

Central Coast Council

Commercial Lands Strategy (Draft)

August 2026

Central Coast Council



Acknowledgment of Country

We acknowledge the Traditional Custodians of the land on which we live, work and play.

We pay our respects to Darkinjung country, and Elders past and present.

We recognise the continued connection to these lands and waterways and extend this acknowledgement to the homelands and stories of those who also call this place home.

We recognise our future leaders and the shared responsibility to care for and protect our place and people.

Executive Summary

Overview of the Strategy

This Central Coast Commercial Lands Strategy (the Strategy) aims to address the evolving landscape of commercial lands within the Central Coast Local Government Area (LGA). It establishes a comprehensive and overarching strategic direction that aligns with the service needs of Central Coast retail and commercial businesses. Locally, commercial lands will be further developed and refined over time through targeted implementation actions that are guided by the strategic directions of this strategy. Key components of the Strategy include:

1. ***Existing Conditions Analysis:***
   Conducting a thorough analysis of the current conditions of commercial lands, including demographic trends, market dynamics, and the existing key precincts, to inform strategic decisions and identify opportunities for improvement.
2. ***Vision and Objectives:***
   Establishing a clear vision and set of objectives and desirable outcomes for the future of commercial lands across the region, ensuring they meet the future needs of the community and local businesses and act as a common strategic goal.
3. ***Centres Hierarchy Reaffirmation:***
   Reassessing and reaffirming the hierarchy of commercial centres to allocate their roles and functions within the region.
4. ***Targeted Centres for Improvement:***
   Identifying specific centres that require further improvement to better serve the community and stimulate economic growth.
5. ***Implementation Guidance:***
   Exploring and identifying actions and mechanisms that can support the implementation and further development of the Strategy.

This strategy is designed to be a proactive response, driven by desired outcomes that guide far-horizon planning and development for the Central Coast's commercial lands.

Commercial Lands Hierarchy

A commercial lands hierarchy helps shape the Central Coast's economic landscape by clarifying the roles of commercial areas, managing growth and addressing opportunities and challenges. The hierarchy classifies commercial areas by size, function and significance, providing a structured framework aligned with the vision. It is important because it:

- Guides efficient resource and infrastructure investment, supporting high-growth areas while meeting local centre needs;

- Disperses commercial activity, easing infrastructure pressure and strengthening local economies;
- Improves access to conveniently located goods and services;
- Supports local centres, small businesses and community connections;
- Promotes sustainable land use and suitable mixed-use development; and
- Enables targeted initiatives aligned with long-term planning goals.

The strategy defines the following commercial land hierarchy:

HIERARCHY	ROLE	PLACE
Metropolitan City	Major regional employment, commercial, civic and mixed-use centre.	**1. Gosford**
Regional City	Major sub-regional retail, employment and service centre.	**1. Tuggerah**
Specialised Centre	Focused employment, business, enterprise or industrial activities.	**1. Somersby** **2. Tuggerah Business Park** **3. West Gosford**
Strategic Centre	Key centres providing retail, services, employment, housing and community functions.	**1. Bateau Bay** **2. Erina** **3. Lake Haven** **4. Woy Woy** **5. Wyong**
Major Centre	Important district-level retail, service and community destinations.	**1. East Gosford** **2. Ettalong Beach** **3. Kincumber** **4. Lisarow** **5. Long Jetty** **6. Terrigal** **7. The Entrance** **8. Toukley** **9. Umina Beach**
Local Centre	Local convenience retail and community services meeting day-to-day needs.	• **All other dispersed villages**

Key Outcomes Desired

The Strategy establishes five desired outcomes for commercial lands to the 2040s. These outcomes respond to demographic change, economic conditions and the performance of existing centres, and provide the basis for long-term planning and investment:

1. ***Fostering Connected Accessible Centres:***

   It acknowledges the importance of connectivity, aiming to develop well-linked centres that are easily accessible by various modes of transport, enhancing mobility and convenience

for all users. At the heart of the Strategy's vision is to support the principles of the 15-minute city, so that services and amenities are within close reach of residential areas.

2. ***Great Places and Vibrant Centres:***

   The strategy seeks to create attractive, engaging public spaces that foster community interaction and enhance the overall quality of life for residents and visitors. In the future, Centres will serve as local destinations where people gather, connect, and thrive, reflecting the unique identity of each community.

3. ***Achieving Economic Vitality and Resilience:***

   The strategy promotes diverse commercial activities and supports local businesses, so that the economic base of the Central Coast is strengthened, ensuring long-term sustainability and resilience against global and national economic fluctuations. The strategy seeks to facilitate the development of economically resilient centres that adapt to changing work and retail trends.

4. ***Achieving Green and Adaptable Commercial Spaces:***

   The strategy promotes environmentally sustainable and adaptable commercial development to ensure centres remain resilient to changing environmental, economic and market conditions. It seeks to encourage greener buildings, flexible workspaces, place-based planning and strong public and private investment, supporting commercial areas that can respond to future opportunities and challenges while maintaining their economic vitality and attractiveness.

5. ***Promoting Innovation, Technology, and Creative Industries:***

   New jobs and industries are emerging while some traditional jobs and industries are shrinking. Change is occurring, and the growth of innovative sectors and creative industries are strategic opportunities to capture. The strategy positions the Central Coast as a hub for modern manufacturing, technological advancement and creative expression, which will attract talent and investment to the region. Key to this is encouraging and integrating green infrastructure and active transport, embracing sustainability, inclusive design and emerging technologies to support the region's liveability and climate change resilience.

To realise these outcomes, the Strategy requires long-term investments and dedicated implementation of actions. The Strategy includes guiding points on additional pieces of work that will help give effect to achieving desired outcomes. As such, this Strategy should be interpreted as a guiding document for achieving desired outcomes, and the actions contained within this Strategy are indicative implementation priorities and may be refined over time in response to changing circumstances, funding availability and emerging planning priorities.

Through this Strategy, the Central Coast has an opportunity to develop a dynamic network of commercial centres that contribute to long-term economic success and community well-being of the region.

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1. Introduction

The Central Coast region of New South Wales is experiencing economic transformation, driven in part by demographic shifts, changes in international and national economic conditions, and evolving community and business needs.

In response to this transformation, this strategy documents the status, challenges, and opportunities facing commercial lands planning. It provides a roadmap for what the future of commercial lands across the Central Coast Local Government Area (LGA) could and should look like to proactively manage change.

It is designed to be a far horizon strategy (looking towards the 2040s) that helps to provide guidance for informed decision-making regarding the future of commercial lands and to help manage proposals for development of commercial lands throughout the Central Coast.

This strategy can be used by Councillors, Council staff, stakeholders and commercial land developers to guide strategic land use planning, local economic development strategies, place-making and property development proposals.

The strategy is a non-statutory document, meaning it is not a requirement to be complied with in formal land use rezoning or property development applications. Rather it provides guidance on what common outcomes should be achieved between public and private sector agents and for alignment of purpose between stakeholders, as well as help communities understand the value and importance of commercial lands planning and development.

This strategy should be reviewed and updated once every 5 years.



1.1 Purpose of the Strategy

The Strategy provides a framework for the future planning and management of commercial lands across the Central Coast. It:

- establishes a long-term vision and desired outcomes;
- defines a hierarchy of commercial centres;
- identifies centres requiring targeted improvement;
- responds to changing consumer behaviour, market conditions and population growth; and
- guides future planning controls, investment and implementation priorities.

1.2 Approach

This strategy was developed via a comprehensive methodology and scope that included:

1. ***Existing Conditions Analysis:*** A thorough examination of the current state of commercial lands, assessing their viability, accessibility, and alignment with community needs.

2. ***Commercial Lands Audit:*** An extensive audit was conducted to evaluate existing commercial properties, identifying strengths, weaknesses, and opportunities for enhancement.

3. ***Discussion Paper:*** Serving as a foundational piece, a discussion paper synthesizing findings from the conditional analysis and audit. It outlined the challenges and opportunities for commercial lands in the region in preparing for broader discussions with Council staff and targeted stakeholders.

4. ***Internal and External Engagement:*** Stakeholder engagement was pivotal in shaping the Strategy. This included consultations with industry representatives, government officials, and community members to gather diverse insights and feedback. Engagement activities spanned interviews, focus groups, surveys, and workshops, ensuring a comprehensive understanding of stakeholder perspectives.

This strategy has been informed by technical studies, modelling and advice commissioned by Council from urban planning experts Mecone Group, commercial real estate experts Jones Lang LaSalle (JLL), and retail experts LocationIQ (refer to Appendix 1 for Retail Trade Area Analysis).

Employment lands (formally industrial lands), that facilitate uses such as heavy and light manufacturing, warehousing and bulky goods are generally out of scope for this study. These land uses are dealt with in the **Central Coast Employment Lands Strategy**.

1.3 What are Commercial Lands?

For the purposes of this strategy, commercial lands refer to land uses that are utilised for local businesses providing services and goods directly to consumers. Commercial lands primarily encompass land use zones that facilitate commercial development, offices, and retail including:

- B3 Commercial Core
- B4 Mixed Use
- E1 Local Centre
- E2 Commercial Centre
- MU1 Mixed Use

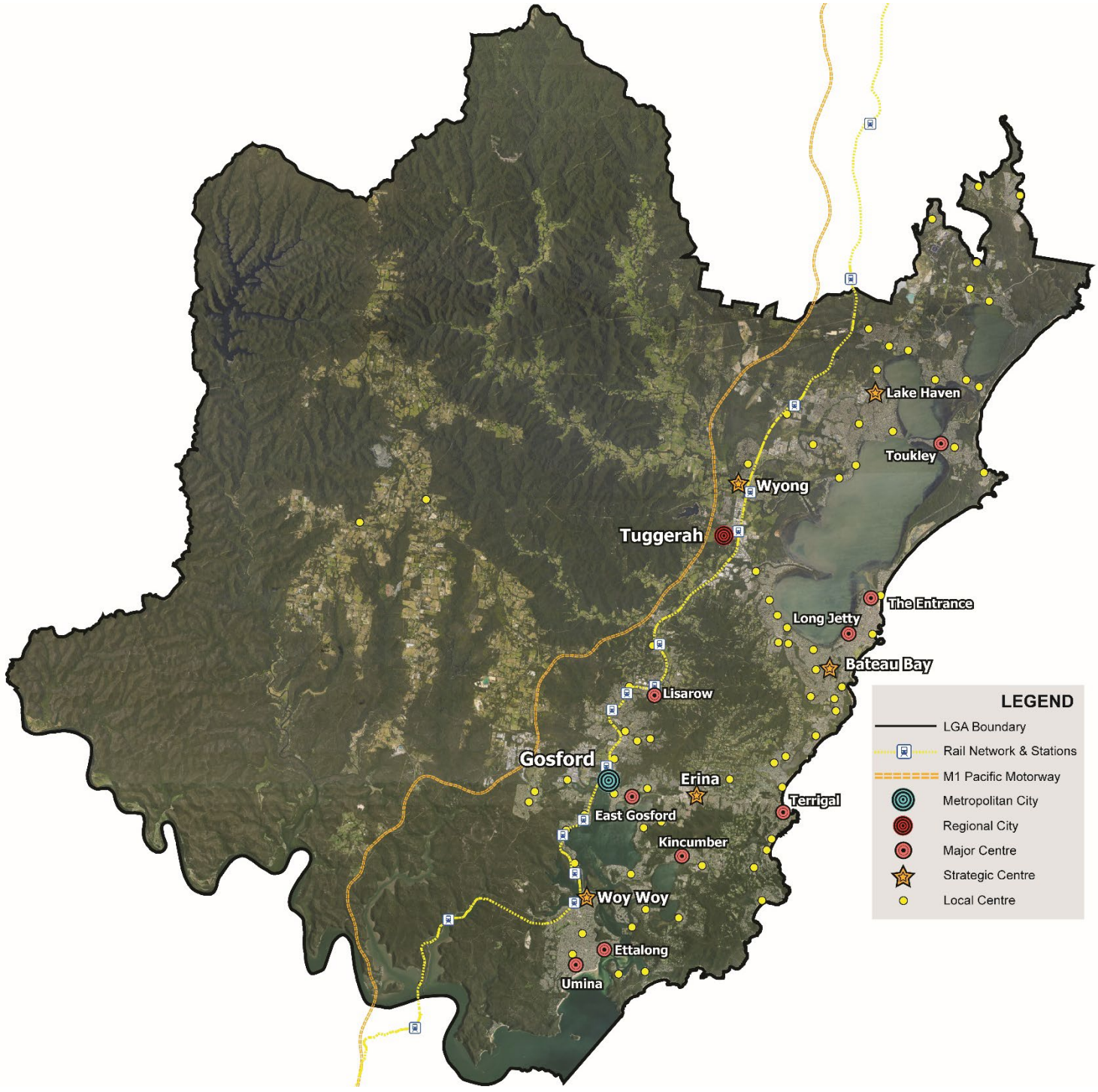


Figure 1: Commercial Lands – Centres Hierarchy (**Current**)

1.4 Importance of Commercial Lands

Our Commercial Centres are the physical places we meet to do business, shop, and build community connectedness. The development of commercial lands in the Central Coast region is of importance for numerous reasons:

1. **Economic Growth:** Commercial lands serve as the backbone of the local economy, providing spaces for businesses to establish and operate, which in turn creates jobs and stimulates economic activity. Commercial centres such as Gosford, Tuggerah, and Erina, play an important role as significant economic hubs, enhancing the region's overall economic resilience and access to jobs, goods and services.

2. **Job Creation:** Commercial enterprises need to be supported with a pipeline of available commercial lands, as this enables new and emerging businesses to establish in a low-cost environment. This is relevant for accommodating population growth and enabling residents to find employment within the Local Government Area (LGA), reducing the need for travel outside the LGA.

3. **Support for Local Businesses:** Commercial lands provide essential spaces for local businesses to thrive. This supports the local economy and fosters a sense of community by encouraging residents to shop and engage with local businesses.

4. **Community Accessibility:** The concept of 15-minute neighbourhoods, as described in the *Central Coast Regional Plan 2041*, emphasises the importance of having commercial services and amenities within easy reach of residential areas. Accessibility to commercial lands ultimately enhances the quality of life for residents and promotes sustainable forms of urban living – providing a venue for civic functions, social interaction, and recreation, and are an ideal location for community facilities and public transport hubs.

5. **Revitalisation of Local Centres:** Investing in mixed-use commercial land can renew assets, boost local appeal, and enhance functionality, leading to more visitors, better public spaces, and a livelier community.

6. **Sustainable Mixed-Use Development:** The integration of commercial lands as part of mixed-use developments requires strategic balance with residential and commercial uses. Getting this balance right supports the *Central Coast Local Strategic Planning Statement* vision for a network of vibrant centres across the Central Coast.

7. **Adaptation to Changing Market Environments:** Markets shift due to evolving trends and unexpected events. Planning and developing commercial land should prioritise flexibility to quickly respond to these changes, ensuring ongoing competitiveness for residents and businesses.

2. Policy and Planning Context

It is important that land use planning is aligned with broader State and Council plans, strategies and policies. This section provides an overview of the broader planning context for the Commercial Lands Strategy.



Overall trends in commercial lands planning:

1. Focus on Mixed-Use Developments
2. Economic Diversification and Growth
3. Transport Integration and Accessibility
4. Sustainability and Environmental Considerations
5. Protection and Optimisation of Employment Lands

2.1 Central Coast Regional Plan 2041

The *Central Coast Regional Plan 2041* (CCRP 2041) outlines a strategic vision for the region, focusing on sustainable development and economic growth. Its influence on commercial lands is diverse, with an overall objective to create a prosperous Central Coast with more jobs close to people's homes. The CCRP 2041 also proposes 15-minute neighbourhoods, where residents can access jobs, services, or amenities within 15 minutes of residential locations.

The CCRP 2041 assigns centres into the following hierarchy categories:

- Metropolitan City (Gosford)
- Regional City (Tuggerah)
- Strategic Centres (Erina, Karagi, Warnervale* (Proposed), Woy Woy, and Wyong)
- Centres (all other centres).

The key commercial areas of the Central Coast and their focus areas, as defined by the CCRP 2041, are outlined in Table 1.

CCRP CATEGORY	CENTRE	EXISTING FOCUS AREAS
Metropolitan City	**Gosford**	Mixed-use development combining commercial, employment, and residential uses. Prioritises non-residential uses at street level to enhance vibrancy.
Regional City	**Tuggerah**	Combines commercial and employment uses, prioritizing enterprise and retail sectors to drive regional economic growth while sustaining a strong commercial base.
Strategic Centre	**Erina**	Retail and commercial activities, with strategies in place to sustain economic growth while preserving employment zones from residential encroachment.
	Woy Woy	High street retail, and shopping centres, with a focus on enhancing the local commercial landscape. The area is characterised by a mix of retail and service industries.
	Karagi (The Entrance, Bateau Bay, Long Jetty)	High street retail with a focus on food and beverage (F&B) along the foreshore. The area aims to enhance pedestrian activity and outdoor lifestyle, with new developments planned to stimulate business activity and improve the overall commercial landscape.
	Warnervale* (Proposed)	Positioned to accommodate significant population growth and aims to establish a commercial centre that serves as a community hub, addressing the needs of the expanding population.
	Wyong	Mixed-use developments that combine residential and commercial spaces. The focus is on creating a vibrant community hub that supports local businesses and enhances livability.

Table 1: Central Coast Regional Plan 2041 Regionally Significant Centres

*Warnervale now known as Woongarrah

2.2 Central Coast Local Strategic Planning Statement

a. Interim Statement 2020

The *Central Coast Local Strategic Planning Statement* – Interim Statement 2020 (Interim LSPS 2020) currently serves as a key reference document that informs Council's priorities for the region, establishing a twenty-year framework for sustainable growth and promoting a network of vibrant centres. Whilst it does not directly impact commercial lands, it provides broader strategic directions that can shape future usage and development. Notably, it prioritises the revitalisation of key centres such as Wyong and Tuggerah to serve as mixed-use hubs, which supports increased commercial activity and economic growth.

b. Draft Statement 2025

The Draft *Central Coast Local Strategic Planning Statement* (Draft LSPS 2025) provides a spatial framework to guide sustainable growth and development in the region through 2036 and beyond. It outlines the strategic direction that will shape future planning instruments, policies, and actions, which will be reflected in upcoming Central Coast Council Delivery Programs and Operational Plans.

The following actions identified in the Draft LSPS 2025 are of relevance to this Strategy:

EC-A1. Prepare a Commercial Lands Strategy and develop a Retail Centres Hierarchy to inform future development in centres.

EC-A4. Undertake a review of E2 Commercial Centre zones to identify potential 'Special Entertainment Precincts' for inclusion in the LEP to support the night-time economy.

EC-A6. Prepare an Accommodation Futures Study to identify the need for visitor accommodation and support the visitor economy.

PL-A1. Work with State Government in delivering initiatives and strategies for Gosford City, including the Gosford Centre Revitalisation project, Gosford Urban Design Framework, and Gosford Streetscape Masterplan.

PL-A3. Council to develop a priority centre planning and improvement program that facilitates renewal and development of these centres as well as investment in town centre improvements that support future development.

EC-A6. Prepare and implement an Accommodation Futures Study to identify the need for visitor accommodation and support the visitor economy.

The development of centre masterplans derived from the draft LSPS will play a critical role in ensuring the future success of our commercial centres. These masterplans will address public domain enhancements, identify potential new car park facilities, and recommend improvements to pedestrian and public transport access, among other considerations.

2.3 Environmental Planning Instruments

a. State Environmental Planning Policy (Precincts – Regional) 2021

The *State Environmental Planning Policy (Precincts – Regional) 2021* (Precincts-Regional SEPP) is a State legislative framework to facilitate strategic planning and development within designated regional precincts. Chapter 5 of the Precincts-Regional SEPP focuses on the revitalisation of the Gosford City Centre, aiming to strengthen its regional position as an innovative centre for commerce, education, healthcare, culture and the arts.

This chapter directly influences commercial lands in the Gosford City Centre by establishing provisions that prioritise and support commercial activities in future developments. These provisions are crucial for shaping the Commercial Lands Strategy as they provide a clear framework for promoting and sustaining commercial vitality.

The B3 Commercial Core, B4 Mixed Use and B6 Enterprise Corridor zones under the Precincts-Regional SEPP were not revised as part of the 2020 employment zone reforms. As a result, Gosford City Centre now has a unique and parallel commercial zoning system compared to the rest of the Central Coast LGA. There is currently a State-led rezoning process which is in the process of bringing Gosford CBD State controls back into CCLEP 2022 and that this is expected to occur before the end of 2026.

b. Central Coast Local Environmental Plan 2022

The *Central Coast Local Environmental Plan 2022* (CCLEP 2022) directly impacts commercial lands in the Central Coast by establishing zoning and development controls that influences the location and nature of commercial activities. Under this framework, key land use zones that facilitate commercial development, offices, and retail include:

- E1 Local Centre
- E2 Commercial Centre
- MU1 Mixed Use.

CCLEP 2022 adopts a flexible approach to development in these zones. They are treated as "open" zones, meaning any development not listed as exempt, complying or prohibited may be permitted with consent. As a result, they can support a wide range of businesses.



Residential development is also permitted in these zones, but in E1 Local Centre and E2 Commercial Centre it is limited to shop-top housing. This means residential development must include commercial or retail uses at ground level. Other zones, such as E3 Productivity Support and SP4 Enterprise, can also accommodate office and retail uses. However, because these uses are more limited in those zones, they are not examined in detail in this strategy.

2.4 Central Coast Development Control Plan 2022

The *Central Coast Development Control Plan 2022* (CCDCP 2022) consolidates the previous Gosford and Wyong Development Control Plans. The CCDCP 2022 includes several relevant chapters, each addressing different types of commercial planning considerations, with site-specific chapters provided for major centres and other locations. Chapter 2.5 applies to all land within the Central Coast LGA where commercial development is permissible under the CCLEP 2022, except in centres covered by specific chapters such as Gosford, Wyong, Terrigal and The Entrance. In these cases, this chapter serves as a supplementary guideline where necessary.

Chapter 2.5 focuses on commercial development, covering business, office and retail projects. The purpose of this chapter is to provide local guidelines for various scales of commercial development, ranging from small neighbourhood centres to large multi-storey office buildings. The chapter promotes quality commercial development that balance economic, social, environmental and service functions. It encourages good design that enhances the streetscape, ensures that new commercial developments respond appropriately to their context, and prioritises pedestrian amenity.

2.5 Gosford City Centre Development Control Plan 2018

The *Gosford City Centre Development Control Plan 2018* (GCCDCP 2018) is to be considered in the preparation and assessment of development applications within the centre in relation to:

- Commercial development to support the regional employment role of Gosford CBD.
- Commercial office developments providing floor plates suited to a range of businesses.
- Opportunities for convenience retail that complements the Gosford CBD.
- A new restaurant zone based along the existing breakwater.

2.6 Somersby to Erina Corridor Strategy 2020

The *Somersby to Erina Corridor Strategy* (SECS) directly impacts commercial lands within the Somersby to Erina Corridor by addressing the feasibility and future direction of development across the key centres. It identifies the limited feasibility of standalone commercial and retail developments, noting that such projects are unlikely to proceed without incorporating significant residential components. This finding suggests that mixed-use developments may be essential to sustaining commercial growth.

