



URBIS

ILLAWARRA SPORTS AND ENTERTAINMENT PRECINCT

Revitalising Wollongong's foreshore

Prepared for Business Illawarra
March 2022

**BUSINESS
ILLAWARRA**

**ILLAWARRA
FIRST**

Urbis acknowledges the important contribution that Aboriginal and Torres Strait Islander people make in creating a strong and vibrant Australian society.

We acknowledge that this project takes place on the lands of the Dharawal people.



This report is dated **9 March 2022** 

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INTRODUCTION

This section provides an outline of the project including the engagement of Urbis to undertake a master plan for the renewal of the Illawarra Sports and Entertainment Precinct and the work undertaken on behalf of Business Illawarra.

01

PROJECT ROLES



Business Illawarra

Business Illawarra is the peak business organisation and the regional chamber that supports businesses and local chambers across the Illawarra primarily, as well as the Shoalhaven, Southeast and Capital regions. Business Illawarra is non-profit organisation and a division of Business NSW (formerly the NSW Business Chamber).

We develop policy and advocate to all levels of government on issues affecting businesses in our region, undertake research to guide greater public and private sector investment in economic infrastructure, and support the development of workforce capacity and skills.

Illawarra First is the peak leadership forum in the region, championing the interests of the local economy to unlock the region's enormous potential by harnessing best practice and thought leadership to progress key priorities.

Its membership comprises a select group of leading businesses in the Illawarra, sharing a commitment to bolster economic growth and prosperity. The leadership and direction of Illawarra First has driven the commissioning of research to support the policy and advocacy priorities of Business Illawarra.

Business Illawarra is the client for this report.

Urbis

Urbis is a market-leading firm with the goal of shaping the cities and communities of Australia for a better future. Drawing together a network of the brightest minds, Urbis consists of practice experts, working collaboratively to deliver fresh thinking and independent advice and guidance – all backed up by real, evidence-based solutions.

Working across the areas of transport, planning, design, policy, heritage, valuations, transactions, economics and research, the expert team at Urbis connect their clients in the public and private sectors to a better outcome, every time.

Urbis led the development of the masterplan contained within this report, including engaging Populous to undertake the Arena and convention and exhibition space concept development.

Populous

Populous are a global architecture firm with almost 40 years' experience in designing thriving sports and entertainment precincts for communities in Australia and around the world.

Their experience in weaving together large public venues and spaces includes smaller more intimate precincts like Wriggall Sports Complex, right through to ICC Sydney, to Tottenham Hotspur's new stadium and up to the 28 hectare Kai Tak Sports Park under construction in Hong Kong. With their Asia-Pacific headquarters in Brisbane, Populous specializes in urban planning, architecture, interior design, event overlay and landscape design, for the places where people love to be together.

As Consulting Architect for the Illawarra Sports and Entertainment Precinct, Populous has considered from a high-level design perspective, how best to reimagine the precinct to deliver a world-class arena, convention and exhibition precinct.

ABOUT THIS PROJECT



1/

Business Illawarra has engaged Urbis to undertake a review of the Illawarra Sports and Entertainment Precinct (ISEP).

The two venues in ISEP - Wollongong Entertainment Centre (WEC) and WIN Stadium were constructed on the site of the Wollongong Showgrounds and are operated by Venues NSW. The WEC is now getting to the point where it needs a significant refurbishment or, like other cities, a rebuild of the site.

The location of ISEP, on the Wollongong foreshore, provides an opportunity to provide to create a new space for the people of the Illawarra and as new regional tourism, entertainment and sports magnet delivering a modern entertainment experience.

More about the existing context can be found in Section 2.



2/

Funding such an upgrade is not currently in the NSW government's budgeting process, with the Hunter Sports Park already securing \$6.7 million in funding and the Penrith Stadium securing \$300 million for redevelopment.

Funding to date from state government has been limited to maintenance and minor upgrades. It is anticipated that government appetite for future investment will be predicated on a clear business case that will deliver best value for taxpayers and see at least partial cost offset by commercial uplift.

A market-led proposal to rebuild the site is necessary, but is complex due to heritage, height limits and lot size.

More about the market-led opportunity can be found in Section 5.



3/

This project seeks to deliver a master plan for a revitalised Illawarra Sport and Entertainment Precinct (ISEP) as well as new development opportunities to support regional business, tourism and community to provide a win for the Illawarra. The end result will be a 'precinct' as a critical part of urban renewal, not just a new convention centre.

This project builds the case for a market-led redevelopment of an ISEP that delivers state-of-the-art facilities, vibrant public spaces, better connection between the facility and the natural environment, activated commercial offerings and inviting streets and spaces in between.

The project provides an opportunity renew the entire precinct including Lang Park and provide an eastern gateway to the City.

More about the Masterplan for the site and a revitalised Lang Park can be found in Section 3.



4/

Any market-led proposal will need to consider more than just the site itself and deliver value to the community. The Department of Premier and Cabinet considered proposals from the non-government sector which deliver innovative ideas, places, services and infrastructure to the people of NSW.

This will most likely include looking at other government (and non-government) land holdings that could sustain the required funding levels and provide suitable accommodation for convention, hotel, entertainment and sporting facilities.

More about the market-led opportunity can be found in Section 5.

STUDY AREA AND PROJECT OBJECTIVE

The objective of the study is to

- **Understand** the capacity and opportunities of the Illawarra Sport and Entertainment Precinct (ISEP) to improve place and economic outcomes and accommodate renewal in central Wollongong.
- **Identify** three options to improve renewal outcomes.
- **Identify** potential land uses and planning controls that are required to achieve the outcome.
- **Evaluate** scenarios and select a preferred option.
- **Develop** a master plan for the overall site redevelopment.
- **Develop** the requirements for a new arena, convention and exhibition space to replace the existing WEC.
- **Undertake** an assessment of the market led opportunity to fund redevelopment.
- **Recommend** actions to progress the preferred option

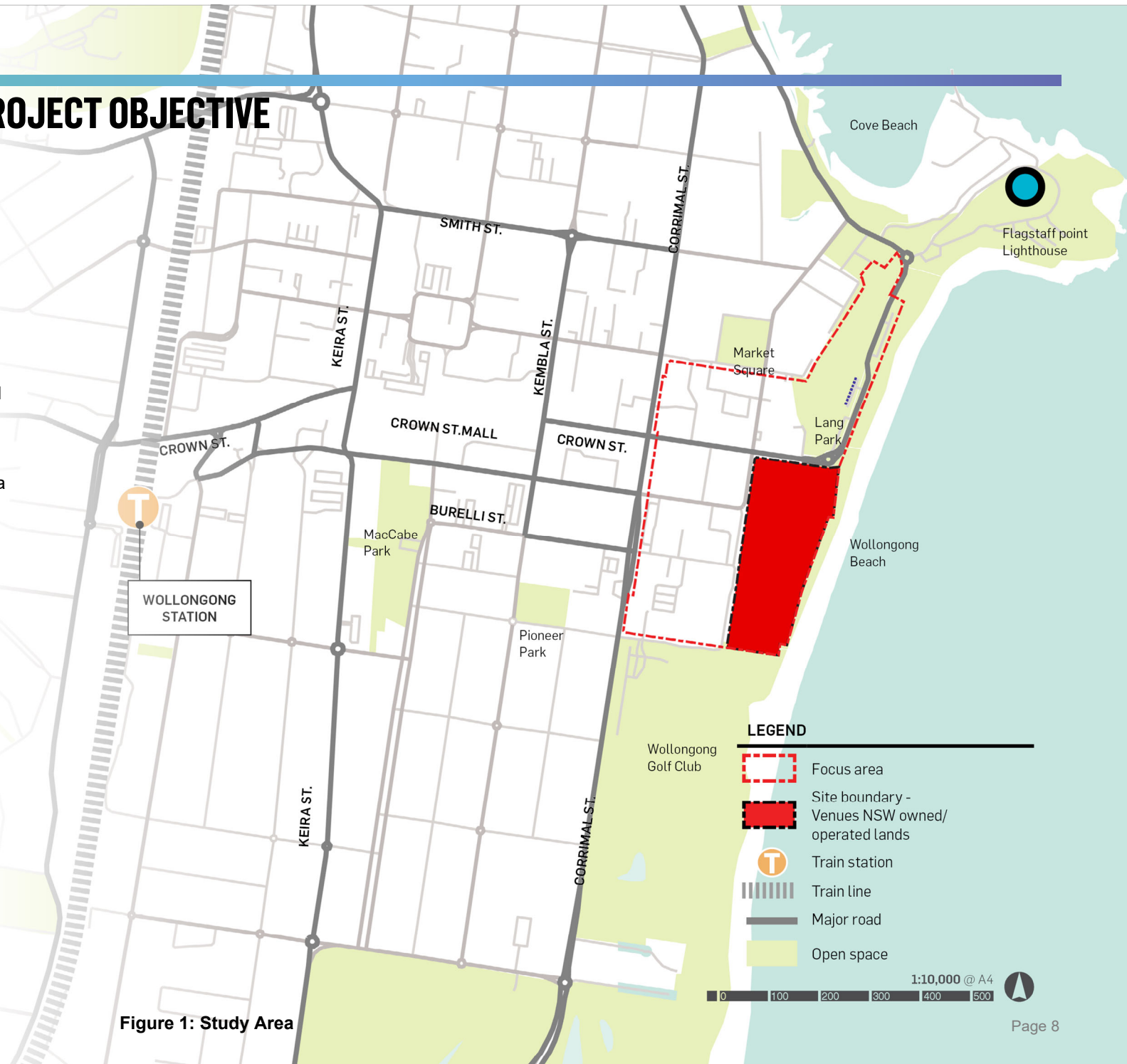


Figure 1: Study Area

BACKGROUND AND EXISTING CONTEXT

This section provides detail on the context of the site, including policy, urban development, economic, transport, planning and heritage. This sets the scene for the need for a re-analysis for the site and informs the development of the site master plan.

02

2.1 POLICY CONTEXT



POLICY CONTEXT

	NSW	Illawarra	Wollongong	Comments
Design				<p>Strategic State planning policy documents are the most relevant for the design of the site. These include:</p> <ul style="list-style-type: none"> • Better Placed. • Connecting with Country. • Movement and Place. • Greener Places. • Design and Place SEPP.
Economy				<p>There are a variety of transport planning documents that outline the strategy for transport planning in Wollongong. These highlight the following:</p> <ul style="list-style-type: none"> • Improvements in existing connections and higher speed rail in the long term. • Frequent, high-capacity city shaping corridors in Wollongong. • 20 per cent of trips to be made by public and active transport by 2041.
Transport				<p>Strategic planning policy documents that are the most relevant for the development of the site highlight the following:</p> <ul style="list-style-type: none"> • Revitalising the sports and entertainment precinct and activating the foreshore is a priority. • The importance of culture, recreation and entertainment should be enhanced. • A better transition from the centre to the beach is key to success in activating foreshore precinct.
Planning				

Further details of the Wollongong Development Control Plan 2009 and the Strategic Context are contained in Appendix A

POLICY CONTEXT

The *Illawarra Shoalhaven Regional Plan 2041* (Regional Plan) sets out the strategic goals and vision to recognise opportunities and potential growth for the region over the next 20 years. Wollongong is identified as one of the region's civic hearts, providing an urban centre with access to shops, services, education and employment opportunities.

A key objective of the Regional Plan is to strengthen Wollongong as a connected, innovative and progressive city by **revitalising the sports and entertainment precinct and activating the foreshore**. Council has also invested \$40 million upgrading the city's foreshore from the Entertainment Centre to North Beach and Stuart Park.

The Illawarra Sports and Entertainment Precinct (ISEP) is acknowledged in the Region Plan and provides a logical connection between the Commercial Core and Foreshore Area. The ISEP could transform into a first-choice multipurpose business, entertainment, cultural and sporting hub to reflect the importance of Wollongong on a regional and state wide scale.

The overall vision of the Regional Plan is solidified within Council's strategic plans which aim to expand existing commercial opportunities while maintaining strong visual and physical connections to the foreshore. The Economic Development Strategy which advocated for further investigation into the ISEP specifically identifies the need for further investment in tourism infrastructure to build on the impact of major events and expand its tourism industry in Wollongong.



Opportunities based on Local and State Planning Policies:

- *Improve visual and physical access to the foreshore, including improving the pedestrian interface with the WEC, WIN Stadium, South Beach and Lang Park;*
- *Encourage broader use of the Precinct outside of events;*
- *Improve access to public and active transport networks including links to Wollongong Train Station and event transport;*
- *Embrace the location's environmental setting by protecting key views, improving and activating public spaces and managing exposure to climate hazards.*

2.2 URBAN CONTEXT



SITE AND SURROUNDING CONTEXT

The 'Illawarra Sports and Entertainment Precinct' (ISEP) a 6-hectare precinct that offers a range of entertainment facilities along the Wollongong foreshore which provides for Wollongong and the greater Illawarra area.



WIN Entertainment Centre (WEC) is an indoor entertainment facility located on the north-west boundary of the site area. The WEC provides capacity for 6,000 people and hosts a variety of concerts, sports events and conferences. The stadium provides a range of services including food and beverage tenancies, corporate suites and offices for staff.



The Illawarra Brewery, a small bar and microbrewery, is located on the eastern frontage of the WEC overlooking Andrew Lysaght Park.



Andrew Lysaght Park is a heritage listed public park that was originally part of a Roman Catholic Cemetery with burials dating back to 1815. It is located on the north-west boundary of the site and has a small parking lot on its boundary to the foreshore. However, there are believed to be no burials remaining on the site.



WIN Stadium is located in the middle portion of the site and is accessible via Harbour Street. The stadium has a capacity of 22,000 people, including undercover stadium seating for 13,000 people. There is a large hill along the eastern boundary for informal seating. The stadium hosts a variety of sporting and special events and is the home ground for the St George Illawarra Dragons. The stadium provides a range of services including food and beverage tenancies, corporate suites and other facilities to provide for mass crowds. Additional food and beverage tenancies are located along the Harbour Street frontage and are accessible to the public outside of Stadium events.



Lang Park is a Crown Land Reserve which runs along the Wollongong foreshore and provides passive and active recreational space including picnic areas (heritage listed) and fitness equipment. A bus interchange is also accessible via Crown Street and Marine Drive. Further north, car parking is provided adjacent to Lang Park.

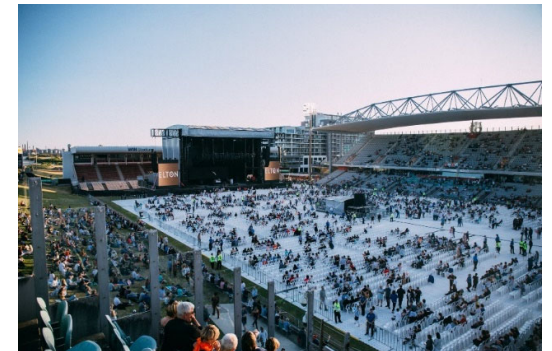
A training field and public parking area are located along the southern boundary of the site. This area is generally used for football training and other recreational uses.



