2%															
Holiday/weekend away	1 0%														1 4%		
Other	5 2%	2 3%					1 8%		1 3%		1 5%						
Don't remember	4 1%	2 3%						1 5%			1 5%						
TOTALS	407 128%	87 136%	28 147%	8 114%	16 145%	8 133%	18 138%	25 119%	40 114%	30 125%	24 114%	9 113%	21 117%	34 126%	30 130%	12 109%	17 155%

	Total	REGION														
		2500- Wollongong	2502- Warrawong	2505- Port Kembla	2515- Thirroul	2516- Bulli	2517- Woonoona	2518- Corrimal	2519- Fairy Meadow	2525- Figtree	2526- Unanderra	2527- Albion Park	2528- Warilla	2529- Shell -harbour	2530- Dapto	2533- Kiama / Bombo
RESPONDENTS	39 100%	3 100%	6 100%	1 100%	2 100%	1 100%	1 100%	4 100%	3 100%	8 100%	1 100%	1 100%	2 100%	3 100%	2 100%	1 100%
Taren Point																
Shopping for household goods	18 46%		1 17%	1 100%	2 100%		1 100%	3 75%		6 75%		1 100%	1 50%		1 50%	1 100%
Day out	5 13%	1 33%	2 33%							1 13%	1 100%					
Other shopping	5 13%	1 33%	1 17%		1 50%			1 25%						1 33%		
Shopping for clothes & accessories	4 10%								1 33%				1 50%	1 33%	1 50%	
Shopping for gifts	1 3%					1 100%										
Business appointment	1 3%								1 33%							
Browse	1 3%								1 33%							
On the way to/from other destination	1 3%													1 33%		
Don't remember	6 15%	1 33%	2 33%							2 25%				1 33%		
TOTALS	42 108%	3 100%	6 100%	1 100%	3 150%	1 100%	1 100%	4 100%	3 100%	9 113%	1 100%	1 100%	2 100%	4 133%	2 100%	1 100%

	Total	REGION												
		2500-Wollongong	2502-Warrawong	2506-Berkeley	2515-Thirroul	2516-Bulli	2517-Woonoona	2518-Corrimal	2519-Fairy Meadow	2525-Figtree	2528-Warilla	2529-Shell-harbour	2530-Dapto	2533-Kiama / Bombo
RESPONDENTS	50	9	4	1	1	1	5	3	4	8	4	6	1	3
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Moore Park														
Shopping for household goods	22	4	1		1	1	4	2	2	4	1	1		1
	44%	44%	25%		100%	100%	80%	67%	50%	50%	25%	17%		33%
Day out	8	3	1	1								3		
	16%	33%	25%	100%								50%		
Other shopping	8	2	1		1			1		1		1		1
	16%	22%	25%		100%			33%		13%		17%		33%
On the way to/from other destination	3	1								1		1		
	6%	11%								13%		17%		
Shopping for gifts	2	1									1			
	4%	11%									25%			
Shopping for clothes & accessories	2	1											1	
	4%	11%											100%	
Browse	2									1	1			
	4%									13%	25%			
Attend cinema	1								1					
	2%								25%					
Something different	1										1			
	2%										25%			
Shopping for food	1	1												
	2%	11%												
To compare prices	1										1			
	2%										25%			
Work	1	1												
	2%	11%												

TABLE 21 (CONT.) PANEL *BY* Q6.MAIN REASONS FOR VISIT TO CENTRES OUTSIDE REGION

		REGION												
	Total	2500- Wollongong	2502- Warrawong	2506- Berkeley	2515- Thirroul	2516- Bulli	2517- Woonoona	2518- Corrimal	2519- Fairy Meadow	2525- Figtree	2528- Warilla	2529- Shell -harbour	2530- Dapto	2533- Kiama / Bombo
RESPONDENTS	50 100%	9 100%	4 100%	1 100%	1 100%	1 100%	5 100%	3 100%	4 100%	8 100%	4 100%	6 100%	1 100%	3 100%
Moore Park														
Other	1 2%									1 13%				
Don't remember	6 12%		1 25%				1 20%		1 25%	1 13%		1 17%		1 33%
TOTALS	59 118%	14 156%	4 100%	1 100%	2 200%	1 100%	5 100%	3 100%	4 100%	9 113%	5 125%	7 117%	1 100%	3 100%

TABLE 22 Q7.SHOPPING CENTRES IN REGION *BY* Q7.FREQUENCY VISIT SHOPPING CENTRES IN REGION

	Q7.SHOPPING CENTRES IN REGION								
	Shellharbour Square	Dapto	Westfield Figtree	Westfield Warrawong	Corrimal	Warilla Grove	Kiama	Unanderra	Thirroul
RESPONDENTS	600 100%	600 100%	600 100%	600 100%	600 100%	600 100%	600 100%	600 100%	600 100%
Q7.FREQUENCY VISIT SHOPPING CENTRES IN REGION									
About once a week (4)	122 20%	42 7%	110 18%	87 15%	100 17%	74 12%	24 4%	32 5%	14 2%
About once a fortnight (2)	65 11%	10 2%	46 8%	75 13%	52 9%	40 7%	7 1%	13 2%	12 2%
About once a month (1)	80 13%	36 6%	83 14%	130 22%	28 5%	40 7%	16 3%	22 4%	15 3%
Less often (0.5)	223 37%	88 15%	186 31%	211 35%	84 14%	84 14%	139 23%	55 9%	69 12%
Never shop (0)	110 18%	424 71%	175 29%	97 16%	336 56%	362 60%	414 69%	478 80%	490 82%
MEANS	1.35	0.45	1.18	1.22	0.96	0.76	0.33	0.34	0.22
STD. DEVIATION	1.45	1.04	1.44	1.28	1.48	1.33	0.82	0.94	0.68