The SECS envisions the future directions for the following centres:

1. **Mount Penang and Kariong**

   An emerging commercial precinct focused on recreation, entertainment and the arts, including a commercial zone adjacent to Mount Penang Gardens.

2. **Erina**

   Develop a Structure Plan for the future mixed-use renewal of areas east of the Central Coast Highway and south of Terrigal Drive, focusing on Erina Town Centre.

3. **West Gosford**

   Maintain current employment zones until further review, specifically retaining existing zoning in areas under pressure for residential development. Public domain upgrades are recommended to enhance the viability of these businesses.

4. **East Gosford and Point Frederick**

   Develop a Structure Plan, exploring opportunities for additional density in the E1 zone, provided amenity is not compromised and that access and parking issues are resolved.

2.7 Tuggerah to Wyong Economic Corridor Strategy 2020

The *Tuggerah to Wyong Economic Corridor Strategy* (TWECS) directly impacts commercial lands within the Tuggerah to Wyong Economic Corridor. The strategy highlights substantial capacity for additional commercial and retail development in Wyong and Tuggerah, projecting a need for approximately 30,000m^2 of retail floorspace and 97,000m^2 of other commercial space. Existing planning controls, particularly at the Westfield Tuggerah site and Wyong Town Centre, provide ample room to accommodate this growth.

However, generating demand for this increased employment capacity remains a challenge, particularly in Wyong Town Centre, with competition from Tuggerah Business Park as a key location for commercial office development, driven by prime road access, large developable lots and ongoing infrastructure investment. To address these challenges, the TWECS recommends several economic development pathways:

- Consolidate Wyong's role as the civic, cultural and recreational heart of the subregion, enhancing Tuggerah's position as the major retail centre, and further developing Tuggerah Business Park as a precinct specialising in back-office functions and professional services.
- In the longer term, office-based development in Wyong could be encouraged by increasing the vibrancy and amenity of the centre, making it a more attractive place to work.
- Future retail development to be concentrated within planned or existing centres, avoiding out-of-centre developments that could detract from the vibrancy of traditional high streets.

2.8 Wyong Retail Centres Strategy 2013

The *Wyong Retail Centres Strategy 2013* (RCS 2013) was developed to guide the future planning and development of retail centres within the former Wyong LGA. This study was conducted prior to the amalgamation of Wyong and Gosford LGAs into the Central Coast LGA. The strategy aims

to identify opportunities for the renewal of existing centres, establish a clear hierarchy for retail centres, and provide broad planning requirements for both existing and new centres. Once adopted by Council, the Central Coast Commercial Lands Strategy will replace the RCS 2013.

The strategy identified opportunities for new retail floorspace including:

- 30,000m^2 expansion of Tuggerah's retail centre,
- 21,000m^2 town centre at Warnervale* (now known as Woongarrah Local Centre – Proposed),
- 4,000m^2 local centre at San Remo, and 5,000m^2 local centre at Lake Munmorah,
- 2,000m^2 supermarket expansion at the Wadalba centre.

These developments intended to address retail shortfalls and support the growing population in the northern part of the former Wyong LGA. These developments have all since been completed except for the Tuggerah proposal (which has development approval) and the Warnervale Town Centre, which has since been downgraded due to the State Government withdrawing support for a new railway station at this location.

2.9 Economic Development Strategy (2026-2030)

The *Economic Development Strategy* (EDS) supports and contributes to the success of our town centres and neighbourhoods by committing Council to supporting local businesses through policy support, capacity-building initiatives, promotion and collaboration with regional leaders. The EDS commits Council to continue to improve the quality of these places through public domain upgrades and working with strategic partners to improve transport connectivity.

In particular, Theme 2 of the EDS (Place, Identity and Activation) involves:

- **Activating town centres and public domain** through placemaking and activation projects that increase vibrancy, attract visitors and support business activity.
- **Embedding cultural identity and storytelling** in public spaces through art, storytelling, design and creative expression, including Aboriginal culture and stories.
- **Improving accessibility and safety** to attract more visitors, grow the night-time economy and strengthen local businesses.
- **Partnering with Aboriginal communities** to embed culture, knowledge and stories placemaking and activation initiatives.
- **Safeguarding and celebrating our natural assets** to ensure that future development is environmentally sustainable and there is an ongoing connection to Country.

This involves actions such as:

- Complete a new or updated Masterplan for one town centre each year.
- Deliver 2 place-making projects each year.
- Complete a Special Entertainment Precinct (SEP) trial by 2030.
- Increase number of businesses open at night by 10% by 2030.
- Reduce the proportion of vacant commercial properties within town centres by 10%.
- Implement a First Nations cultural marker in each strategic centre, incorporating language, storytelling or artistic interpretation that reflects Aboriginal identity.

2.10 Current NSW planning priorities and housing reforms

The NSW planning system is increasingly focused on delivering housing in well-located centres and transport-accessible locations while maintaining and growing employment opportunities. Current planning reforms seek to increase housing supply and diversity through well-planned, mixed-use communities that provide access to jobs, services, public transport and community infrastructure.

The Strategy responds to these priorities by promoting mixed-use development, encouraging shop-top housing, supporting active transport and public domain improvements, and reinforcing the role of centres as locations for employment, housing, services and community activity. It also supports the integration of land use and transport planning, consistent with contemporary planning approaches that concentrate growth in accessible centres with established infrastructure and services.

In implementing this Strategy, Council will seek to balance housing growth with the protection of commercial and employment functions, ensuring centres remain economically strong while adapting to changing community needs.

3. Stakeholder Engagement

Stakeholder engagement has been a vital part of the Strategy to ensure diverse perspectives are heard. The following engagement methodologies were used to establish a clear understanding of the strategic direction for this strategy:

- Strategy overview, economic and market trends globally nationally and locally,
- Interviews and focus groups,
- Surveys and Questionnaires.

The engagement process combined technical analysis, stakeholder insights and strategic thinking to inform the Strategy from the lens of local business operators and local knowledge experts in commercial operations. Best practice engagement methodologies were used to ensure feedback was valuable for establishing the long-, medium- and short-term views.

3.1 Identification of Key Stakeholders

Key stakeholders for this strategy were identified through a combination of desktop research, stakeholder mapping, and consultation with Council representatives. Priority was given to local knowledge experts, economic and planning expertise, including business owners, government representatives, cultural representatives and business chamber representatives.

3.2 Engagement Feedback

Stakeholders consistently highlighted a growing demand for flexible, high-amenity commercial spaces, particularly mixed-use developments that cater to evolving work and lifestyle patterns such as hybrid work models and satellite offices. Erina and Tuggerah were identified as commercial growth hubs, while Gosford was repeatedly cited as a priority area for revitalisation due to outdated infrastructure and high vacancy rates.

Other localities requiring attention included Somersby, Wyong, Toukley, Long Jetty, Lake Haven, and Woy Woy, each facing a combination of infrastructure limitations, poor transport connectivity, or shifting consumer behaviour.

Barriers to investment and development included lengthy and complex planning approvals, infrastructure deficits (e.g., water, sewerage, transport), zoning constraints, high construction costs, and resourcing shortages. It was also identified the need for culturally sensitive development that supports Aboriginal-owned businesses, walk-up centres, and the integration of cultural heritage into commercial planning.

Stakeholders also noted that vacancy rate trends were influenced by factors such as accessibility, tenant expectations, and outdated building stock, particularly in older commercial precincts like Gosford and Wyong.

The findings underscore the need for streamlined planning processes, infrastructure investment, a clear commercial lands hierarchy, and inclusive development strategies that accommodate community, economic, and cultural priorities across the Central Coast.

4. Economic Context

Population

348,493 forecast to grow to **408,390** by 2041.

The Economy

Gross Regional Product: Central Coast's Gross Regional Product was **$15.14B** for year ending June 2021, growing 0.4% since 2020.
Largest employer: Health care and social assistance – **19.3%**
Local jobs: 119,781
Local Workers: 90.5%
- 4.3% travelled from Lake Macquarie
- 0.7% travelled from Newcastle
- 0.6% travelled from Hornsby

The Workforce

Participation rate: 55.7% compared to Greater Sydney 60%
Unemployment rate: **3.6%** compared to Greater Sydney 4.2% (as of June quarter 2022)
Employed full time: 50.1% compared to Greater Sydney 55.5%

The Industries

Top 3 industries (workers):
- Healthcare and social assistance **17.8%**
- Construction **11.5%**
- Retail Trade **10.2%**

The People

Median age: 43 compared to Greater Sydney 37%
Qualifications: Bachelor or higher **18%** compared to Greater Sydney 33%

Reference: Economy Id. and Profile Id. Sourced 8 Feb 2023



5. Market Context

5.1 Changing Demand for Commercial Spaces

Understanding the implications of changing consumer behaviours and market trends is crucial for long-term commercial lands planning and economic development.

1. Experiential Retailing

There has been a notable rise of Experiential Retailing – the promotion of experience and placemaking through diverse retail offerings to attract customers. Demand is growing for experience-based destinations that offer a combination of retail, food, and cultural experiences. Precincts that accommodate a blend of hospitality, entertainment, and lifestyle offerings increasingly outperform conventional retail strips.

2. E-Commerce

Over the last 10 years, online sales in Australia have grown considerably in both quantum and as a proportion of total retail sales. Online retail sales have grown from AUD $15.5 billion to AUD $57.8 billion over the ten years to June 2024 (JLL, 2024). E-commerce has changed the way we shop, prompting a re-evaluation of traditional 'shop to customer' delivery models. The rise in online shopping necessitates a balance between traditional retail (shopfront – customer visits store) and modern retail delivery models (shopfront is online and product is delivered to the customer).

3. Night-Time Economy

As labour flexibility and requirements for night shift work increases, so too does the need to access convenient goods and services during non-traditional hours (24 hr trading).

4. Local Production and Distribution

Global supply chain disruptions and a changing geopolitical environment have highlighted the importance of local production and distribution, potentially increasing demand for land uses that support these activities. For example, merging hospitality with modern food manufacturing (brewery with shopfront bar) and farm-gate shop/café/restaurant (agricultural farm shops) can support local business supply and demand chains and are more resilient to global supply chain shocks.

5. Hybrid Working

Hybrid working has become a popular way of working and has been adopted by many workers. Australia's current in-office average is in line with the global average (3.1 days worked from the office per week). Office spaces are experiencing elevated vacancy levels compared with pre-COVID levels (Q4 2019). Further, all office markets in Sydney have vacancies higher than their respective 10-year average (Figure 2). Office markets are therefore still in a recovery phase following COVID-19, especially as they adapt to other factors such as hybrid working.

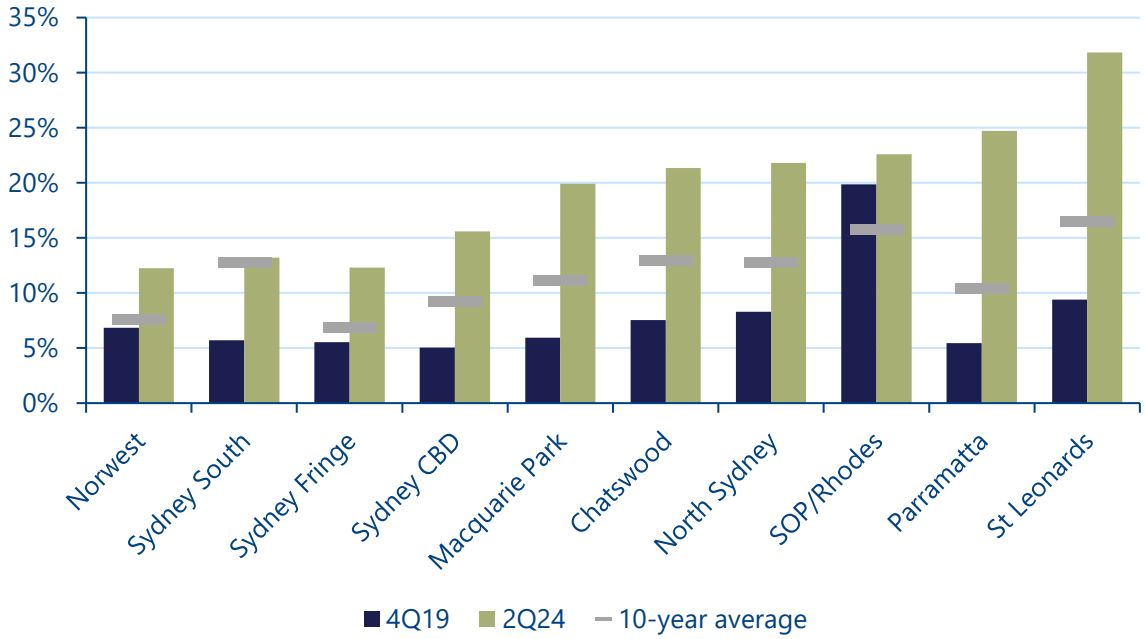


Figure 2: Sydney Office Markets Vacancy, 4Q19, 2Q24 and 10-year average

Source: JLL 2024

5.2 Employment Trends

Central Coast employment trends show clear divergence between expanding and contracting industries (Figure 4). The most significant growth is projected to be in the Health Care and Social Assistance sector, followed by the Professional, Scientific and Technical Services sector, and Education and Training. Other notable growth industries include Financial and Insurance Services (growing at 1.5% p.a) and Arts and Recreation Services (1.2% p.a.), reflecting a shift towards service-oriented roles that cater to the region's demographic needs.

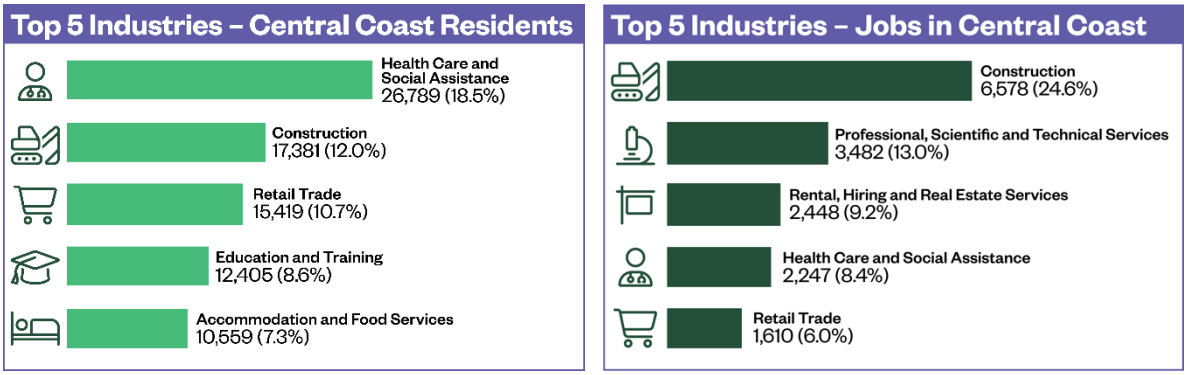


Figure 3: Central Coast Commercial Lands – Top 5 Industries

Source: ABS prepared by Mecone.

Conversely, some traditional sectors are experiencing contraction (Figure 5). Industries such as Wholesale Trade, Information, Media and Telecommunications and Mining are seeing declining employment growth rates. This is a result of a broader trend of technology uptake in these sectors (automations) and urbanisation.

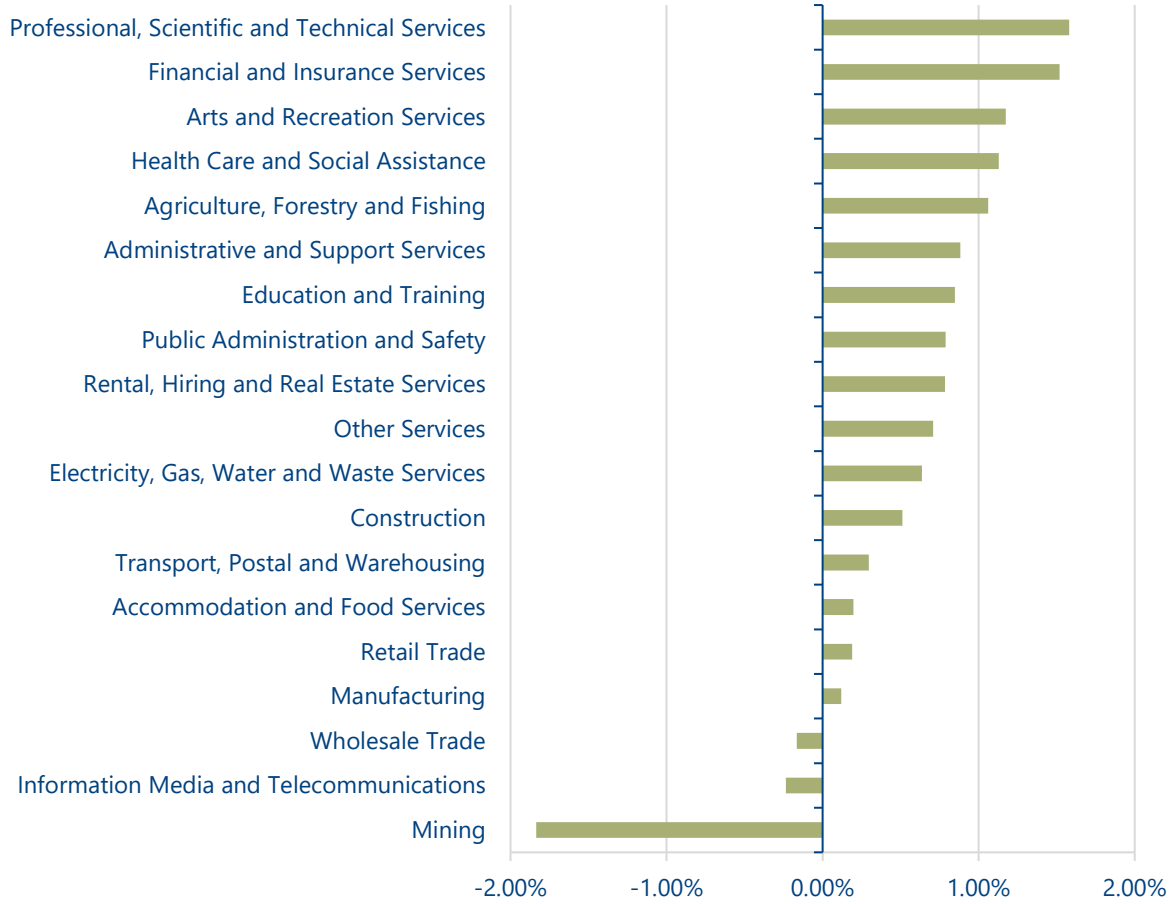


Figure 4: Employment Industry by Growth

Source: JLL Existing Conditions Analysis Report September 2024

5.3 Demographic Trends

There are two key demographic drivers affecting commercial lands planning for the Central Coast – population growth and age distribution.

1. Population Growth

The Central Coast has seen a steady increase in population, with a growth rate of around 0.7% p.a. between 2016–2021. This trend is expected to continue, with the annual growth being 0.8% p.a. for 2021–2026, equivalent to 2,850 additional people/year. It is expected that population growth will continue, to over 400,000 people by 2041.

Growth will be particularly prevalent in areas such as Woy Woy, Gosford, Wyong-Tuggerah, and Warnervale, which are becoming increasingly attractive to families and retirees.

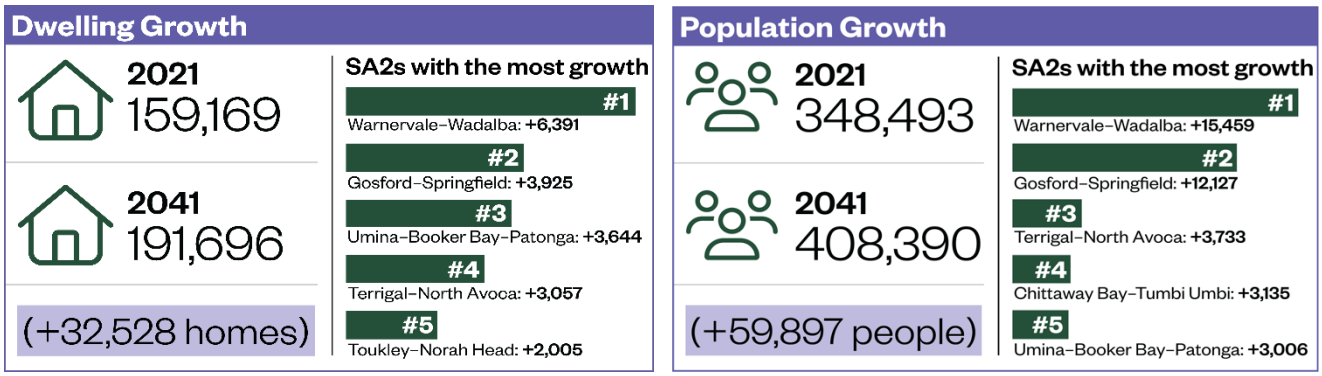


Figure 5: Central Coast Commercial Lands – Dwelling Growth and Population Projections
Source: ABS and NSW Department of Planning, Industry and Environment, prepared by Mecone.

2. Age Distribution Change

The region's age profile is shifting, with a notable increase in the proportion of older residents and young families. The population aged 65 and over is projected to rise significantly (in line with national trends), necessitating a focus on age-friendly commercial services. Conversely, there is also a growing number of young families (because of internal migration), highlighting the need for diverse local employment opportunities and goods and services that meet the expectations of younger families.

5.4 Competition from Sydney and Newcastle

The Central Coast is uniquely positioned between Sydney and Newcastle, and while affording accessibility to these major economies, the Central Coast is also impacted by their competitiveness and economic strengths. These opportunities and challenges need to be addressed in developing and maintaining commercial lands development on the Central Coast. For example, when compared to Sydney (as of 2024):

- Office rents on the Central Coast averaged ~$360/m^2 per annum (p.a.). Sydney secondary office stock in non-CBD locations (a point of comparison in terms of the quality of stock available in both regions) averaged ~$470/m^2 p,a.
- Retail rents on the Central Coast range between ~$240/m^2 to ~$610/m^2 p.a., while a sample of Sydney metropolitan assets had a rate of ~$315/m^2 to ~$1,050/m^2 p.a. depending upon location, street frontage and size.
- Commercial land development site rates range between ~$610/m^2 to ~$3,900/m^2 across the Central Coast, with the highest rates in the Gosford market. Sydney Metropolitan sites had a range of ~$2,200/m^2 to ~$87,200/m^2 depending upon location, development status, size, zoning and existing improvements.

The differences in rental and development rates between the Central Coast and Sydney metropolitan areas can be attributed to several factors:

- The Central Coast region generally offers a lower density of commercial activity compared to Sydney, resulting in less competition for space and subsequently lower rental prices.
- The Central Coast's proximity to natural amenities and a more suburban lifestyle may appeal to a different sector of businesses. It does not command the same office and retail premium as the urban core of Sydney, which benefits from higher foot traffic and greater accessibility to a larger workforce and consumer base.
- Varying levels of infrastructure investment and urban amenities available in each region. Sydney's extensive public transport network and amenities will attract higher demand for premium office space and elevated rates. In contrast, the Central Coast lacks some of the critical workforce skills, consumer base, public transport infrastructure and amenities that drive demand in metropolitan Sydney, leading to lower valuations for commercial properties.

The Central Coast is therefore characterised by lower demand, different consumer preferences, and varying levels of investment "pull" factors (such as public transport infrastructure and modern office towers) to support a larger volume of commercial businesses.