Illawarra Hawks basketball at the WEC



The Hill at WIN Stadium



Concert at WIN Stadium

POINTS OF INTEREST / VIEW CORRIDORS

The site is situated amongst a range of important points of interest and view corridors, as follows –

1. Crown Street Mall
2. Arts Precinct
3. Council Building
4. Catholic Primary School
5. St. Francis Xavier Cathedral
6. High School
7. Market Square
8. Olympics Memorial
9. Andrew Lysaght park
10. Illawarra Brewery

LEGEND






-  Focus area
-  Site boundary
-  Existing built footprint
-  Key landscape areas?
-  View corridors



Figure 2: Points of Interest / View Corridors

PHOTOS



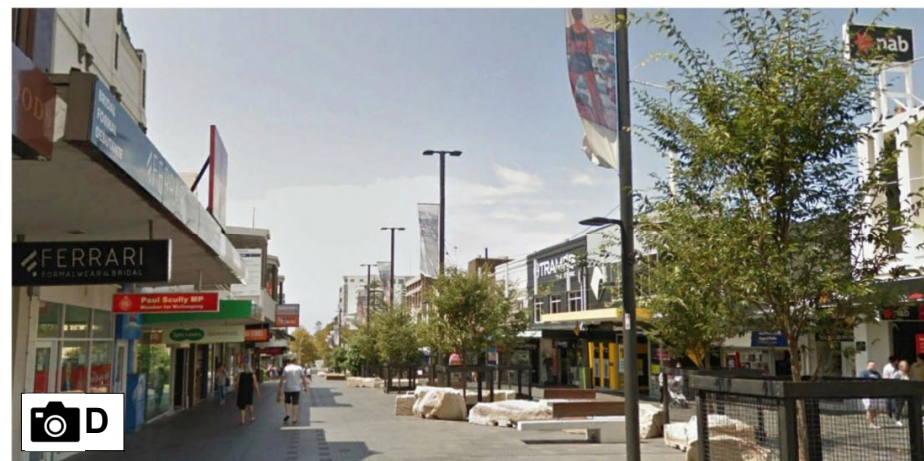
View to Flagstaff Point Lighthouse from observation deck on Marine Drive



Key Place – Market Square



View towards Wollongong Beach from East End of Bank Street



Key Place – Crown Street Mall

POTENTIAL REDEVELOPMENT SITES

Several potential theoretical development sites have been identified within the immediate vicinity of the focus area. It should be noted that no discussion has taken place with landowners regarding potential purchases. The current uses of these buildings include:

- | | |
|---|---|
| 1. RAMS, Massage Parlour, Realtor, Pizzeria | 9. Commercial Centre |
| 2. Motel and Parking | 10. Parking building |
| 3. South Coast BMW, E-Learning | 11. Industrial & Residential |
| 4. Cathedral House | 12. Essentials - Aldi, Coles Express |
| 5. Plot 6 | 13. Plot 15,17,19 and 21, Parking and various plots |
| 6. Plot 12, 14 and 16 | 14. Residential - Plot 1,3,5,6,7 |
| 7. Mixed Use - Residential Commercial | 15. Motel site, Plot 10 and 22 |
| 8. Parking | |

In future pages, the buildings depicted in **Figure 3** are shown as white generic multistorey buildings.

LEGEND







	Site boundary		B4 - Mixed Use
	Focus area		R1 - General Residential
	B3 - Commercial Core		SP3 - Tourist



Figure 3: Potential Redevelopment Sites

PHOTOS



Intersection of Corrimal and Stewart Streets



Intersection of Stewart and Harbour Streets



Intersection of Market Street and Harbour Streets



Crown Street opposite northern boundary of the site

PUBLIC REALM CHARACTER

The character of the streets and open spaces are outlined in the following diagram. We anticipate that Crown Street will integrate with the civic character of the pedestrianised zone to the west.

LEGEND
















-  Focus area
-  Site boundary
-  Heritage - General
-  Tree-lined street
-  Tree-lined heritage-listed street
-  Mixed-commercial street character
-  Open Space
-  Open space inside boundary
-  Pedestrianized Street
-  Stadium
-  Sports Facility
-  Park
-  Memorial park
-  Golf club
-  Bus Parking



Figure 4: Public Realm Character

PHOTOS



Marine Drive - a tree lined heritage listed street



Lang Park adjacent to Wollongong Beach foreshore



Intersection of Crown Street and Harbour Street; looking north

ACCESS AND MOVEMENT

The ISEP site is in proximity to bus services, walking/cycling connections and parking. The street network immediately adjacent to the site offers major road connections from Corrimal Street, Crown Street and Marine Drive.

The transport context of the site is discussed in greater detail in **Section 2.4**, with car parking and public transport discussed on **Pages 38** and **39** respectively.

LEGEND

- Focus area
- Site boundary
- Major road
- Local road
- Minor road
- Off-road shared path
- Off-road shared path (pop-up)
- Off-street parking
- On-street parking



Figure 5: Access and movement

PHOTOS



Off-street parking and shared path along the foreshore



Intersection of Corrimal and Burelli Streets



Off-street parking at the southern end of Harbour Street



Pedestrian and bike paths in Lang Park

2.3 ECONOMIC CONTEXT



ECONOMIC DRIVERS




This section considers the economic drivers of a variety of potential land uses for the subject site. Specifically, we have assessed the following land uses:

- Residential apartments
- Short term accommodation (hotel and serviced apartments)
- Commercial office

Some **retail** is likely to be supportable at the subject site, however, given the strong competition from the Wollongong CBD retail core, retail at the subject site is expected to be supplementary to other existing and proposed uses. Retail is likely to comprise ground floor tenancies facing higher-activation street fronts on Crown Street and Harbour Street.

In this section, we rate the subject site against the key economic land use drivers and draw implications for the relative supportability of these uses at the site. These success drivers are detailed in Table 1.

Table 1: Land Use Economic Drivers

	LOCATION FACTORS	DESCRIPTION
	I. Market Demand	The number and growth of surrounding residents and workers is a very important determinant of the commercial viability of many potential land uses.
	II. Competition	Provision, location and quality of offer of competitors can limit the market scope to support additional uses.
	III. Competitive Positioning of the Subject Site	<p>The competitive positioning of the subject site is a key determinant of the type and scale of land uses that are supportable, and is driven by several factors including:</p> <ul style="list-style-type: none">▪ Road Access, Visibility and Exposure▪ Public Transport Access▪ Proximity to Services, Amenities and Economic Opportunities▪ Alignment with Existing Club Uses▪ Synergies with Other Proposed Uses at the Subject Site.

KEY FINDINGS

Residential apartment

Broader market demand will be subject to moderate projected population growth and a significant supply pipeline within the Wollongong CBD. However, the subject site rates highly on competitive positioning by virtue of its access to ocean views and co-location with extensive lifestyle amenity and would present a strong opportunity.

Short term accommodation

The ISEP's prominent beach-side location with access to ocean views and onsite sport and entertainment events results in a strong competitive positioning which would likely attract good interest from operators.

Commercial office


Is rated highly for market demand, particularly for A-Grade office, however, is rated moderate-low due to extent of competition. The site's outlook is likely to attract office tenants, particularly if improved retail amenity for workers is provided. However, is less central than other core office clusters that provide agglomeration benefits.

CATCHMENT AREA DEFINITIONS

We have defined two catchments to assess the market potential for land uses:

- The **Wollongong Catchment** has been defined by analysing migration data from the ABS 2016 Census.
- The **CBD Catchment** has been defined to generally reflect the extent of the Wollongong City Centre (i.e., the Wollongong - East and Wollongong - West SA2s).

LEGEND

-  Existing Train Line and Station
 Wollongong Catchment
 CBD Catchment



MARKET DEMAND – RESIDENT POPULATION AND VISITATION

Table 2 presents the projected **population growth** across the two defined catchment areas between 2021 and 2036. Key findings include:

- The Wollongong Catchment population is projected to grow moderately at 0.7% per annum to 2036.
- This is slower than projected population growth across the Illawarra Region (0.9% per annum) and NSW (1.2% per annum) in this period.

Table 3 shows the forecast **visitor nights** in the Wollongong Catchment between 2021 and 2036. This forecast is based on 2019 Tourism Research Australia visitor projections and as such, it does not take into account the significant impact of COVID-19.

The visitation outlook for Wollongong is summarised as follows:

- Occupancy rates in Wollongong have historically exceeded those of the wider South Coast Tourism Region, indicating Wollongong's strong appeal as a visitor destination.
- While the pre-COVID visitation forecast for the catchment in the next 15 years is strong (4.1% per annum), this projected growth is underpinned by strong international visitation, forecast to grow faster than the NSW average at 6.1% per annum to 2036.
- Given the major barrier that COVID-19 presents to international travel, we expect that growth in visitor nights to the Wollongong catchment will be significantly lower than the pre-COVID forecast to 2025. Growth beyond 2025 will depend on the strength of the global economic recovery.

Table 2: Projected Population – Wollongong Catchment vs Regional Benchmarks

	2021	2026	2031	2036	Annual Growth Rate (%)
Wollongong Catchment	207,945	216,772	224,691	232,431	0.7%
Illawarra Region	317,781	332,974	346,901	360,930	0.9%
NSW Overall	8,414,972	9,011,013	9,560,568	10,077,964	1.2%

Source: Transport for NSW; Urbis

Table 3: Pre-COVID Forecast Visitor Nights – Wollongong Catchment vs Regional Benchmarks

	2021	2026	2031	2036	Annual Growth Rate (%)
Wollongong Catchment					
Domestic	1,963,572	2,085,633	2,193,915	2,307,337	1.1%
International	1,908,575	2,379,533	3,198,282	4,733,982	6.2%
Total	3,872,147	4,465,166	5,392,198	7,041,320	4.1%
NSW Overall					
Domestic	116,891,971	124,650,177	145,973,730	170,945,042	2.6%
International	117,758,248	152,863,895	179,013,888	209,637,287	3.9%
Total	234,650,218	277,514,072	324,987,618	380,582,329	3.3%

Source: Tourism Research Australia; Urbis

MARKET DEMAND – EMPLOYMENT GROWTH

Table 4 outlines the projected **employment growth** in the two catchment areas over the next 15 years, based on Transport for NSW projections. Key findings include:

- The Wollongong CBD is projected to experience **job growth of 0.85% per annum** to 2036.
- This is slightly higher than the projected growth for the Wollongong Catchment (0.82% p.a.) but lower than the projected growth for NSW (1.13% p.a.).
- **Office jobs** in the CBD Catchment are forecast to grow marginally faster at an average of 0.87% per annum, in line with the wider Wollongong catchment and slower than the projected NSW growth.

Table 5 shows the top five projected growth industries in the Wollongong CBD catchment to 2036. Health care and social assistance are expected to generate the greatest number of new jobs by 2036. Some of these jobs will be accommodated in office space.

Professional, scientific and technical services, an industry that is often office-based, is also projected to experience strong growth driving demand for office and residential accommodation.

Council as part of its Economic Development Strategy has set a jobs growth target of 1.1 per cent per annum. If this is achieved, it would result in a higher number of jobs than contained in this forecast.

Table 4: Projected Employment – Wollongong CBD vs Regional Benchmarks

	2021	2026	2031	2036	Annual Growth Rate (%)
Total Employment					
Wollongong CBD	35,314	36,930	38,518	40,121	0.85%
Wollongong Catchment	94,326	98,300	102,698	106,694	0.82%
Total NSW	4,168,922	4,437,806	4,690,546	4,933,121	1.13%
Office-Based Employment					
Wollongong CBD	14,703	15,406	16,031	16,752	0.87%
Wollongong Catchment	32,653	34,192	35,656	37,171	0.87%
Total NSW	1,598,314	1,716,242	1,813,465	1,913,891	1.21%

Source: Transport for NSW Employment Projections; Urbis

Table 5: Wollongong CBD Top 5 Projected Growth Industries (2021-36)

Industry	2021-36 Growth
Health Care and Social Assistance	1,548
Public Administration and Safety	585
Professional, Scientific and Technical Services	537
Education and Training	340
Accommodation and Food Services	324

Source: Transport for NSW Employment Projections; Urbis

MARKET DEMAND – OFFICE MARKET PERFORMANCE

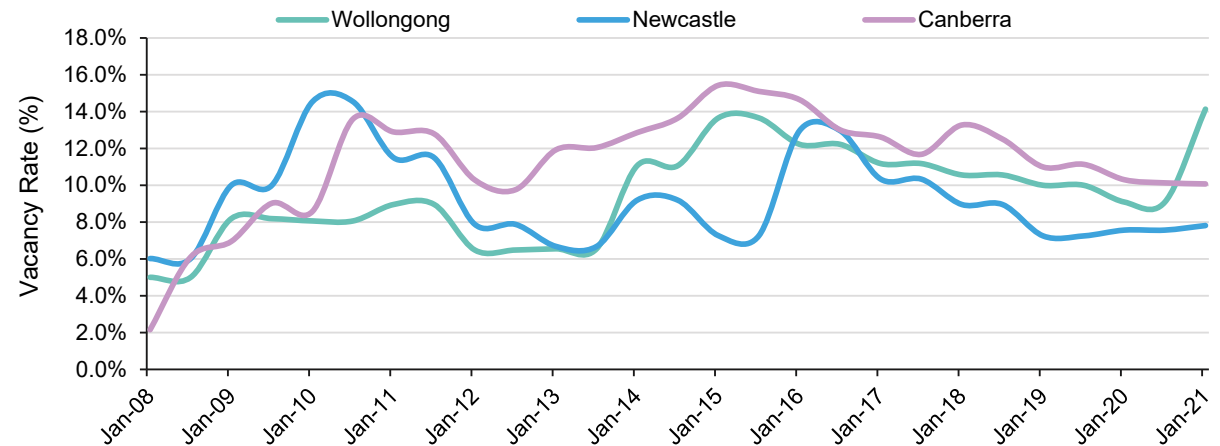
The Wollongong office market is a small but established regional market. Demand from office tenants has been supported by significant investment in the following recent infrastructure projects:

- \$20 million Crown Street Mall revitalisation works,
- the new \$120 million Wollongong Private Hospital, operated by Ramsay Health Care,
- the \$134 million expansion of the Wollongong Public Hospital,
- the \$268 million recent upgrade to Wollongong Central Shopping Centre by GPT Group,
- road and rail transport upgrades worth over \$450 million facilitated by the NSW Government,
- the University of Wollongong's (UOW) upgrades in excess of \$300 million over four years from 2017 as part of their Strategic Plan, and
- WIN Grand Development mixed use development in excess of \$400 million

Chart 1 illustrates the change in the Wollongong office market vacancy rate since 2008, compared to the Newcastle and Canberra office markets. Wollongong has generally maintained high vacancies with a 10-year average of 10.2%, in line with other major regional markets. The vacancy rate spiked in the six months to Jan 2021 owing to the completion of two new A-Grade offices (3-5 Rawson Street and 140 Keira Street).

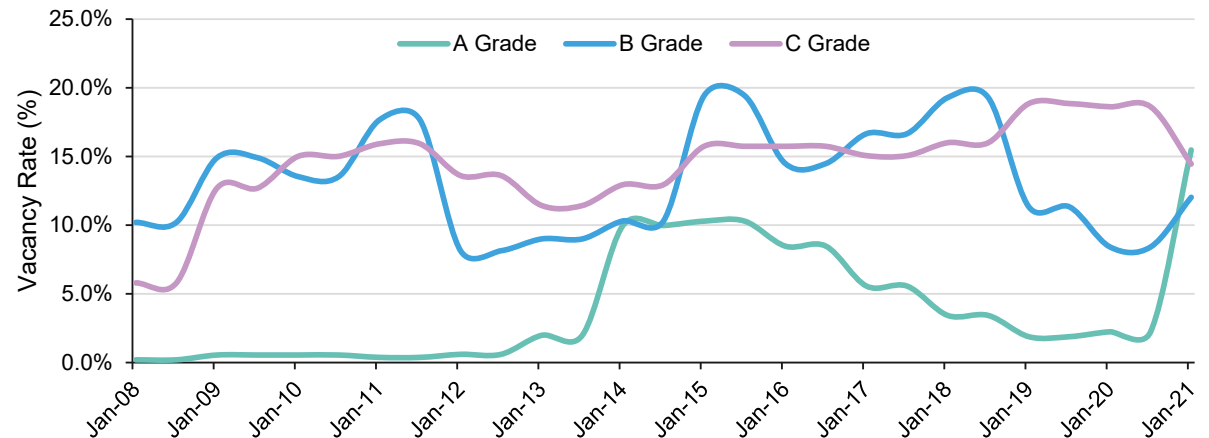
The market is characterised by constrained office stock supply and a lack of large contiguous A-grade leasing options or large-scale institutional assets. As shown in Chart 2, vacant secondary grade stock has driven the market's high vacancy rate in the last five years.

