

Population, employment and land use findings

Population profile

The Central Coast Regional Plan identifies the need for 41,500 dwellings to accommodate the projected population growth of 75,000 anticipated to reside in the Central Coast by 2036. An average of approximately 2,075 dwellings per year.

Four (4) per cent of the current population of the Central Coast live in the Tuggerah – Wyong Economic Corridor, with a recorded population of 13,200 in 2016. The population of the Corridor has grown every year since 2001, with a population increase of 20.1 per cent between 2001-2017. This growth has generally been greater than in the Central Coast and the population in the Corridor is anticipated to reach 17,350 by 2036.

The number of dwellings is forecast to increase across the Corridor, with growth rates forecast to exceed those in the Central Coast and Sydney Greater Metropolitan Area (Sydney GMA). Based on past development trends, the largest forecast population increases are in Wyong and Tuggerah, with smaller increases in Tuggerah Straight (Mardi) and East Wyong. However, there is opportunity to rethink the most appropriate location for residential development to contribute to the desired future role of each precinct.

While household size is expected to decrease over the next thirty years as the population ages, forecast population growth rates in the Corridor exceed historical growth rates. This will require changes to how the Corridor is planned.

Employment profile

The Wyong – Tuggerah Economic Corridor contains 13 per cent of the Central Coast’s jobs but only four (4) per cent of the LGA’s resident workers. The Corridor has a high proportion of jobs within the administration and retail sectors reflecting the regional retail role provided by Tuggerah Westfield and the sub-regional administrative role of Wyong. Employment profiles show the following specialisations for different parts of the Corridor:

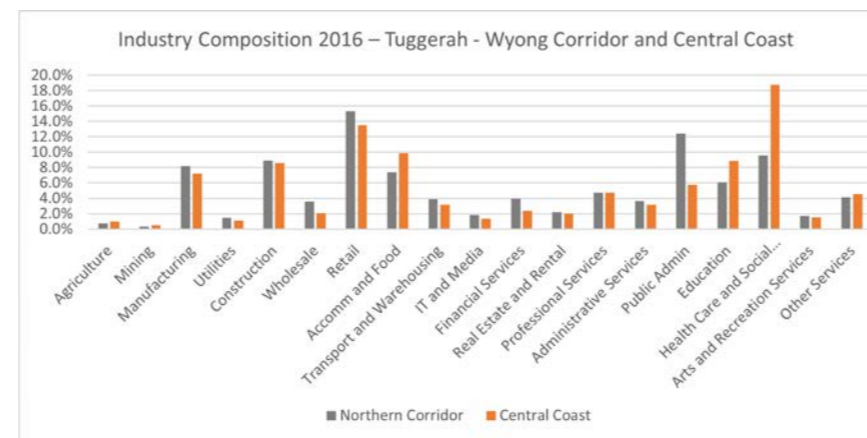
- Wyong: Local administration and civic functions, with the Centre having a sub-regional administrative role
- Westfield Tuggerah: A regional retail role
- Tuggerah Business Park: Professional and administrative services
- Tuggerah Straight and North Wyong: Manufacturing and urban services

Compared to the Sydney region, the Corridor as a whole has employment specialisations in retail, hospitality, public administration, manufacturing and construction. However, hospitality and accommodation jobs are more concentrated in other parts of the Central Coast LGA. Comparisons between the industry compositions of the Corridor and the Central Coast are shown in Figure 1.

Table 1. Local jobs in Tuggerah – Wyong Corridor and Central Coast

	Gross Regional Product	Local Jobs (2016 census)	Jobs Change % (2011-2016)	Employed Residents (2016 census)	Largest industry (jobs)
Central Coast	\$13.8 billion	104,720	7.2%	139,595	Health care & social assistance
Tuggerah - Wyong Corridor		13,100	5.6%	5,081	Retail Trade

Figure 1. Industry composition Tuggerah – Wyong Corridor and Central Coast



After retail and public administration, manufacturing and construction are the largest industries in the Corridor. Health care is fifth largest industry in the Corridor, but constitutes a much smaller proportion of employment in the Corridor than in the Central Coast more broadly. While specialist health services are located in Wyong and Tuggerah, major healthcare facilities such as the Wyong Hospital are located outside the Corridor. Given Wyong’s civic and administrative role, an aging population and the high proportion of older people in the Central Coast, there is the potential for growth in smaller health services.