	Total	REGION															
		2500-Wollongong	2502-Warrawong	2505-Port Kembla	2506-Berkeley	2515-Thirroul	2516-Bulli	2517-Woonoona	2518-Corrimal	2519-Fairy Meadow	2525-Figtree	2526-Unanderra	2527-Albion Park	2528-Warilla	2529-Shell -harbour	2530-Dapto	2533-Kiama / Bombo
RESPONDENTS	600	109	39	17	17	7	18	36	58	52	32	15	31	67	57	26	19
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Shellharbour Square																	
About once a week (4)	122		3	3			1		1	1		1	20	46	41	1	4
	20%		8%	18%			6%		2%	2%		7%	65%	69%	72%	4%	21%
About once a fortnight (2)	65	5	6	4	3		1	1	2			1	10	8	11	8	5
	11%	5%	15%	24%	18%		6%	3%	3%			7%	32%	12%	19%	31%	26%
About once a month (1)	80	10	11	1	5	1	2	4	6	6	4		1	10	4	8	7
	13%	9%	28%	6%	29%	14%	11%	11%	10%	12%	13%		3%	15%	7%	31%	37%
Less often (0.5)	223	55	14	7	7	2	11	15	37	31	23	10		2	1	6	2
	37%	50%	36%	41%	41%	29%	61%	42%	64%	60%	72%	67%		3%	2%	23%	11%
Never shop (0)	110	39	5	2	2	4	3	16	12	14	5	3		1		3	1
	18%	36%	13%	12%	12%	57%	17%	44%	21%	27%	16%	20%		1%		12%	5%
MEANS	1.35	0.44	1.08	1.44	0.85	0.29	0.75	0.38	0.56	0.49	0.48	0.73	3.26	3.15	3.34	1.19	1.79
STD. DEVIATION	1.45	0.46	1.04	1.40	0.63	0.39	0.93	0.44	0.61	0.58	0.27	1.02	1.03	1.31	1.10	0.91	1.31

TABLE 24 PANEL *BY* Q7.FREQUENCY VISIT SHOPPING CENTRES IN REGION

	Total	REGION															
		2500-Wollongong	2502-Warrawong	2505-Port Kembla	2506-Berkeley	2515-Thirroul	2516-Bulli	2517-Woonoona	2518-Corrimal	2519-Fairy Meadow	2525-Figtree	2526-Unanderra	2527-Albion Park	2528-Warilla	2529-Shell-harbour	2530-Dapto	2533-Kiama / Bombo
RESPONDENTS	600	109	39	17	17	7	18	36	58	52	32	15	31	67	57	26	19
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Dapto																	
About once a week (4)	42	1	2	1	5				2	1	1	2	3	2		22	
	7%	1%	5%	6%	29%				3%	2%	3%	13%	10%	3%		85%	
About once a fortnight (2)	10	1			1								2		2	4	
	2%	1%			6%								6%		4%	15%	
About once a month (1)	36	2	2	1	3		2	1	1	5	1	3	7		6		2
	6%	2%	5%	6%	18%		11%	3%	2%	10%	3%	20%	23%		11%		11%
Less often (0.5)	88	13	6	3	3	1		5	10	4	9	7	7	11	8		1
	15%	12%	15%	18%	18%	14%		14%	17%	8%	28%	47%	23%	16%	14%		5%
Never shop (0)	424	92	29	12	5	6	16	30	45	42	21	3	12	54	41		16
	71%	84%	74%	71%	29%	86%	89%	83%	78%	81%	66%	20%	39%	81%	72%		84%
MEANS	0.45	0.13	0.33	0.38	1.56	0.07	0.11	0.10	0.24	0.21	0.30	0.97	0.85	0.20	0.25	3.69	0.13
STD. DEVIATION	1.04	0.46	0.91	0.98	1.70	0.19	0.32	0.23	0.75	0.62	0.73	1.27	1.18	0.70	0.47	0.74	0.33

		REGION															
	Total	2500- Wollongong	2502- Warrawong	2505- Port Kembla	2506- Berkeley	2515- Thirroul	2516- Bulli	2517- Woonoona	2518- Corrimal	2519- Fairy Meadow	2525- Figtree	2526- Unanderra	2527- Albion Park	2528- Warilla	2529- Shell -harbour	2530- Dapto	2533- Kiama / Bombo
RESPONDENTS	600	109	39	17	17	7	18	36	58	52	32	15	31	67	57	26	19
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Westfield Figtree																	
About once a week (4)	110	54	3				1		7	3	30	9	1			2	
	18%	50%	8%				6%		12%	6%	94%	60%	3%			8%	
About once a fortnight (2)	46	11	3	2	3	1	1	5	7	4	1	1	2	1	1	3	
	8%	10%	8%	12%	18%	14%	6%	14%	12%	8%	3%	7%	6%	1%	2%	12%	
About once a month (1)	83	14	4	3	4		3	13	13	12	1	2	1	5	3	4	1
	14%	13%	10%	18%	24%		17%	36%	22%	23%	3%	13%	3%	7%	5%	15%	5%
Less often (0.5)	186	19	14	6	3	4	12	12	23	25		2	15	23	17	7	4
	31%	17%	36%	35%	18%	57%	67%	33%	40%	48%		13%	48%	34%	30%	27%	21%
Never shop (0)	175	11	15	6	7	2	1	6	8	8		1	12	38	36	10	14
	29%	10%	38%	35%	41%	29%	6%	17%	14%	15%		7%	39%	57%	63%	38%	74%
MEANS	1.18	2.40	0.74	0.59	0.68	0.57	0.83	0.81	1.15	0.86	3.84	2.73	0.53	0.28	0.24	0.83	0.16
STD. DEVIATION	1.44	1.66	1.10	0.64	0.75	0.67	0.89	0.60	1.20	0.93	0.63	1.66	0.82	0.38	0.38	1.13	0.29