Chart 1: Office Market Vacancy Rate – Wollongong CBD vs Comparable Markets



Source: PCA Office Market Report; Urbis

Chart 2: Wollongong Office Market Vacancy by Office Grade



Source: PCA Office Market Report; Urbis

MARKET DEMAND FINDINGS

RESIDENTIAL

Scored 2 out of 5

- Moderate population growth of 0.7% per annum is projected in the Wollongong Catchment to 2036, below the NSW average of 1.2% per annum over the same period.
- There are projected to be an additional ~24,500 residents in the Wollongong Catchment by 2036, reflecting a ~12% increase in the current population.
- Unique positioning of sites near the ocean will improve their attractiveness and likely result in a premium over other sites that don't benefit from ocean frontage.

SHORT-TERM ACCOMMODATION

Scored 2 out of 5

- Prior to COVID-19, the Wollongong catchment short term accommodation experienced occupancy rates higher than the wider South Coast Tourism Region and was forecast for strong visitation growth over the next 15 years.
- As forecast growth in visitor nights was driven by international visitors, overall visitation growth to Wollongong is expected to be significantly impacted by COVID-19 in the short to medium term.
- Visitor growth beyond 2025 and the supportability of additional short term accommodation is highly dependent on the timing of international borders opening and the strength of the recovery of key economies supplying Australian tourism.
- Ocean fronting accommodation will have a competitive advantage.

COMMERCIAL OFFICE

Scored 4 out of 5

- Moderate projected office-based job growth in the CBD Catchment at 0.87% per annum to 2036, faster than overall job growth in the CBD Catchment, is supported by strong growth in the health and professional services industries.
- Demand from office tenants has been supported by major city investment in recent infrastructure projects.
- While the Wollongong office market has maintained a consistently high vacancy rate over the last five years (~10%), this has been driven by vacant secondary grade stock. This indicates pent up demand for large contiguous A-Grade leasing options.

COMPETITION – RESIDENTIAL APARTMENTS

Residential Competition

Scored 2 out of 5

- There is a high level of future supply pipeline of apartments in the Wollongong Catchment with a total of 2,836 apartments proposed across 46 projects (only including projects with 15 or more units).
- This reflects the increasing investment in high density residential development that has been attracted to Wollongong in the last five years, driven by the Illawarra region's relative affordability and lifestyle appeal when compared to Sydney.
- The largest supply pipeline is in the Wollongong City Centre comprising 2,068 of the proposed apartments across 31 projects. This represents 73% of all future supply in the catchment. There are also 275 apartments proposed across 3 projects in Dapto.
- Over 550 proposed apartments are currently under construction and are expected to be completed in 2021, with another 200 apartments under construction due for completion in 2022.
- An estimated 1,285 apartments are in the pipeline which have received development approval and a further 571 apartments in the development application stage.
- Ultimately development near or on the ocean will be sought after and is likely to attract a premium.

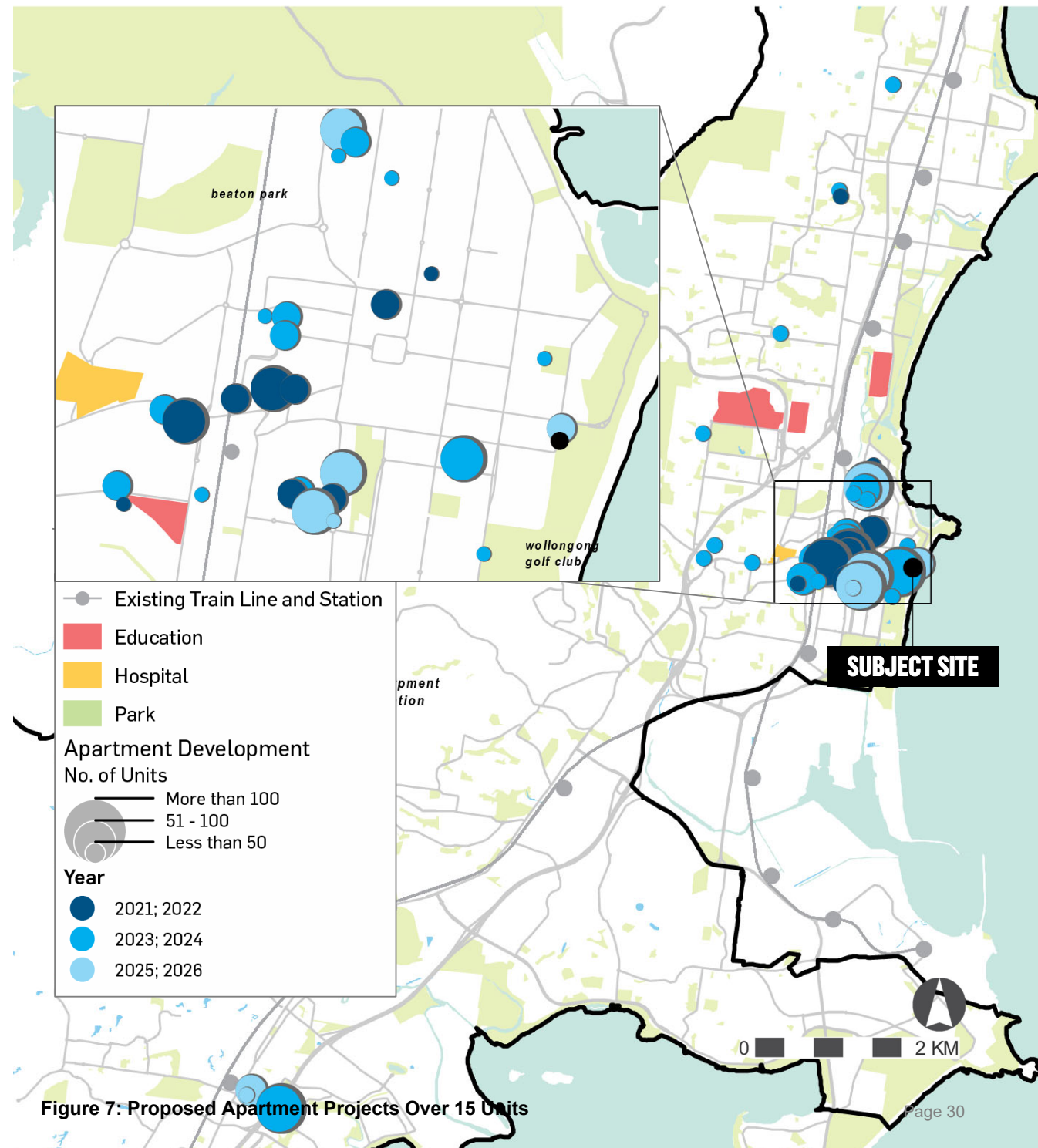


Figure 7: Proposed Apartment Projects Over 15 Units

COMPETITION – SHORT TERM ACCOMMODATION

Short Term Accommodation Competition

Scored 3 out of 5

- There are currently **33 short term accommodation establishments** operating across the Wollongong Catchment, providing over 1,440 rooms. 14 are motels, 10 are hotels and 9 are serviced apartments.
- Hotel rooms represent the largest proportion of short term accommodation at 41% of all rooms, while motels and serviced apartments account for 32% and 27% respectively.
- The existing short term accommodation establishments are primarily clustered in and around the city centre, particularly on the eastern side where they benefit from ocean views and easy access to the beaches.
- There are **three proposed hotel developments** in the catchment that will deliver an additional 790 rooms.
- Two of the proposed developments (both in the Wollongong City Centre), totaling 361 rooms, are in the development approval stage and are due for completion between 2025 and 2026.
- Short stay accommodation located overlooking the pacific ocean will be more highly sought after and will have a competitive advantage.

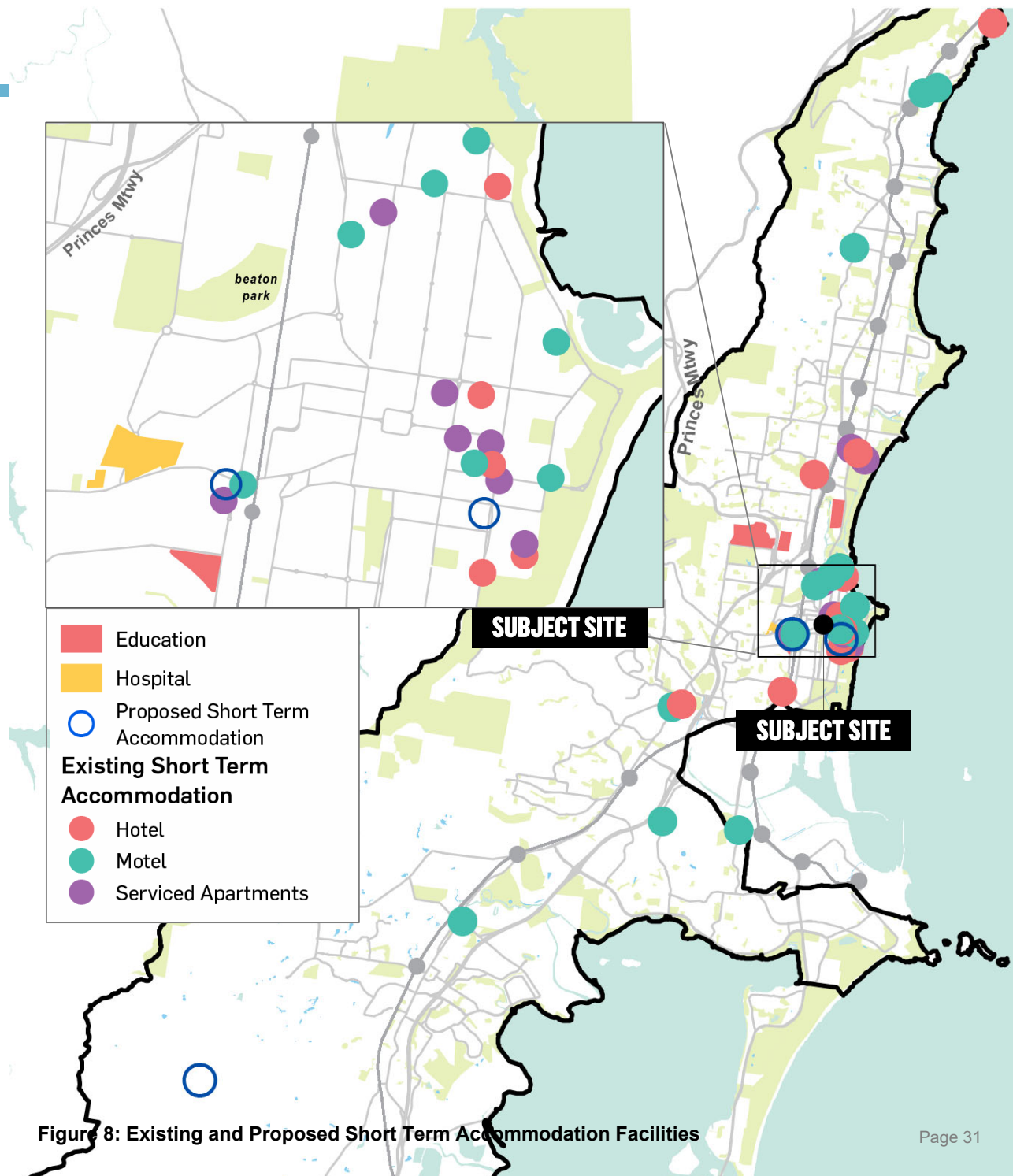


Figure 8: Existing and Proposed Short Term Accommodation Facilities

COMPETITION – COMMERCIAL OFFICE

Commercial Office Competition

Scored 2 out of 5

Vacancy rates are around 10% in the last five years. Most of this vacancy was concentrated in lower grade stock, while A Grade vacancy rates were just 2.2% until July 2020. This suggests an undersupply of A Grade office space in Wollongong.

Two recently completed and five proposed major office developments in the CBD (Table 6) representing 53,700 sqm additional floor space, or a 35% increase on current supply.

Two proposed developments just outside the subject focus area are currently under construction:

- 4 Burelli St – **IMB headquarters**, due for completion in Q3 2021
- 95 Crown St - **Langs Corner** - 12,032 sqm of office space over 10 floors and eight ground floor retail premises.

Table 6: Proposed Major Offices in Wollongong CBD

	Address	GFA (sq.m)	Completion
A	3-5 Rawson Street	5,489	Q3 2020
B	134-148 Keira Street	5,259	Q4 2020
C	47 Burelli Street	6,695	Q3 2021
D	95 Crown Street	12,032	Q2 2022
E	111 Crown Street	9,181	2023+
F	25 - 27 Denison Street	10,641	Mooted
G	80 - 82 Market Street	4,400	Mooted

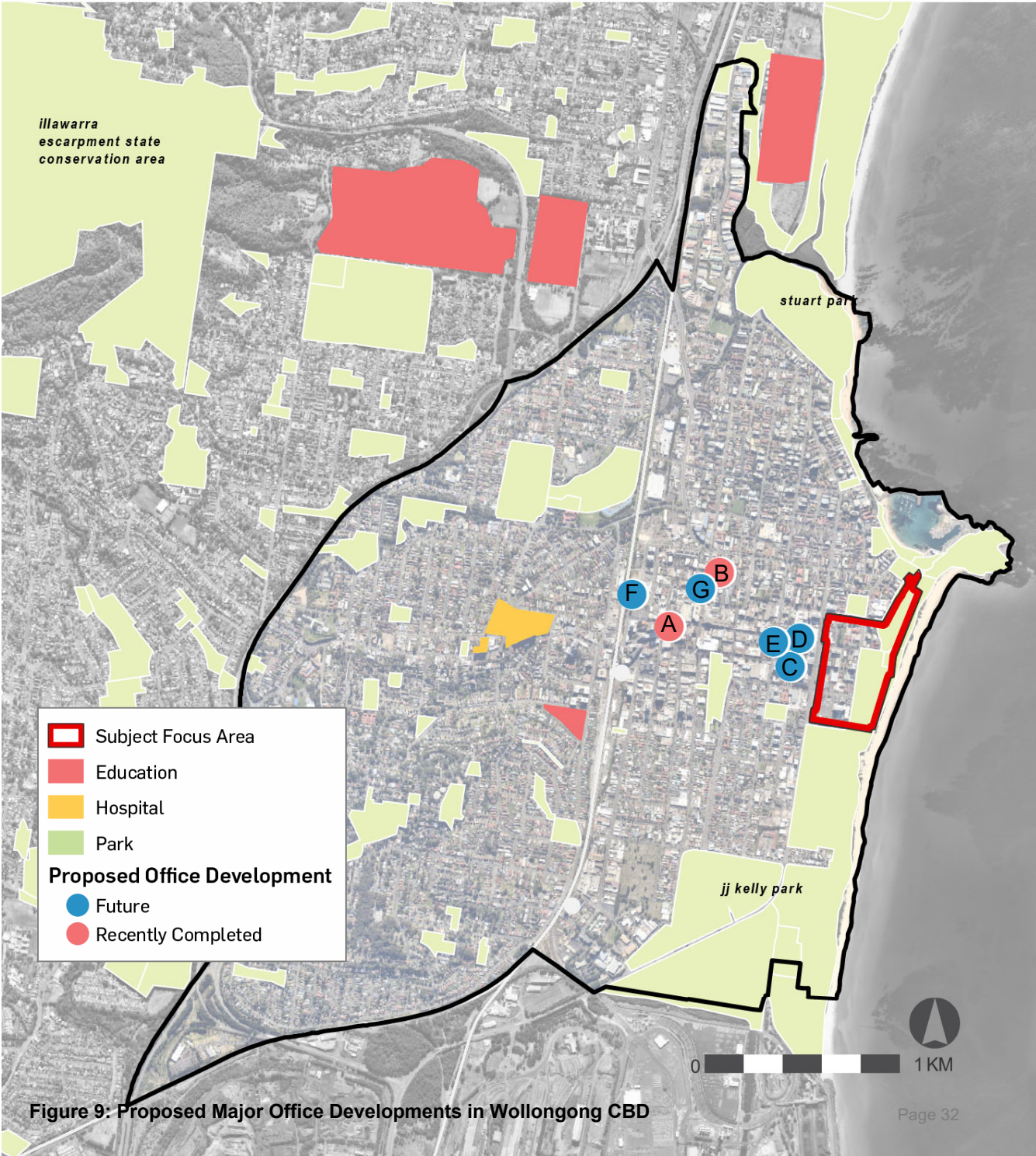


Figure 9: Proposed Major Office Developments in Wollongong CBD

SITE COMPETITIVE POSITIONING

Proximity to Services, Amenity, and Economic Opportunities

As detailed in previous sections of this report, the site is close to services and amenities that support its competitive positioning for each land use:

- **WIN Entertainment Centre (WEC)** and **WIN Stadium** at the subject site are Wollongong's major sport and entertainment venues.
- **Wollongong Beach** and **Wollongong North Beach** are directly to the east of the site. Both have multiple reserves with picnic areas, including **Lang Park** directly to the north of the site.
- **Crown Street Mall** and **Wollongong Central Shopping Centre** is Wollongong's retail and commercial centre, 800 metres west of the site. In addition to extensive retail in the regional shopping centre, it offers a mix of retail, food and beverage along a pedestrian-only high street.
- **Wollongong Hospital** is located 1.6 km west of the site. With over 500 beds, it is the largest hospital in the Illawarra Shoalhaven Health District. It is also a teaching hospital with close affiliations with the University of Wollongong. **Wollongong Private Hospital** is a new 151-bed facility adjacent to this.
- The **University of Wollongong's** main campus is 3 km north-west of the subject site while its Innovation Campus is located 2.4 km north of the site. UOW was ranked 11th in Australia in the QS 2020 World University Rankings and attracts significant enrolments from international students.
- **TAFE Wollongong**, situated 2.4 km north-west of the subject site, offers 114 courses, ranging from Short Courses to Advanced Diplomas.