Employment in the Corridor grew between 2011-2016, but slightly more slowly than in the Central Coast LGA as a whole (5.6% vs 7.2%). Employment in manufacturing, wholesale and retail industries declined between 2011-2016, while most other sectors grew, with large increases in construction, health care and transport and warehousing. Employment grew strongly in Tuggerah (2% per year) and North Wyong (2.6% per year) between 2011-2016, but shrank in Wyong (-1.1% per year).

The Corridor has relatively high proportions of jobs for administrative and sales workers, reflecting its function as a regional centre. There are relatively few jobs for professionals or community and personal service workers. The number of people employed in most occupation categories increased from 2011 to 2016, except for sales workers and labourers. The largest increases were in community and personal service workers and clerical and administrative workers, with more modest increases in managers and professionals. Employment by occupation and change in employment occupation from 2011 – 2016 is shown in Figures 2 - 3.

Figure 2. 2016 Employment by occupation

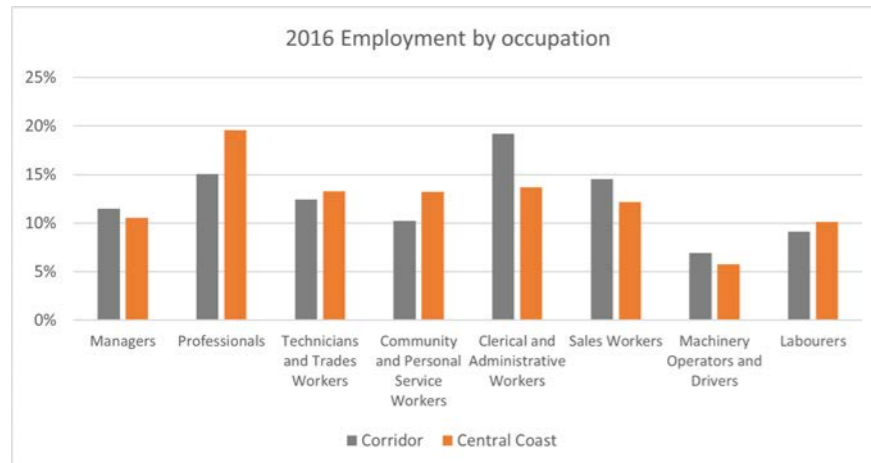
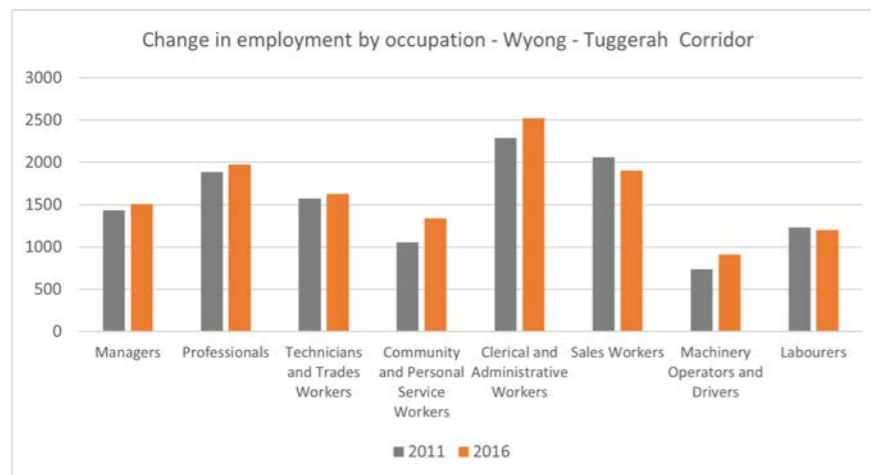


Figure 3. Change in employment by occupation



Employment projections

Between 2016 and 2036, the number of jobs located within the Corridor is projected to increase by approximately 3,400 to 16,500. This is an increase of 26% on current employment levels in the Corridor.