TABLE 26 PANEL *BY* Q7.FREQUENCY VISIT SHOPPING CENTRES IN REGION

	Total	REGION															
		2500-Wollongong	2502-Warrawong	2505-Port Kembla	2506-Berkeley	2515-Thirroul	2516-Bulli	2517-Woonoona	2518-Corrimal	2519-Fairy Meadow	2525-Figtree	2526-Unanderra	2527-Albion Park	2528-Warilla	2529-Shell-harbour	2530-Dapto	2533-Kiama / Bombo
RESPONDENTS	600 100%	109 100%	39 100%	17 100%	17 100%	7 100%	18 100%	36 100%	58 100%	52 100%	32 100%	15 100%	31 100%	67 100%	57 100%	26 100%	19 100%
Westfield Warrawong																	
About once a week (4)	87 15%	2 2%	35 90%	12 71%	12 71%		1 6%	1 3%	4 7%	3 6%		2 13%	4 13%	5 7%	4 7%	2 8%	
About once a fortnight (2)	75 13%	13 12%	4 10%	4 24%	4 24%		2 11%	7 19%	2 3%	3 6%	4 13%		5 16%	16 24%	5 9%	5 19%	1 5%
About once a month (1)	130 22%	23 21%				2 29%	4 22%	7 19%	15 26%	12 23%	10 31%	1 7%	7 23%	18 27%	17 30%	12 46%	2 11%
Less often (0.5)	211 35%	37 34%				2 29%	11 61%	14 39%	29 50%	23 44%	11 34%	11 73%	12 39%	22 33%	23 40%	4 15%	12 63%
Never shop (0)	97 16%	34 31%		1 6%	1 6%	3 43%		7 19%	8 14%	11 21%	7 22%	1 7%	3 10%	6 9%	8 14%	3 12%	4 21%
MEANS	1.22	0.69	3.79	3.29	3.29	0.43	0.97	0.89	0.85	0.80	0.73	0.97	1.26	1.21	0.96	1.23	0.53
STD. DEVIATION	1.28	0.77	0.61	1.21	1.21	0.45	0.90	0.86	0.96	0.94	0.61	1.25	1.22	1.03	0.99	1.01	0.46

TABLE 27 PANEL *BY* Q7.FREQUENCY VISIT SHOPPING CENTRES IN REGION

	Total	REGION															
		2500- Wollongong	2502- Warrawong	2505- Port Kembla	2506- Berkeley	2515- Thirroul	2516- Bulli	2517- Woonoona	2518- Corrimal	2519- Fairy Meadow	2525- Figtree	2526- Unanderra	2527- Albion Park	2528- Warilla	2529- Shell -harbour	2530- Dapto	2533- Kiama / Bombo
RESPONDENTS	600	109	39	17	17	7	18	36	58	52	32	15	31	67	57	26	19
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Corrimal																	
About once a week (4)	100	5			1	2	9	21	39	21				1	1		
	17%	5%			6%	29%	50%	58%	67%	40%				1%	2%		
About once a fortnight (2)	52	3	2			2	6	5	15	15	3				1		
	9%	3%	5%			29%	33%	14%	26%	29%	9%				2%		
About once a month (1)	28	9	2			1		5	1	6	2		1		1		
	5%	8%	5%			14%		14%	2%	12%	6%		3%		2%		
Less often (0.5)	84	18	4	6	2	2	1	4	3	7	10	2	7	5	5	6	2
	14%	17%	10%	35%	12%	29%	6%	11%	5%	13%	31%	13%	23%	7%	9%	23%	11%
Never shop (0)	336	74	31	11	14		2	1		3	17	13	23	61	49	20	17
	56%	68%	79%	65%	82%		11%	3%		6%	53%	87%	74%	91%	86%	77%	89%
MEANS	0.96	0.40	0.21	0.18	0.29	2.00	2.69	2.81	3.25	2.38	0.41	0.07	0.15	0.10	0.17	0.12	0.05
STD. DEVIATION	1.48	0.90	0.50	0.25	0.97	1.50	1.49	1.50	1.13	1.47	0.60	0.18	0.26	0.50	0.61	0.21	0.16

	Total	REGION															
		2500-Wollongong	2502-Warrawong	2505-Port Kembla	2506-Berkeley	2515-Thirroul	2516-Bulli	2517-Woonoona	2518-Corrimal	2519-Fairy Meadow	2525-Figtree	2526-Unanderra	2527-Albion Park	2528-Warilla	2529-Shell -harbour	2530-Dapto	2533-Kiama / Bombo
RESPONDENTS	600	109	39	17	17	7	18	36	58	52	32	15	31	67	57	26	19
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Warilla Grove																	
About once a week (4)	74		1	3									2	51	15	1	1
	12%		3%	18%									6%	76%	26%	4%	5%
About once a fortnight (2)	40	1	6		2								3	8	19		1
	7%	1%	15%		12%								10%	12%	33%		5%
About once a month (1)	40		4	4	2		1	2	1		1	1	3	5	7	1	8
	7%		10%	24%	12%		6%	6%	2%		3%	7%	10%	7%	12%	4%	42%
Less often (0.5)	84	16	11	3				1	4	8	6	1	11	2	8	10	3
	14%	15%	28%	18%				3%	7%	15%	19%	7%	35%	3%	14%	38%	16%
Never shop (0)	362	92	17	7	13	7	17	33	53	44	25	13	12	1	8	14	6
	60%	84%	44%	41%	76%	100%	94%	92%	91%	85%	78%	87%	39%	1%	14%	54%	32%
MEANS	0.76	0.09	0.65	1.03	0.35	0.00	0.06	0.07	0.05	0.08	0.13	0.10	0.73	3.37	1.91	0.38	0.82
STD. DEVIATION	1.33	0.26	0.89	1.47	0.70	0.00	0.24	0.24	0.18	0.18	0.25	0.28	1.06	1.18	1.44	0.79	0.95