Figure 10: Services, Amenity and Economic Opportunities in Wollongong

SITE COMPETITIVE POSITIONING

Views and Setting

The site has unobstructed views east of the ocean, Wollongong Beach and the Lighthouse. These views are highly attractive for potential residents, accommodation visitors and office tenants, and will be a key competitive advantage over other Wollongong CBD locations.

The public realm adjoining and within the site also offers an attractive setting for all of the considered land uses. There are several attractive public open spaces and reserves adjacent to the site, including Lang Park and Andrew Lysaght Park, as well as substantial open space within the eastern boundary of the site facing Wollongong Beach. Crown Street and Marine Drive (heritage listed) are attractive tree lined streets.

Transport Access

As detailed in the next section, the site is highly accessible by a range of transport modes.

While the site is adequately accessible to current and future visitors, residents and workers, it is at a competitive disadvantage to sites more centrally located in the Wollongong CBD. Sites along Crown Street to the west of the site experience greater foot traffic due to the clustering of retail and commercial uses. Office tenants and workers are likely to be attracted to the superior public transport access and a wider range of retail and services at central CBD sites.

SITE COMPETITIVE POSITIONING – LAND USE RATINGS

RESIDENTIAL

Scored 5 out of 5

- Strong retail, entertainment and lifestyle amenity within walking distance will be a strong attractor for future residents, including easy access to the Wollongong CBD, beach and reserves.
- Employment opportunities in the CBD commercial core, hospitals and universities are within 3 kilometres, with adequate vehicle access to the site.
- The potential for uninterrupted ocean views from residential apartments will be a strong competitive attraction.

SHORT-TERM ACCOMMODATION

Scored 5 out of 5

- Walkable access to some of Wollongong's key tourism attractions, including the CBD retail high street, beaches, and lighthouse reserve. Potential to attract overnight stays from visitors to major sport, music and entertainment events on site.
- Potential for uninterrupted ocean views from short term accommodation will be a strong competitive attraction.

COMMERCIAL OFFICE

Scored 4 out of 5

- The site has walking accessibility to the Wollongong CBD retail and amenity, but is separated from the existing cluster of commercial offices in the CBD core. Office tenants and workers may prefer a core CBD office location due to co-location with other businesses, the variety of amenities in the immediate vicinity and superior public transport options.
- Ocean and beach views are a clear competitive advantage.
- Opportunity to provide improved on site food and beverage offering.

ECONOMIC LAND USE ASSESSMENT FINDINGS




Land Use Assessment

Table 7 ranks the subject site against the economic land use drivers for potential land uses at the subject site. We have produced a Location Suitability Score, which is the average of scores across the economic land use drivers.

As shown in the table, all three of the considered land uses received an above-average suitability score (i.e. >2.5 out of 5) based on the characteristics of the subject site and its location.

Based on this preliminary economic assessment, we recommend that all three uses could be supportable at the site, and for detailed market assessments to be undertaken for each use to determine the supportable scale.

Table 7: Summary of Economic Land Use Drivers

	LOCATION FACTORS	Residential Apartments	Short Term Accommodation	Commercial Office
	I. Market Demand	2	2	4
	II. Competition	2	3	2
	III. Competitive Positioning of the Subject Site	5	5	4
	Location Suitability Score (out of 5)	3.0	3.3	3.3

5 very strong
 4 strong
 3 moderate
 2 relatively unfavourable
 1 very unfavourable

Residential apartment

Rated 2 out of 5 due on market demand and competition to moderate projected population growth and a significant supply pipeline. However, the site rates highly on competitive positioning by virtue of its access to ocean views and co-location with extensive lifestyle amenity (rated 5 out of 5).

Short term accommodation

The subject site’s beach-side location with access to ocean views and onsite sport and entertainment events results in a strong competitive positioning (rated 5 out of 5).

Commercial office

Is rated highly for market demand, particularly for A-Grade office, however, is rated moderate-low for competition. The site’s outlook is likely to attract office tenants, particularly if improved retail amenity for workers is provided. However, the site is rated 4 out of 5 due to its competitive disadvantage to inner CBD locations.

2.4 TRANSPORT CONTEXT



TRANSPORT OVERVIEW

There are a variety of advantages to the ISEP site being centrally located, including:

- High density of bus services in proximity to the site.
- Proximity of the north/south coastal walking and cycling paths.
- Strong walking connections to the Wollongong CBD.
- Proximity to a range of parking options in parking stations in and around the Wollongong CBD.

The following pages discuss the transport offering and issues in greater detail.

LEGEND

- Focus area
- Site boundary
- T Train station
- Train line
- Bus stop
- Bus route
- On-street parking
- Off-street parking (Council)
- Off-street parking (Commercial)
- Off-road shared path
- Off-road shared path (pop-up)
- Off road separated cycleway



Figure 11: Transport connectivity to the site

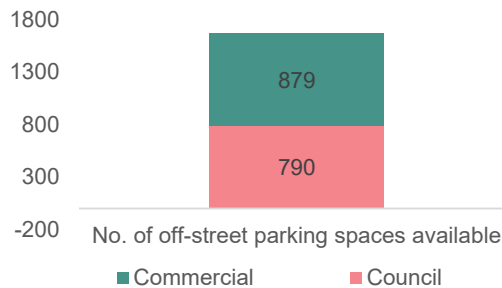
PARKING IN THE AREA

The study area is well connected to both free and paid parking facilities in both on-street and off-street car parks.

Apart from free parking, the Council also provides low-cost off-street parking (\$0.6 - \$0.8 per hour) during working hours on weekdays (8.30 am to 4.30 pm), while after hours parking is free. Commercial car parks also offer two-hour free parking.

Within an 800 m walking distance from the WIN entertainment centre there are almost 1,700 off-street car parking spaces available in commercial and Council car parks (Chart 3).

Chart 3: Off-street parking in an 800 m catchment



LEGEND

- Focus area
- Site boundary
- T Train station
- Train line
- On-street parking
- Off-street parking (Council)
- Off-street parking (Commercial)

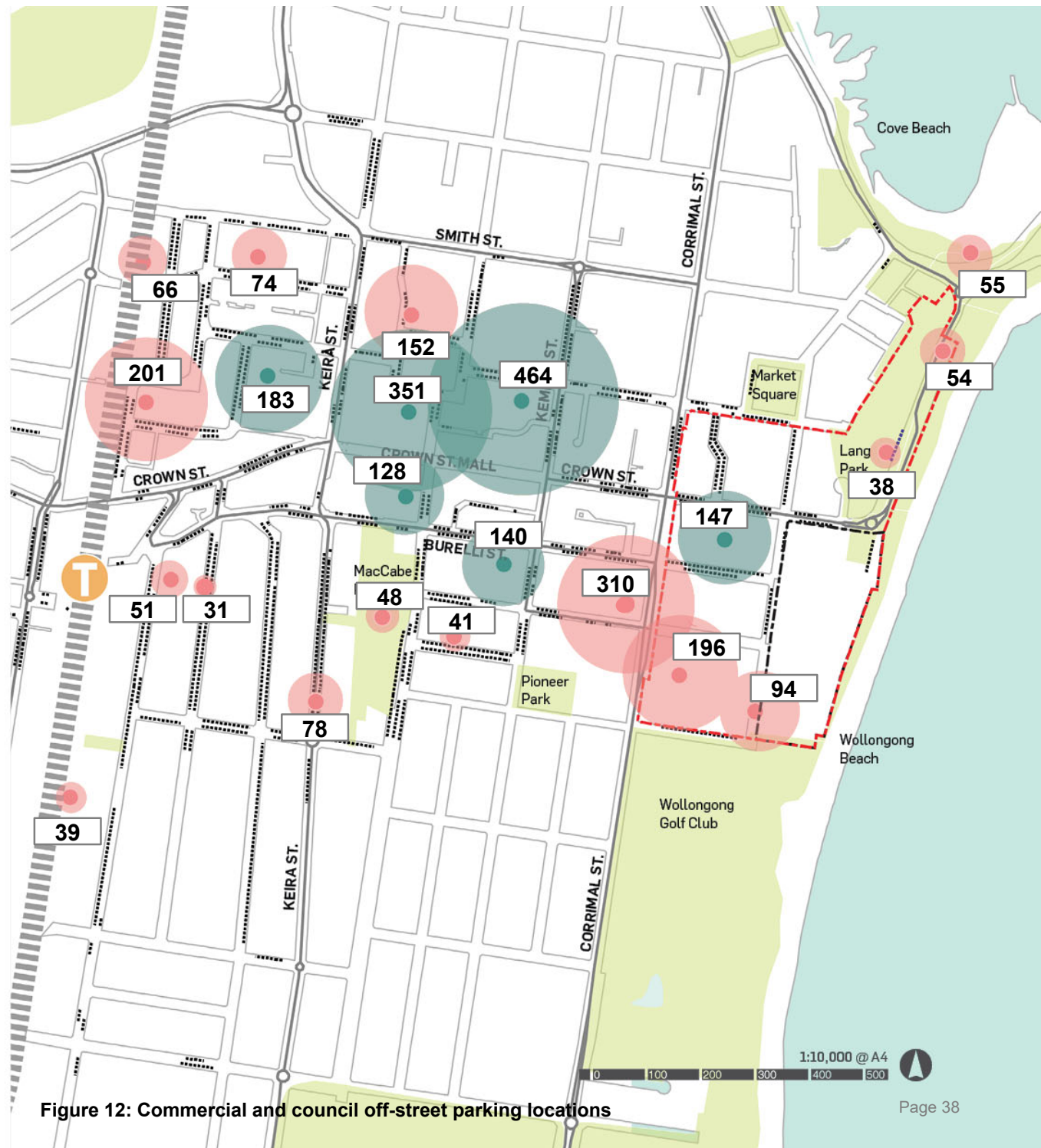


Figure 12: Commercial and council off-street parking locations

PUBLIC TRANSPORT CONNECTIVITY

Multiple bus routes provide access to the site as shown in Table 8. The train station is around 1.4 km walk to the site so would be impractical for most people to walk. However, the Gong Shuttle does offer a direct shuttle connection between the Station, ISEP and onto the University of Wollongong.

There is a bus layover located immediately to the north of ISEP in Lang Park. This location is a high-amenity location (noting the views, proximity to the waterfront) and is deserving of a higher amenity use than a bus layover. The bus layover requires capacity for six buses.

Table 8: Bus routes and destinations

Destinations	Bus routes
University of Wollongong ↔ North Wollongong Station (Gong Shuttle)	55A & 55C
Wollongong ↔ Austinmer Station	90
Wollongong ↔ Bulli	92
Wollongong ↔ Campbelltown	887
Wollongong ↔ Dapto	33
Wollongong ↔ Bellambi	3,7,8
Unanderra ↔ Wollongong	35
Wollongong ↔ Kembla Heights	36
North Wollongong ↔ Port Kembla	65
Wollongong ↔ Stanwell Park	2



ACTIVE TRANSPORT

ISEP has the advantage of strong north/south cycling links through the shared paths along the foreshore. Separated cycleways such as these are important as they attract a broad variety of users including children, families and inexperienced/less confident cyclists.

Further additions to the cycling network that is separated from traffic have been made recently. This has seen pop-up (temporary) infrastructure on –

- Crown Street (immediately adjacent to the site)
- Corrimal Street
- Burelli Street connecting to Wollongong Station.

Pending an assessment of how this temporary infrastructure has performed this infrastructure may be made permanent, resulting in a permanently enhanced active transport network to ISEP that is suitable for a broad range of users.

Currently only 0.7% of journeys to work are made by bike (ABS Census, 2016), however there is potential to increase this. The Wollongong Cycling Strategy 2030 identified that 22 per cent of residents in the LGA were interested in cycling for transport but concerned about safety/quality of infrastructure.

LEGEND








-  Focus area
-  Site boundary
-  Train station
-  Train line
-  Off-road shared path
-  Off-road shared path (pop-up)
-  Off road separated cycleway



Figure 14: Active transport connectivity to the site to the site

ACCESS AND MOVEMENT – OPPORTUNITIES AND CONSIDERATIONS

A range of transport opportunities and considerations have been examined as part of this study. Options for updating the ISEP have been developed in line with the following:

- **Consideration:** The train station is over 1.4 km from the ISEP. While this may be a short distance for a capital city stadium, in the context of the many available parking options in Wollongong, it has not historically resulted in a large mode-share of people walking to the stadium from the train station. As such, parking will remain an important aspect of access in the ISEP. There are opportunities to provide some parking onsite as well as in proximate off-site facilities.
- **Opportunity:** There is a bus layover located immediately to the north of ISEP in Lang Park. There is an opportunity to relocate the bus layover and utilise this space for a use which results in more people able to take advantage of this high-amenity location.
- **Opportunity:** Improving walking connections between the Wollongong CBD and the waterfront is a key opportunity for the redevelopment of ISEP.
- **Opportunity:** Extend the one-way configuration of Harbour Street to Crown Street and narrow Crown Street and make Harbour Street a shared zone that is closable as a public event space.



An aerial photograph of a city, likely Johannesburg, with a large stadium in the foreground. The stadium has a curved running track and a large field in the center. The city is densely packed with buildings, and the mountains of the city are visible in the background. The image is overlaid with a blue gradient on the left side where the text is located.

2.5 PLANNING AND HERITAGE CONTEXT

BUILT HERITAGE CONTEXT

Built Heritage

The study area contains the following listed heritage items (inter alia):

- Item 6383 Wollongong LEP 2009, Former Roman Catholic cemetery including Gravestones and Monument 9–11 Crown Street— Andrew Lysaght Park.
- Item 6590 Wollongong LEP 2009, Avenue of Norfolk Island pines, Marine Drive.
- Item 6269 Wollongong LEP 2009, Three picnic shelters in WA Lang Park, W A Lang Park, Marine Drive.
- Item 6369 Wollongong LEP 2009, Flats, 10 Crown Street.
- Item 01940 State Heritage Register / Item 5910 Wollongong LEP 2009, Original Wollongong Telegraph and Post Office and WWII Air raid shelter, 11 Market Street.