The industry projected to experience the highest growth is retail trade, with approximately 575 additional jobs expected from 2016 – 2036. This is followed by increases in Public Administration (+570 jobs), health care and social assistance (+520 jobs), professional services (+360 jobs), education and training (+350 jobs) and construction (+330 jobs).

Table 2. Job Forecast and Change 2016 - 2036

	2016 Jobs Forecast	Change 2016 - 2036 (% change)
Economic Corridor	13,100	3,400 (26%)
Central Coast	104,732	30,000 (29%)
Greater Sydney GMA	2,209,294	827,800 (37%)

Employment is forecast to increase in all precincts of the Corridor. Large forecast increases in Wyong Town Centre reflect its high numbers of jobs in professional services and public administration (which are growing sectors on a metropolitan basis). It will be a challenge to facilitate this growth in Wyong Town Centre given its recent decline in employment, and some of these new jobs may relocate to North Wyong or the Tuggerah Business Park given the demand for these precincts. Large forecast increases in Tuggerah, as shown in Table 3, are due to the growing regional retail role of Westfield Tuggerah.

Table 3. Employment change and highest industry growth per Precinct 2016 - 2036

	Tuggerah	Wyong	North Wyong
Employment change forecast 2016-2036	+2,100	+1,000	+300
Highest growth industry	Retail	Public administration	Construction
	+500	+350	+75

Population, employment and land use findings

Employment Land Availability and Supply

Forecasts predict employment land supply in the Corridor to be sufficient until after 2036, but these are based on metropolitan wide industrial land trends and do not reflect the healthy state of the existing industrial precincts in the Corridor.

Extrapolating recent land take-up shows land supply to be sufficient for over 20 years. If take-up rates increase in the future or some land in the Corridor is not attractive for industrial development, supply will lessen more quickly. However, there are other large industrial precincts nearby such as in Warnervale, which have shown that overall industrial land supply in the Central Coast is sufficient. For these reasons, rezoning additional industrial land is not likely to be required in the next 20 years. It will be more important in the Corridor that the health and specialisation of the industrial precincts continues to be developed.

Currently the Central Coast has sufficient supply of industrial land. However, some of the available employment land in the Corridor is not in attractive locations for development. In particular, the land in East Wyong is flood affected and has low levels of accessibility to heavy vehicles. Much of the recent growth in professional services and public administration has been occurring in North Wyong and the Tuggerah Business Park. There is capacity for this to continue in Wyong Town Centre.

There is also substantial capacity for additional commercial and retail development in Wyong and Tuggerah. Projections indicate a need for approximately an additional 30,000sqm of retail floorspace in these locations and around 97,000sqm of other floor space. This could be accommodated within the existing planning controls on the Westfield Tuggerah site which currently contains around 87,000sqm of floorspace, and in Wyong Town Centre, which has a floor-space-ratio control of up to 3:1 and has approximately 86,000sqm of residual development capacity under the current planning controls (See section Capacity under current controls for more detail).

A challenge in securing this increase in employment will be creating demand for it. This is particularly relevant for Wyong Town Centre, given that employment in Wyong Town Centre contracted between 2011-2016 and that recent growth in professional services has been concentrated in North Wyong and the Tuggerah Business Park. Economic development pathways which seek to increase demand in different precincts, are outlined in the following section in this Strategy.