	Total	REGION															
		2500-Wollongong	2502-Warrawong	2505-Port Kembla	2506-Berkeley	2515-Thirroul	2516-Bulli	2517-Woonoona	2518-Corrimal	2519-Fairy Meadow	2525-Figtree	2526-Unanderra	2527-Albion Park	2528-Warilla	2529-Shell -harbour	2530-Dapto	2533-Kiama / Bombo
RESPONDENTS	600 100%	109 100%	39 100%	17 100%	17 100%	7 100%	18 100%	36 100%	58 100%	52 100%	32 100%	15 100%	31 100%	67 100%	57 100%	26 100%	19 100%
Kiama																	
About once a week (4)	24 4%	2 2%		1 6%	1 6%									2 3%	2 4%		16 84%
About once a fortnight (2)	7 1%		1 3%					1 3%	1 2%				1 3%		1 2%		2 11%
About once a month (1)	16 3%	3 3%		1 6%				1 3%				1 7%	5 16%	3 4%	2 4%		
Less often (0.5)	139 23%	31 28%	7 18%	2 12%	3 18%	4 57%	4 22%	4 11%	10 17%	12 23%	8 25%	3 20%	10 32%	16 24%	15 26%	9 35%	1 5%
Never shop (0)	414 69%	73 67%	31 79%	13 76%	13 76%	3 43%	14 78%	30 83%	47 81%	40 77%	24 75%	11 73%	15 48%	46 69%	37 65%	17 65%	
MEANS	0.33	0.24	0.14	0.35	0.32	0.29	0.11	0.14	0.12	0.12	0.13	0.17	0.39	0.28	0.34	0.17	3.61
STD. DEVIATION	0.82	0.58	0.36	0.98	0.97	0.27	0.21	0.39	0.31	0.21	0.22	0.31	0.48	0.71	0.79	0.24	0.98

TABLE 30 PANEL *BY* Q7.FREQUENCY VISIT SHOPPING CENTRES IN REGION

		REGION															
	Total	2500-Wollongong	2502-Warrawong	2505-Port Kembla	2506-Berkeley	2515-Thirroul	2516-Bulli	2517-Woonoona	2518-Corrimal	2519-Fairy Meadow	2525-Figtree	2526-Unanderra	2527-Albion Park	2528-Warilla	2529-Shell -harbour	2530-Dapto	2533-Kiama / Bombo
RESPONDENTS	600	109	39	17	17	7	18	36	58	52	32	15	31	67	57	26	19
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Unanderra																	
About once a week (4)	32	5	3		3		1			2	2	14				2	
	5%	5%	8%		18%		6%			4%	6%	93%				8%	
About once a fortnight (2)	13	1			1					2	6				1	1	1
	2%	1%			6%					4%	19%				2%	4%	5%
About once a month (1)	22	5	3	2	2						4	1	2			2	1
	4%	5%	8%	12%	12%						13%	7%	6%			8%	5%
Less often (0.5)	55	10	4	1	4	2	3	1	3	4	6		4	6	3	4	
	9%	9%	10%	6%	24%	29%	17%	3%	5%	8%	19%		13%	9%	5%	15%	
Never shop (0)	478	88	29	14	7	5	14	35	55	44	14		25	61	53	17	17
	80%	81%	74%	82%	41%	71%	78%	97%	95%	85%	44%		81%	91%	93%	65%	89%
MEANS	0.34	0.29	0.44	0.15	1.06	0.14	0.31	0.01	0.03	0.27	0.84	3.80	0.13	0.04	0.06	0.54	0.16
STD. DEVIATION	0.94	0.87	1.08	0.34	1.50	0.24	0.94	0.08	0.11	0.85	1.12	0.77	0.29	0.14	0.28	1.12	0.50

PANEL *BY* Q7.FREQUENCY VISIT SHOPPING CENTRES IN REGION

	Total	2500-Wollongong	2502-Warrawong	2505-Port Kembla	2506-Berkeley	2515-Thirroul	2516-Bulli	2517-Woonoona	2518-Corrimal	2519-Fairy Meadow	2525-Figtree	2526-Unanderra	2527-Albion Park	2528-Warilla	2529-Shell-harbour	2530-Dapto	2533-Kiama / Bombo
		REGION															
RESPONDENTS	600	109	39	17	17	7	18	36	58	52	32	15	31	67	57	26	19
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Thirroul																	
About once a week (4)	14	1				7	4	1	1								
	2%	1%				100%	22%	3%	2%								
About once a fortnight (2)	12	1					3	5	3								
	2%	1%					17%	14%	5%								
About once a month (1)	15	1	2				3	4	2	2					1		
	3%	1%	5%				17%	11%	3%	4%					2%		
Less often (0.5)	69	16	1	1	1		2	10	14	11	3		3	1	3	3	
	12%	15%	3%	6%	6%		11%	28%	24%	21%	9%		10%	1%	5%	12%	
Never shop (0)	490	90	36	16	16		6	16	38	39	29	15	28	66	53	23	19
	82%	83%	92%	94%	94%		33%	44%	66%	75%	91%	100%	90%	99%	93%	88%	100%
MEANS	0.22	0.14	0.06	0.03	0.03	4.00	1.44	0.64	0.33	0.14	0.05	0.00	0.05	0.01	0.04	0.06	0.00
STD. DEVIATION	0.68	0.46	0.23	0.12	0.12	0.00	1.57	0.89	0.69	0.27	0.15	0.00	0.15	0.06	0.17	0.16	0.00