All redevelopment options must consider the potential heritage impacts of the design and manage these impacts appropriately. A Heritage Impact Statement will be required to accompany any application for redevelopment to assess the potential heritage impacts of the proposal on the heritage items within the redevelopment area and within the vicinity of the study area.

LEGEND

- Focus area
- Site boundary
- Conservation Area - General
- Item - General
- Item - Archaeological
- Item - Landscape



Figure 15: Built Heritage Context

ARCHAEOLOGICAL CONTEXT

Aboriginal Archaeology

The study area is located near two archaeologically sensitive landforms (ocean and sand bodies) and known Aboriginal sites. Areas of lesser ground disturbance within the study area have moderate potential for Aboriginal sites to be retained.

As a minimum, Urbis recommends undertaking an Aboriginal Objects Due Diligence Assessment prior to development works. Further investigation in the form of an Aboriginal Cultural Heritage Assessment in accordance with the *National Parks and Wildlife Act 1974*, including Aboriginal community consultation, is likely to also be required.

Historical Archaeology

The study area has seen development since at least the early 19th century. Archaeological remains are likely to include:

- Burials within the former Roman Catholic Cemetery, spanning the years 1805-1914.
- Footings and other material associated with earlier showground buildings.

Urbis recommends undertaking a Historical Archaeological Assessment in accordance with the *Heritage Act 1977*.

LEGEND

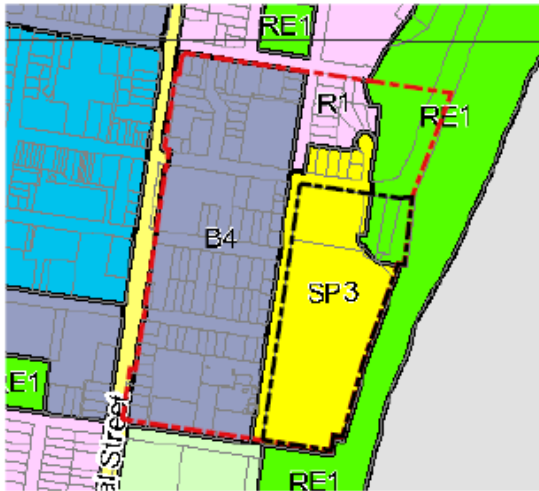
- Focus area
- Site boundary
- Registered Aboriginal Sites
- High Historical Aboriginal Archaeological Potential
- Moderate Historical Aboriginal Archaeological Potential
- Low Historical Aboriginal Archaeological Potential



Figure 16: Aboriginal and Historical Archaeological Context

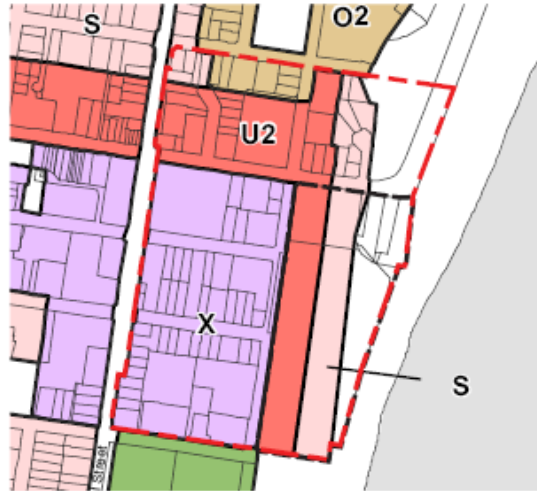
CURRENT PLANNING CONTROLS

LZN



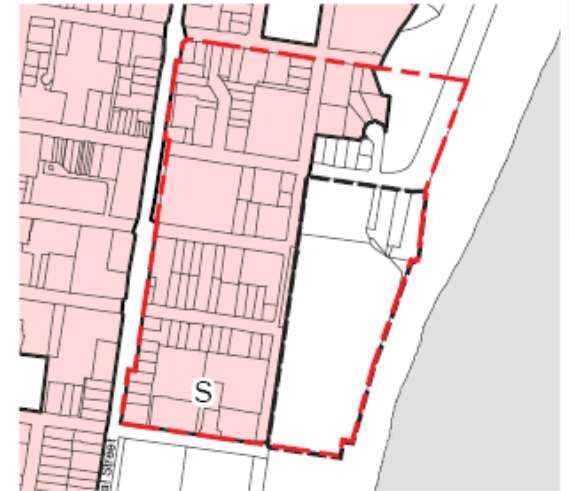
The current land use zones of the study area vary, reflecting the diverse land uses within the city centre. The west portion is zoned B4 Mixed Use making up the majority of the study area. Entertainment uses including the WEC and WIN Stadium are within the SP3 Tourist which extends to the northern edge of Crown Street. A small section along the northern site boundary is zoned R1 General Residential and the north east of the study area is zoned RE1 Public Recreation.

HOB



The height of the buildings in the study area is mostly 48m (X), reflective of the Mixed Use zoning. Half of the site area to the north west is a maximum of 32m (U2) and a small section to the east of that zone running through the site is 24m (S). The public recreation zoned area does not have a height of building maximum as it is considered open space.

FSR



A maximum floor space ratio is not identified for the SP3 and RE1 zones due to the nature of the land use. Other uses within the study area have a maximum FSR of 1.5:1 (S). These zones reflect generally lower density development with a range of lot sizes and are consistent across the eastern section of the Wollongong Commercial Core.

Appendix A contains further details of planning controls applicable to the site.

MASTER PLAN CONSIDERATIONS



This section of the report looks at the considerations that underpin the masterplan. An analysis of the site is presented in the form of the site's constraints and opportunities.

A comparison of other Convention Centres in Australia to benchmark the scale of development that we could consider on our site were considered to inform key site planning directions which develop the three masterplan scenarios proposed.

Renewing Lang Park and the benefits that it will bring is also covered in this chapter.

03

PLACE VISION

The following four place outcomes were agreed through a consultation process with Wollongong City Council and Illawarra First members.

A nationally significant sporting and entertainment destination

Entertainment Quarter, Sydney



Townsville's Queensland Country Bank Stadium

Urban renewal that respects the existing character and natural environment



Cairns
Convention
Centre

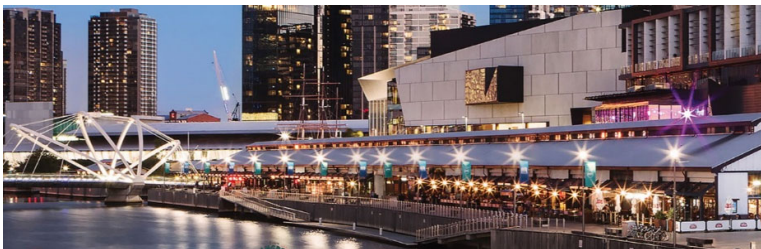
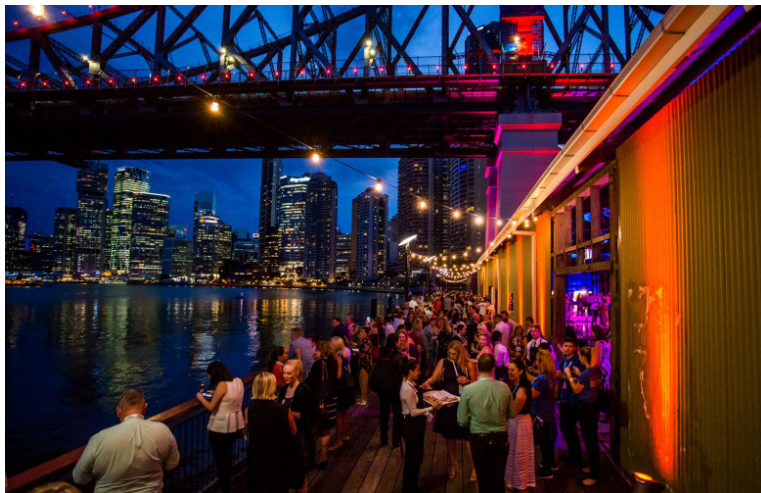


Sydney Olympic Park

PLACE VISION

A vibrant place that supports economic growth

Howard Smith Wharves, Brisbane



South Wharf, adjacent to Melbourne Exhibition and Convention Centre









Design that enhances the connection to the waterfront

Adelaide Convention Centre





Darwin Convention Centre

SITE CONSTRAINTS

-  Existing Western Grandstand built form is too bulky to the street.
-  Existing Andrew Lysaght park memorial headstones prohibit better use of the site and could be relocated if it is confirmed that they no longer have occupants beneath.
-  Existing heritage items in the focus areas shall also be considered.
-  Existing training ground does not pose constraints but the buildings behind it may due to views to the sea.
-  The narrow dimension of the southern side may become a challenge for a viable larger scale convention centre footprint (see scale comparison).
-  Footpath with mounding along the beach is fenced off from the rest of the site.
-  Existing service access to the entertainment centre at the end of Marine Drive disconnects the site to the beach.
-  Existing car parking spaces.

LEGEND

-  Site boundary
-  Focus area

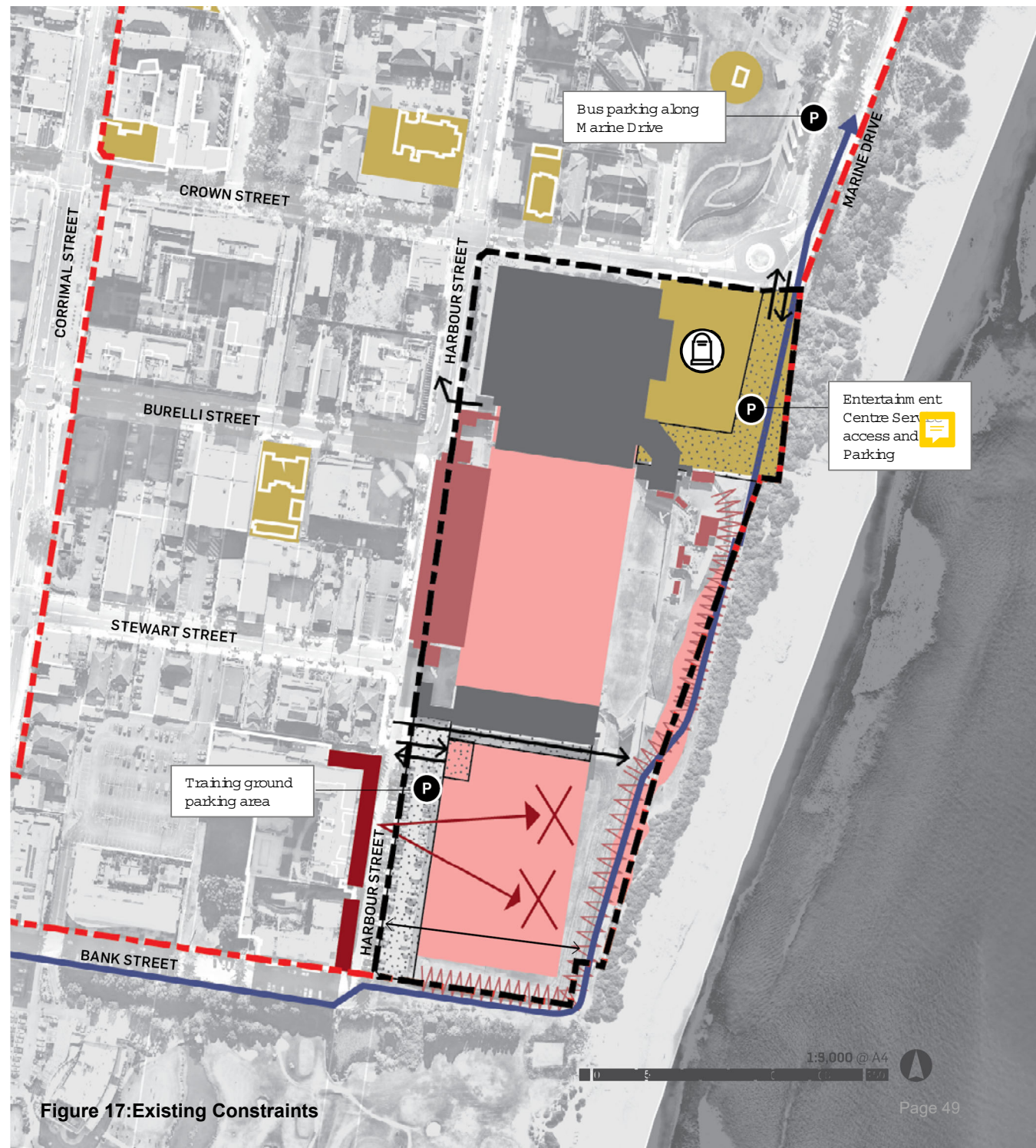











Figure 17: Existing Constraints

SITE OPPORTUNITIES

-  Redevelopment of the existing Wollongong Entertainment Centre (WEC) and the Stadium grandstands with additional uses/activation.
-  Potential for ground floor / roof top activation.
-  Positioning of new tower built form to take advantage of desirable views.
-  Relocation of the training ground that will free up space for newer development.
-  Providing a shared vehicular service access points to minimise pedestrian-vehicle crossover. The Marine Drive bus layover can be expanded to accommodate new demand for the redeveloped Lang Park.
-  Improving accessibility from nearby transport to provide a safer pedestrian environment and redevelopment of a parking and transport interchange structure off-site to accommodate more parking demand.
-  Provision of a contiguous open space from Lang park, Andrew Lysaght park and a new public open space in the south.
-  Opportunity for ground level activation at eastern low-level tiered seating ("The Hill").
-  Opportunity for bus layover relocation away from the beachfront.

LEGEND



-  Site boundary
-  Focus area



Figure 18: Potential Opportunities

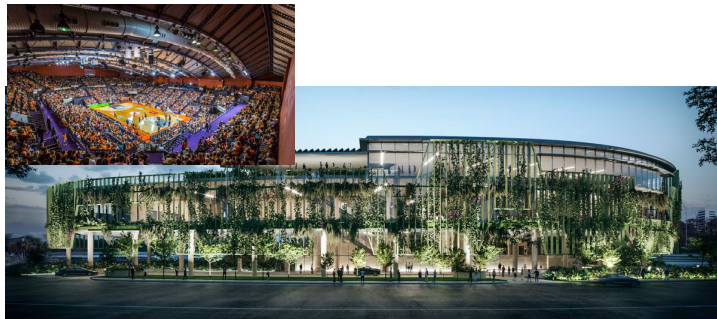
SCALE COMPARISON OF PRECEDENT CONVENTION / ENTERTAINMENT CENTRES



HOBART CONVENTION CENTRE:

Hobart Convention Centre is a has 12,600 sqm available gross building area and the site is attached to Hotel Grand Chancellor Hobart, conveniently situated in Hobart City centre.

The Hobart Convention Centres waterfront location and a very compact design provides opportunity for flexible spaces.



CAIRNS CONVENTION CENTRE:

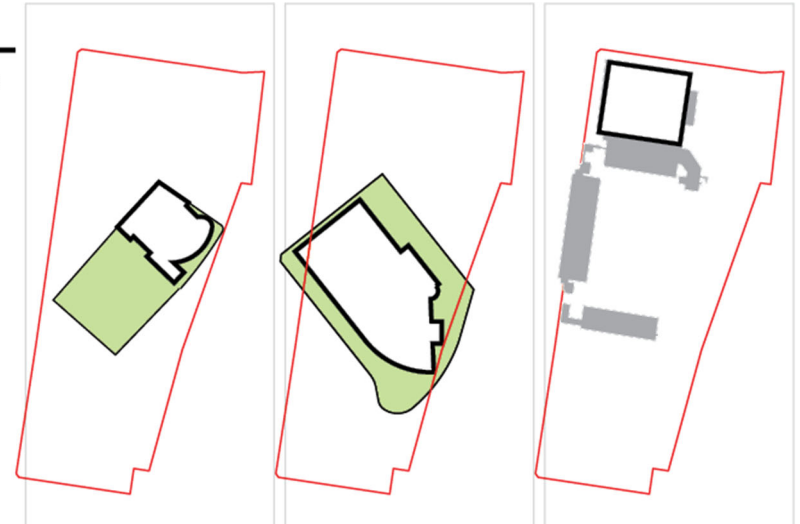
Cairns Convention Centre has 28,500 sqm available gross building area and the site is ideally located adjacent the Cairns City central business district, transport routes, hotel and accommodation precincts.