Table 4. Industrial land demand estimation by recent take-up rates

Average annual employment land up-take 2011-2017	1.8 ha
Available land	69.7 ha
Years of supply	38.7 years

Table 5. Industrial land demand estimation by employment forecast

	Tuggerah employment precincts	North Wyong	Total
Forecast employment growth 2016-2036 in employment Precincts	1,200	125	3,510
Approx. land demand 2016-2036 in employment precincts	4.1 ha	0.2 ha	4.3 ha
Undeveloped land (Jan 2017) in employment precincts	27.4 ha	42.3 ha	69.7 ha
Forecast average annual employment growth rate in employment precincts	1.1%	0.8%	
Average annual employment growth rate 2011-2016 in employment precincts	4.0%	2.8%	

Table 5. Additional dwelling and job forecasts 2016 - 2036

Precinct	Additional dwellings (2016-2036)	Additional Jobs (2016-2036)
North Wyong & Watanobbi	75	300
Wyong & East Wyong	1,150	1,000
Tuggerah	750	2,100
Total	1,975	3,400

Competitive strengths of the Corridor

Employment grew strongly in the Corridor's industrial and employment precincts between 2011-2016. Continued demand for these precincts is indicated by a strong development pipeline and the completion of the Central Coast Mariner's development. Competitive advantages of the Corridor compared to other areas which contribute to this growth, include:

- Proximity to major transport infrastructure including the Pacific Motorway and Railway Line, which provide good accessibility from Sydney and Newcastle;
- Central location in the Central Coast, providing access to the local labour market;
- Developable employment land with suitable lot sizes and few constraints;
- Amenity for businesses through accessibility to retail and civic functions;
- Strong active recreation opportunities/facilities within the Corridor;
- Existing networks of local businesses with integration into the Hunter and Greater Sydney regions; and
- Land prices, which are relatively low compared to Sydney, driving relocation of some businesses.

In addition to these characteristics, continued employment growth is likely to be tied to metropolitan and national economic trends including migration rates to Australia and factors impacting the competitiveness of local manufacturing. Local factors which will drive future economic growth in the Corridor include:

- Continued nearby population growth, which increases demand for retail, recreation and urban services;
- Anchor tenants such as the Central Coast Mariners development; and
- The continued presence of available and serviced land.

Future Economic Development Pathways

Ensuring that the local economy in the Corridor continues to grow will require competitive advantages to be maximised and local economic drivers to be maintained with an understanding of the employment profiles of different centres and precincts.

Employment contracted recently in Wyong Town Centre but increased strongly in Tuggerah Business Park, the Tuggerah Straight and North Wyong. Commercial office development has located in Tuggerah Business Park, and to a lesser degree North Wyong, rather than in Wyong Town Centre. This is not likely to change in the short-medium term given the excellent road access of Tuggerah Business Park, its large developable lots and the economic momentum created by local infrastructure investment and the Central Coast Mariners Development.

In the longer term, office-based development in Wyong could be driven by:

- Increased vibrancy and amenity of the centre, making it a great place to work, and
- Improved access through the train network to Sydney and Newcastle, without access being improved in Tuggerah.

In the short-medium term, Council should focus on building the competitive strengths of Wyong, Tuggerah and the industrial precincts:

- Wyong should consolidate its role as the civic, cultural and recreational heart of the subregion and a vibrant, well connected place with high amenity and a pleasant public domain. If this occurs, increased business development may occur in the longer term.
- Tuggerah should continue its role as the major retail centre in the area, although any expansion of retail in the Westfield should not threaten the viability of the Wyong Town Centre.
- Tuggerah Business Park should consolidate its role as a mixed enterprise precinct with specialisations in back-office functions and professional services, as well as containing some other industrial functions. Improved access to the Tuggerah Station and Wyong will ensure that Wyong benefits from proximity to this precinct.

- Other industrial precincts have grown in employment recently and appear to be operating well. These areas are in demand and do not require Council intervention in terms of re-zoning (discussed further in the following section). However, the addition of anchor tenants could increase demand and generate economic development. Initiatives which seek to increase industrial precinct functionality and worker amenity are outlined in this Strategy.

There is an emerging market for residential apartments on key sites.

The feasibility for residential apartment projects in the Tuggerah to Wyong Economic Corridor is challenging for a number of reasons – the market is limited because the cost of single dwellings is affordable; apartment sales have not quite caught up to construction costs and high parking rates/ demand for parking makes development extremely expensive. Our testing reveals that an apartment development project may be feasible if the circumstances are right. Our strategy should be to promote the circumstances where we can achieve these outcomes.