TABLE 32 PANEL *BY* Q8.DEPARTMENT STORES SHOPPED AT IN PAST 6 MONTHS

	Total	REGION															
		2500- Wollongong	2502- Warrawong	2505- Port Kembla	2506- Berkeley	2515- Thirroul	2516- Bulli	2517- Woonoona	2518- Corrimal	2519- Fairy Meadow	2525- Figtree	2526- Unanderra	2527- Albion Park	2528- Warilla	2529- Shell -harbour	2530- Dapto	2533- Kiama / Bombo
RESPONDENTS	600	109	39	17	17	7	18	36	58	52	32	15	31	67	57	26	19
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Q8.DEPARTMENT STORES SHOPPED AT IN PAST 6 MONTHS																	
Big W Warrawong	391	47	35	17	16	4	15	21	34	27	15	9	24	53	43	20	11
	65%	43%	90%	100%	94%	57%	83%	58%	59%	52%	47%	60%	77%	79%	75%	77%	58%
Kmart Warrawong	366	44	37	15	15	4	14	20	35	30	11	10	23	46	33	22	7
	61%	40%	95%	88%	88%	57%	78%	56%	60%	58%	34%	67%	74%	69%	58%	85%	37%
Grace Bros Wollongong	349	85	17	8	8	6	13	23	35	37	24	11	16	21	22	13	10
	58%	78%	44%	47%	47%	86%	72%	64%	60%	71%	75%	73%	52%	31%	39%	50%	53%
David Jones Wollongong	312	78	13	7	8	6	14	17	29	27	21	12	14	25	18	13	10
	52%	72%	33%	41%	47%	86%	78%	47%	50%	52%	66%	80%	45%	37%	32%	50%	53%
Kmart Shellharbour Square	302	25	17	9	11	1	6	11	20	11	4	7	31	61	57	17	14
	50%	23%	44%	53%	65%	14%	33%	31%	34%	21%	13%	47%	100%	91%	100%	65%	74%
Target Shellharbour Square	301	30	15	4	8	1	9	8	16	15	13	6	30	60	54	19	13
	50%	28%	38%	24%	47%	14%	50%	22%	28%	29%	41%	40%	97%	90%	95%	73%	68%
Kmart Figtree	294	82	6	5	10	3	11	22	44	31	32	15	6	7	6	11	3
	49%	75%	15%	29%	59%	43%	61%	61%	76%	60%	100%	100%	19%	10%	11%	42%	16%
None of the above	29	8			1	1	1	3	7	4				1		1	2
	5%	7%			6%	14%	6%	8%	12%	8%				1%		4%	11%
TOTALS	2344	399	140	65	77	26	83	125	220	182	120	70	144	274	233	116	70
	391%	366%	359%	382%	453%	371%	461%	347%	379%	350%	375%	467%	465%	409%	409%	446%	368%

TABLE 33 Q9.HOUSEHOLD GOODS CENTRES *BY* Q9.HOUSEHOLD GOODS PURCHASED FROM CENTRES IN PAST 12 MONTHS

	Q9.HOUSEHOLD GOODS CENTRES											
	Shellharbo -ur	Warrawong	Wollongong CBD	Taren Point	Moore Park	Other Centres	Warilla / Warilla Grove	Corrimal	Figtree	Miranda	Fairy Meadow	Kiama
RESPONDENTS	600 100%	600 100%	600 100%	600 100%	600 100%	600 100%	600 100%	600 100%	600 100%	600 100%	600 100%	600 100%
Q9.HOUSEHOLD GOODS PURCHASED FROM CENTRES IN PAST 12 MONTHS												
Electrical goods	66 11%	113 19%	93 16%	3 1%	2 0%	11 2%	11 2%	9 2%	7 1%	6 1%	1 0%	1 0%
Furniture	19 3%	94 16%	26 4%	3 1%	8 1%	8 1%		7 1%	1 0%			
Whitegoods	19 3%	52 9%	51 9%		2 0%	3 1%	4 1%	7 1%		1 0%		2 0%
Floor coverings	5 1%	16 3%	14 2%	2 0%	1 0%	5 1%	1 0%				2 0%	
None	511 85%	382 64%	442 74%	592 99%	587 98%	577 96%	586 98%	579 97%	592 99%	594 99%	597 100%	597 100%
TOTALS	620 103%	657 110%	626 104%	600 100%	600 100%	604 101%	602 100%	602 100%	600 100%	601 100%	600 100%	600 100%

TABLE 34 PANEL *BY* Q9.HOUSEHOLD GOODS PURCHASED FROM CENTRES IN PAST 12 MONTHS

	Total	REGION															
		2500-Wollongong	2502-Warrawong	2505-Port Kembla	2506-Berkeley	2515-Thirroul	2516-Bulli	2517-Woonoona	2518-Corrimal	2519-Fairy Meadow	2525-Figtree	2526-Unanderra	2527-Albion Park	2528-Warilla	2529-Shell -harbour	2530-Dapto	2533-Kiama / Bombo
RESPONDENTS	600	109	39	17	17	7	18	36	58	52	32	15	31	67	57	26	19
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Shellharbour																	
Electrical goods	66	3	5	2	3		1			1			7	23	17	2	2
	11%	3%	13%	12%	18%		6%			2%			23%	34%	30%	8%	11%
Whitegoods	19		1										1	4	8	2	3
	3%		3%										3%	6%	14%	8%	16%
Furniture	19	2							1				2	7	7		
	3%	2%							2%				6%	10%	12%		
Floor coverings	5													3	1	1	
	1%													4%	2%	4%	
None	511	105	33	15	14	7	17	36	57	51	32	15	23	38	31	23	14
	85%	96%	85%	88%	82%	100%	94%	100%	98%	98%	100%	100%	74%	57%	54%	88%	74%
TOTALS	620	110	39	17	17	7	18	36	58	52	32	15	33	75	64	28	19
	103%	101%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	106%	112%	112%	108%	100%