Image source: ArchitectureAU, ARUP

ISEP - Revitalising Wollongong's foreshore

LEGEND

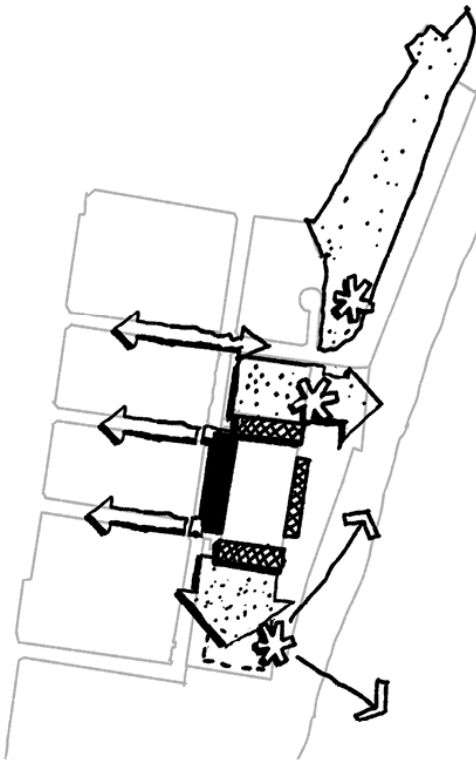
- ISEP study area
- Building footprint
- Case study site area



Name	Hobart Convention Centre	Cairns Convention Centre	Existing WIN Entertainment centre
GBA*	12,600 sqm	28,500 sqm	21,000 sqm
Building Envelope	4,200 sqm	14,250 sqm	7,000 sqm
Storeys	G+2	G+1	G+2
Est. Site area	12,200 sqm	22,000 sqm	60,822 sqm
Building Dimension	60x75 m	95x185 m	75x90 m
Building Height	3 storeys	2 storeys	3 storeys
Capacity	1,100 seats	5,300+ pax	6,000 pax
Exhibition Space	3,800 sqm	no data	no data
Banquet Capacity	1,000 pax	1,300 pax	no data
Meeting Rooms	n.a.	22	no data

* GBA - High level measurement of Gross Building area

KEY SITE PLANNING DIRECTIONS



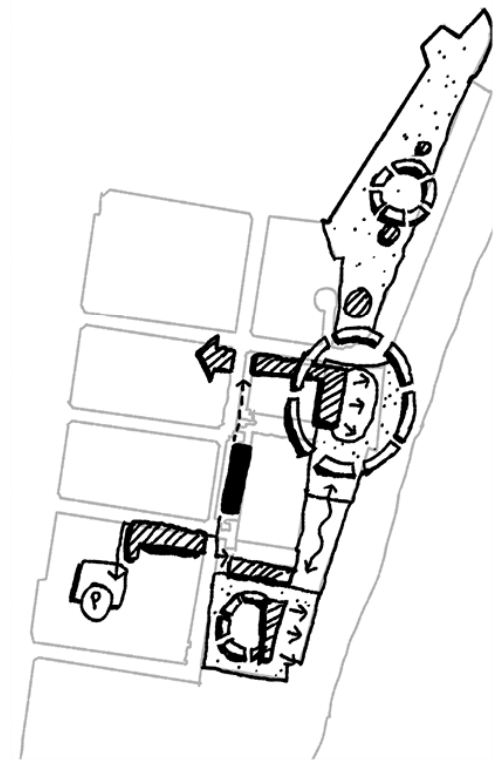
UPGRADE THE PRECINCT TO AN ENTERTAINMENT DESTINATION

Introduce additional uses on site on key frontages and corners which are complementary to existing entertainment facilities to capture visitors' attention.



INTEGRATE THE PRECINCT WITH SURROUNDING PUBLIC SPACES

Create green connections on precinct edges which link the Precinct to surrounding public spaces.



ACTIVATE THE FORESHORE

Emphasise connections to the foreshore by orienting active frontages towards the foreshore.

TRANSPORT IMPLICATIONS

Through redevelopment of the site, the emphasis should be on prioritising public transport and active transport to make these as attractive as possible, whilst supporting parking and deliveries for necessary trips.

Key opportunities are as follows:

- Relocating the bus layover to realise more of Lang Park as a recreational space. Reconfiguring bus network to enable layover to be relocated.
- Establishing a bus interchange under the proposed new multi-storey car park on Stewart Street, making for a more efficient transport system.
- Capitalise on access to existing cycling infrastructure by providing undercover and secure bike parking.
- Providing of parking in an off-site car parking location to provide access for necessary car trips without prioritising them.
- Off-site parking will also provide benefits by spreading out departures (for example, some people will stop on the way to the car parking station or walk at different speeds).
- Through off-site car parking, local activation can support surrounding business through incidental purchases.

LEGEND







-  Focus area
-  Site boundary
-  Train station
-  Train line
-  Bus stop
-  Bus route
-  Wollongong Shuttle
-  Shared path/cycle paths



Figure 19: Transport Implications of Redevelopment

3.1 RENEWING LANG PARK

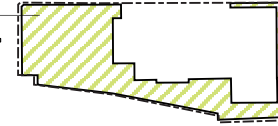
Lang Park is an important public domain asset for Wollongong and the Study Area.

The redevelopment of the Illawarra Sports and Entertainment Precinct would include the upgrade of the park with new programmes and landscape improvements.

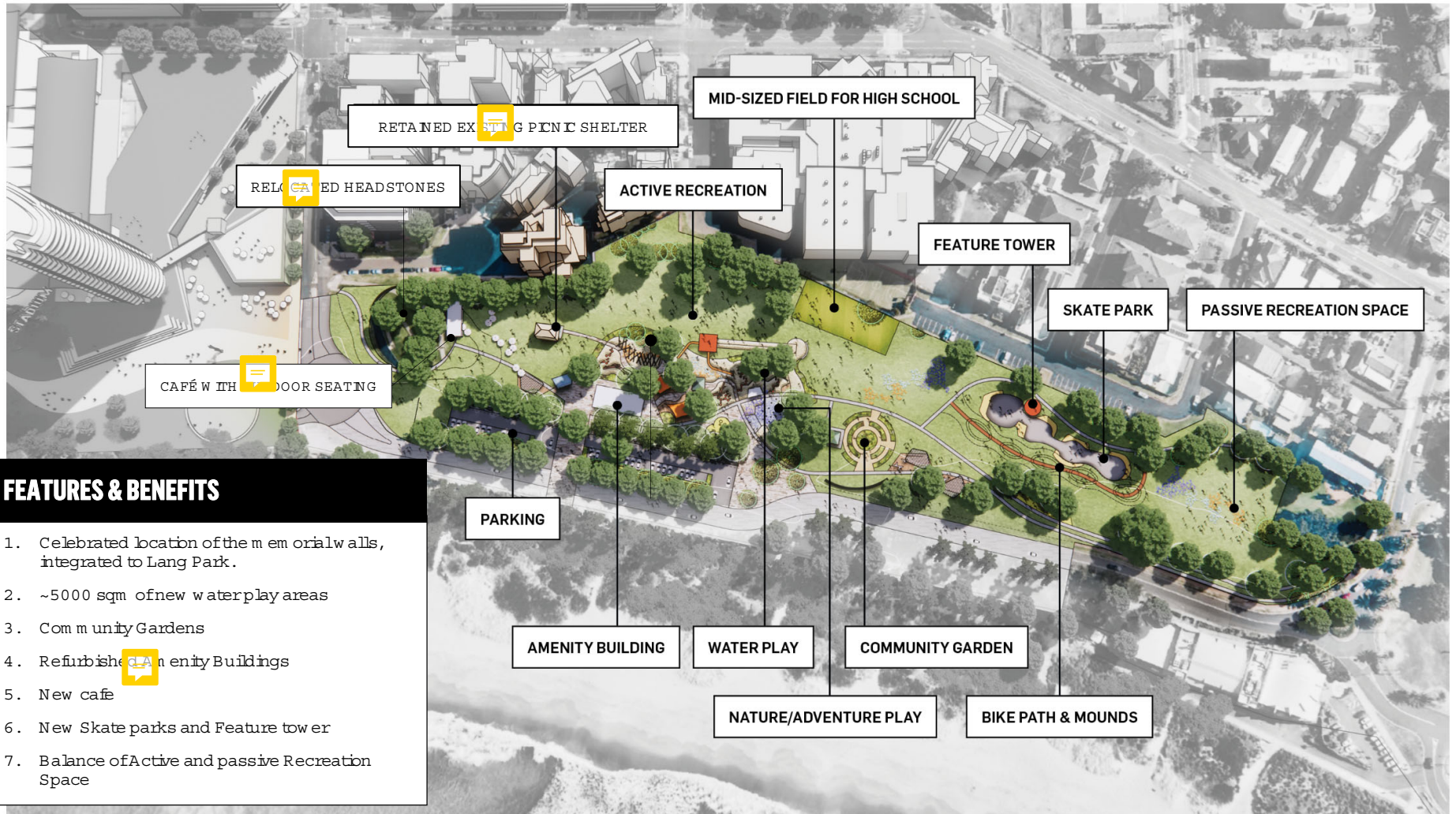
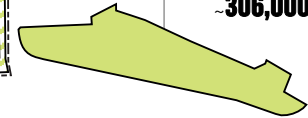
The following pages outline a vision and potential renewal scenario for Lang Park.

BENEFITS OF LANG PARK REVITALISATION

SEP
200-250,000 SQM OF
NEW PARK SPACE*



Revitalised Lang park
~306,000 SQM



FEATURES & BENEFITS

1. Celebrated location of the memorial walls, integrated to Lang Park.
2. ~5000 sqm of new waterplay areas
3. Community Gardens
4. Refurbished Amenity Buildings
5. New café
6. New Skate parks and Feature tower
7. Balance of Active and passive Recreation Space

FEATURES OF LANG PARK REVITALISATION



SHELTER



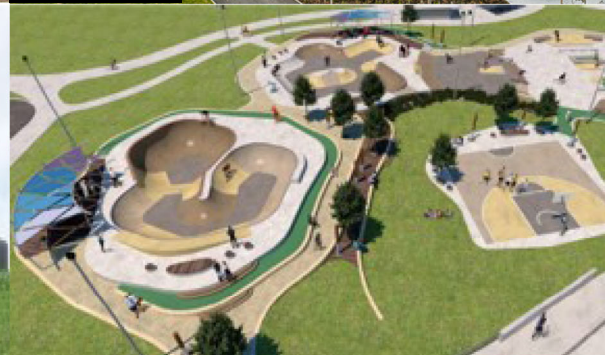
PASSIVE & ACTIVE RECREATION SPACES



BIKE PARK



FEATURES OF LANG PARK REVITALISATION



3.2 MASTER PLAN SCENARIOS

A Base Case and three redevelopment scenarios were considered for the study area.

Each scenario proposes additional uses, distribution of floorspace and/or extent of the new Conference and Exhibition Centre (**Coex**) across the study area.

Consultation on the three options was undertaken with members of Illawarra First and other key stakeholders to select a preferred option.

A layout for the preferred Coex option was further detailed by Populous.

BASE SCENARIO OVERVIEW: RENEWAL OF EXISTING SITE

A minor upgrade of the existing Venues NSW facilities, while welcome, would not capitalise fully on any of the opportunity inherent in the site and its surrounds. Shown is a scenario depicting this, which complies with all existing planning controls and other restrictions on the site outlined previously, but to not deliver the best outcome for the community, the NSW Government or the City.



ISSUES

A minor upgrade of the existing Venues NSW facilities, while welcome, would not capitalise fully on any of the opportunities inherent in the site and its surroundings. Shown is a scenario depicting this, which complies with all existing planning controls and other restrictions on the site outlined previously, but to not deliver the best outcome for the community, the NSW Government or the City. Following this base scenario will lead to the following issues:

1. Missed opportunity in creating an integrated parkland with the existing memorial.
2. Bus circulation along Marine Drive disconnects Lang Park to the beach.
3. Impeded potential of the training ground to be activated as a usable public access open space/ activation and spill over for outdoor events.
4. No provision for an activated eastern low-level tiered seating That can be integrated with the park system.
5. Does not take advantage of surrounding opportunities advanced to the site to create an integrated urban renewal precinct for the City.
6. Does not create opportunities for related development to offset the cost of venue redevelopment.

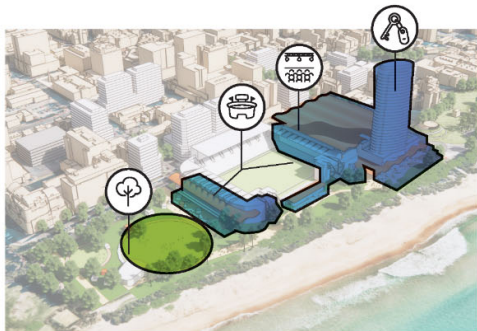
SUMMARY OF OPTIONS


Stadium

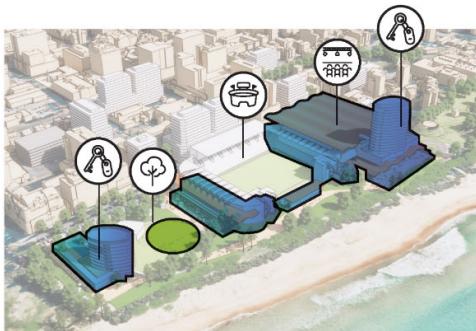

Park


Hotel

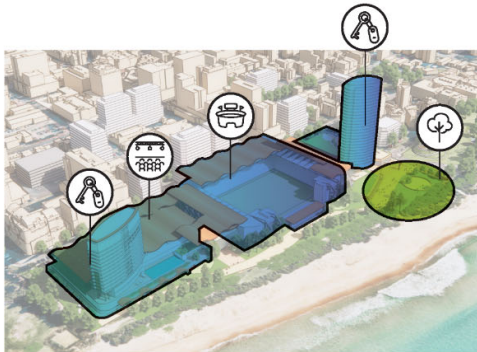

Entertainment



SCENARIO 1: NEW SOUTHERN PUBLIC OPEN SPACE



SCENARIO 2: SOUTHERN PARTIAL REDEVELOPMENT



SCENARIO 3: ENTERTAINMENT PRECINCT ACTIVATION

MAJOR ZONES

Entertainment (North)	Focus on redeveloping northern side, Hotel in corner of Harbour and Crown St.	Integrated entertainment centre on the north with hotel facing the sea in the east.	To redevelop as a new development parcel that can potentially be a tourism centre/museum below an iconic hotel.
Stadium (Middle)	Activate southern grandstand, the addition of eastern low-level tiered seating.	Activate southern grandstand, addition of eastern low-level tiered seating.	Redevelop the new stadium as part of the integrated development.
Training Field (South)	Relocated, to develop as a new public open space.	Relocated, replaced with partial redevelopment and public open space.	Relocate the entertainment centre towards the south.