The Westfield Tuggerah Gateway Site presents a key opportunity for the development of residential apartments in the future. The NSW Government has announced that it will be working with the landowners of this site to consider options for its development as an expanded shopping centre and for residential, transport, leisure, health and education uses.

Capacity under current controls

Future development potential under current controls

High level capacity testing for land located within the Corridor identified future development potential under the current planning controls. The exercise assessed the residual uplift capacity against future 2036 employment and dwelling projections to ascertain if there is enough appropriately zoned land to accommodate anticipated growth.

Methodology and applied assumptions

Step 1: Land categorisation: To understand future capacity and uplift potential, land within the Corridor was categorised into one of the following land types.

- **Category 1:** Environmentally constrained land and existing public open space – no significant additional development potential
- **Category 2:** At / near capacity under the current controls and not identified for renewal.
- **Category 3:** Some additional capacity under the current controls
- **Category 4:** Renewal area – Wyong
- **Category 5:** Renewal area – Tuggerah

The categorisation of land, as shown in **Figure 4**, was informed by Corridor wide investigations undertaken in Stage 1 (Background Analysis Phase), information obtained during Council workshops, assessment of vacant sites and DA approvals and review of the Department of Planning and Environment's (DPE) Employment Land Development Monitor (ELDM) data.

Step 2: FSR application to land categories: Areas identified to have future development potential were considered. As such, residual development capacity was only calculated for **Categories 3, 4 & 5**.

The various land use zones included within each land category were multiplied by the relevant Floor Space Ratio (FSR) designated under WLEP 2013 and Wyong DCP 2013 to determine total capacity under the current controls.

For land within these categories that have no prescribed FSR under WLEP 2013 or Wyong DCP 2013, the DPE's standard rates were applied. Some standard rates were lowered to reflect the regional context of the study area (As DPE's rates are applicable to metropolitan areas). The assumed FSRs applied are outlined in **Table 6**.

Table 6. Assumed Floor Space Ratio rates applied

Land Use	FSR	Source/Assumption
Industrial	0.5:1	DPE standard rates and assumptions, adjusted to consider regional context
Commercial	1.0:1	DPE standard rates and assumptions
Bulky Goods	1.0:1	DPE standard rates and assumptions
RU6 Transition	0.2:1	Based on 1,000m ² lot and dwelling of 200m ²
R1 General Residential	0.6:1	FSR considers potential residential typologies available under R1 (dwellings to RFB), as well as existing adjacent residential development (detached dwellings) zoned R1

Step 3: Calculate residual development capacity under current controls: The following steps were undertaken to determine the residual uplift capacity under current WLEP 2013 planning controls (and applicable FSR assumptions) for land within **Categories 3, 4 & 5**:

- **Development capacity under current controls (calculated as a total area in m²):** Development capacity under current controls (in m²) was calculated by multiplying the total area for each land use zone with their corresponding FSR. Land use zones that were subject to multiple FSRs were apportioned accordingly. From the total land areas calculated, 25% of area was deducted to account for existing / future roads, open space and building setbacks.
- **Total existing development (in m²):** The total area of existing development within each land use zone was calculated by:
 - (1) Identifying sites that represented the overall existing development of their land use zone.
 - (2) Measuring the land area, existing building footprint and building height in storeys, to calculate an approximate FSR for each site.
 - (3) Based on these results, calculate the average existing FSR for each land use zone.
 - (4) Apply the average existing FSR to the total area of each land use zone to calculate the total existing development in m².
- **Residual capacity (in m²):** Total existing development (in m²) was subtracted from total development capacity under current controls (in m²). Both employment capacity and residential capacity were considered and calculated separately, with the following assumptions applied to zones that may have employment and / or residential uses.