	Total	REGION															
		2500-Wollongong	2502-Warrawong	2505-Port Kembla	2506-Berkeley	2515-Thirroul	2516-Bulli	2517-Woonoona	2518-Corrimal	2519-Fairy Meadow	2525-Figtree	2526-Unanderra	2527-Albion Park	2528-Warilla	2529-Shell -harbour	2530-Dapto	2533-Kiama / Bombo
RESPONDENTS	600 100%	109 100%	39 100%	17 100%	17 100%	7 100%	18 100%	36 100%	58 100%	52 100%	32 100%	15 100%	31 100%	67 100%	57 100%	26 100%	19 100%
Warrawong																	
Electrical goods	113 19%	14 13%	14 36%	7 41%	8 47%	1 14%	3 17%	9 25%	4 7%	8 15%	4 13%	5 33%	5 16%	11 16%	10 18%	6 23%	4 21%
Furniture	94 16%	15 14%	4 10%	5 29%	1 6%	1 14%	2 11%	6 17%	13 22%	9 17%	3 9%	1 7%	5 16%	7 10%	13 23%	4 15%	5 26%
Whitegoods	52 9%	10 9%	3 8%	3 18%		1 14%	1 6%	3 8%	4 7%	8 15%	2 6%	1 7%	2 6%	4 6%	6 11%	2 8%	2 11%
Floor coverings	16 3%	1 1%			1 6%	2 29%		1 3%	4 7%	2 4%	1 3%			1 1%	3 5%		
None	382 64%	76 70%	21 54%	7 41%	7 41%	3 43%	12 67%	19 53%	40 69%	31 60%	23 72%	10 67%	19 61%	49 73%	38 67%	17 65%	10 53%
TOTALS	657 110%	116 106%	42 108%	22 129%	17 100%	8 114%	18 100%	38 106%	65 112%	58 112%	33 103%	17 113%	31 100%	72 107%	70 123%	29 112%	21 111%

	Total	REGION															
		2500-Wollongong	2502-Warrawong	2505-Port Kembla	2506-Berkeley	2515-Thirroul	2516-Bulli	2517-Woonoona	2518-Corrimal	2519-Fairy Meadow	2525-Figtree	2526-Unanderra	2527-Albion Park	2528-Warilla	2529-Shell-harbour	2530-Dapto	2533-Kiama / Bombo
RESPONDENTS	600	109	39	17	17	7	18	36	58	52	32	15	31	67	57	26	19
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Wollongong CBD																	
Electrical goods	93	31	3	2	3	2	2	5	9	10	7	3	5	7	2	1	1
	16%	28%	8%	12%	18%	29%	11%	14%	16%	19%	22%	20%	16%	10%	4%	4%	5%
Whitegoods	51	10			2		3	3	12	4	3	3	1	4	1	4	1
	9%	9%			12%		17%	8%	21%	8%	9%	20%	3%	6%	2%	15%	5%
Furniture	26	8	1		1	1	2	2	2	2			2	1	3		1
	4%	7%	3%		6%	14%	11%	6%	3%	4%			6%	1%	5%		5%
Floor coverings	14	3	1		1		2		3	2			1	1			
	2%	3%	3%		6%		11%		5%	4%			3%	1%			
None	442	65	34	15	12	4	13	27	37	34	22	10	23	57	52	21	16
	74%	60%	87%	88%	71%	57%	72%	75%	64%	65%	69%	67%	74%	85%	91%	81%	84%
TOTALS	626	117	39	17	19	7	22	37	63	52	32	16	32	70	58	26	19
	104%	107%	100%	100%	112%	100%	122%	103%	109%	100%	100%	107%	103%	104%	102%	100%	100%

	Total	REGION															
		2500-Wollongong	2502-Warrawong	2505-Port Kembla	2506-Berkeley	2515-Thirroul	2516-Bulli	2517-Woonoona	2518-Corrimal	2519-Fairy Meadow	2525-Figtree	2526-Unanderra	2527-Albion Park	2528-Warilla	2529-Shell -harbour	2530-Dapto	2533-Kiama / Bombo
RESPONDENTS	600 100%	109 100%	39 100%	17 100%	17 100%	7 100%	18 100%	36 100%	58 100%	52 100%	32 100%	15 100%	31 100%	67 100%	57 100%	26 100%	19 100%
Taren Point																	
Electrical goods	3 1%		1 3%						1 2%		1 3%						
Furniture	3 1%								1 2%		2 6%						
Floor coverings	2 0%					1 14%							1 3%				
None	592 99%	109 100%	38 97%	17 100%	17 100%	6 86%	18 100%	36 100%	56 97%	52 100%	29 91%	15 100%	30 97%	67 100%	57 100%	26 100%	19 100%
TOTALS	600 100%	109 100%	39 100%	17 100%	17 100%	7 100%	18 100%	36 100%	58 100%	52 100%	32 100%	15 100%	31 100%	67 100%	57 100%	26 100%	19 100%

TABLE 38 PANEL *BY* Q9.HOUSEHOLD GOODS PURCHASED FROM CENTRES IN PAST 12 MONTHS

		REGION															
	Total	2500-Wollongong	2502-Warrawong	2505-Port Kembla	2506-Berkeley	2515-Thirroul	2516-Bulli	2517-Woonoona	2518-Corrimal	2519-Fairy Meadow	2525-Figtree	2526-Unanderra	2527-Albion Park	2528-Warilla	2529-Shell -harbour	2530-Dapto	2533-Kiama / Bombo
RESPONDENTS	600 100%	109 100%	39 100%	17 100%	17 100%	7 100%	18 100%	36 100%	58 100%	52 100%	32 100%	15 100%	31 100%	67 100%	57 100%	26 100%	19 100%
Moore Park																	
Furniture	8 1%	2 2%	1 3%					3 8%	1 2%		1 3%						
Whitegoods	2 0%	1 1%									1 3%						
Electrical goods	2 0%	1 1%							1 2%								
Floor coverings	1 0%														1 2%		
None	587 98%	105 96%	38 97%	17 100%	17 100%	7 100%	18 100%	33 92%	56 97%	52 100%	30 94%	15 100%	31 100%	67 100%	56 98%	26 100%	19 100%
TOTALS	600 100%	109 100%	39 100%	17 100%	17 100%	7 100%	18 100%	36 100%	58 100%	52 100%	32 100%	15 100%	31 100%	67 100%	57 100%	26 100%	19 100%