5.5 Land Use Conflicts

A key pressure point to address is the risk of high value residential developments encroaching on commercial spaces, especially in mixed-use zones. This could undermine the feasibility and/or viability of commercial land use operations. As the NSW government's focus on housing development and urban renewal initiatives strengthen, new commercial lands planning will be required as part of the planning for new homes and urban centres.

Housing interventions, such as the Transport Oriented Development (TOD) Program along the Central Coast train line, and the Low and Mid-Rise Housing Policy, is expected to increase residential development and accessibility to and from key transport-based centres. These types of interventions also provide opportunities for expansion of commercial lands to support new residents and create inclusive, vibrant places.

5.6 Supply Challenges

1. Land Values

An analysis of recent commercial development site sales reveals significant differences in land values between the Central Coast and the Sydney Metropolitan region. In Sydney, the average rate for commercial development sites is approximately $\$16,900/m^2$, with a range from $\$2,200/m^2$ to $\$87,200/m^2$, influenced by factors such as location, development approval status, size, zoning, and existing improvements. The highest values are found in Sydney's East, North Shore, and Northern Beaches.

In contrast, the Central Coast shows development site rates ranging from approximately $\$610/m^2$ to $\$3,900/m^2$, with the highest values observed in the Gosford market. This disparity highlights the challenges faced by the Central Coast in attracting investment compared to Sydney, where higher land values reflect greater demand and development potential. The lower land values in the Central Coast could present opportunities for

property developers; however, they must also consider the associated risks involved, including the need for residential foot traffic, improved infrastructure and amenities to enhance the attractiveness of potential development sites for businesses to occupy.

2. Development Feasibility

Due to low supply and population growth, supply of new retail floor space per person is expected to drop over the coming decade. Labour shortages, high construction and finance costs are significantly delaying retail supply. Owners are likely to postpone large-scale projects, favouring smaller reconfigurations and upgrades to existing centres. High construction costs are hindering new store openings, leading to a focus on renewal in existing store fit outs and repurposing strategies.

6. Key Commercial Precincts

6.1 Gosford

As the regional centre of the Central Coast, Gosford plays a crucial role in supporting local employment and economic activity:

1. ***Professional, civic and health services:*** Gosford is a vibrant and diverse hub with employment opportunities, housing, health and education precincts, public transport, restaurants, bushwalks and cycleways, shopping, culture and waterfront activities.
2. ***Strategic Location:*** Gosford's position as a transport hub, with access to major road networks and public transport, enhances its attractiveness for businesses.
3. ***Revitalisation:*** An increasingly urbanised Gosford is being revitalised with investments in health care, education, residential apartments, affordable housing, tourism and commercial sectors.
4. ***Gosford Waterfront Development:*** Planned revitalisation of Gosford Waterfront offers potential for new retail spaces that complement the existing central retail zone.
5. ***Trade Area Catchment Visits:*** Gosford trade area is larger than most other centres on the Central Coast, being a strong link along the Kariong to Erina corridor.
6. ***Market Competition:*** The success of nearby commercial hubs, such as Tuggerah Business Park and Somersby, has led to increased competition for local businesses, potentially overshadowing Gosford's commercial viability.
7. ***Balancing Residential Land Uses:*** There is a risk that residential developments may out compete commercial spaces.

CONDITION ASSESSMENT:

Stock:	Generally dated stock in varying condition ranging from abandoned to newly developed. Multiple sites are under construction.
Public Domain:	Condition varies based on surrounding stock conditions.
Parking:	Low availability during peak business periods, both on street and in car parks.
Walkability:	Easy walkability in the centre.
Accessibility:	Public transport includes a train station and bus interchange.
Level of Activity:	High level of activity in the centre of the precinct. Activity diminishes on the outskirts where the stock conditions worsen.

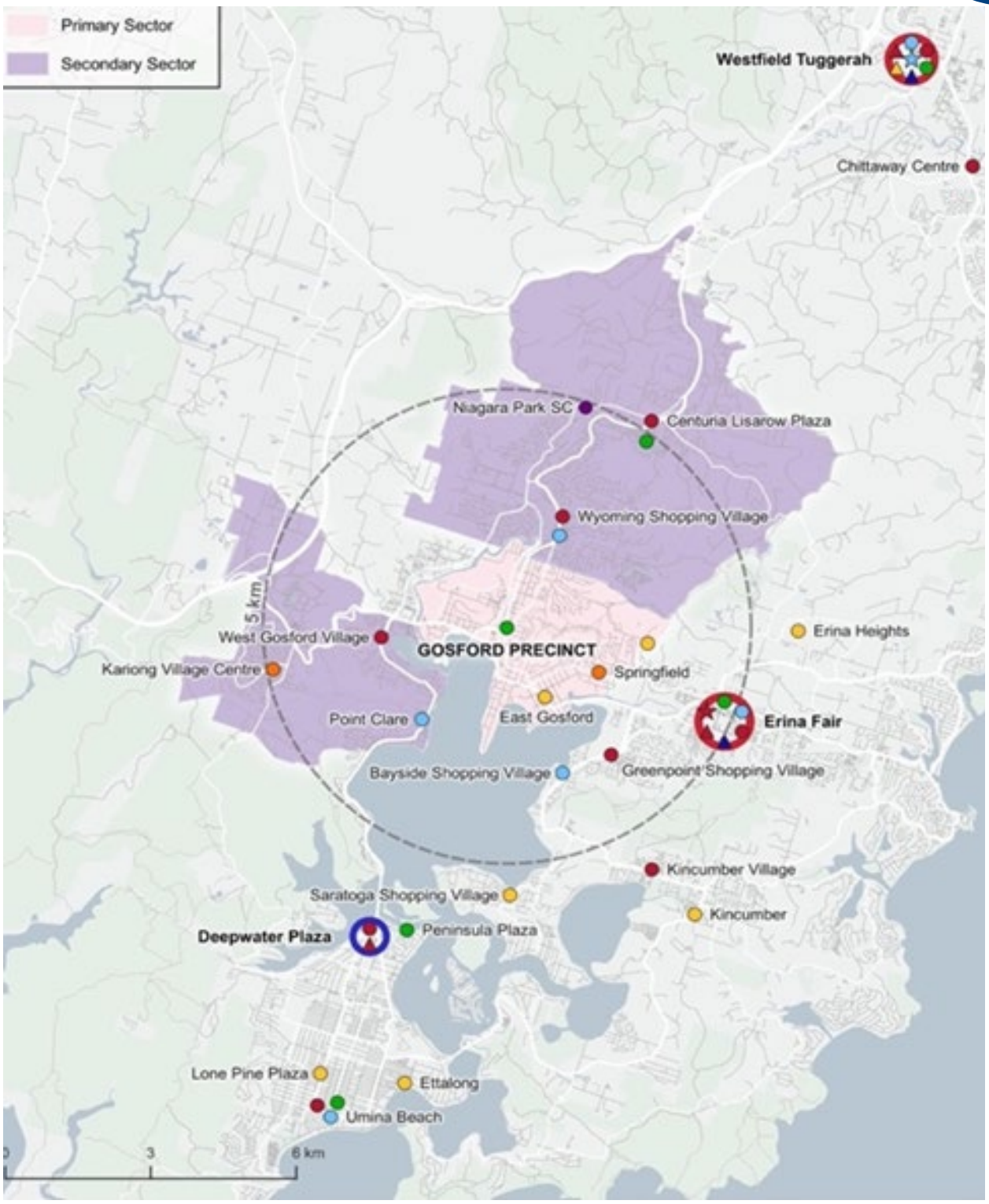


Figure 6: Gosford Retail Catchment (Source Location IQ: 2024)



As of the latest audit sample (2024) Gosford CBD has a total commercial net lettable area (NLA) of 116,803m^2, with an office and retail vacancy rate of 32.4%:

COMMERCIAL USES	NLA (m^2)	VACANCY (m^2)	VACANCY (%)
High Street Retail *Retail Arcade/Plaza* *Medical (Hospital, Medical Centre, Allied Health)* *Office* *Secondary Retail* *Shopping Centre* *Fast Food*	**116,803**	**37,815**	**32.4%**

Table 2: Gosford Precinct Commercial Land Audit

Source: JLL, September 2024.

Note 1: Secondary Retail means converted house / above ground floor retail on a high street.

In comparison, the East Gosford precinct has a total commercial NLA of **17,191m^2**, with a vacancy rate of **10.65%**.

6.2 Tuggerah

Tuggerah, like Gosford and Erina, has a diversity of commercial lands that are not typically observed in other local areas across the Central Coast, and attracts a wider trade area due to the goods and services on offer and variety of commercial activities. This presents both challenges and opportunities. Tuggerah provides the main retail and bulky goods functions for the wider area. Tuggerah Business Park has been planned differently, with Zones SP4 and E3 Productivity Support indicating a different hierarchy of uses. Note: Zones SP4 and E3 were excluded from the commercial lands audit and are dealt with in the Central Coast Employment Lands Strategy.

Tuggerah is situated at a vital geographic junction, connecting the northern part of the Central Coast region (Wyong) to the south (Gosford) and the coastal areas. It has dual carriage highways and main road access as well as train line access.

1. ***Strategic Location:*** Tuggerah's geographic position provides a competitive advantage for commercial development. Its large footprint and vehicle accessibility attracts businesses seeking to capitalise on high volume and high visibility commercial ventures.
2. ***Alignment to Wyong:*** The Tuggerah to Wyong Economic Corridor Strategy outlines an opportunity to develop mixed-use precincts that integrate commercial, bulky-goods and retail spaces, fostering regional based commercial assets and service offerings.
3. ***Infrastructure Investment:*** Ongoing infrastructure investments, including improvements to transport links and amenities at Tuggerah Station, will enhance Tuggerah's attractiveness for businesses and consumers alike.
4. ***Competition for Retail and Office Roles:*** Tuggerah faces competition from established retail and office-based centres such as Erina Fair, Wyong and Gosford.

5. *Trade Area Catchment Visits:* The Tuggerah trade area is large, with strong pull throughout the region with a particular pull from residents located around Tuggerah Lake.

CONDITION ASSESSMENT:

Stock:	Good condition.
Public Domain:	Good condition.
Parking:	Good parking availability. According to Scentre Group, there are 3,157 car parking spaces available.
Walkability:	Poor walkability on Wyong Road, with lack of footpaths in many sections.
Accessibility:	There is a bus interchange at the Westfield Shopping Centre, including routes from the train station.
Level of Activity:	High level of activity.

As of the latest audit sample, Tuggerah Westfield shopping centre commercial land market comprises a total of over 85,070m^2 of space, with a vacancy rate of **0.0%:**

COMMERCIAL USES	NLA (m^2)	VACANCY (m^2)	VACANCY (%)
Westfield Shopping Centre	**85,070**	**0.0**	**0.0%**

Table 3: Tuggerah Westfield Land Audit

Scentre Group is planning a 12,600m^2 extension to Westfield Tuggerah, and a reconfiguration of existing tenancies. In addition, Scentre Group is pursuing the development of master-planned community next to the shopping centre site.

In comparison, the commercial land audits sample for nearby Wyong, Bateau Bay, Long Jetty and The Entrance reveal the following:

	TOTAL NLA (m^2)	TOTAL VACANCY
BATEAU BAY	**30,005**	**2.2%**
LONG JETTY	**14,407**	**1.6%**
THE ENTRANCE	**42,235**	**13%**
WYONG	**29,632**	**7.7%**

Table 4: Tuggerah Commercial Land Audit - Comparison to nearby centres



Figure 7: Tuggerah Retail Catchment (Source Location IQ: 2024)

Super Regional
Major Sub-regional
Other Regional
Other Sub-regional

David Jones
Myer
Harris Scarfe
Kmart
Big W
Target
Woolworths
Coles
Aldi
IGA
Foodworks
Costco
Spar

6.3 Erina

Erina presents a unique landscape of challenges and opportunities for commercial lands development. The presence of Erina Fair Shopping Centre, large shop box retail warehouses along the highway and commercial office spaces present a diversity of commercial lands not typically observed in other precincts across the Central Coast.

1. ***Walkability and Connectivity:*** The precinct's low walkability, exacerbated by its car reliance and the presence of multiple roundabouts and highway traffic limits pedestrian access and may hinder the growth of a vibrant street-level retail environment.
2. ***Market Competition:*** With the Central Coast experiencing varying commercial and retail land values, Erina faces competition from nearby areas like Gosford, which may offer more attractive rates or newer developments as commercial and retail offices construction projects are completed.
3. ***Market Demand for Retail:*** The ongoing demand for retail spaces presents an opportunity for Erina to continue capitalising on its existing shopping centre strengths.
4. ***Trade Area Catchment Visits:*** Erina's trade area visit is large, with strong connection and pull throughout the region.

CONDITION ASSESSMENT:

Stock:	Good condition.
Public Domain:	Good condition.
Parking:	Good parking availability with multiple outdoor car parks as well as multilevel car parks.
Walkability:	Low walkability across car reliant precinct. The large precinct is separated by multiple roundabouts with limited pedestrian paths.
Accessibility:	Good accessibility. Public transport includes bus interchange and taxis.
Level of Activity:	High level of activity.



Figure 8: Erina Retail Catchment (Source Location IQ: 2024)



As of the latest audit, Erina's commercial land market comprises over 114,598m^2 of commercial spaces, with a vacancy rate of 6.7%:

COMMERCIAL USES	NLA (m^2)	VACANCY (m^2)	VACANCY (%)
Secondary Retail *Shopping Centre* *Fast Food*	**114,598**	**6,349**	**5.5%**

Table 5: Erina Commercial Land Audit

Source: JLL, September 2024

Note 1: Secondary Retail means converted house / above ground floor retail on a high street.

In comparison, the commercial land audits sampled for nearby Kincumber, Avoca and Terrigal reveal the following:

	TOTAL NLA (m^2)	TOTAL VACANCY
KINCUMBER	**11,043**	**2.4%**
AVOCA BEACH	**3,298**	**0%**
TERRIGAL	**21,920**	**1.0%**

Table 6: Erina Commercial Land Audit - Comparison to nearby centres

6.4 Lake Haven

Lake Haven will also face a range of challenges and opportunities that will shape its development in the coming years. Lake Haven's commercial lands will be challenged largely by population growth in new and emerging greenfield areas. Notable challenges will likely include:

1. ***Competition from Regional Centres:*** The Warnervale* Town Centre has recently been downgraded from a town centre to a local centres in the Greater Warnervale Structure Plan 2024, reducing future competition to Lake Haven.
2. ***Population Growth:*** Warnervale's population alone is projected to increase significantly, reaching 57,000 by 2044, which will necessitate not only expanded housing, but also commercial services.
3. ***Infrastructure Limitations:*** The road network is currently at capacity – restricting the ability for Lake Haven commercial offerings to expand.
4. ***Low vacancy:*** Lake Haven precinct has a 0% vacancy rate, indicating that it has strong demand and/or attractiveness, anchored by the shopping centre and high street retail.

*Warnervale now known as Woongarrah Local Centre (Proposed)

5. ***Trade Area Catchment Visits:*** Lake Haven centre is attracting most of the trade activity around the Lakes area. Other centres such as Wyong, Wadalba, and Toukley show less signs of pulling in trade activity, indicating the importance and reliance on Lake Haven.

CONDITION ASSESSMENT:

Stock:	Good condition.
Public Domain:	Good condition.
Parking:	Good parking availability.
Walkability:	Reasonable. Pedestrian crossings available on busier roads
Accessibility:	There is a bus interchange at the Shopping Centre.
Level of Activity	High.

As of the latest audit, Lake Haven's commercial land market comprises over **67,675m²** of commercial spaces, with an average vacancy rate of **0.0%**:

COMMERCIAL USES	NLA (m^2)	VACANCY (m^2)	VACANCY (%)
High Street Retail *Retail Arcade / Plaza* *Office* *Secondary Retail* *Shopping Centre* *Fast Food*	**67,675**	**0**	**0.0%**

Table 7: Lake Haven Commercial Land Audit

Source: JLL,September 2024

Note 1: Secondary Retail means converted house / above ground floor retail on a high street.

In comparison, the commercial land audits sample for nearby Toukley and Wadalba reveal the following:

	TOTAL NLA (m^2)	TOTAL VACANCY
TOUKLEY	**34,119**	**3.1%**
WADALBA	**7,746**	**0%**

Table 8: Lake Haven Commercial Land Audit - Comparison to nearby centres

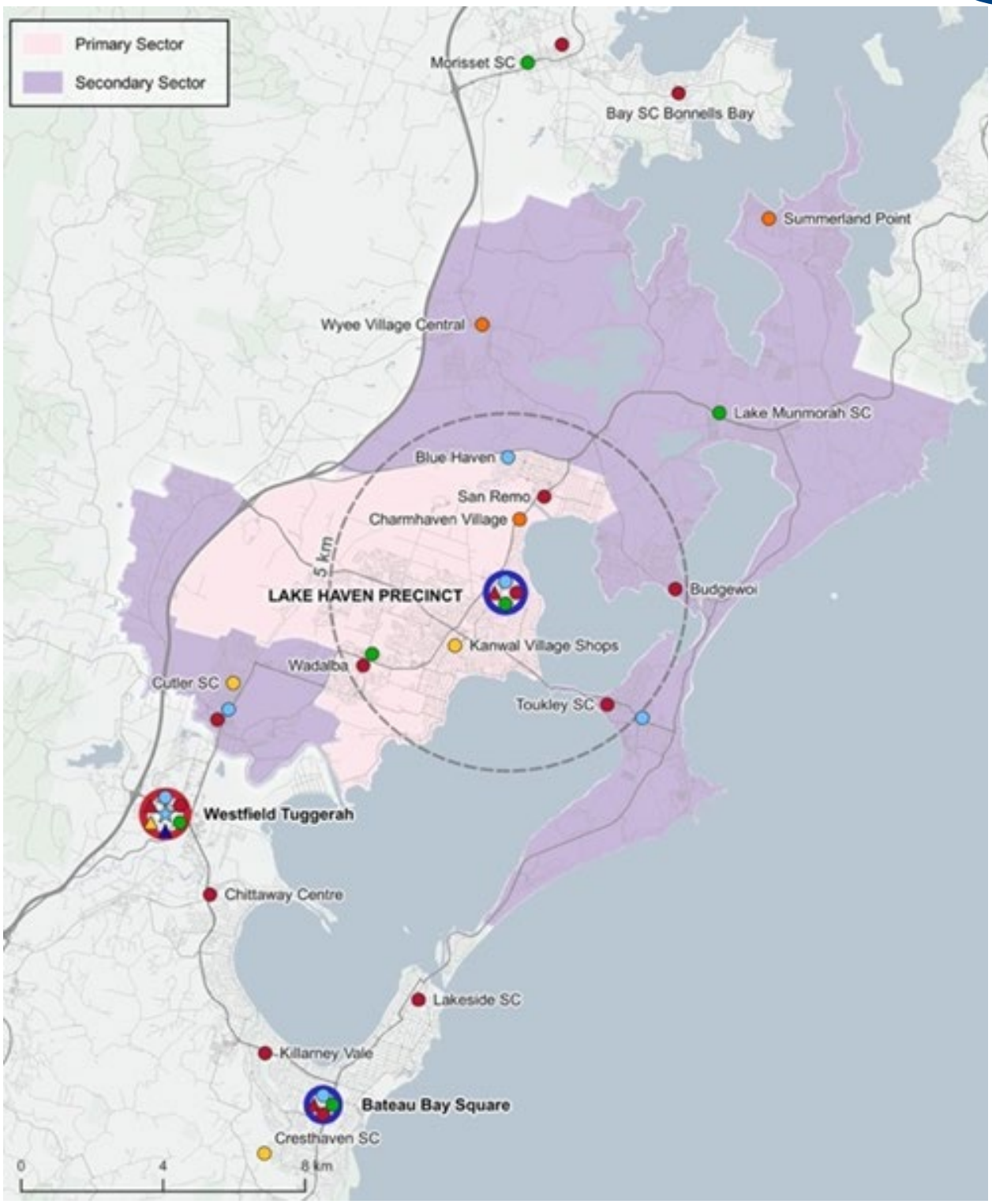


Figure 9: Lake Haven Retail Catchment (Source Location IQ: 2024)

Other Regional
Major Sub-regional
Other Sub-regional

David Jones
Kmart
Woolworths
IGA
Big W
Coles
Foodworks
Target
Aldi

6.5 Wyong

Wyong provides a focus for office and government services and has a traditional main street commercial precinct. Wyong's commercial lands face a range of challenges and opportunities that are shaped by evolving market dynamics, demographic changes, and planning frameworks:

1. ***Strategic Location:*** Wyong is positioned strategically to major road networks and public transport including the northern railway line.
2. ***Revitalisation:*** Parts of Wyong have recently undergone revitalisation with investments in the private commercial sector.
3. ***High Vacancy Rates in Office Spaces:*** The commercial audit sample indicates a significant vacancy rate in office spaces in Wyong.
4. ***Balancing Residential Land Uses:*** The push for increased residential development in Wyong, for example from NSW Government Transit Oriented Development program, can outmuscle the investments in commercial spaces. However, this can also represent an opportunity with an increase in resident increasing the demand for goods and services.
5. ***Competition from Regional Centres:*** Tuggerah is identified as a key area for commercial lands, which may divert expenditure from local centres like Wyong.
6. ***Infrastructure Limitations:*** Wyong will be impacted by the proposed upgrades to the Pacific Highway, reducing on-street parking and the convenience of this retail offering.

CONDITION ASSESSMENT:

Stock:	Average condition with some buildings in disrepair. Limited new developments.
Public Domain:	Generally average condition.
Parking:	Good availability - Car parking adjacent to the Village Centre. Street parking is also available.
Walkability	Reasonable. Pedestrian crossings available on busier roads however gradient changes reduce walkability for less mobile visitors.
Accessibility	Public transport includes a train station and bus interchange.
Level of Activity	Higher level activity in the central area, diminishing in the northern and southern end.