- **B4 Mixed Use:** 90% residential use and 10% employment use
- **RE2 Private Recreation:** 10% employment use
- **RU6 Transition:** 50% residential use and 50% employment use

Step 4: Residual capacity and correlating job / dwellings yield: The residual development capacity for land use zones within each land category are outlined in **Table 8**. These figures have been used to determine the approximate number of additional dwellings and jobs supported within the residual uplift capacity. Assumptions applied for differing employment generating land and dwellings are outlined in **Table 7**.

Table 7. Average employment rates (m²) & average dwelling assumptions

Employment
19m ² for each Office / Commercial job
35m ² for each Business Park job
60m ² for each Industrial job
Residential
100m ² for each dwelling

Table 8. Residual development capacity (m²) and correlating job / dwelling yield

	Category 3: Some Additional Capacity		Category 4: Wyong				Category 5: Tuggerah			
	Employment Residual Capacity (m ²)	Total Additional Jobs Supported	Residential Residual Capacity (m ²)	Total Additional Dwellings Supported	Employment Residual Capacity (m ²)	Total Additional Jobs Supported	Residential Residual Capacity (m ²)	Total Additional Dwellings Supported	Employment Residual Capacity (m ²)	Total Additional Jobs Supported
R3 Medium Density Residential	-	-	79,056	791	-	-	-	-	-	-
B3 Commercial Core	-	-	-	-	77,509	4,079	-	-	69,175	3,641
B4 Mixed Use	-	-	27,227	272	3,025	159	96,241	962	10,693	563
B6 Enterprise Corridor	423,912	7,065	-	-	-	-	-	-	36,327	605
RE2 Private Recreation	-	-	-	-	5,470	91	-	-	-	-
R1 General Residential	-	-	4,245	42	-	-	17,793	178	-	-
R2 Low Density Residential	-	-	11,097	111	-	-	-	-	-	-
B5 Business Development	87,873	2,511	-	-	-	-	-	-	-	-
IN1 General Industrial	65,603	1,093	-	-	-	-	-	-	-	-
IN2 Light Industrial	17,621	294	-	-	-	-	-	-	-	-
RU6 Transition	-	-	-	-	-	-	20,111	201	20,111	335
B7 Business Park	99,150	2,833	-	-	-	-	-	-	-	-
Total: Jobs / Dwellings		13,796		1,216		4,330		1,341		5,144

Capacity under current controls

Step 5: Residual capacity and future projections: The approximate number of additional dwellings and jobs supported within the residual uplift capacity are outlined in **Table 9** below.

Table 9. Additional dwelling and job capacity under current controls

Corridor Summary	Total additional dwellings supported under current controls	Total additional jobs supported under current controls
	2,558	23,270

Table 10. Additional dwelling and job forecasts 2016 - 2036

Precinct	Additional Dwellings (2016-2036)	Additional Jobs (2016-2036)
North Wyong & Watanobbi	+75	+300
Wyong & East Wyong	+1,150	+1,000
Tuggerah	+750	+2,100
Total	1,975	3,400

Table 11. Residual dwelling and job capacity under current controls

Residual Capacity	Dwellings	Jobs
	583	19,870

Note: Potential for an additional 5,000 dwellings located on the Westfield Tuggerah site (subject to approval) - Refer to action 13.2 (Page 68)

Key outcomes:

- The current controls enable sufficient capacity to support projected additional required dwellings to 2036.
- The current controls enable sufficient capacity for employment in the corridor to 2036.
- The ability for the Corridor to support an additional 19,000+ jobs over the next 20 years (based on current take up rates) highlights the availability of appropriately zoned land for employment projections is not a critical issue for the short term, although does not negate the need to monitor take-up rates to ensure changes do not alter current supply. For these reasons, rezoning additional industrial land is not likely to be required in the next 20 years. It will be more important that the health and specialisation of the industrial precincts continues to be developed, and focus be prioritised to attracting and securing appropriate industries within available land supply.