	Total	REGION															
		2500-Wollongong	2502-Warrawong	2505-Port Kembla	2506-Berkeley	2515-Thirroul	2516-Bulli	2517-Woonoona	2518-Corrimal	2519-Fairy Meadow	2525-Figtree	2526-Unanderra	2527-Albion Park	2528-Warilla	2529-Shell -harbour	2530-Dapto	2533-Kiama / Bombo
RESPONDENTS	600	109	39	17	17	7	18	36	58	52	32	15	31	67	57	26	19
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Other Centres																	
Electrical goods	11		1				1	1			2		2		4		
	2%		3%				6%	3%			6%		6%		7%		
Furniture	8	2							1					1	1	3	
	1%	2%							2%					1%	2%	12%	
Floor coverings	5								1		1				3		
	1%								2%		3%				5%		
Whitegoods	3													2	1		
	1%													3%	2%		
None	577	107	38	17	17	7	17	35	57	52	29	15	29	65	50	23	19
	96%	98%	97%	100%	100%	100%	94%	97%	98%	100%	91%	100%	94%	97%	88%	88%	100%
TOTALS	604	109	39	17	17	7	18	36	59	52	32	15	31	68	59	26	19
	101%	100%	100%	100%	100%	100%	100%	100%	102%	100%	100%	100%	100%	101%	104%	100%	100%

	Total	REGION															
		2500- Wollongong	2502- Warrawong	2505- Port Kembla	2506- Berkeley	2515- Thirroul	2516- Bulli	2517- Woonoona	2518- Corrimal	2519- Fairy Meadow	2525- Figtree	2526- Unanderra	2527- Albion Park	2528- Warilla	2529- Shell -harbour	2530- Dapto	2533- Kiama / Bombo
RESPONDENTS	600	109	39	17	17	7	18	36	58	52	32	15	31	67	57	26	19
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Warilla/ Warilla Grove																	
Electrical goods	11		2											8	1		
	2%		5%											12%	2%		
Whitegoods	4		3											1			
	1%		8%											1%			
Floor coverings	1																1
	0%																5%
None	586	109	35	17	17	7	18	36	58	52	32	15	31	59	56	26	18
	98%	100%	90%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	88%	98%	100%	95%
TOTALS	602	109	40	17	17	7	18	36	58	52	32	15	31	68	57	26	19
	100%	100%	103%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	101%	100%	100%	100%

TABLE 41 PANEL *BY* Q9.HOUSEHOLD GOODS PURCHASED FROM CENTRES IN PAST 12 MONTHS

		REGION															
	Total	2500-Wollongong	2502-Warrawong	2505-Port Kembla	2506-Berkeley	2515-Thirroul	2516-Bulli	2517-Woonoona	2518-Corrimal	2519-Fairy Meadow	2525-Figtree	2526-Unanderra	2527-Albion Park	2528-Warilla	2529-Shell -harbour	2530-Dapto	2533-Kiama / Bombo
RESPONDENTS	600 100%	109 100%	39 100%	17 100%	17 100%	7 100%	18 100%	36 100%	58 100%	52 100%	32 100%	15 100%	31 100%	67 100%	57 100%	26 100%	19 100%
Corrimal																	
Electrical goods	9 2%						1 6%		6 10%	2 4%							
Whitegoods	7 1%						2 11%	1 3%	4 7%								
Furniture	7 1%	3 3%							1 2%	1 2%						2 8%	
None	579 97%	106 97%	39 100%	17 100%	17 100%	7 100%	15 83%	35 97%	49 84%	49 94%	32 100%	15 100%	31 100%	67 100%	57 100%	24 92%	19 100%
TOTALS	602 100%	109 100%	39 100%	17 100%	17 100%	7 100%	18 100%	36 100%	60 103%	52 100%	32 100%	15 100%	31 100%	67 100%	57 100%	26 100%	19 100%

	Total	REGION															
		2500- Wollongong	2502- Warrawong	2505- Port Kembla	2506- Berkeley	2515- Thirroul	2516- Bulli	2517- Woonoona	2518- Corrimal	2519- Fairy Meadow	2525- Figtree	2526- Unanderra	2527- Albion Park	2528- Warilla	2529- Shell -harbour	2530- Dapto	2533- Kiama / Bombo
RESPONDENTS	600	109	39	17	17	7	18	36	58	52	32	15	31	67	57	26	19
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Figtree																	
Electrical goods	7	3						1	1	1					1		
	1%	3%						3%	2%	2%					2%		
Furniture	1										1						
	0%										3%						
None	592	106	39	17	17	7	18	35	57	51	31	15	31	67	56	26	19
	99%	97%	100%	100%	100%	100%	100%	97%	98%	98%	97%	100%	100%	100%	98%	100%	100%
TOTALS	600	109	39	17	17	7	18	36	58	52	32	15	31	67	57	26	19
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

	Total	REGION															
		2500- Wollongong	2502- Warrawong	2505- Port Kembla	2506- Berkeley	2515- Thirroul	2516- Bulli	2517- Woonoona	2518- Corrimal	2519- Fairy Meadow	2525- Figtree	2526- Unanderra	2527- Albion Park	2528- Warilla	2529- Shell -harbour	2530- Dapto	2533- Kiama / Bombo
RESPONDENTS	600 100%	109 100%	39 100%	17 100%	17 100%	7 100%	18 100%	36 100%	58 100%	52 100%	32 100%	15 100%	31 100%	67 100%	57 100%	26 100%	19 100%
Miranda																	
Electrical goods	6 1%	2 2%	2 5%	1 6%		1 14%											
Whitegoods	1 0%			1 6%													
None	594 99%	107 98%	37 95%	16 94%	17 100%	6 86%	18 100%	36 100%	58 100%	52 100%	32 100%	15 100%	31 100%	67 100%	57 100%	26 100%	19 100%
TOTALS	601 100%	109 100%	39 100%	18 106%	17 100%	7 100%	18 100%	36 100%	58 100%	52 100%	32 100%	15 100%	31 100%	67 100%	57 100%	26 100%	19 100%