As of the latest audit, Wyong's commercial land market comprises a total of 29,632m^2 of net lettable area (NLA), with a vacancy rate of 7.7%:

COMMERCIAL USES	NLA (m^2)	VACANCY (m^2)	VACANCY
High Street Retail *Retail Arcade/Plaza* *Medical (Medical Centre)* *Office* *Secondary Retail* *Shopping Centre* *Fast Food*	**29,632**	**2,282**	**7.7%**

Table 9: Wyong Commercial Land Audit

In comparison, the commercial land audits sample for nearby Tuggerah and Wadalba reveal the following:

	TOTAL NLA (m^2)	TOTAL VACANCY
TUGGERAH	**85,070**	**0%**
WADALBA	**7,746**	**0%**

Table 10: Wyong Commercial Land Audit - Comparison to nearby centres

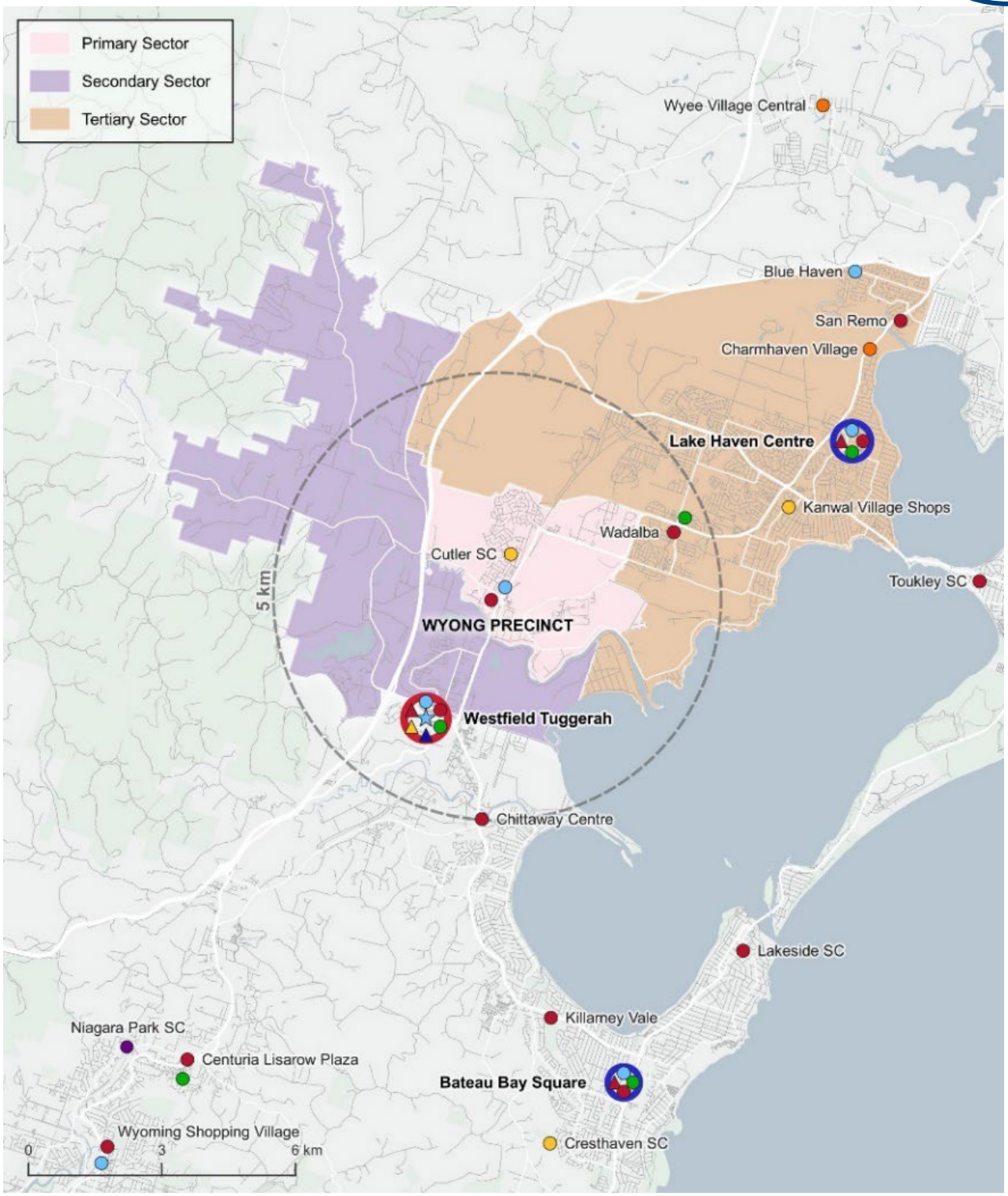


Figure 10: Wyong Retail Catchment (Source Location IQ: 2024)

6.6 Woy Woy

Woy Woy presents a unique landscape of challenges and opportunities for commercial lands, shaped by its geographical context, demographic trends, and evolving market.

1. ***Limited Commercial Space:*** Woy Woy has a constrained supply of undeveloped commercial land, which can hinder the growth.
2. ***Competition from Nearby Centres:*** The proximity of larger commercial hubs, such as Gosford and Erina, poses a challenge for Woy Woy and its role in the region.
3. ***Transport Accessibility and Infrastructure:*** The overall standard and capacity of infrastructure, both regional and local, may not adequately support strong growth in commercial activity without major infrastructure improvements.
4. ***Balancing Residential Land Uses:*** The push for increased residential development in Woy Woy, for example from NSW Government Transit Oriented Development program, can outmuscle the investments in commercial spaces. However, this can also represent an opportunity with an increase in resident increasing the demand for goods and services.
5. ***Trade Area Catchment Visits:*** Woy Woy's trade area visit is smaller and more localised, with strong connection to local centres along the train line towards Gosford.

CONDITION ASSESSMENT:

Stock:	Average condition with some buildings in disrepair. Limited new developments.
Public Domain:	Generally average condition.
Parking:	Good availability - Car parks adjacent to the Deepwater and Peninsula Plazas. Street parking is also available.
Walkability	Reasonable. Pedestrian crossings available on busier roads however connections between Deepwater Plaza and the high street need significant improvements.
Accessibility	Public transport includes a train station and bus interchange.
Level of Activity	Higher level activity in the central area, diminishing in the northern end.

As of the latest audit, Woy Woy's commercial land market comprises a total of 56,620m^2 of net lettable area (NLA), with a vacancy rate of 7.1%:

COMMERCIAL USES	NLA (m^2)	VACANCY (m^2)	VACANCY
High Street Retail *Retail Arcade/Plaza* *Medical (Hospital, Medical Centre, Allied Health)* *Office* *Secondary Retail* *Shopping Centre* *Fast Food*	**56,620**	**4,016**	**7.1%**

Table 11: Woy Woy Commercial Land Audit Source: JLL, September 2024
Note 1: Secondary Retail means converted house / above ground floor retail on a high street.

In comparison, the commercial land audits for Ettalong Beach and Umina Beach reveal the following:

	TOTAL NLA (m^2)	TOTAL VACANCY
ETTALONG	**21,453**	**9.4%**
UMINA BEACH	**33,128**	**3.8%**

Table 12: Woy Woy Commercial Land Audit - Comparison to nearby centres

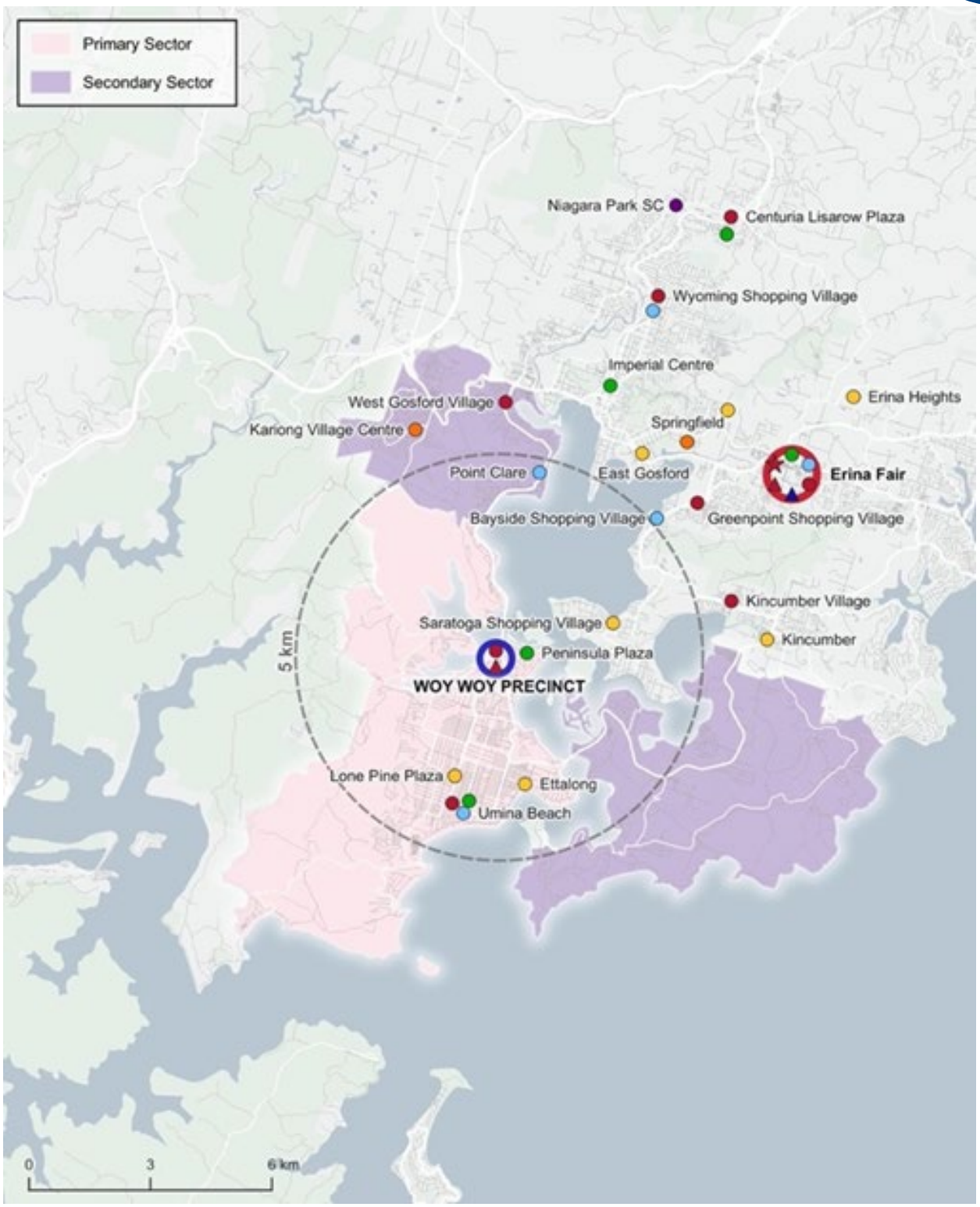


Figure 11: Woy Woy Retail Catchment (Source Location IQ: 2024)

Super Regional
Other Sub-regional

Myer
Kmart
Big W
Woolworths
Coles
Aldi
IGA
Foodworks
Spar

6.7 Dispersed commercial lands – Local Centres

There are around 73 dispersed precincts (local centres such as Wyoming, Lake Munmorah, Budgewoi etc) within the Central Coast LGA, totalling approximately 193,000m^2 of retail floor space. This reveals a broad landscape for commercial land use, characterised by a mix of retail and service offerings that primarily cater to local populations.

1. ***Land Use Distribution:*** The dispersed precincts predominantly feature main street retail and shopping centres, which account for a significant portion of the total net lettable areas.
2. ***Vacancy Rates:*** The overall vacancy rate across the dispersed precincts stands at 1.6%, with notable variations among different use types. Retail arcades and plazas exhibit remarkably low vacancy rates, suggesting strong demand in these areas and customers not wanting to travel to major centres.
3. ***Condition of Stock:*** The condition of commercial stock is generally dated, with many properties requiring upgrades to meet modern standards. This aging infrastructure may contribute to the observed vacancy rates, particularly in secondary retail spaces.
4. ***Accessibility Challenges:*** Accessibility remains a critical issue. The lack of train stations and infrequent bus services restricts the potential customer base, particularly for businesses reliant on foot traffic. This limitation may further exacerbate vacancy issues.
5. ***Local Activity Levels:*** The level of commercial activity in dispersed precincts is lower compared to larger commercial hubs. These areas primarily serve local neighbourhoods, which may limit growth potential. However, the consistent demand for essential services, such as medical facilities and fast-food outlets, indicates a stable market.
6. ***Future Considerations:*** There may be opportunities to enhance the viability of dispersed precincts through targeted investments in infrastructure and public transport that support a 15-minute city. Additionally, revitalisation efforts could focus on improving the condition of existing stock and diversifying land use to attract a broader range of businesses.

COMMERCIAL USES	NLA (m^2)	VACANCY (m^2)	VACANCY (%)
High Street Retail *Retail Arcade / Plaza* *Medical (Hospital, Medical Centre, Allied Health)* *Office* *Secondary Retail* *Shopping Centre* *Fast Food*	**193,245**	**3,140**	**1.6%**

Table 13: Local Centres – Commercial Land Audit Source: JLL, September 2024.

Note 1: Secondary Retail means converted house / above ground floor retail on a high street.
Note 2: Consists of Local Centre that are not key commercial hubs, mostly providing either a shopping centre or a small retail strip.

7. Supply overview

7.1 Total commercial land area

Audits and floor space modelling analysis was carried out to identify existing commercial floor space supply across the various precincts within the Central Coast. The modelling and audits have limitations such as approximations in GFA measurements, and building inefficiencies, which may affect the accuracy. It is used as guidance only.

As of September 2024, there was **575.2ha** of commercially zoned land across the Central Coast. The largest quantum of commercial zoned lands is within the suburb of Gosford – accounting for nearly 100ha of land, and 17% of total commercial land area on the Central Coast. Refer to Appendix 2 for a detailed breakdown of commercial lands by suburbs.

SUBURB	ZONE (HECTARES)					TOTAL
	B3	B4	E1	E2	MU1	
Gosford	20.3	78.2	-	-	0.6	**99.2**
Tuggerah	-	-	-	32.5	20.5	**53.0**
Erina	-	-	52.3	-	-	**52.3**
Bateau Bay	-	-	16.3	-	17.3	**33.5**
The Entrance	-	-	21.2	-	9.2	**30.4**
Lake Haven	-	-	14.0	-	13.5	**27.5**
Wyong	-	-	0.8	20.6	4.4	**25.8**
Woongarrah	-	-	12.7	-	12.9	**25.5**
Woy Woy	-	-	21.8	-	-	**21.8**
Toukley	-	-	13.4	-	5.6	**19.0**
*Remaining**	-	9.0	166.3	-	11.9	**187.2**
TOTAL:	**20.3**	**87.2**	**318.8**	**53.1**	**95.9**	**575.2**

Table 14: Central Coast Commercial Lands by Suburb and Zone

Note: Indicative area only based on cadastre information.

**Remaining includes 58 suburbs. Refer to Trade Area Analysis in Appendix 1 for more details.*

Source: JLL

7.2 Vacant Commercial Lands

The analysis indicates that **vacant commercial land** (E1 Local Centre, E2 Commercial Centre, and MU1 Mixed Use zones) which could potentially be developed in the future across the Central Coast is approximately 389,000m^2 – of which 312,648m^2 (80%) is vacant and 76,599m^2 is used for parking (20%).

CENTRE	BY TYPE (m^2)			BY ZONE (m^2)			TOTAL
	PARKING / HARDSTAND	VACANT		E1	E2	MU1	
Bateau Bay	-	7,486		-	-	7,486	**7,486**
East Gosford	5,572	505		6,077	-	-	**6,077**
Erina Fair	-	-		-	-	-	**0**
Ettalong Beach	1,885	2,303		4,188	-	-	**4,188**
Gosford	15,673	29,648		-	6,971*	38,351*	**45,322**
Lake Haven	4,796	-		-	-	4,796	**4,796**
Long Jetty	741	4,335		3,435	-	1,640	**5,076**
North Gosford	-	3,083		3,083	-	-	**3,083**
Terrigal	-	1,661		1,661	-	-	**1,661**
The Entrance	4,623	22,449		19,807	-	7,266	**27,073**
Toukley	9,748	7,556		6,946	-	10,357	**17,304**
Tuggerah	-	21,224		-	-	21,224	**21,224**
Umina Beach	6,726	-		6,726	-	-	**6,726**
Warnervale	-	9,899		9,899	-	-	**9,899**
Woongarrah	-	131,006		93,022		37,985	**131,006**
Woy Woy	2,546	546		3,092	-	-	**3,092**
Wyong	7,797	9,587			9,568	7,817	**17,384**
Dispersed	16,492	61,360		77,850	-	-	**73,978**
TOTAL:	**76,599**	**312,648**		**235,786**	**16,539**	**136,922**	**389,247**

Table 15: Central Coast Developable Commercial Lands by Suburb and Zones (2024)

Source: JLL

**B3 and B4 zones under SEPP*

7.3 Vacant Commercial Net Lettable Area (NLA)

The analysis identified approximately 903,317m^2 of commercial **Net Lettable Area (NLA)** across the Central Coast, of which approximately 66,584m^2 (7.4%) is vacant.

There are significant disparities across the Central Coast for retail and office vacancy rates. Areas with high vacancy suggest that existing offerings may not align with business needs (e.g., Gosford, Wyong). Conversely, localities like Lisarow, Tuggerah, and Lake Haven exhibit low vacancy rates, indicating a stronger demand for commercial spaces that offer local services. This disparity in vacancy rates is significant and is suggesting that localities will require different strategies and interventions to address their current supply and demand scenarios.

Most vacancy in Gosford is attributed to office uses (~28,000m^2). More broadly, office uses in metropolitan markets are challenged as organisations adjust their workspaces to adapt to hybrid working patterns.

PRECINCT	NLA	VACANCY	VACANCY
Bateau Bay	30,005 m^2	663 m^2	**2.21%**
East Gosford	17,191 m^2	1,830 m^2	**10.65%**
Erina	114,598 m^2	6,349 m^2	**5.54%**
Ettalong Beach	21,453 m^2	2,010 m^2	**9.37%**
Gosford	116,803 m^2	37,815 m^2	**32.38%**
Kincumber	11,043 m^2	261 m^2	**2.36%**
Lake Haven	67,675 m^2	Nil	**0.00%**
Lisarow	14,172 m^2	Nil	**0.00%**
Long Jetty	14,407 m^2	226 m^2	**1.57%**
Terrigal	21,920 m^2	219 m^2	**1.00%**
The Entrance	42,235 m^2	5,486 m^2	**12.99%**
Toukley	34,119 m^2	1,041 m^2	**3.05%**
Tuggerah	85,070 m^2	Nil	**0.00%**
Umina Beach	33,128 m^2	1,246 m^2	**3.76%**
Woy Woy	56,620 m^2	4,016 m^2	**7.09%**
Wyong	29,632 m^2	2,282 m^2	**7.70%**
Dispersed Local Centres	193,245 m^2	3,140 m^2	**1.54%**
TOTAL:	**903,317 m^2**	**66,584 m^2**	**7.37%**

Table 16: Central Coast Commercial Lands Vacancy (2024)
Source: JLL

Figure 7 shows the spatial distribution of vacancy rates for commercial floor space across Central Coast centres for the following three categories:

- **High Vacancy:** >10% of vacancy
- **Medium Vacancy:** 5.0% - 9.9% of vacancy
- **Low Vacancy:** <5% of vacancy

Condition analysis found common attributes for the centres sharing similar vacancy rates (noting that local character statements apply only to centres within the former Gosford LGA, and are not available for centres within the former Wyong LGA):

- Centres with **low vacancy** (<5%):
  - Strong levels of pedestrian activity, generally anchored by a supermarket;
  - Good parking availability;
  - Public domain generally in good condition;
  - Commercial stock dated but largely in good condition.
- Centres with **moderate to high vacancy** (>5%):
  - Commercial stock is generally dated and in average condition;
  - Public domain is in average condition.

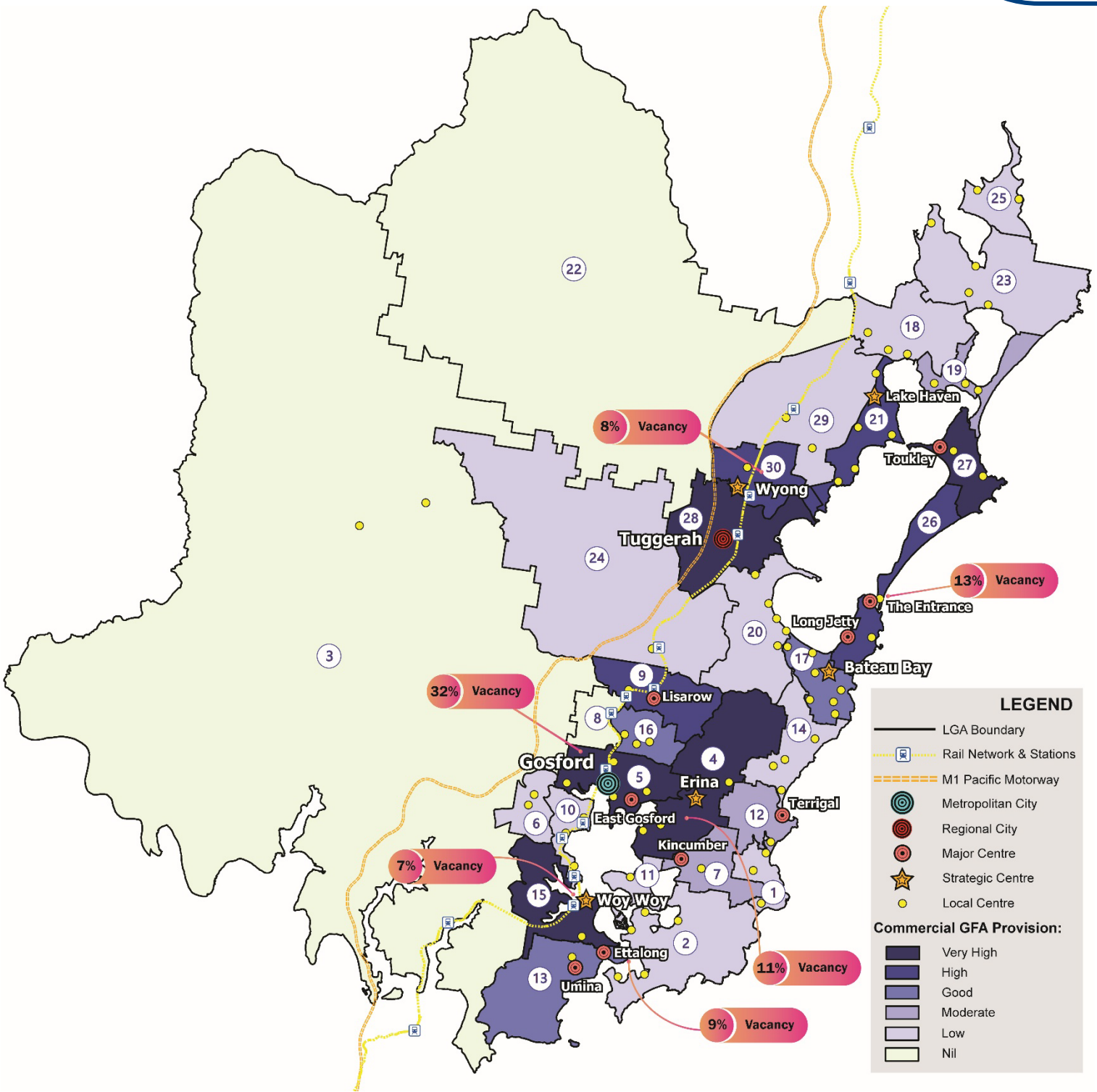


Figure 12: *Vacancy Map (September 2024)*
Source: JLL 2025

8. Gap Analysis - Current and Future Needs

8.1 Current Commercial Floorspace Supply

Commercial floor space supply per person has been modelled. Based on the LGA's 2021 population, there is 2.59m^2 of commercial floor space (NLA) per person.