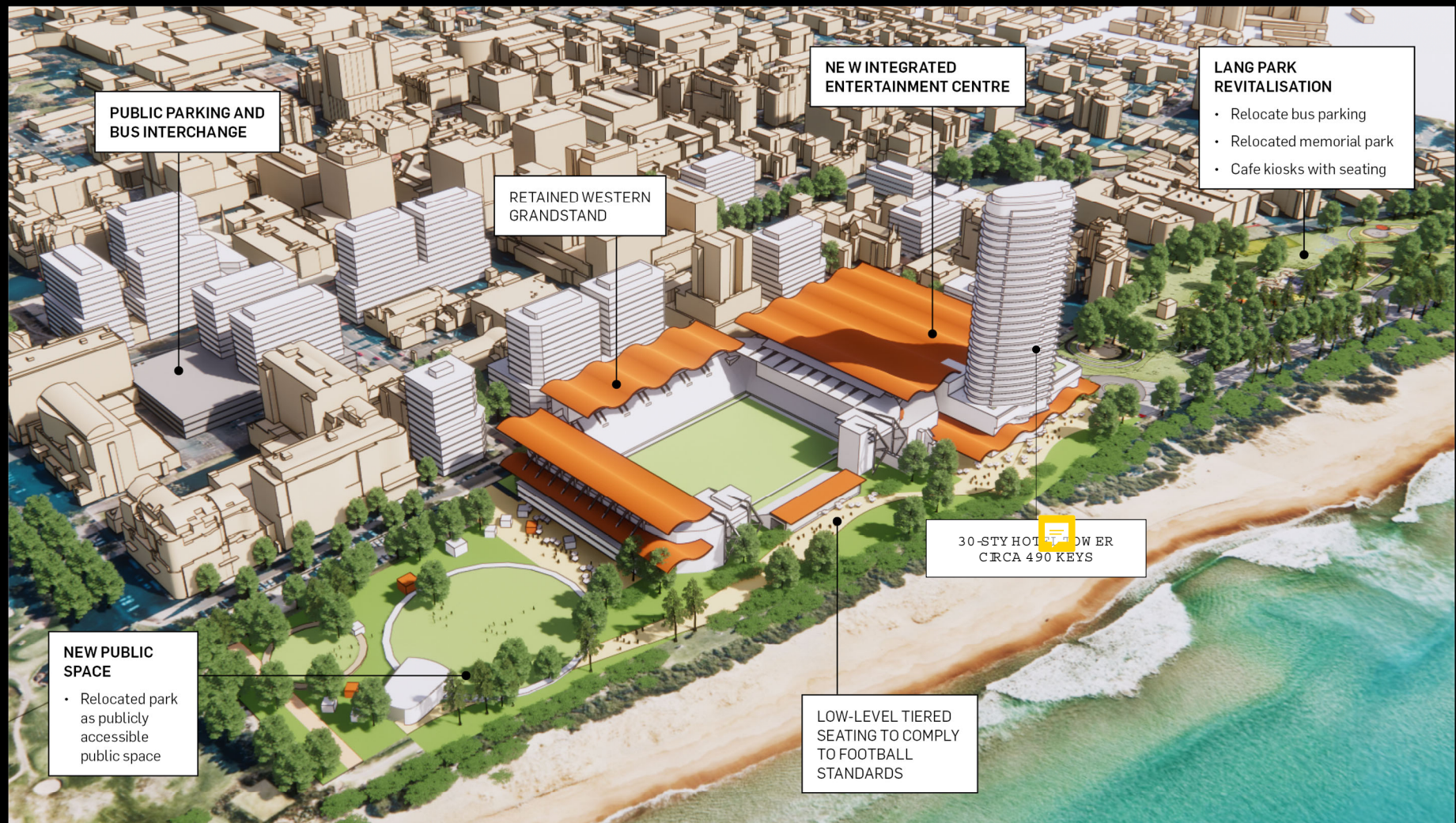
TOTAL GFA: 37,820 SQM
TOTAL FSR: 0.62
MAX HEIGHT: RL 112 M @ 30 STY. MAX
TOTAL NO. OF KEYS: 490

TOTAL GFA: 45,400 SQM
TOTAL FSR: 0.75
MAX HEIGHT: 77 M @ 20 STOREYS MAX
TOTAL NO. OF KEYS: 410

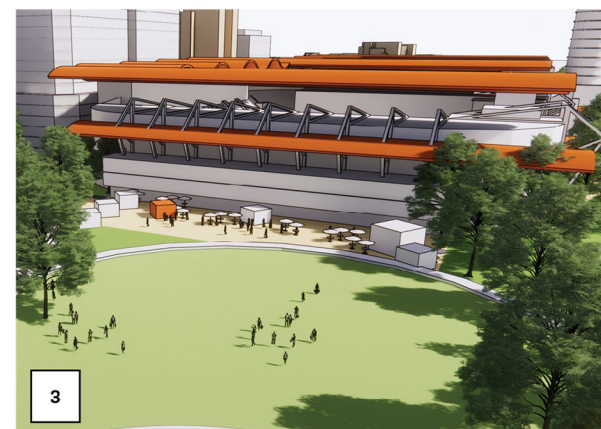
TOTAL GFA: 62,280 SQM
TOTAL FSR: 1.02
MAX HEIGHT: RL 112 M @ 30 STY. MAX
TOTAL NO. OF KEYS: 675

SCENARIO 1 OVERVIEW: SOUTHERN PUBLIC SPACE

Note: The Andrew Lysaght Park headstones Heritage Impact Statement is needed prior to being relocated to Lang Park.



SCENARIO 1: ACTIVATION AREAS



FOCUS AREAS

1. Activation of the corner of Crown St. and Marine Drive.
2. Activation fronting the sea as part of the new eastern low-level tiered seating.
3. Utilization of Southern grandstand's ground floor for park-facing F&B.

LEGEND

- Activation
- Building
- Open space



SCENARIO 1: MAXIMUM POTENTIAL SCHEDULE OF AREAS FOR COEX FACILITY

KEY FUNCTIONAL AREA	AREA (M2)
Entertainment Arena Floor & Tiered Seating Bowl – 7,500 pax	5,125
Exhibition Halls – 4 No. Halls	4,000
Banquet Capacity in 2 No. Exhibition Halls – 1,000 pax**	(2,000)**
Arena & Exhibition Hall Circulation & FOH Support Areas	3,500
Arena & Exhibition Hall BOH Support Areas	2,100
Exhibition Hospitality Suites – 4 No. (additional to Meeting Rooms)	320
Meeting Rooms – 8 No. ***	(650)@50% ***
Optional Outdoor Event Deck FOH Support*	(3,200)*
Meeting Rooms BOH Support	(300)@50% ***
Main Production Kitchen***	(700)***
Approx. Truck Apron, Loading & Circulation Area*/***	(2,500)*/***
BOH Service & Staff Rooms***	(1,805)***
Mechanical & Electrical Plant – approx. 15% GFA	3,000
Vertical & BOH Circulation – approx. 5% GFA	1,250
Total Net Enclosed Area	22,750
(Not included in Net Enclosed Area)	(5,700)
(Part of Exhibition Hall Area)	(2,000)
*** (Part or Approx. Shared Areas with Stadium)	(5,480)***
Site Boundary Area	60,822
Potential Arena & COEX Development GFA	22,700
Enclosed areas – Truck Apron, Loading & Circulation Area (excluded from GFA)	2,500
Basement Car Parking – approx. 400 spaces (excluded from GFA)	14,000

COMPARABLE VENUE SIZE AND FACILITIES

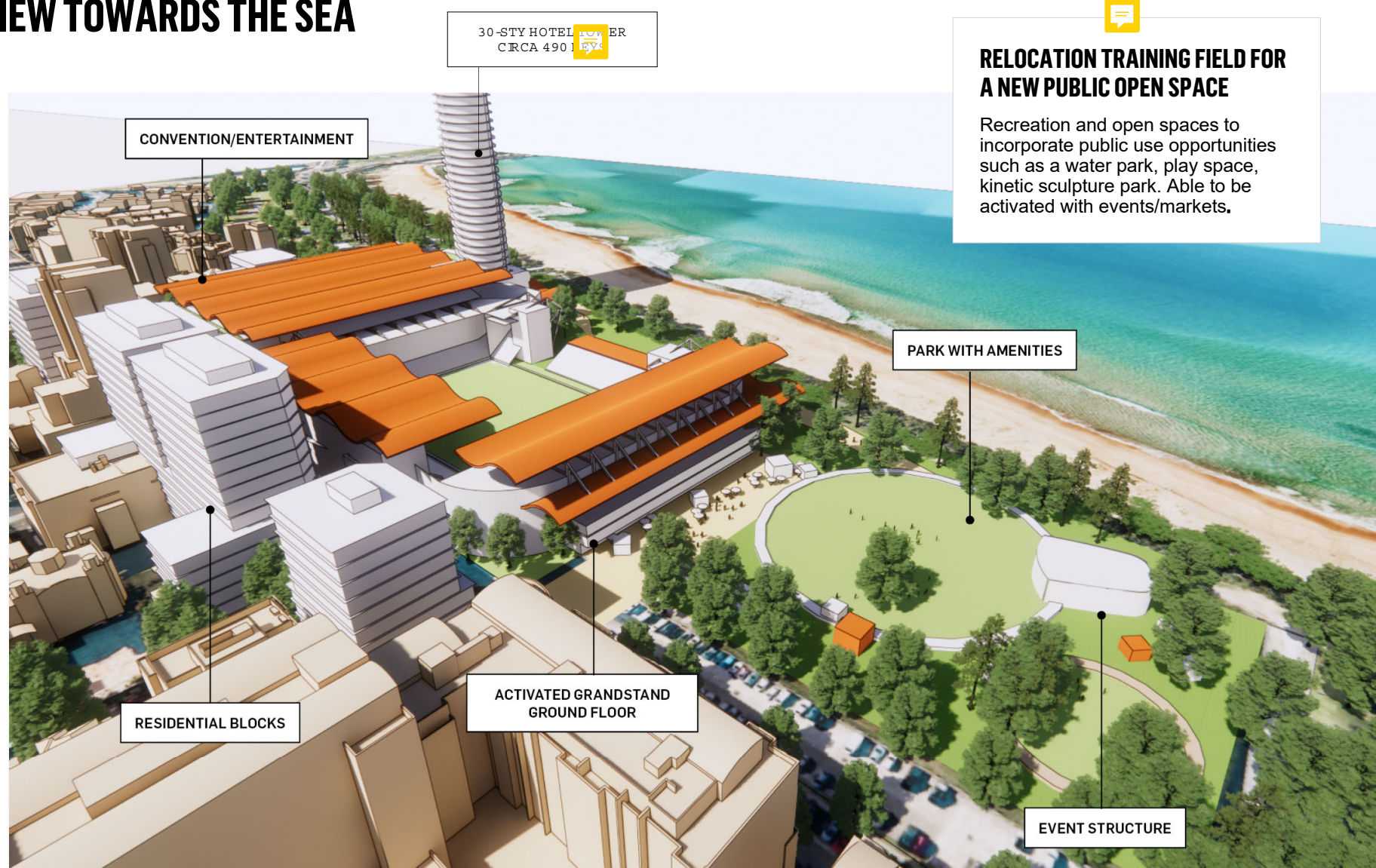
- Darwin Convention & Exhibition Centre
- Cairns Convention & Exhibition Centre

Please note: Assumptions on the Functional Area Provisions are subject to further market demand analysis on event types, content, frequency and market size.

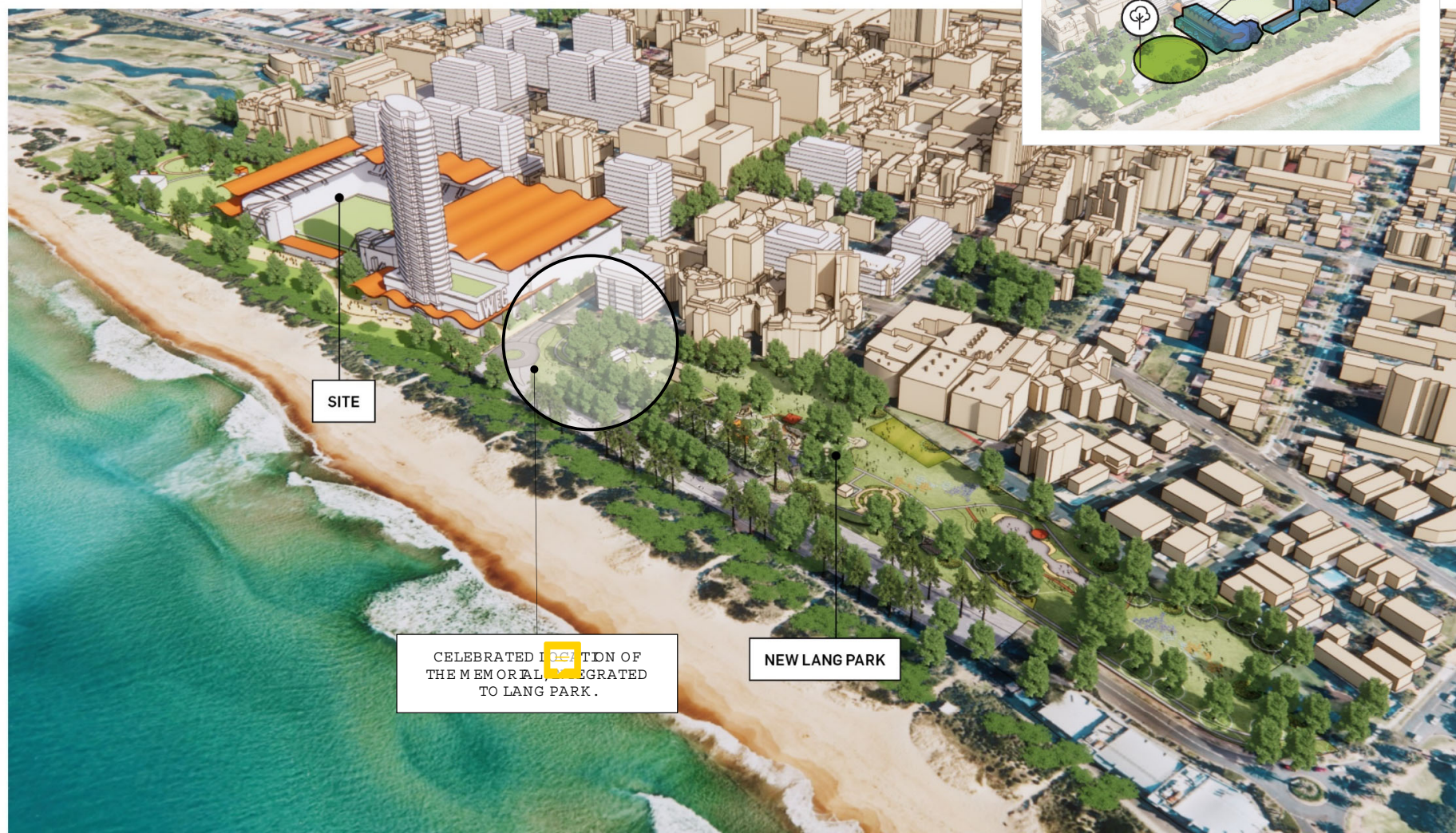
Note on warm up area: Warm up area could be located underneath the stand. Approximate area required is 150sqm per team.

Refer to Appendix B – Populous Report for considerations in the development of the schedule of areas.