	Total	REGION															
		2500-Wollongong	2502-Warrawong	2505-Port Kembla	2506-Berkeley	2515-Thirroul	2516-Bulli	2517-Woonoona	2518-Corrimal	2519-Fairy Meadow	2525-Figtree	2526-Unanderra	2527-Albion Park	2528-Warilla	2529-Shell -harbour	2530-Dapto	2533-Kiama / Bombo
RESPONDENTS	600 100%	109 100%	39 100%	17 100%	17 100%	7 100%	18 100%	36 100%	58 100%	52 100%	32 100%	15 100%	31 100%	67 100%	57 100%	26 100%	19 100%
Fairy Meadow																	
Floor coverings	2 0%	1 1%														1 4%	
Electrical goods	1 0%							1 3%									
None	597 100%	108 99%	39 100%	17 100%	17 100%	7 100%	18 100%	35 97%	58 100%	52 100%	32 100%	15 100%	31 100%	67 100%	57 100%	25 96%	19 100%
TOTALS	600 100%	109 100%	39 100%	17 100%	17 100%	7 100%	18 100%	36 100%	58 100%	52 100%	32 100%	15 100%	31 100%	67 100%	57 100%	26 100%	19 100%

	Total	REGION															
		2500- Wollongong	2502- Warrawong	2505- Port Kembla	2506- Berkeley	2515- Thirroul	2516- Bulli	2517- Woonoona	2518- Corrimal	2519- Fairy Meadow	2525- Figtree	2526- Unanderra	2527- Albion Park	2528- Warilla	2529- Shell -harbour	2530- Dapto	2533- Kiama / Bombo
RESPONDENTS	600	109	39	17	17	7	18	36	58	52	32	15	31	67	57	26	19
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Kiama																	
Whitegoods	2										1						1
	0%										3%						5%
Electrical goods	1																1
	0%																5%
None	597	109	39	17	17	7	18	36	58	52	31	15	31	67	57	26	17
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	97%	100%	100%	100%	100%	100%	89%
TOTALS	600	109	39	17	17	7	18	36	58	52	32	15	31	67	57	26	19
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

TABLE 46 PANEL *BY* Q10.AGE GROUP

	Total	REGION															
		2500-Wollongong	2502-Warrawong	2505-Port Kembla	2506-Berkeley	2515-Thirroul	2516-Bulli	2517-Woonoona	2518-Corrimal	2519-Fairy Meadow	2525-Figtree	2526-Unanderra	2527-Albion Park	2528-Warilla	2529-Shell-harbour	2530-Dapto	2533-Kiama / Bombo
RESPONDENTS	600	109	39	17	17	7	18	36	58	52	32	15	31	67	57	26	19
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Q10.AGE GROUP																	
18-29 years	84	24	6	4			2	2	12	6	2	1	3	6	10	4	2
	14%	22%	15%	24%			11%	6%	21%	12%	6%	7%	10%	9%	18%	15%	11%
30-39 years	116	20	8	4	5		3	7	10	11	5	7	7	11	13	3	2
	19%	18%	21%	24%	29%		17%	19%	17%	21%	16%	47%	23%	16%	23%	12%	11%
40-49 years	116	15	6	1	4	1	5	6	15	9	6	2	11	19	7	7	2
	19%	14%	15%	6%	24%	14%	28%	17%	26%	17%	19%	13%	35%	28%	12%	27%	11%
50-59 years	127	20	8	5	3	3	5	8	8	10	8	2	7	17	12	7	4
	21%	18%	21%	29%	18%	43%	28%	22%	14%	19%	25%	13%	23%	25%	21%	27%	21%
60+ years	156	30	11	3	5	3	3	13	13	16	11	3	2	14	15	5	9
	26%	28%	28%	18%	29%	43%	17%	36%	22%	31%	34%	20%	6%	21%	26%	19%	47%
Refused	1												1				
	0%												3%				

	Total	REGION: 2500- Wollongong	2502- Warrawong	2505- Port Kembla	2506- Berkeley	2515- Thirroul	2516- Bulli	2517- Woonoona	2518- Corrimal	2519- Fairy Meadow	2525- Figtree	2526- Unanderra	2527- Albion Park	2528- Warilla	2529- Shell -harbour	2530- Dapto	2533- Kiama / Bombo
RESPONDENTS	600 100%	109 100%	39 100%	17 100%	17 100%	7 100%	18 100%	36 100%	58 100%	52 100%	32 100%	15 100%	31 100%	67 100%	57 100%	26 100%	19 100%
Q11.HOUSEHOLD TYPE																	
Couple, with children/dependents	185 31%	21 19%	13 33%	4 24%	9 53%		5 28%	8 22%	12 21%	17 33%	14 44%	8 53%	16 52%	23 34%	21 37%	7 27%	7 37%
Couple, with non-dependent people	76 13%	11 10%	5 13%	1 6%		1 14%	3 17%	6 17%	3 5%	9 17%	5 16%	1 7%	6 19%	10 15%	6 11%	8 31%	1 5%
Couple only	129 22%	31 28%	7 18%	5 29%	3 18%	2 29%	3 17%	12 33%	10 17%	7 13%	5 16%	4 27%	4 13%	12 18%	15 26%	6 23%	3 16%
Single Parent with children/dependents	49 8%	7 6%	5 13%	2 12%		1 14%	1 6%	4 11%	7 12%	6 12%	1 3%	1 7%	1 3%	5 7%	5 9%	2 8%	1 5%
Single person	135 23%	32 29%	7 18%	4 24%	5 29%	2 29%	3 17%	6 17%	22 38%	11 21%	7 22%		4 13%	15 22%	10 18%	2 8%	5 26%
Group household	23 4%	7 6%	2 5%	1 6%		1 14%	2 11%		4 7%	1 2%		1 7%		1 1%		1 4%	2 11%
Other	2 0%						1 6%							1 1%			
Refused	1 0%									1 2%							