SA2	EXISTING GFA m^2	POPULATION	GFA PER RESIDENT	SUPPLY CATEGORY
Avoca Beach-Copacabana	5,276	7,532	0.70	Low
Bateau Bay-Killarney Vale	46,185	22,993	2.01	Good
Blue Haven-San Remo	9,575	11,392	0.84	Low
Box Head-MacMasters Beach	3,809	11,057	0.34	Low
Budgewoi-Buff Pt-Halekulani	11,966	9,793	1.22	Moderate
Calga-Kulnura		4,750		-
Chittaway Bay-Tumbi Umbi	10,653	16,080	0.66	Low
Erina-Green Point	123,230	14,804	8.32	Very High
Gorokan-Kanwal-Charmhaven	79,902	22,588	3.54	High
Gosford-Springfield	165,911	21,359	7.61	Very High
Jilliby-Yarramalong	-	3,427	-	-
Kariong	3,388	6,518	0.52	Low
Kincumber-Picketts Valley	11,351	7,629	1.49	Moderate
Lake Munmorah-Mannering Pk	9,308	11,013	0.85	Low
Narara	-	7,191	-	-
Niagara Park-Lisarow	20,036	8,237	2.43	Good
Ourimbah-Fountaindale	2,858	4,941	0.58	Low
Point Clare-Koolewong	5,910	6,577	0.90	Low
Saratoga-Davistown	3,202	7,180	0.45	Low
Summerland Pt-Gwandalan	4,007	6,520	0.61	Low
Terrigal-North Avoca	22,104	14,894	1.48	Moderate
The Entrance	59,726	15,938	3.75	High
Toukley-Norah Head	44,580	9,975	4.47	Very High
Tuggerah-Kangy Angy	85,070	5,259	16.18	Very High
Umina-Booker Bay-Patonga	58,223	24,863	2.34	Good
Wamberal-Forresters Beach	6,937	10,693	0.65	Low
Warnervale-Wadalba	8,107	20,228	0.40	Low
Woy Woy-Blackwall	58,074	14,406	4.03	Very High
Wyoming	12,763	11,460	1.11	Moderate
Wyong	31,166	9,196	3.39	High
TOTAL:	**903,317**	**348,493**	**2.59**	

Table 17: Current floor space provision per person - 2021 *

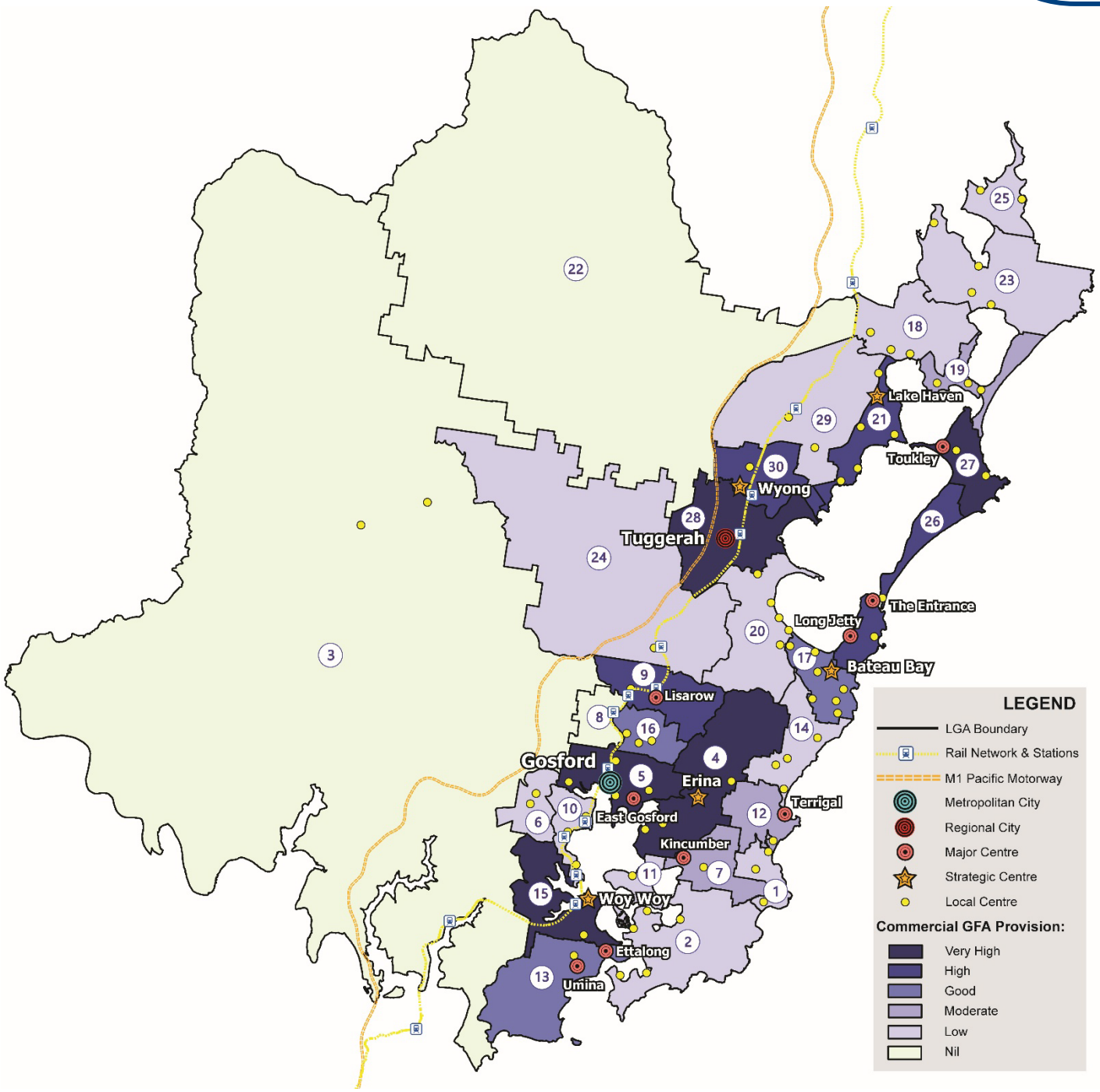


Figure 13: SA2 boundaries – 2021

SA2 Name		SA2 Name		SA2 Name	
1.	Avoca Beach	2.	Box Head - MacMasters Beach	3.	Calga - Kulnura
4.	Erina - Green Point	5.	Gosford - Springfield	6.	Kariong
7.	Kincumber - Picketts Valley	8.	Narara	9.	Niagara Park - Lisarow
10.	Point Clare - Koolewong	11.	Saratoga - Davistown	12.	Terrigal - North Avoca
13.	Umina - Booker Bay - Patonga	14.	Wamberal - Forresters Beach	15.	Woy Woy - Blackwall
16.	Wyoming	17.	Bateau Bay	18.	Blue Haven - San Remo
19.	Budgewoi - Buff Point - Halekulani	20.	Chittaway Bay - Tumbi Umbi	21.	Gorokan - Kanwal - Charmhaven
22.	Jilliby - Yarramalong	23.	Lake Munmorah - Mannering Pk	24.	Ourimbah - Fountaindale
25.	Summerland Point - Gwandalan	26.	The Entrance	27.	Toukley - Norah Head
28.	Tuggerah - Kangy Angy	29.	Warnervale - Wadalba	30.	Wyong

8.2 Future Commercial Floorspace Requirements

Commercial floor space supply per person has been modelled. Based on the LGA's 2021 population, there is 2.59m^2 of commercial floor space (NLA) per person. Assuming no further stock is supplied, by 2041 the LGA will have a floor space provision of 2.21m^2 per person.

At a local scale, the planning yield GFA and population projections for SA2 geographies has been calculated to determine GFA (m^2) per person in 2041. This modelling is outlined further in Appendix 5 Floor Space Modelling – SA2s.

SA2	EXISTING GFA m^2	POPULATION	GFA PER RESIDENT	SUPPLY CATEGORY
Avoca Beach-Copacabana	5,276	8,296	0.64	Low
Bateau Bay-Killarney Vale	46,185	24,089	1.92	Moderate
Blue Haven-San Remo	9,575	12,609	0.76	Low
Box Head-MacMasters Beach	3,809	11,779	0.32	Low
Budgewoi-Buff Pt-Halekulani	11,966	10,309	1.16	Moderate
Calga-Kulnura		5,127		-
Chittaway Bay-Tumbi Umbi	10,653	19,215	0.55	Low
Erina-Green Point	123,230	16,380	7.52	Very High
Gorokan-Kanwal-Charmhaven	79,902	24,500	3.26	High
Gosford-Springfield	165,911	33,486	4.95	Very High
Jilliby-Yarramalong	-	3,941	-	-
Kariong	3,388	6,812	0.50	Low
Kincumber-Picketts Valley	11,351	7,982	1.42	Moderate
Lake Munmorah-Mannering Pk	9,308	11,532	0.81	Low
Narara	-	8,558	-	-
Niagara Park-Lisarow	20,036	9,036	2.22	Good
Ourimbah-Fountaindale	2,858	5,226	0.55	Low
Point Clare-Koolewong	5,910	7,347	0.80	Low
Saratoga-Davistown	3,202	8,043	0.40	Low
Summerland Pt-Gwandalan	4,007	7587	0.53	Low
Terrigal-North Avoca	22,104	18,627	1.19	Moderate
The Entrance	59,726	17,684	3.38	High
Toukley-Norah Head	44,580	11,008	4.05	Very High
Tuggerah-Kangy Angy	85,070	5,315	16.01	Very High
Umina-Booker Bay-Patonga	58,223	27,869	2.09	Good
Wamberal-Forresters Beach	6,937	12,399	0.56	Low
Warnervale-Wadalba	8,107	35,687	0.23	Low
Woy Woy-Blackwall	58,074	15,646	3.71	High
Wyoming	12,763	11,764	1.08	Moderate
Wyong	31,166	10,537	2.96	Good
TOTAL:	**903,317**	**408,390**	**2.21**	

Table 18: Future floor space provision per person - 2041 *

1. Current commercial land provision per capita

The current per capita commercial floorspace on the Central Coast is 2.59m^2, whereas national benchmarking suggests an average retail provision of around 2.2m^2 per capita across Australia. This higher ratio does not represent oversupply; rather, this can be explained by looking at the unique structure of the Central Coast's commercial lands market:

a) The presence of multiple higher-order regional centres

The Central Coast has three major regional centres—Erina, Tuggerah and Gosford—each of which contains large-format retail and shopping centres. These centres draw trade from:

- the entire Central Coast
- southern Lake Macquarie
- northern fringe of Sydney
- passing traffic on the M1 corridor

This inflow increases floorspace per resident.

b) Strong tourism and seasonal population uplift

Coastal centres such as Terrigal, The Entrance, Avoca, Ettalong and Umina experience very large seasonal inflows of visitors, holiday-home users and day-trippers. These non-resident populations significantly increase retail demand but are not counted in per-capita calculations. Effectively, the LGA supports a "shadow population" that inflates actual demand beyond what the resident population implies.

c) Historical development patterns and legacy retail centres

The Central Coast grew through dispersed local townships, each developing its own commercial centre. This created more centres—and more floorspace—per capita than a typical urban area. Additionally, older centres (e.g., Woy Woy, The Entrance, Toukley) contain legacy retail floorspace that persists despite changes in spending patterns. This legacy stock increases total m^2 per person.

2. Future commercial land provision per capita

Planning for future commercial needs in the Central Coast requires an evidence-based benchmark for modelling demand across the LGA. This Strategy adopts a per-capita commercial floorspace provision rate to guide long-term centres planning and ensure that the LGA has sufficient capacity to meet population and employment needs.

This Strategy applies 2.2m^2 per resident as a baseline benchmark for modelling future LGA-wide retail floorspace requirements, given that:

- This is the current national average;
- The current per capita commercial floorspace on the Central Coast is 2.59m^2; and
- Commercial floorspace provision per capita is expected to drop over the next decades due to growth in online retail, improved floorspace efficiency, and the rise of hybrid work.

Centre-specific capacity and actual development outcomes will vary according to each centre's accessibility, land availability, seasonal trade, and localised socio-economic factors.

* "Very High" supply areas are those with bigger centres (Erina, Gosford, Tuggerah, Lake Haven) and the low supply areas are those with smaller neighbourhood centres. This is expected due to the nature of the retail hierarchy. Areas identified as "Low" supply are not necessarily in need of more retail/commercial floorspace.

** Rural areas like Jilliby-Yarramalong and Calga-Kulnura show a GFA gap, but in reality these residents would shop at Wyong, Tuggerah. Kariong or Gosford. The GFA gap does not indicate that further retail provision is required in rural areas.

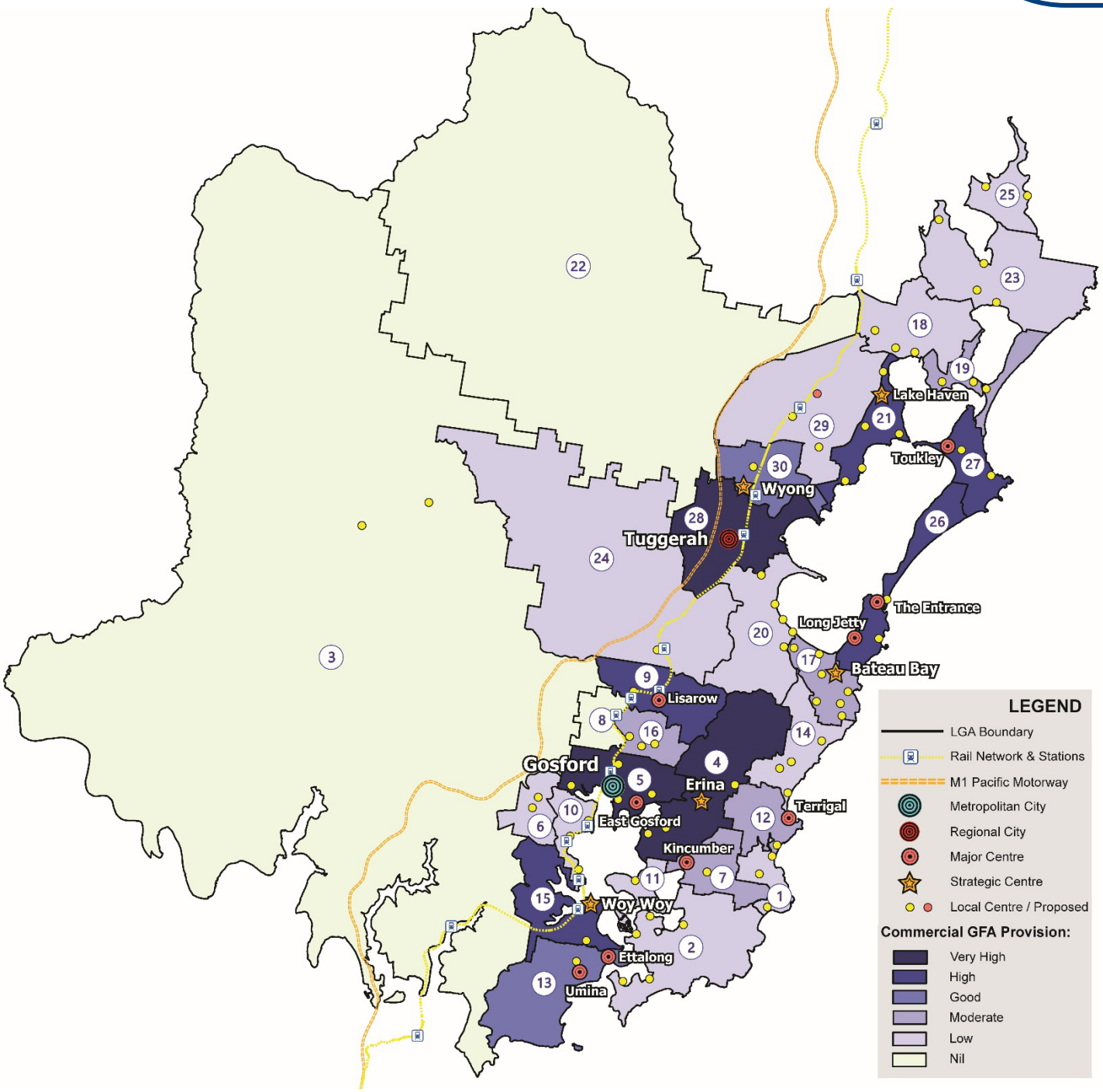


Figure 14: SA2 boundaries – 2041

SA2 Name		SA2 Name		SA2 Name	
1.	Avoca Beach	2.	Box Head - MacMasters Beach	3.	Calga - Kulnura
4.	Erina - Green Point	5.	Gosford - Springfield	6.	Kariong
7.	Kincumber - Picketts Valley	8.	Narara	9.	Niagara Park - Lisarow
10.	Point Clare - Koolewong	11.	Saratoga - Davistown	12.	Terrigal - North Avoca
13.	Umina - Booker Bay - Patonga	14.	Wamberal - Forresters Beach	15.	Woy Woy - Blackwall
16.	Wyoming	17.	Bateau Bay	18.	Blue Haven - San Remo
19.	Budgewoi - Buff Point - Halekulani	20.	Chittaway Bay - Tumbi Umbi	21.	Gorokan - Kanwal - Charmhaven
22.	Jilliby - Yarramalong	23.	Lake Munmorah - Mannering Pk	24.	Ourimbah - Fountaindale
25.	Summerland Point - Gwandalan	26.	The Entrance	27.	Toukley - Norah Head
28.	Tuggerah - Kangy Angy	29.	Warnervale - Wadalba	30.	Wyong

SA2	CURRENT GFA - 2024 (m^2)	TOTAL GFA REQUIRED – 2041 (m^2)	GAP GFA (m^2)
Avoca Beach - Copacabana	5,276	18,251	**12,976**
Bateau Bay - Killarney Vale	46,185	52,996	**6,811**
Blue Haven - San Remo	9,575	27,740	**18,165**
Box Head - MacMasters Beach	3,809	25,914	**22,105****
Budgewoi - Buff Point - Halekulani	11,966	22,680	**10,713**
Calga-Kulnura	-	11,279	**11,279****
Chittaway Bay - Tumbi Umbi	10,653	42,273	**31,620**
Erina - Green Point	123,230	36,036	**-87,194***
Gorokan - Kanwal - Charmhaven	79,902	53,900	**-26,002***
Gosford - Springfield	165,911	73,669	**-92,242***
Jilliby- Yarramalong	-	8,670	**8,670****
Kariong	3,388	14,986	**11,598**
Kincumber - Picketts Valley	11,351	17,560	**6,209**
Lake Munmorah - Mannering Park	9,308	25,370	**16,062**
Narara	-	18,828	**18,828**
Niagara Park - Lisarow	20,036	19,879	**-157**
Ourimbah - Fountaindale	2,858	11,497	**8,640**
Point Clare - Koolewong	5,910	16,163	**10,254**
Saratoga - Davistown	3,202	17,695	**14,492**
Summerland Point - Gwandalan	4,007	16,691	**12,685**
Terrigal - North Avoca	22,104	40,979	**18,875**
The Entrance	59,726	38,905	**-20,821**
Toukley - Norah Head	44,580	24,218	**-20,362**
Tuggerah - Kangy Angy	85,070	11,693	**-73,377***
Umina - Booker Bay - Patonga	58,223	61,312	**3,089**
Wamberal - Forresters Beach	6,937	27,278	**20,341**
Warnervale - Wadalba	8,107	78,511	**70,404**
Woy Woy - Blackwall	58,074	34,421	**-23,653**
Wyoming	12,763	25,881	**13,118**
Wyong	31,166	23,181	**-7,984**
TOTAL:	**903,317**	**898,458**	

Table 19: GFA required to meet 2.2m^2/person standard by 2041

Key findings of this modelling indicate priorities for additional commercial lands be focussed on the following SA2 geographies:

- Warnervale – Wadalba
- Blue Haven – San Remo
- Chittaway Bay – Tumbi Umbi
- Terrigal - North Avoca
- Narara
- Wamberal – Forresters Beach

9. Commercial Lands Vision

9.1 Long Term Vision Statement

A Connected Coast of Vibrant, Distinctive Centres—Thriving Economically, Anchored in Community, and Built for the Future.

By 2045, the Central Coast will offer a dynamic network of commercial centres that are economically resilient, socially vibrant, connected and environmentally sustainable. These centres will be more than just places of business—they will be local destinations where people gather, connect, and thrive, reflecting the unique identity of each community and supporting the principles of the 15-minute city. Built for the future, they will be adaptable to changing work and retail trends, integrate green infrastructure and active transport, and embrace inclusive design and emerging technologies. From region-shaping hubs to coastal precincts, each centre will play its role in supporting the region's liveability, climate resilience, and long-term economic success.

9.2 Alignment with Regional and State Planning Priorities

The Strategy has been prepared having regard to relevant State, regional and local strategic planning frameworks, including the Central Coast Regional Plan 2041, the Central Coast Local Strategic Planning Statement, regional economic development strategies, transport planning frameworks and current NSW Government priorities relating to housing delivery, employment growth, productivity and well-connected centres (including the Housing Delivery Program, Transport Oriented Development Program, Low and Mid-Rise Housing Policy).

These documents collectively support the creation of vibrant mixed-use centres that provide housing, jobs, services and community infrastructure in accessible locations. The idea of 15-minute neighbourhoods, where goods and services are close to home, sits at the heart of the vision. The vision also supports the revitalisation of key areas like Gosford, Wyong, and The Entrance and growth of new areas (like Woongarrah) – ensuring that each place grows in a way that reflects its own identity and community needs.

Importantly, the Strategy recognises the need to balance housing delivery objectives with the protection and growth of commercial floorspace, ensuring centres continue to perform their economic, employment and service functions while accommodating population growth.

9.3 Commercial Lands Hierarchy

The development of a commercial lands hierarchy is a fundamental aspect of commercial lands strategy that plays a crucial role in shaping the economic and development landscape of the Central Coast. Understanding the roles and functions of various commercial areas can help manage growth, address challenges and take advantage of opportunities.

The hierarchy outlined in this section will help categorises commercial areas based on their size, function, and significance, providing a structured approach to commercial lands planning and development that aligns with the vision. Establishing and maintaining a hierarchy of commercial lands framework is important for several reasons:

- This assists Council in allocating resources and investing in infrastructure more efficiently. As a result, regions with the greatest economic potential gain essential support for growth, while the requirements of smaller local commercial centres are also addressed.
- It disperses commercial activity, easing infrastructure demands and supporting varied, resilient local economies.
- Improved accessibility to goods and services will benefit all residents. Strategically placing commercial functions gives communities convenient options for shopping and services.
- It will promote local centres that meet residents' daily needs, support small businesses, and build stronger community connections for both locals and visitors.
- It supports sustainable land use and positive development trends. For instance, promoting mixed-use projects in suitable areas contributes to lively and dynamic communities.
- It enables Council staff and stakeholders to design targeted initiatives for different commercial areas, aligning planning and development with long-term goals.