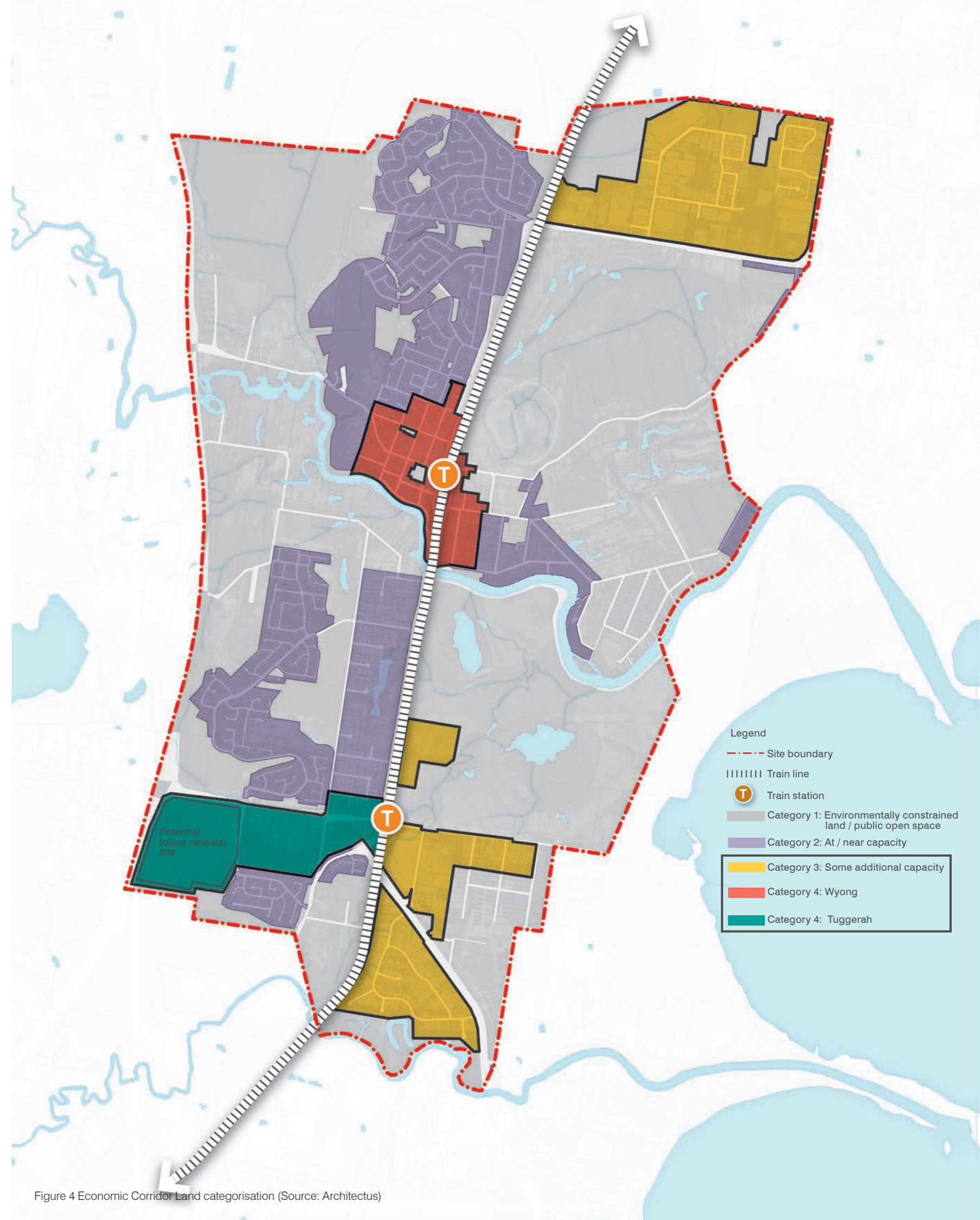


Figure 4 Economic Corridor Land categorisation (Source: Architectus)

Key findings

The Tuggerah - Wyong Economic Corridor has an opportunity to accommodate metropolitan-wide economic trends and promote industrial specialisation

The Tuggerah to Wyong Economic Corridor plays a significant role in providing employment opportunities in the Central Coast District. Job numbers in employment precincts grew strongly between 2011-2016. Between 2016 and 2036, the number of jobs located within the Corridor is projected to increase by approximately 3,400 to 16,500. This is an increase of 26% per cent on current employment levels in the Corridor.