HIERARCHY	ROLE	TYPICAL USES	PLACE	
Metropolitan City	Major regional employment, commercial, civic and mixed-use centre.	Health, education, government and major office uses.	• **Gosford**	
Regional City	Major sub-regional retail, employment and service centre.	Retail, offices, entertainment and community facilities.	• **Tuggerah**	
Specialised Centre	Focused employment, business, enterprise or industrial activities.	Manufacturing, logistics, agriculture, food production, bulky goods, showrooms and front-of-house retail.	1. **Somersby** 2. **Tuggerah Business Park** 3. **West Gosford**	
Strategic Centre	Key centres providing retail, services, employment, housing and community functions.	Offices, hospitality, health, community, cultural and supporting infrastructure uses.	1. **Bateau Bay** 2. **Erina** 3. **Lake Haven**	4. **Woy Woy** 5. **Wyong**
Major Centre	Important district-level retail, service and community destinations.	Supermarkets, specialty retail, hospitality and community gathering spaces.	1. **East Gosford** 2. **Ettalong Beach** 3. **Kincumber** 4. **Lisarow** 5. **Long Jetty**	6. **Terrigal** 7. **The Entrance** 8. **Toukley** 9. **Umina Beach**
Local Centre	Local convenience retail and community services meeting day-to-day needs.	Daily needs retail, services and community uses.	• **All other dispersed villages**	

Table 20: Commercial Lands Hierarchy

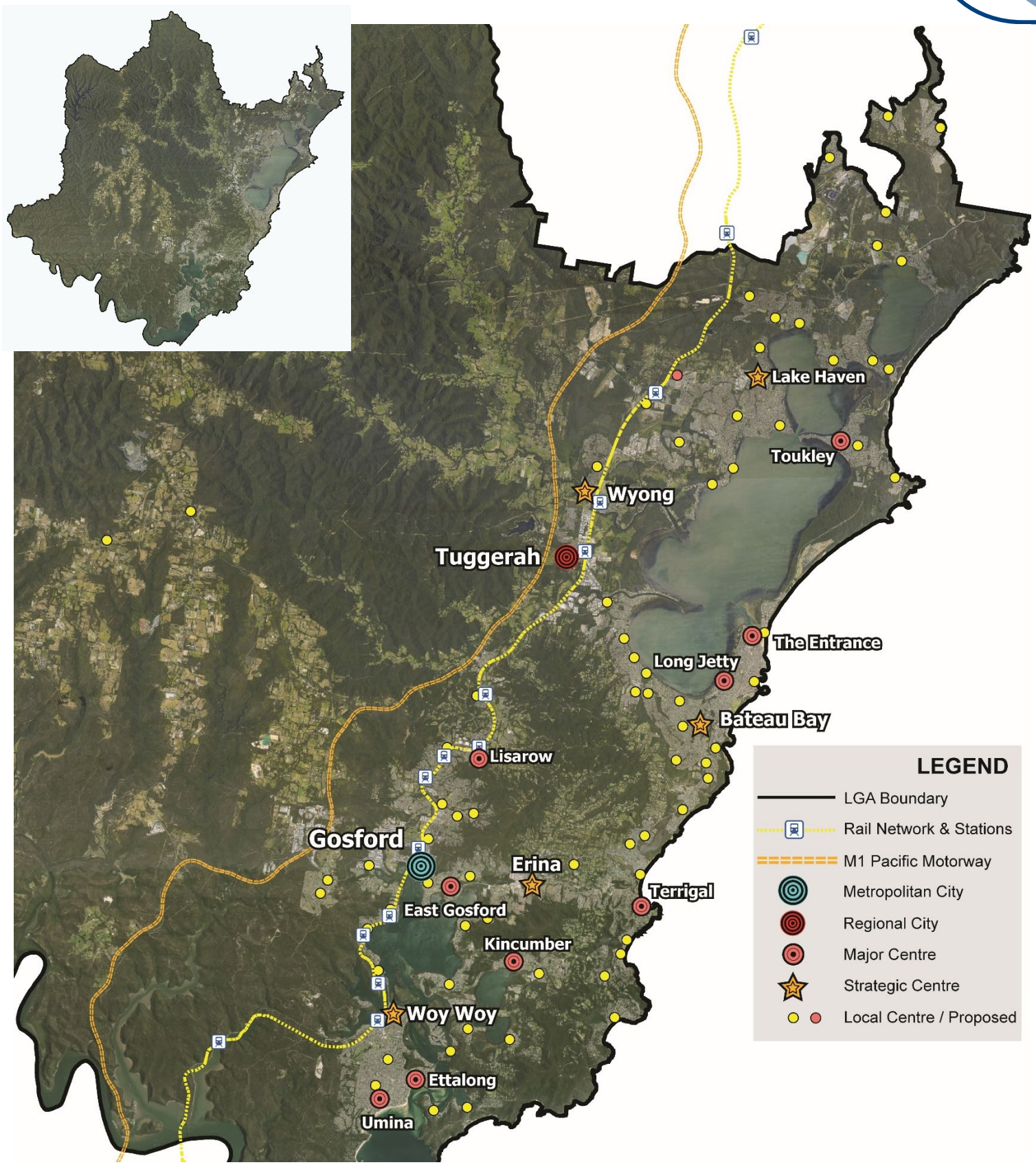


Figure 15: Centres Hierarchy (**Proposed**)

9.4 Desired Outcomes for Commercial Lands

Outcome 1: Connected and accessible centres

What success looks like:	• Planning for walkable and cyclable centres: Enhanced active transport infrastructure (footpaths, lighting, bike lanes, end-of-trip facilities) support walkable and safe access to commercial lands. • Increased visitation in commercial areas due to improved transport links and accessibility options. • Commercial areas positioned as mobility hubs, supporting electric vehicle infrastructure, ride-share services, and public transport interchange points. • Provide clear directions on the role and function of streets in our Centres. • Provide clear parking controls and public parking facilities that are in line with sustainable community needs.

Outcome 2: Vibrant centres that support community life and local business.

What success looks like:	• Increased residential development within mixed-use centres supporting centre vitality, economic activity and community life. • Housing growth in commercial centres is balanced with the retention of employment and commercial functions. • Improved public domain quality, safety, and accessibility. • Update active frontage planning controls to improve street frontage and public domain. • Increased pedestrian activity and time spent in centres. • Improved safety and amenity for both residents and visitors. • Increased night-time economy offerings. • Reflect local identity through placemaking, arts, and design.

Outcome 3: Diverse and resilient commercial centres

What success looks like:	• Increased commercial diversity, including healthcare, hospitality, knowledge, technology and creative sectors. • Greater presence of co-working, shared use, and flexible office formats. • Infrastructure to support a variety of transportation modes. • Programs to support urban renewal and new business support in areas with high vacancy rates.

Outcome 4: Green & adaptable spaces for changing environmental and economic conditions

What success looks like:	• A higher percentage of commercial buildings achieving Green Star, NABERS or other green certifications. • Increased utilisation of adaptable workspaces, with businesses successfully reconfiguring spaces. • Commercial areas demonstrate resilience to economic downturns, with minimal vacancy rates. • Successful implementation of place-based planning strategies and projects that anticipate and respond to future market and environmental trends. • Strong public and private investment strategies and partnerships.

Outcome 5: Innovative, technologically advanced and creative centres

What success looks like:	• Increased R&D Investment by businesses and organisations within commercial areas. • Smart city concepts explored and trialed in public domain areas. • Increased establishment of startups and tech companies. • Higher rates of technological adoption among businesses, leading to improved productivity and efficiency. • Local innovative businesses and start-ups in new and emerging markets, including retail, pop-up stores, arts and crafts, and hospitality experiences.

9.5 Criteria for new commercial centres

Ensuring planning controls remain flexible enough to accommodate innovation and emerging retail formats, while protecting the viability and function of existing centres, is a key challenge for commercial land planning. To achieve this balance, the following criteria should be applied when assessing proposals for new or expanded commercial centres, including where additional floorspace is proposed outside existing centres.

1. Strategic Alignment

The proposal is consistent with relevant State, regional and local strategic planning objectives.

2. Market Demand

A demonstrated need exists for additional commercial floorspace that cannot reasonably be accommodated within existing centres or edge-of-centre locations. Market demand must be supported by a retail demand assessment and an economic impact assessment.

3. Protection of Existing Centres

The new centre will not diminish the level of services and facilities currently provided.

4. Land Use Conflict

The proposal integrates appropriately with surrounding land uses and does not create significant land use conflicts. Proposals must demonstrate that enabling commercial uses will not create conflict with nearby land uses or result in undermining the current uses within the locality, for example employment land uses.

5. Transport

The site must be well serviced by public transport, and surrounding road infrastructure must be capable of accommodating heavy vehicle access.

6. Pedestrian and Cyclist Accessibility

The location must be integrated with the retail catchment area through safe and accessible pedestrian and cycleway networks.

7. Environmental Impacts

The site is suitable for development without significant environmental constraints or excessive engineering intervention.

8. Community and Urban Design Outcomes

The development delivers a high-quality built form, contributes positively to the public domain, and provides community benefits through accessible, attractive and well-designed commercial spaces.

Also see Appendix 6 for the size parameters when considering new centres.

10. Strategies and Actions

This section identifies actions to implement the Strategy through planning controls, policy, operational programs and capital investment. Delivery will be guided by Council priorities, available resources, funding and budget, with actions reviewed periodically to respond to changing circumstances.

Five overarching strategies have been identified to deliver on retail land requirements to 2046. Additional detail on the strategies is identified in the following tables.



Timeframes and roles have been allocated for each initiative as outlined in Table 15.

Table 21: Timeframes and role criteria

TIMEFRAME	
Short:	0-2 years
Medium:	3-5 years
Long:	5+ years
Ongoing:	Ongoing basis

COUNCIL'S ROLE
Advocate: Represent the community's interests to State, Commonwealth and private sector
Deliver: Coordinate delivery
Promote: Provide information
Regulate: Monitor and review
Support: Supporting other stakeholders (e.g. assisting local industries, businesses and government agencies to advocate for state infrastructure upgrades)

10.1 Action 1: Targeted Centres Improvement

Council can support retail growth by improving amenities, security, and streetscapes. Wider footpaths allow for outdoor dining, creating a vibrant atmosphere. Accessible and safe streets are also essential for an aging population.

To identify potential targeted centres for improvements, vacancy levels provide a key performance indicator of commercial health. However large-scale private shopping centres precincts (e.g., Erina Fair, Tuggerah Westfield, Bateau Bay and Lake Haven) are excluded as there are limited intervention opportunities for Council to sponsor change.

The following vacancy indicators have been used in the following groups:

- High Vacancy: Over 10% of vacancy
- Medium Vacancy: 5.0% - 9.9% of vacancy
- Low Vacancy: 0% - 4.9% of vacancy

Please see Appendix 4 for further detail on all suburbs and the local evaluation framework for targeted centres improvement.

Table 22: Implementation – Targeted Centres Actions *

REFERENCE	OBJECTIVE	ACTION	MEASURE OF SUCCESS	TIMING	ROLE
A1-1	**High Vacancy Centres –** *Activate and reposition high-vacancy centres to restore market confidence and identify viable pathways for renewal.*	**Targeted improvements required*:** • Undertake precinct-based analysis of identified high-vacancy centres to understand market drivers, constraints, and redevelopment potential, including: - Gosford - The Entrance - Wyong - Ettalong - East Gosford - Woy Woy	A pipeline of precincts to undergo further investigation.	**Medium**	**Deliver**

REFERENCE	OBJECTIVE	ACTION	MEASURE OF SUCCESS	TIMING	ROLE
		• Use findings to identify priority land-use changes, planning controls, infrastructure gaps, and catalytic opportunities to support reinvestment.			
A1-2	**Low Vacancy Centres –** *Enable managed growth in high-demand centres to support business expansion, employment growth, and service diversification.*	**Capacity enhancing interventions required:** • Investigate opportunities to unlock additional commercial capacity in low-vacancy centres through: – Planning controls review – Built-form and floor space optimisation – Redevelopment and consolidation opportunities. • Priority centres include: - Avoca Beach - Bateau Bay - Kincumber - Long Jetty - Terrigal - Toukley - Umina Beach - Wadalba	A pipeline of precincts to undergo further investigation and planning to deliver the additional capacity.	**Long**	**Deliver**
A1-3	**Improve the appearance of and vitality of Centres –** *Support centre revitalisation by improving built-form quality, public domain outcomes, and investment certainty for businesses and landowners.*	• Prepare centre-specific urban design principles to guide redevelopment and infill within existing centres. • Collaborate with landowners, developers, and businesses to achieve coordinated, high-quality design outcomes. • Develop a clear and practical planning guidance package articulating redevelopment opportunities, approval pathways, and economic benefits of centre renewal.	CCDCP amendments finalised. More physically attractive commercial centres. Increase in town centre turnover. Lower vacancies.	**Medium**	**Deliver and Support**

Source: JLL Existing Conditions Analysis Report September 2024

* Refer to Appendix 4 for improvement evaluation framework.

10.2 Action 2: Improving Planning and Development Controls in CCLEP and CCDCP

Table 23: Implementation – Planning Instrument Reviews

REFERENCE	OBJECTIVE	ACTION	MEASURE OF SUCCESS	TIMING	ROLE
A2–1	**Reinforce centre roles and hierarchy**	**CCLEP:** • Define desired centre roles and hierarchy in any updates to the Local Strategic Planning Statement. **CCDCP:** • Examine local character statements to confirm they align with the specific function of each centre. Note that these statements are relevant only to the former Gosford Local Government Area (LGA) and do not apply within the former Wyong LGA. • Require a Strategic Role Justification within Statements of Environmental Effects to show alignment with the centre hierarchy.	CCLEP and CCDCP amendments finalised.	**Medium**	**Deliver**
A2–2	**Protect and Promote Active Ground-Level Uses**	**CCLEP:** • Require non-residential ground-floor uses in E1, E2, and MU1 zones along walkable main streets through primary development standards. • Apply minimum floor space area requirements for commercial uses in MU1 zones to retain commercial viability. **CCDCP:** • Strengthen active frontage requirements to prevent residential encroachment and improve pedestrian permeability. Clearly define uses considered "active" (e.g., cafés, medical centres). • Identify Public Domain Improvement Precincts to guide Council investment and assessment priorities.	CCLEP and CCDCP amendments finalised.	**Medium**	**Deliver**

REFERENCE	OBJECTIVE	ACTION	MEASURE OF SUCCESS	TIMING	ROLE
A2–3	**Enable Flexibility and Adaptation for Emerging Business Models**	**CCLEP:** • Encourage a range of permissible uses that support hospitality, shared workspaces, creative studios, research and development, technology-based enterprises and temporary uses (e.g., pop-ups, markets). **CCDCP:** • Strengthen design guidance to support adaptive reuse and flexible tenancies, including variable ceiling heights, minimum ground-floor commercial depth, loading access, and broadband readiness.	CCLEP and CCDCP amendments finalised.	**Medium**	**Deliver**
A2–4	**Facilitate Transit-Oriented Development to support commercial activity.**	**CCLEP:** • Incorporate pedestrian-priority objectives for commercial centres within the Aims of the Plan. • Require end-of-trip facilities and pedestrian shelter as part of principal development standards for developments above a defined threshold. **CCDCP:** • Require detailed transport and access plans for larger mixed-use developments within identified transit-oriented development nodes.	CCLEP and CCDCP amendments finalised.	**Medium**	**Deliver**
A2–5	**New commercial land use zones or uplifts.**	**CCLEP:** • Consider new commercial zones (E1, E2 and MU1) and/or development standard uplifts (height and FSR) for existing commercial lands within SA2s where additional commercial capacity is required. **CCDCP:** • May be required, depending on the location of new commercial zones or development standard uplifts.	CCLEP and CCDCP amendments finalised.	**Medium**	**Deliver**

10.3 Action 3: Improving Infrastructure and Accessibility of Commercial Places

Table 24: Implementation – Improving Infrastructure and Accessibility

REFERENCE	OBJECTIVE	ACTION	MEASURE OF SUCCESS	TIMING	ROLE
A3–1	**Improve pedestrian environments**	Identify public domain upgrades (shade, lighting, footpaths, wayfinding and crossings) as part of future town centre master planning.	Centre masterplans completed.	**Long**	**Deliver and Support**
A3–2	**Support the night-time economy**	• Map areas suitable for night-time activation. • Improve safety through lighting and security upgrades. • Implement a Special Entertainment Precinct (SEP) at Gosford.	• Night-time activation map completed • CCDCP amendments finalised. • SEP established at Gosford.	**Medium**	**Deliver and Support**
A3–3	**Integrate smart place technology**	Trial smart technology solutions such as smart lighting, environmental monitoring and public safety systems in key locations.	Smart technology infrastructure trial completed at key locations.	**Medium**	**Deliver**

10.4 Action 4: Improving Sustainability of Commercial Places

Table 25: Implementation – Improving Sustainability

REFERENCE	OBJECTIVE	ACTION	MEASURE OF SUCCESS	TIMING	ROLE
A4–1	**Integrate green infrastructure into commercial development**	Promote the incorporation of green infrastructure measures (such as green roofs, living walls and permeable paving) in commercial developments to support biodiversity, stormwater management and urban heat mitigation.	CCDCP amendments finalised.	**Short**	**Deliver**

REFERENCE	OBJECTIVE	ACTION	MEASURE OF SUCCESS	TIMING	ROLE
A4–2	**Improve sustainable design outcomes in public spaces**	Investigate grant funding to undertake a green infrastructure audit of public spaces within E1 and E2 zones and implement urban greening retrofits (including street trees, shade, raingardens, planter boxes and green walls).	Green Infrastructure Audit completed.	**Medium**	**Deliver**

10.5 Action 5: Well-Located Housing in Vibrant Centres

Appropriate residential intensification will be encouraged within strategic centres and around transport hubs, while maintaining sufficient commercial floorspace to support local employment, business investment and long-term economic resilience.

By supporting housing growth in appropriate centres, the Strategy contributes to broader State objectives relating to housing supply, housing diversity, productivity, liveability and the creation of connected, walkable communities.

Table 26: Implementation - Well-Located Housing in Vibrant Centres

REFERENCE	OBJECTIVE	ACTION	MEASURE OF SUCCESS	TIMING	ROLE
A5–1	**Incentivise shop-top housing**	Investigate planning and financial incentives to encourage shop-top housing in commercial centres, including increased height limits or reduced development contributions.	Centres accommodate a greater share of future housing growth through well-designed mixed-use development.	**Medium**	**Support**

11. Conclusion

This strategy aims to address the evolving landscape of commercial areas within the Central Coast region, responding to demographic shifts, economic changes, and community needs.

This strategy establishes a clear vision, hierarchy of commercial centres and set of outcomes to achieve. It incorporates an evaluation framework for ongoing planning and development of commercial lands to meet individual centre service needs.

The strategy leverages insights from stakeholders to ensure alignment with business community aspirations and economic goals.

As an outcome-based strategy it will enable Council to be flexible in how the Strategy is implemented – based on Council resources and funding opportunities. It also provides Council with flexibility to be proactive to changing and unforeseen economic circumstances.

The frameworks and objectives provided are from a commercial lands planning and development lens to support Council officers in integrating commercial lands planning and development into other aspects of Council's operations.

Overall, the Strategy will facilitate the development of vibrant, sustainable commercial spaces that cater to local businesses and enhance the overall economic vitality of the Central Coast region.

Appendix 1
Trade Area Analysis

Location iQ has conducted a retail trade area analysis identifying eight major precincts on the Central Coast (in order of catchment size):

- Tuggerah,
- Erina,
- Lake Haven,
- Woy Woy,
- The Entrance,
- Gosford,
- Wyong, and
- Warnervale.

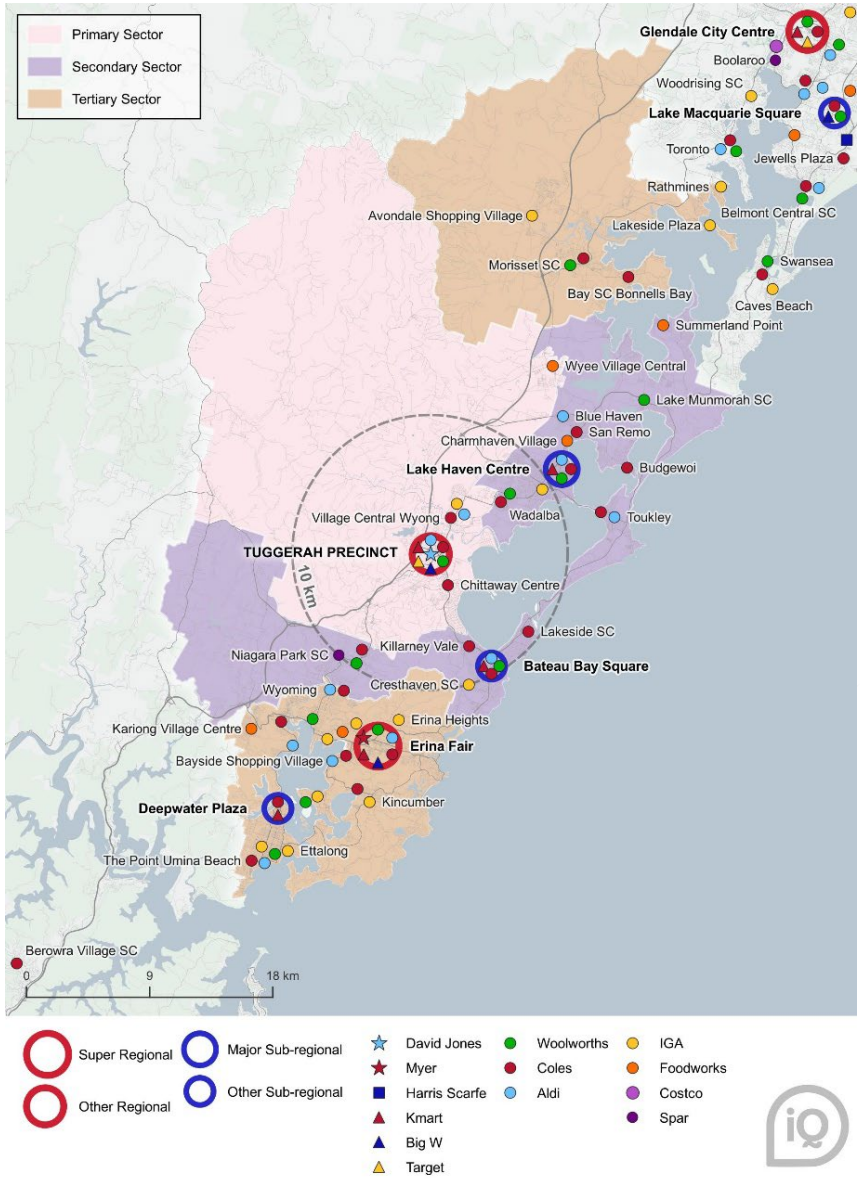
The retail catchment areas for each precinct are segmented into primary, secondary, and tertiary sectors.

Current and projected population is based on NSW Department of Housing and Infrastructure Population Projections 2021 – 2041.

This exercise excludes the SA2 and population which does not fall within the Central Coast LGA, although it may be inside some of the tertiary catchment areas.

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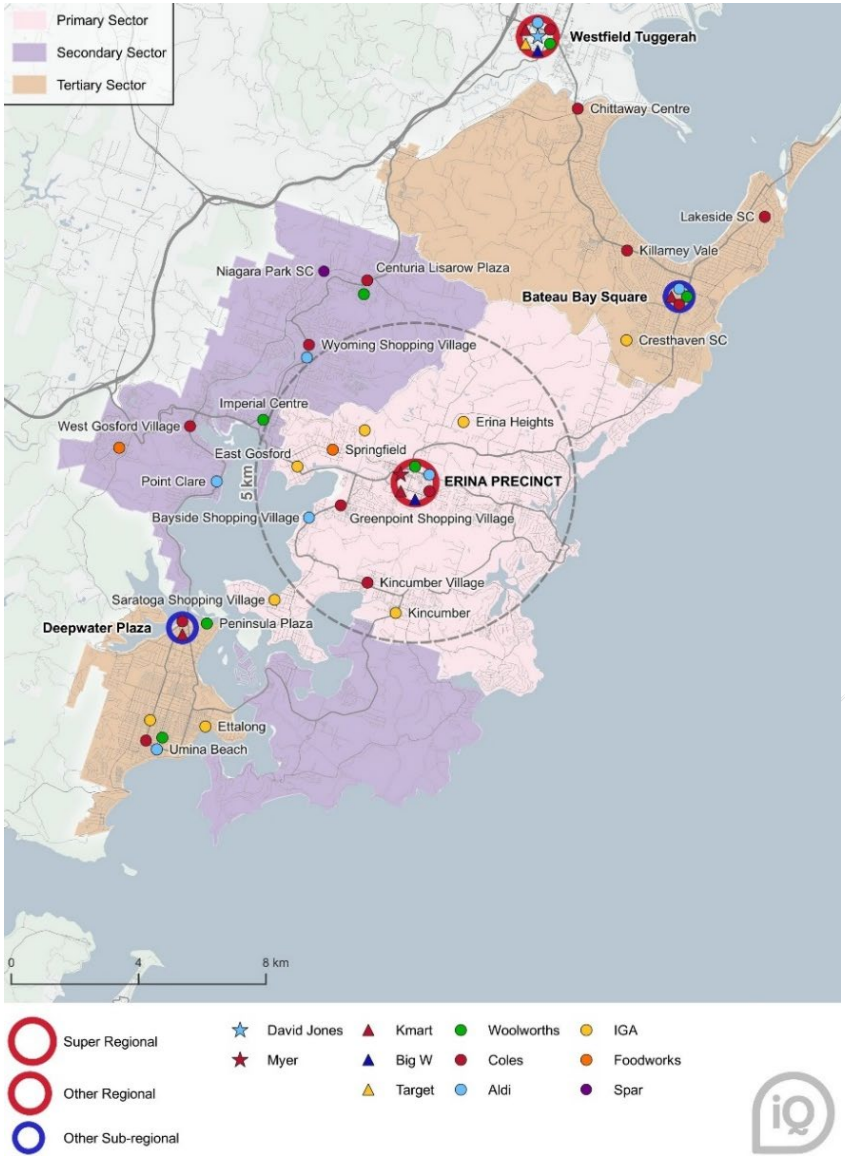
1. Tuggerah Trade Area Catchment



SA2	2021 POPULATION	2041 POPULATION
Primary		
Chittaway Bay - Tumbi Umbi	16,080	19,215
Jilliby - Yarramalong	3,427	3,941
Ourimbah - Fountaindale	4,941	5,226
Tuggerah - Kangy Angy	5,259	5,315
Warnervale - Wadalba	20,228	35,687
Wyong	9,196	10,537
Secondary		
Bateau Bay - Killarney Vale	22,993	24,089
Blue Haven - San Remo	11,392	12,609
Budgewoi - Buff Point - Halekulani	9,793	10,309
Calga - Kulnura	4,750	5,127
Gorokan - Kanwal - Charmhaven	22,588	24,500
Lake Munmorah - Mannering Park	11,013	11,532
Narara	7,191	8,558
Niagara Park - Lisarow	8,237	9,036
Summerland Point - Gwandalan	6,520	7,587
The Entrance	15,938	17,684
Toukley - Norah Head	9,975	11,008
Tertiary		
Avoca Beach - Copacabana	7,532	8,296
Box Head - MacMasters Beach	11,057	11,779
Erina - Green Point	14,804	16,380
Gosford - Springfield	21,359	33,486
Kariong	6,518	6,812
Kincumber - Picketts Valley	7,629	7,982
Point Clare - Koolewong	6,577	7,347
Saratoga - Davistown	7,180	8,043
Terrigal - North Avoca	14,894	18,627
Umina - Booker Bay - Patonga	24,863	27,869
Wamberal - Forresters Beach	10,693	12,399
Woy Woy - Blackwall	14,406	15,646
Wyoming	11,460	11,764
TOTAL:	**348,493**	**408,390**

Source: *Location iQ; Department of Housing and Infrastructure Population Projections*

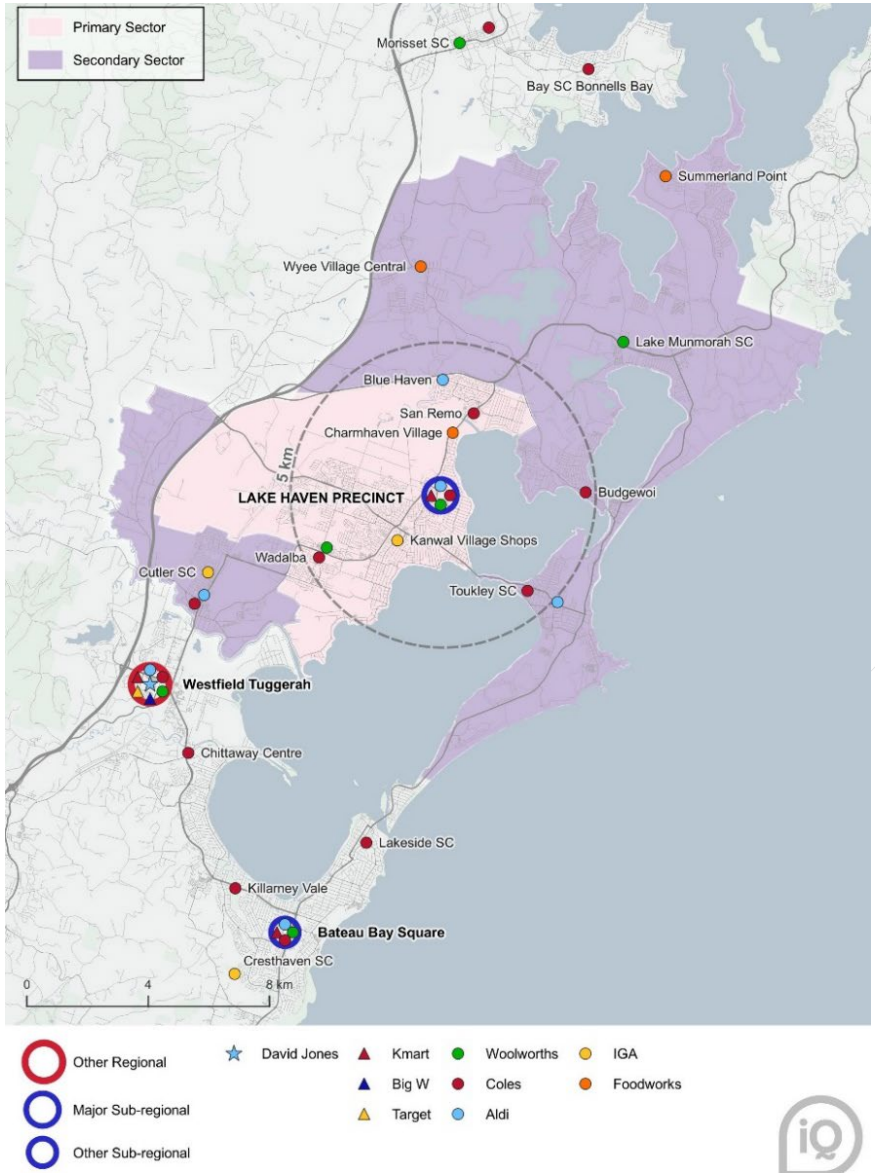
2. Erina Trade Area Catchment



SA2	POPULATION 2021	POPULATION 2041
Primary		
Avoca Beach - Copacabana	7,532	8,296
Erina - Green Point	14,804	16,380
Gosford - Springfield	21,359	33,486
Kincumber - Picketts Valley	7,629	7,982
Saratoga - Davistown	7,180	8,043
Terrigal - North Avoca	14,894	18,627
Wamberal - Forresters Beach	10,693	12,399
Secondary		
Box Head - MacMasters Beach	11,057	11,779
Kariong	6,518	6,812
Narara	7,191	8,558
Niagara Park - Lisarow	8,237	9,036
Point Clare - Koolewong	6,577	7,347
Wyoming	11,460	11,764
Tertiary		
Bateau Bay - Killarney Vale	22,993	24,089
Chittaway Bay - Tumbi Umbi	16,080	19,215
Ourimbah - Fountaindale	4,941	5,226
The Entrance	15,938	17,684
Umina - Booker Bay - Patonga	24,863	27,869
Woy Woy - Blackwall	14,406	15,646
TOTAL:	**234,352**	**270,238**

Source: *Location iQ; Source: Department of Housing and Infrastructure Population Projections 2021 – 2041*

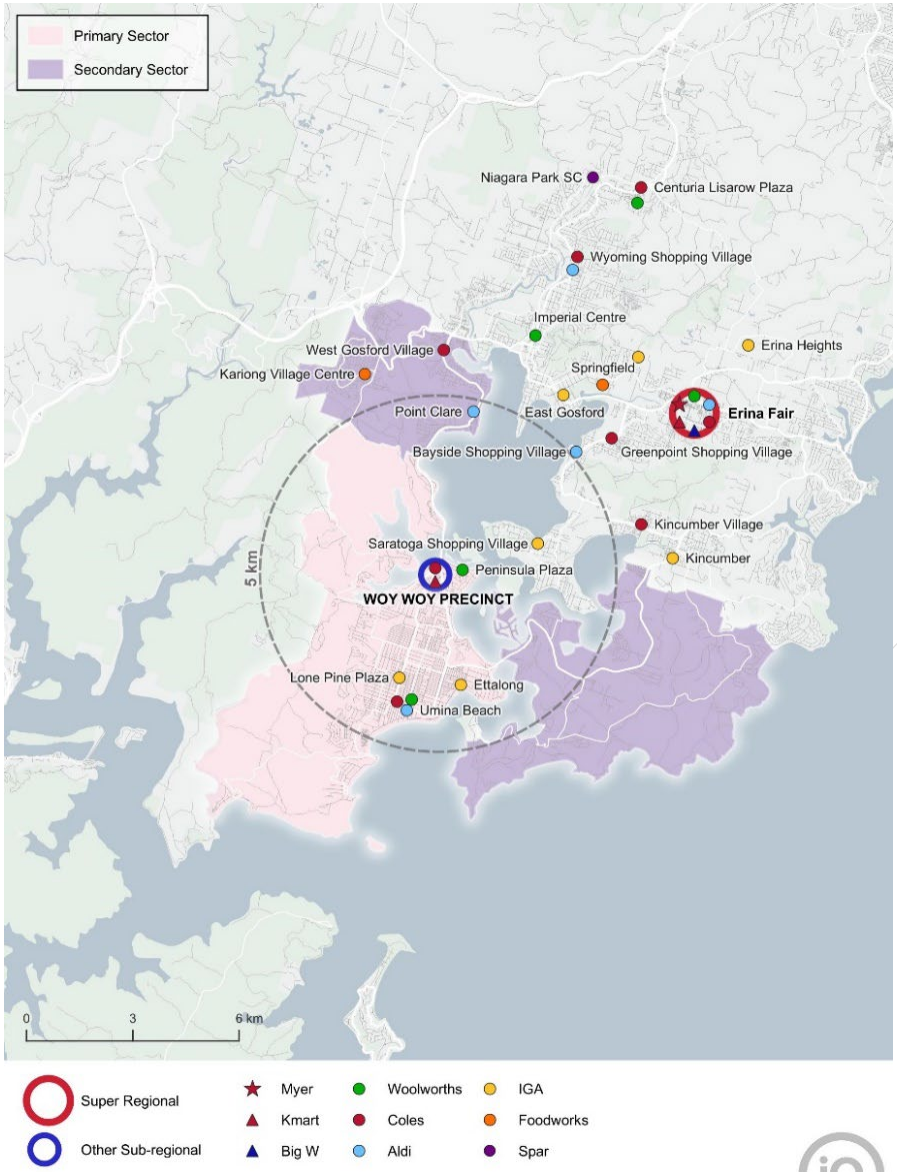
3. Lake Haven Trade Area Catchment



SA2	POPULATION 2021	POPULATION 2041
Primary		
Blue Haven - San Remo	11,392	12,609
Gorokan - Kanwal - Charmhaven	22,588	24,500
Warnervale - Wadalba	20,228	35,687
Secondary		
Budgewoi - Buff Point - Halekulani	9,793	10,309
Jilliby - Yarramalong	3,427	3,941
Lake Munmorah - Mannering Park	11,013	11,532
Summerland Point - Gwandalan	6,520	7,587
The Entrance	15,938	17,684
Toukley - Norah Head	9,975	11,008
Wyong	9,196	10,537
TOTAL:	**120,070**	**145,394**

Source: *Location iQ; Source: Department of Housing and Infrastructure Population Projections 2021 – 2041*

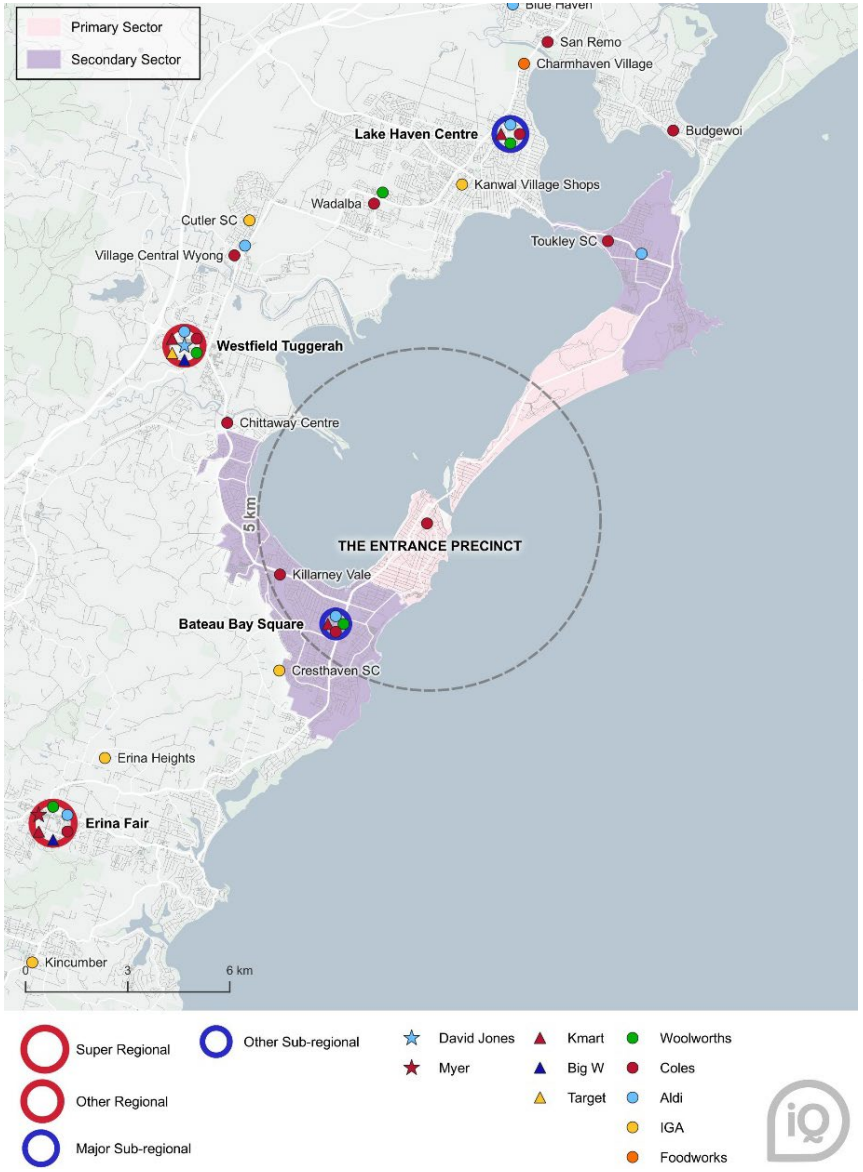
4. Woy Woy Trade Area Catchment



SA2	POPULATION 2021	POPULATION 2041
Primary		
Point Clare - Koolewong	6,577	7,347
Umina - Booker Bay - Patonga	24,863	27,869
Woy Woy - Blackwall	14,406	15,646
Secondary		
Box Head - MacMasters Beach	11,057	11,779
Gosford - Springfield	21,359	33,486
Kariong	6,518	6,812
TOTAL:	**84,780**	**102,939**

Source: *Location iQ; Source: Department of Housing and Infrastructure Population Projections 2021 – 2041*

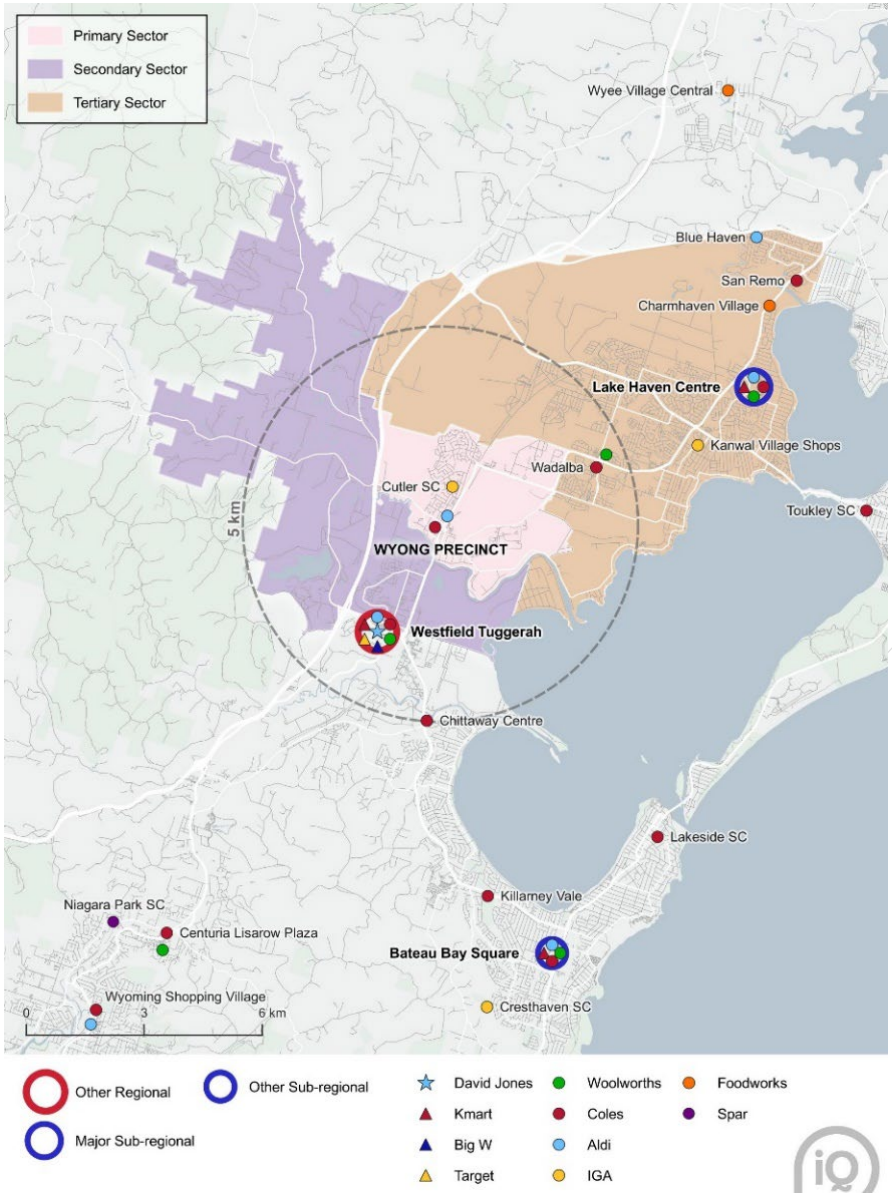
5. The Entrance Trade Area Catchment



SA2	POPULATION 2021	POPULATION 2041
Primary		
The Entrance	15,938	17,684
Secondary		
Bateau Bay - Killarney Vale	22,993	24,089
Chittaway Bay - Tumbi Umbi	16,080	19,215
Toukley - Norah Head	9,975	11,008
Wamberal - Forresters Beach	10,693	12,399
TOTAL:	**75,679**	**84,395**

Source: *Location iQ; Source: Department of Housing and Infrastructure Population Projections 2021 – 2041*

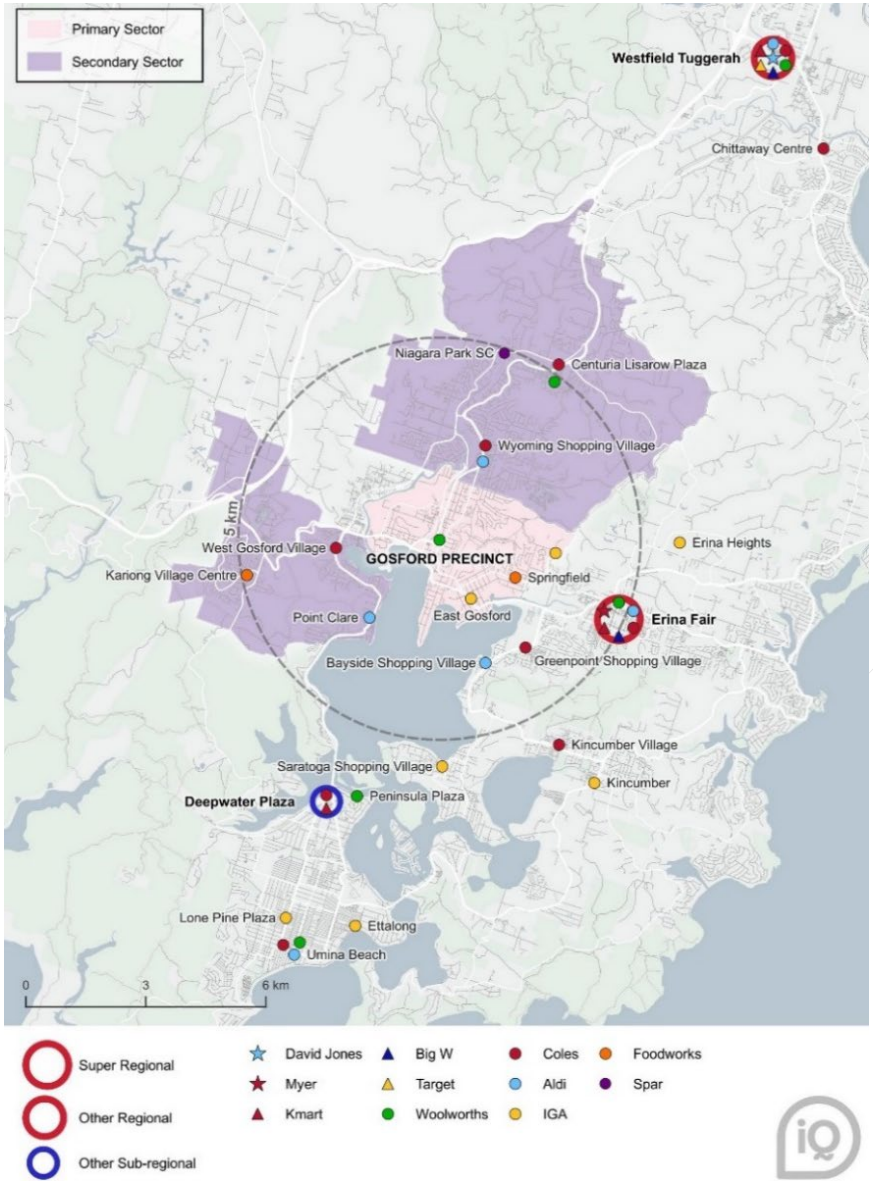
6. Wyong Trade Area Catchment



SA2	POPULATION 2021	POPULATION 2041
Primary		
Wyong	9,196	10,537
Secondary		
Jilliby - Yarramalong	3,427	3,941
Tuggerah - Kangy Angy	5,259	5,315
Tertiary		
Blue Haven - San Remo	11,392	12,609
Gorokan - Kanwal - Charmhaven	22,588	24,500
Warnervale - Wadalba	20,228	35,687
TOTAL:	**72,090**	**92,589**