While manufacturing and some other traditional industrial sectors are forecast to decline across Greater Sydney, local industrial specialisation in the Corridor could allow it to buck this trend and retain industrial employment. Further attraction of economic catalysts and anchor institutions would also allow local specialisations and industry connections to be built.

The Corridor includes distinct and important industrial employment areas – Tuggerah, Tuggerah Straight and North Wyong Industrial Precinct. These precincts are successful and employment within them is growing, and so minimal planning intervention is currently needed. Continuing to work with businesses to increase industry specialisation would assist the retention and attract industrial employment to the Corridor.

Planning for 3,400 additional jobs by 2036.

Job projections based on historical trends forecast that the Corridor could contain 16,500 jobs by 2036. The highest growth is projected in retail trade, with approximately 575 additional jobs projected from 2016 – 2036. This is followed by increases in Public Administration (+570 jobs), health care and social assistance (+520 jobs), professional services (+360 jobs), education and training (+355 jobs) and construction (+330 jobs).

There is enough suitably zoned land to accommodate this growth, however some areas are less attractive for development because of constraints or lack of infrastructure. If land take-up rates increase in the future, additional infrastructure may be required to remove development constraints in the East Tuggerah area. These would include improvements to access to the precinct and addressing flood affectation.

Planning for 4,150 additional residents by 2036

Four (4) per cent of the current population of the Central Coast live in the Tuggerah – Wyong Economic Corridor, with a recorded population of 13,200 in 2016. The population of the Corridor has grown every year since 2001, with a population increase of twenty (20) per cent between 2001-2017. This growth rate has generally been greater in recent years than in the Central Coast LGA. The population in the Corridor is forecast to reach 17,350 by 2036. The number of dwellings is also forecast to increase across the Corridor. This growth has generally been greater than in the Central Coast, and growth rates are forecast to exceed those in the Central Coast and Sydney Greater Metropolitan Area (Sydney GMA). Continued population growth will drive local economic development, but will depend upon continued improvements to local amenity and vibrancy.

While household size is expected to decrease over the next thirty years as the population ages, forecast growth rates in the corridor exceed historical growth rates. Based on past development trends, the largest forecast population increases are in Wyong and Tuggerah, with smaller increases in Tuggerah Straight and East Wyong. However, there is an opportunity to rethink the most appropriate locations for residential development to contribute to the future roles of different precincts. Additional development around Wyong could support the consolidation of its role as a vibrant cultural hub for the region. See *Corridor Strategy 2 Areas for future growth* for key areas considered suitable to accommodate future growth.

Wyong as the civic and cultural centre for investment and growth

Wyong is identified as a Strategic Centre in the Central Coast Regional Plan and is the primary centre for culture, civic buildings and administration. It has a great heritage character and permeable street grid with lots of public domain opportunities. The road and station access upgrades will also contribute to the centre's success in the future. Employment declined in Wyong between 2011-2016 and commercial development is favouring other employment precincts over Wyong. Making Wyong a great place to live, work and visit will increase its long-term attractiveness to businesses. It should consolidate its role as a civic, cultural, recreation and services hub of the Region. Increased residential population, new shops and public domain should be concentrated in Wyong to ensure critical mass and the success of local businesses.

Amenity, local character, services and nature will be important for broader economic success.

In order to attract the best businesses to the Corridor, the Corridor's amenity and types of services and restaurants and entertainment available needs to be attractive to high quality workers. The following projects should be the focus of Council's efforts:

- Wyong River as a major recreational asset and weekend destination.
- Active connections, like the proposed Lake Loop cycle way that connects centres to attractions.
- Ensuring that renewal and road upgrades in Wyong Town Centre do not deteriorate the quality of the streets, retain heritage buildings and the fine grain shop fronts that accommodate diverse retail, bars and restaurants.