Source: *Location iQ; Source: Department of Housing and Infrastructure Population Projections 2021 – 2041*

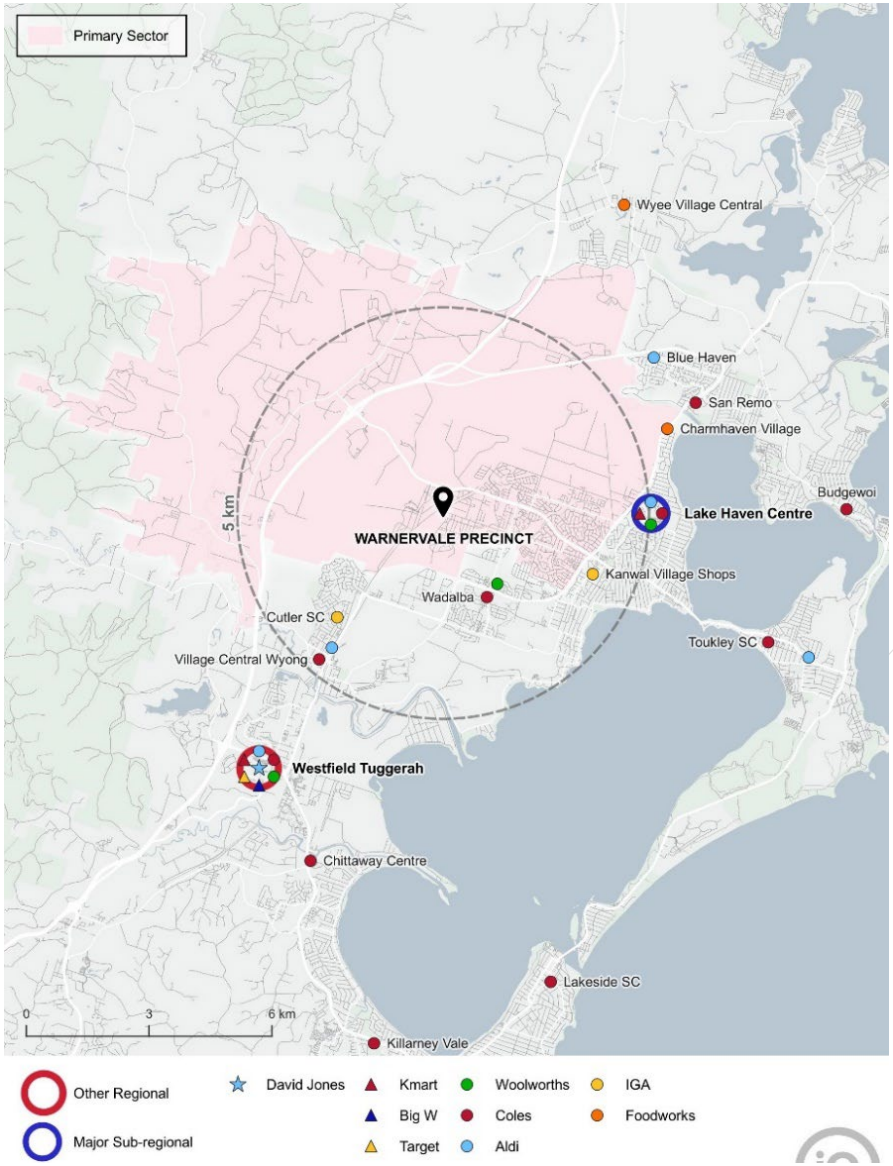
7. Gosford Trade Area Catchment



SA2	POPULATION 2021	POPULATION 2041
Primary		
Gosford - Springfield	21,359	33,486
Secondary		
Calga - Kulnura	4,750	5,127
Kariong	6,518	6,812
Narara	7,191	8,558
Niagara Park - Lisarow	8,237	9,036
Ourimbah - Fountaindale	4,941	5,226
Point Clare - Koolewong	6,577	7,347
TOTAL:	**59,573**	**75,592**

Source: *Location iQ; Source: Department of Housing and Infrastructure Population Projections 2021 – 2041*

8. Warnervale Trade Area Catchment



SA2	POPULATION 2021	POPULATION 2041
Primary		
Jilliby - Yarramalong	3,427	3,941
Warnervale - Wadalba	20,228	35,687
TOTAL:	**23,655**	**39,628**

Source: *Location iQ; Source: Department of Housing and Infrastructure Population Projections 2021 – 2041*

Appendix 2
Commercial lands by suburbs (2024)

SUBURB	ZONE (HECTARES)					TOTAL
	B3	B4	E1	E2	MU1	
Avoca Beach	-	-	5.72	-	-	**5.72**
Bateau Bay	-	-	16.27	-	17.26	**33.53**
Bensville	-	-	0.3	-	-	**0.3**
Berkeley Vale	-	-	0.73	-	-	**0.73**
Blue Haven	-	-	1.28	-	-	**1.28**
Budgewoi	-	-	7.03	-	-	**7.03**
Buff Point	-	-	0.35	-	-	**0.35**
Chain Valley Bay	-	-	0.24	-	-	**0.24**
Charmhaven	-	-	0.98	-	8.81	**9.79**
Chittaway Bay	-	-	3.05	-	-	**3.05**
Copacabana	-	-	1.13	-	-	**1.13**
Daleys Point	-	-	0.69	-	-	**0.69**
Davistown	-	-	1.47	-	-	**1.47**
East Gosford	-	-	8.31	-	-	**8.31**
Empire Bay	-	-	1.18	-	-	**1.18**
Erina	-	-	52.31	-	-	**52.31**
Erina Heights	-	-	0.72	-	-	**0.72**
Ettalong Beach	-	-	12.24	-	-	**12.24**
Forresters Beach	-	-	0.6	-	-	**0.6**
Gorokan	-	-	1.23	-	-	**1.23**
Gosford	20.35	78.23	-	-	0.65	**99.22**
Green Point	-	-	3.36	-	-	**3.36**
Gwandalan	-	-	4.69	-	-	**4.69**
Kanwal	-	-	1.03	-	-	**1.03**
Kariong	-	-	1.95	-	-	**1.95**
Killarney Vale	-	-	2.62	-	-	**2.62**
Killcare	-	-	1.06	-	-	**1.06**
Kincumber	-	-	10.01	-	-	**10.01**
Koolewong	-	-	0.59	-	-	**0.59**
Lake Haven	-	-	13.99	-	13.54	**27.52**
Lake Munmorah	-	-	8.73	-	-	**8.73**
Lisarow	-	-	8	-	-	**8**
Long Jetty	-	-	6.22	-	0.32	**6.55**
Macmasters Beach	-	-	0.42	-	-	**0.42**
Mannering Park	-	-	0.68	-	-	**0.68**
Niagara Park	-	-	5.49	-	-	**5.49**
Norah Head	-	-	0.52	-	0.47	**0.99**
North Avoca	-	-	0.24	-	-	**0.24**
North Gosford	-	4.98	-	-	-	**4.98**
Ourimbah	-	-	2.81	-	-	**2.81**
Patonga	-	-	0.22	-	-	**0.22**
Point Clare	-	-	1.98	-	-	**1.98**
Point Frederick	-	4.04	-	-	-	**4.04**

SUBURB	ZONE (HECTARES)					TOTAL
	B3	B4	E1	E2	MU1	
San Remo	-	-	4.28	-	-	**4.28**
Saratoga	-	-	1.42	-	-	**1.42**
Springfield	-	-	0.13	-	-	**0.13**
Summerland Point	-	-	0.55	-	-	**0.55**
Tascott	-	-	0.09	-	-	**0.09**
Terrigal	-	-	8.95	-	-	**8.95**
The Entrance	-	-	21.18	-	9.24	**30.43**
The Entrance North	-	-	0.53	-	2.28	**2.81**
Toowoon Bay	-	-	0.54	-	-	**0.54**
Toukley	-	-	13.44	-	5.57	**19.01**
Tuggerah	-	-	-	32.51	20.47	**52.99**
Tuggerawong	-	-	0.28	-	-	**0.28**
Tumbi Umbi	-	-	2.56	-	-	**2.56**
Umina Beach	-	-	15.87	-	-	**15.87**
Wadalba	-	-	4.08	-	-	**4.08**
Wagstaffe	-	-	0.46	-	-	**0.46**
Wallarah	-	-	4.05	-	-	**4.05**
Wamberal	-	-	2.41	-	-	**2.41**
Warnervale	-	-	2.85	-	-	**2.85**
West Gosford	-	-	2.53	-	-	**2.53**
Woongarrah	-	-	12.67	-	12.87	**25.54**
Woy Woy	-	-	21.78	-	-	**21.78**
Wyoming	-	-	6.64	-	-	**6.64**
Wyong	-	-	0.82	20.56	4.41	**25.78**
Wyongah	-	-	0.2	-	-	**0.2**
Total:	**20.35**	**87.25**	**318.75**	**53.07**	**95.89**	**575.31**

Source: JLL Existing Conditions Analysis Report September 2024
Note: Indicative area only based on cadastre information.

Appendix 3
Commercial Centres GFA

	CENTRE	EXISTING GFA
1	Avoca Beach	3,298.34
2	Avoca Beach (The Round Dr)	180.26
3	Avoca North	183.88
4	Bateau Bay (Bateau Bay Rd)	1,053.54
5	Bateau Bay (Coleridge)	1,120.79
6	Bateau Bay (Cresthaven	2,754.64
7	Bateau Bay Shopping Centre	30,005
8	Bateau Bay (Village Ln)	1,979.71
9	Bensville	232.50
10	Berkeley Vale (Bluebell Ave)	1,047.45
11	Berkeley Vale (Lakedge Ave)	448.00
12	Berkeley Vale (Shannon Pde)	1,218.00
13	Blackwall	1,454.05
14	Blue Haven	2,170.79
15	Budgewoi (East)	2,916.94
16	Budgewoi Local Centre	8,340.73
17	Buff Point	708.80
18	Chain Valley Bay	634.64
19	Charmhaven	4,624.76
20	Chittaway Bay	3,636.20
21	Copacabana	1,797.03
22	Daleys Point	1,551.49
23	Davistown	943.73
24	Empire Bay	689.89
25	Erina Heights	1,477.39
26	Erina Shopping Centre	114,598
27	Ettalong Beach	21,453
28	Forresters Beach	2,685.53
29	Gorokan	3,799.61
30	Gosford	116,803
31	Gosford East	17,191
32	Gosford North	19,526.34
33	Gosford West	11,126.23
34	Green Point (Bayside Dr)	2,012.78
35	Green Point (Sun Valley Rd)	5,142.29
36	Gwandalan	1,811.34
37	Hardys Bay	92.95
38	Kanwal	2,677.59
39	Kariong (Curringa Rd)	1,476.33
40	Kariong (Langford Dr)	1,911.82
41	Killarney Vale (Robertson Rd)	549.91
42	Killarney Vale (Wyong Rd)	6,728.89
43	Killcare	941.32
44	Kincumber	11,043

	CENTRE	EXISTING GFA
45	Kincumber (Tora Ave)	308.32
46	Koolewong	172.18
47	Lake Haven Centre	67,675
48	Lake Munmorah (Anita Ave)	1,393.04
49	Lake Munmorah Local Centre	5,723.23
50	Lisarow	14,172
51	Long Jetty	14,407
52	Mannering Park	1,557.48
53	Niagara Park	5,864.26
54	Norah Head	2,101.41
55	Noraville	2,897.98
56	Ourimbah	2,857.60
57	Point Claire	5,291.61
58	Point Frederick	526.71
59	San Remo Local Centre	6,456.55
60	San Remo (Liamena Ave)	947.53
61	Saratoga	2,258.46
62	Springfield	737.53
63	Summerland Point	2,195.36
64	Tascott	445.95
65	Terrigal	21,920
66	The Entrance	42,235
67	The Entrance North	436.92
68	Toowoon Bay	2,646.00
69	Toukley	34,119
70	Toukley East	5,461.39
71	Tuggerawong	705.95
72	Tuggerah Shopping Centre	85,070
73	Tumbi Umbi(Mingara)	4,304.14
74	Tumbi Umbi (Wyong Rd)	1,992.21
75	Umina Beach	33,128
76	Umina Beach (Lone Pine Ave)	3,641.64
77	Wadalba	7,745.92
78	Wagstaffe	300.51
79	Wamberal (Ghersi Ave)	2,001.63
80	Wamberal (Ocean View Dr)	579.54
81	Wamberal (Pitt Rd)	1,670.47
82	Warnervale	361.41
83	Woy Woy	56,620
84	Wyoming	11,285.35
85	Wyoming (Maidens Brush Rd)	1,116.72
86	Wyoming (North Cr)	360.61
87	Wyong	29,632
88	Wyong (Cutler Dr)	1,533.42
89	Wyongah	419.56
	TOTAL:	**903,317**

Appendix 4
Centres Improvement – Evaluation Framework

Prioritisation of areas for intervention are to be targeted, at:

1. **Areas with high vacancy** and a strategic role in the hierarchy (>11%+) – Requiring potential public domain urban renewal and business improvement strategies.
2. **Areas with low vacancy** and a strategic role in the hierarchy (<6%) – Requiring potential capacity enhancing interventions.

This framework guides the evaluation of commercial centres identified for possible Council intervention. After evaluation, recommended actions can be submitted to Council governance forums for funding or approval.

TARGETED CENTRE IMPROVEMENT PLAN	
DESIRED OUTCOME	**KEY AREAS OF RESEARCH AND EVALUATION**
Great Places and Vibrant Centre's *To assess the physical, cultural, and social qualities that shape the everyday experience of the Centre, including comfort, safety, design, and local identity. A vibrant Centre supports visitation, interaction, and pride in place.*	• **Public realm quality:** Pavement condition, lighting, wayfinding, shade, and cleanliness. • **Streetscape vitality:** Presence of activated frontages, outdoor dining, shop windows. • **Place identity:** Local art, cultural features, Centre "character". • **Amenity:** Seating, toilets, gathering spaces, informal play & gathering and public open space management. • **Evening economy and safety**: Night-time lighting, open venues, CPTED audit. • **Event or activation potential:** Civic spaces for markets, festivals, or pop-ups. • **Centre maintenance and management:** Visual assessment and trader feedback.
Achieving Economic Vitality and Resilience *To understand the economic composition and commercial health of the Centre.*	• **Commercial mix:** Retail, services, food, health, creative. • **Vacancy rates and tenancy turnover:** Trends, hotspots, and persistence. • **New business formation:** New businesses or tenancies within 12–24 months. • **Centre-level employment snapshot:** Job types, economic contribution. • **Flexible/complementary spaces:** Co-working, studios, multi-use tenancies. • **Economic uplift potential:** Key sites or partnerships for growth?
Fostering Connected and Accessible Centre's.	• **Public transport access:** Proximity to bus/rail; service frequency.

TARGETED CENTRE IMPROVEMENT PLAN	
DESIRED OUTCOME	**KEY AREAS OF RESEARCH AND EVALUATION**
To evaluate how well the Centre is connected to surrounding communities and how people experience access via their experience, transport, mobility, and inclusivity.	• **Walkability and bike access:** Pathways, crossings, end-of-trip facilities. • **Parking management:** Availability, turnover, signage, back of house delivery access. • **Disability and pram accessibility:** Kerb ramps, grades. • **First/last mile integration:** Walking links to surrounding residential areas. • **Connection to key amenities:** Health, childcare, open space, education. • **Barriers to access:** Topography, roads, traffic volume, or other infrastructure gaps.
Promoting Innovation, Technology and Creative Industry Businesses. *To identify how centres support emerging industries, creative talent, and digitally enabled business models.*	• **Presence of innovation/creative sectors:** Design, tech, media, co-working. • **Affordability and flexibility of space:** Suitability for small/start-up operators. • **Digital infrastructure readiness:** NBN availability, public Wi-Fi, smart signage. • **Creative placemaking:** Spaces for performances, exhibitions, or makers to showcase. • **Education and training adjacency:** TAFEs, unis, schools, and upskilling hubs. • **Partnership potential:** With local institutions, incubators, or enterprise hubs. • **Regulation flexibility:** Enabling commercial and retail uses to operate without cumbersome regulations that add significant cost.
Being Prepared: Green & Adaptable Future Proofing. *To assess how prepared the Centre is for future challenges including climate risks, changing consumer behavior, and demographic shifts.*	• **Canopy cover and cooling**: Urban heat island mitigation, tree shade. • **Flood risk and adaptation capacity**: Drainage, exposure, resilience actions. • **Green infrastructure**: WSUD, raingardens, permeable surfaces. • **Building sustainability potential**: Retrofit readiness, solar, energy use. • **Circular economy alignment**: Waste minimisation, local loops. • **Public transport prioritisation**: Long-term mode shift potential. • **Demographic alignment**: Centre's adaptability to ageing or youth trends.

Appendix 5
Recommended DCP Chapter 2.5 amendments

CONSIDERATIONS	POTENTIAL AMENDMENT
• *Review local character statements in the CCDCP to confirm they align with each centre's role and hierarchy.* • *Require Strategic Role Justification in Statements of Environmental Effects to confirm the proposal aligns with the centre's long-term purpose.* • *Introduce typology-based controls (e.g., for urban lifestyle centres, priority can be outdoor dining, small floorplates, and conditions of consent that allow for 7-day trade).*	**New Section 2.5.2.1 (e) Add**: Where a separate Context Analysis Plan is required to be submitted, review Central Coast Commercial Lands Strategy for alignment to centres hierarchy and desired strategic outcomes. **New Section 2.5.2.3 add:** Commercial Lands Typology Consider built-form typology outcomes based on Central Coast Commercial Lands Strategy for the following Key Centres: 1. Metropolitan City: Gosford Centre • High-rise built form in alignment to FSR and maximum height allowances. • Commercial floorspace on podium/ground levels. • Integration with regional transport and government infrastructure. • High-quality public realm, civic space, and activated laneways. 2. Regional City: Tuggerah • Encourage professional services, logistics, wholesale and retail, large format floor plates. • Active frontages on key streets. • Integration of business parks with retail services and amenities. 3. Strategic Centre – Transit Oriented Mixed-Use Nodes: Woy Woy; Wyong • Ground floor commercial floor space within walkable catchments (400–800m) from station/key bus stops where commercial uses are permissible. • Support mid-rise housing above commercial uses where housing is a permissible use. • Promote public domain infrastructure that facilitates walkability. • Promote public domain improvements enhance transport node arrival/leaving experience. 4. Strategic Centre – Urban Lifestyle Centres: Erina, Bateau Bay, Lake Haven • Promote design that activates frontages and walkable streets. • Encourage design emphasis that support a variety of small and medium size retail footprints for hospitality and boutique retail. • Encourage design emphasis that facilitate creative workspaces/studios.

CONSIDERATIONS	POTENTIAL AMENDMENT
	• Encourage outdoor dining spaces and shade structures in food and beverage areas. 5. Specialised Centre: Somersby, West Gosford, Warnervale Business Park • Encourage designs that accommodate industrial/commercial mix. • Consider spaces for supporting uses (e.g., front of house retail, cafés) to enhance support and amenity. • Encourage designs that facilitate sustainable building standards and adaptive re-use of buildings. • Design for vehicle access, freight, and servicing efficiency. 6. Major Centre: East Gosford, Ettalong Beach, Kincumber, Lisarow, Long Jetty, Terrigal, The Entrance, Toukley, Umina Beach. • Encourage designs that allow for small to medium variety of retail footprints. • Encourage design that facilitate local services for health, education, and community facilities. • Encourage designs that facilitate public domain walkability and access. • Allow Shop-top housing (where permitted) and retain commercial ground floor spaces. • Design for flexibility over time (e.g., convertibility of tenancies and modularity). • Consider designs that enable seasonal/pop-up and night-time economy activity. 7. Local Centres: Dispersed villages and shops • Preserve local character and low-rise built form scale. • Design spaces that support local essential services (e.g., convenience retail and medical). • Promote walkable access, bike racks and small plazas • Avoid conversion to residential-only. • Encourage design of spaces for local hospitality, creative tenancies and workshops to support local identity.
• *Strengthen active frontage requirements to prevent residential encroachment and ensure pedestrian permeability.* • *Better define specific uses considered "active" (e.g., cafes, medical centres, coworking) and "discouraged uses" (e.g., enclosed banks, blank walls).* • *Include areas of Public Domain Improvement Precincts (mapped) to*	**Amend Section 2.5.5.2:** Introduce paragraph to add greater clarification on active frontage uses: In this section, active frontage uses aims to facilitate development types that encourage interaction between retail tenancies and public domain including but not limited to food and drink premises, boutique retail shops, cultural and creative spaces, co-working, and arts and crafts spaces. Uses that require blank walls, enclosed frontages, or do not promote street activation are not supported on identified active frontages or main streets.

CONSIDERATIONS	POTENTIAL AMENDMENT
guide Council funding and assessment focus.	
• *Strengthen design guidance for adaptive reuse, pop-up stores and plug-and-play tenancies (e.g., variable ceiling heights, loading access, broadband cable readiness).* • *Encourage multi-tenant flexibility through floorplate heights, depths and back of house service arrangements.* • *Set clear minimum ground floor commercial depth and ceiling height requirements.*	**Amend Section 2.5.5.1 Objectives** New Objective: *To support commercial developments that can enable plug-and-play tenancy fit-outs, including variable ceiling heights, service reticulation zones, and flexible internal partitions.* **Add new retail tenancy depth in Control 2.5.5.2 (a)(IV) to enable active frontages** New commercial buildings should provide a minimum ground-floor commercial floorplate depth of 10 metres (excluding services) along active street frontages.
• *Require detailed transport and access plans for larger mixed-use developments in TOD nodes.*	**Add 2.5.2.2 Site analysis requirements to include TOD Principles** XV – Include plans or information detailing pedestrian support, cycling infrastructure, access to public transit facilities, e-charging stations and/or support for alternate non-car transport modes.

Appendix 6
Rapid response equivalent demand table

NUMBER OF DWELLINGS (PROPOSED)	ESTIMATED POPULATION SERVED	RECOMMENDED NEW COMMERCIAL LANDS (HA)
0–500	0 – 1,300	0.25 – 0.75
501–1,000	1,301 – 2,600	0.5 – 1.5
1,001–1,500	2,601 – 3,900	1.0 – 2.0
1,501–2,000	3,901 – 5,200	1.5 – 3.0
2,001–2,500	5,201 – 6,500	2.0 – 3.5
2,501–3,000	6,501 – 7,800	2.5 – 4.5
3,001–3,500	7,801 – 9,100	3.0 – 5.0
3,501–4,000	9,101 – 10,400	3.5 – 6.0
4,001–4,500	10,401 – 11,700	4.0 – 6.5
4,501–5,000	11,701 – 13,000	4.5 – 7.5
5,001–6,000	13,001 – 15,600	5.0 – 9.0
6,001–7,000	15,601 – 18,200	6.0 – 10.5
7,001–8,000	18,201 – 20,800	7.0 – 12.0
8,001–9,000	20,801 – 23,400	8.0 – 13.5
9,001–10,000	23,401 – 26,000	9.0 – 15.0

NOTE the following assumptions:

- Average household size: 2.6 persons per dwelling (ABS, 2021 Census).
- Commercial land requirements based on 0.5–1.5 ha per 1,000 dwellings (NSW DPIE)

Commercial Lands Strategy (Draft)

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