SCENARIO 1: VIEW TOWARDS THE SEA

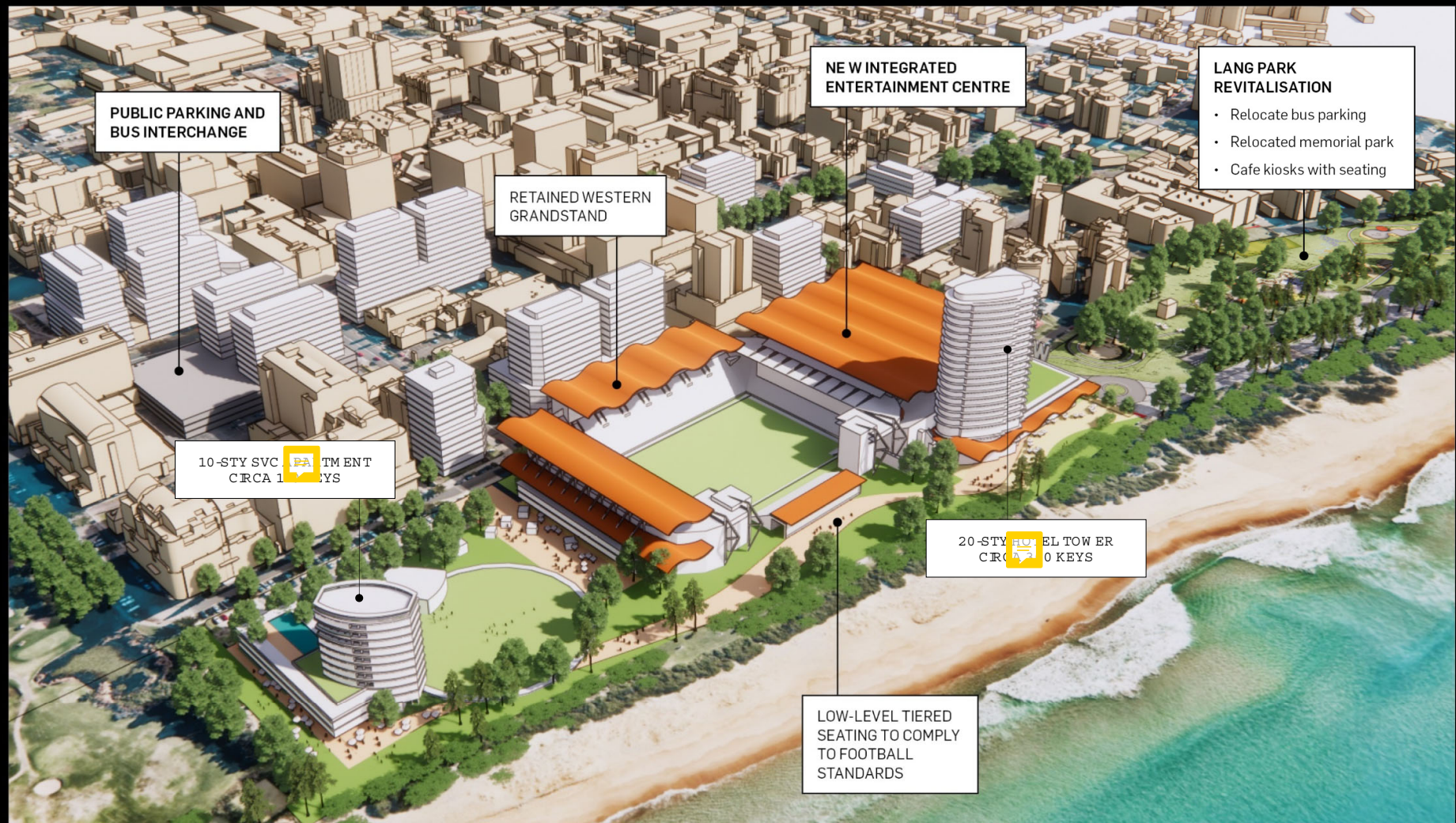


SCENARIO 1: OVERALL VIEW

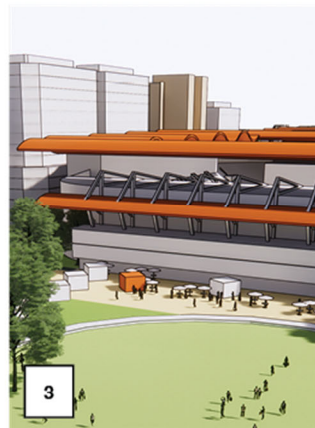
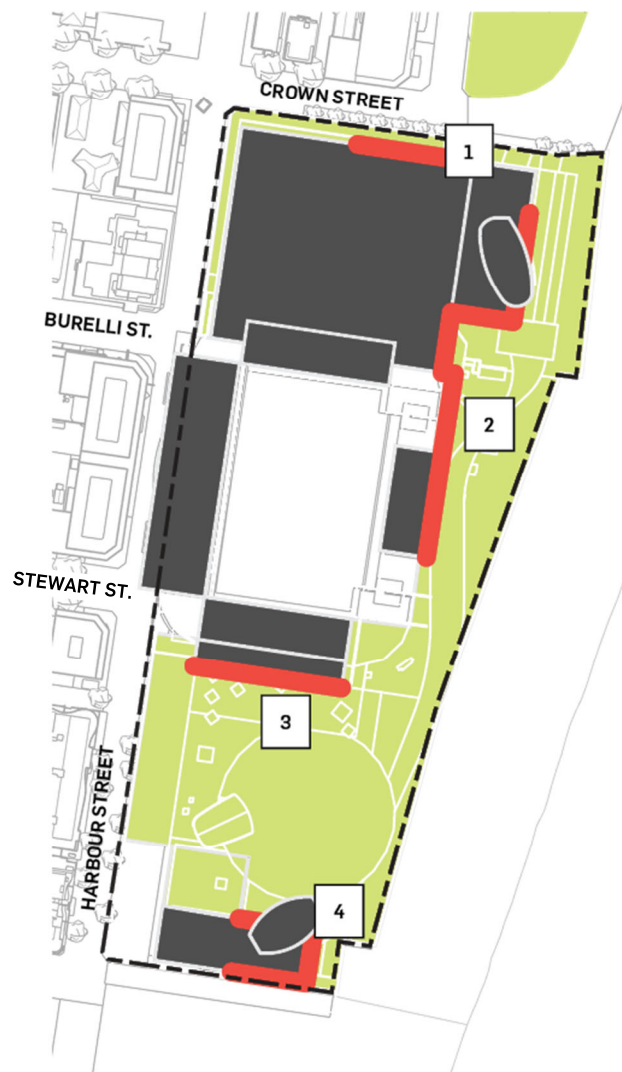


SCENARIO 2 OVERVIEW: SOUTHERN PARTIAL DEVELOPMENT

Note: The Andrew Lysaght Park headstones Heritage Impact Statement is needed prior to being relocated to Lang Park.



SCENARIO 2: ACTIVATION AREAS



FOCUS AREAS

1. Activation in the corner of Crown St. and Marine Drive.
2. Activation fronting the sea new eastern low-level tiered seating.
3. Utilization of Southern grandstand's ground floor for park-facing F&B.
4. Activation below the new southern development, focus on facing the sea.

LEGEND

■	Activation
■	Building
■	Open space



SCENARIO 2: MAXIMUM POTENTIAL SCHEDULE OF AREAS FOR COEX FACILITY

KEY FUNCTIONAL AREA	AREA (M2)
Entertainment Arena Floor & Tiered Seating Bowl – 8,900 pax	6,000
Exhibition Halls – 5 No. Halls	5,000
Banquet Capacity in 3 No. Exhibition Halls – 1,200 pax**	(3,000)**
Arena & Exhibition Hall Circulation & FOH Support Areas	4,500
Arena & Exhibition Hall BOH Support Areas	2,700
Exhibition Hospitality Suites – 5 No. (additional to Meeting Rooms)	400
Meeting Rooms – 12 No. (30m2 to 200m2)***	(750)@50% ***
Optional Outdoor Event Deck FOH Support*	(3,800)*
Meeting Rooms BOH Support	(500)@50% ***
Main Production Kitchen***	(1,000)***
Approx. Truck Apron, Loading & Circulation Area*/***	(3,000)*/***
BOH Service & Staff Rooms***	(2,000)***
Mechanical & Electrical Plant – approx. 15% GFA	3,700
Vertical & BOH Circulation – approx. 5% GFA	1,400
Total Net Enclosed Area	27,950
(Not included in Net Enclosed Area)	(6,800)
** (Part of Exhibition Hall Area)	(3,000)**
*** (Part or Approx. Shared Areas with Stadium)	(6,625)***
Site Boundary Area	60,822
Potential Arena & COEX Development GFA	27,950
Enclosed areas – Truck Apron, Loading & Circulation Area (excluded from GFA)	3,000
Basement Car Parking – approx. 500 spaces (excluded from GFA)	17,500

VENUE SIZE AND FACILITIES BETWEEN

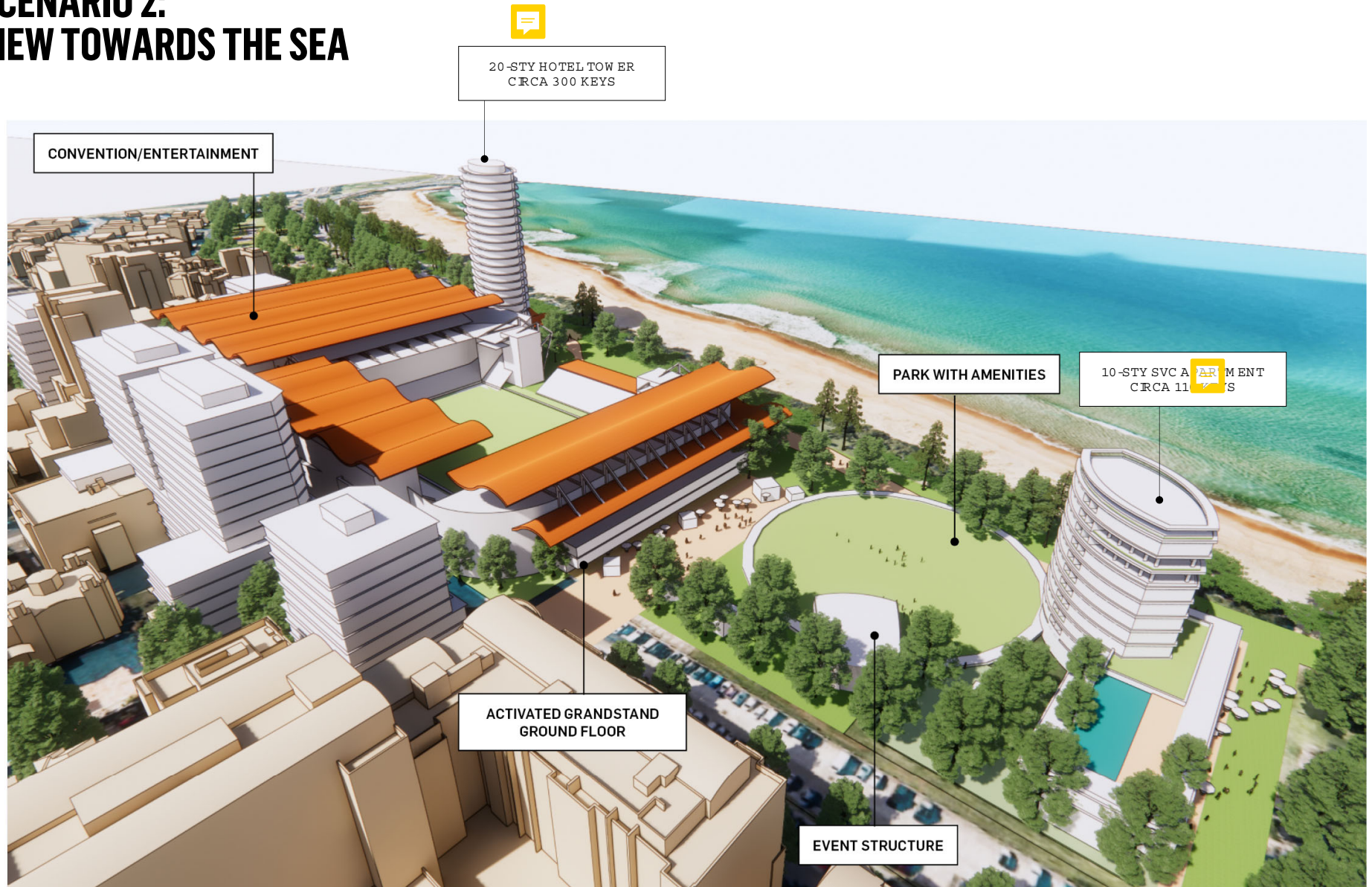
- Darwin Convention & Exhibition Centre
- Cairns Convention & Exhibition Centre

Please note: Assumptions on the Functional Area Provisions are subject to further market demand analysis on event types, content, frequency and market size.

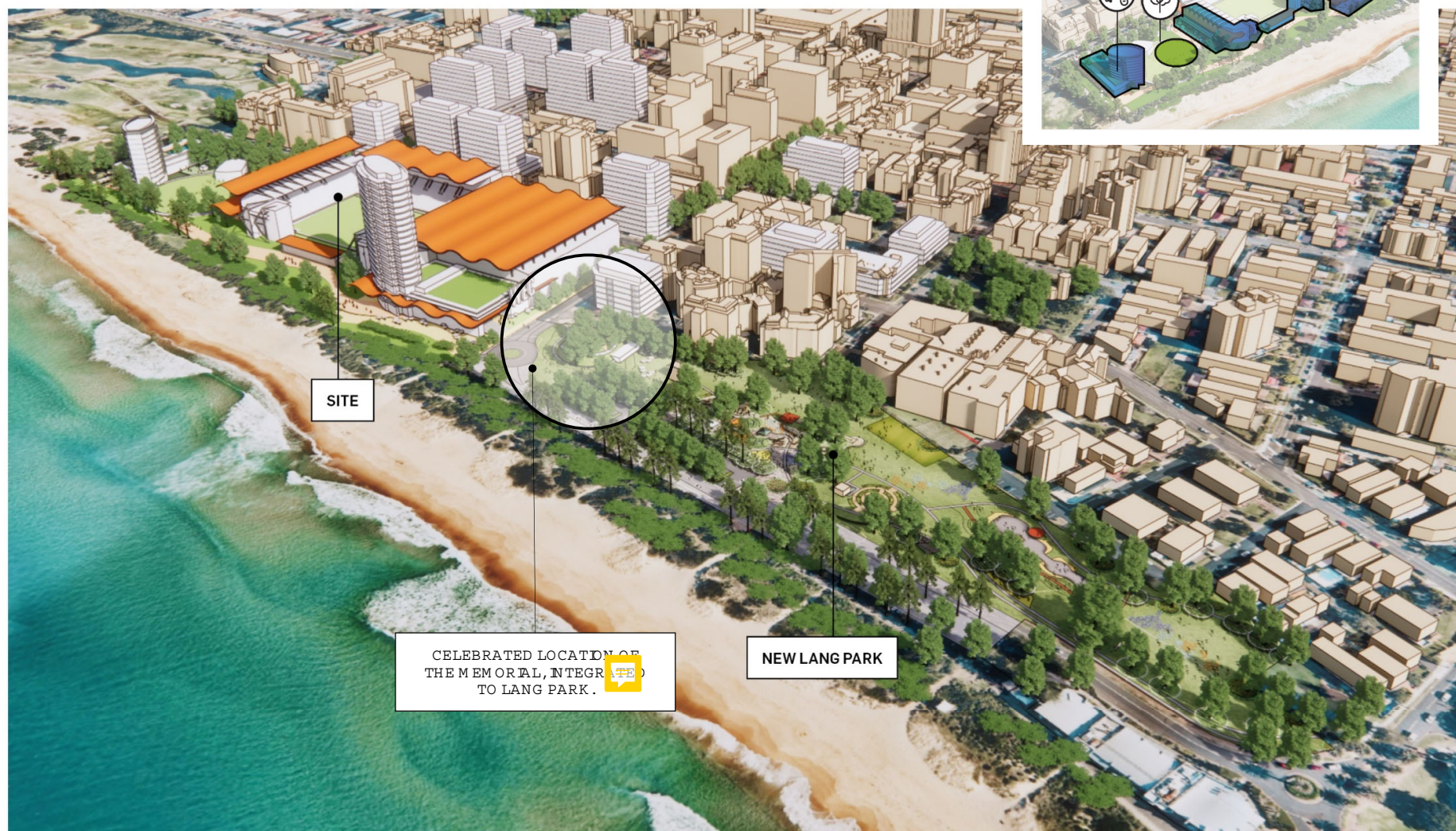
Note on warm up area:
Warm up area could be located underneath the stand. Approximate area required is 150sqm per team.

Refer to Appendix B – Populous Report for considerations in the development of the schedule of areas.

SCENARIO 2: VIEW TOWARDS THE SEA

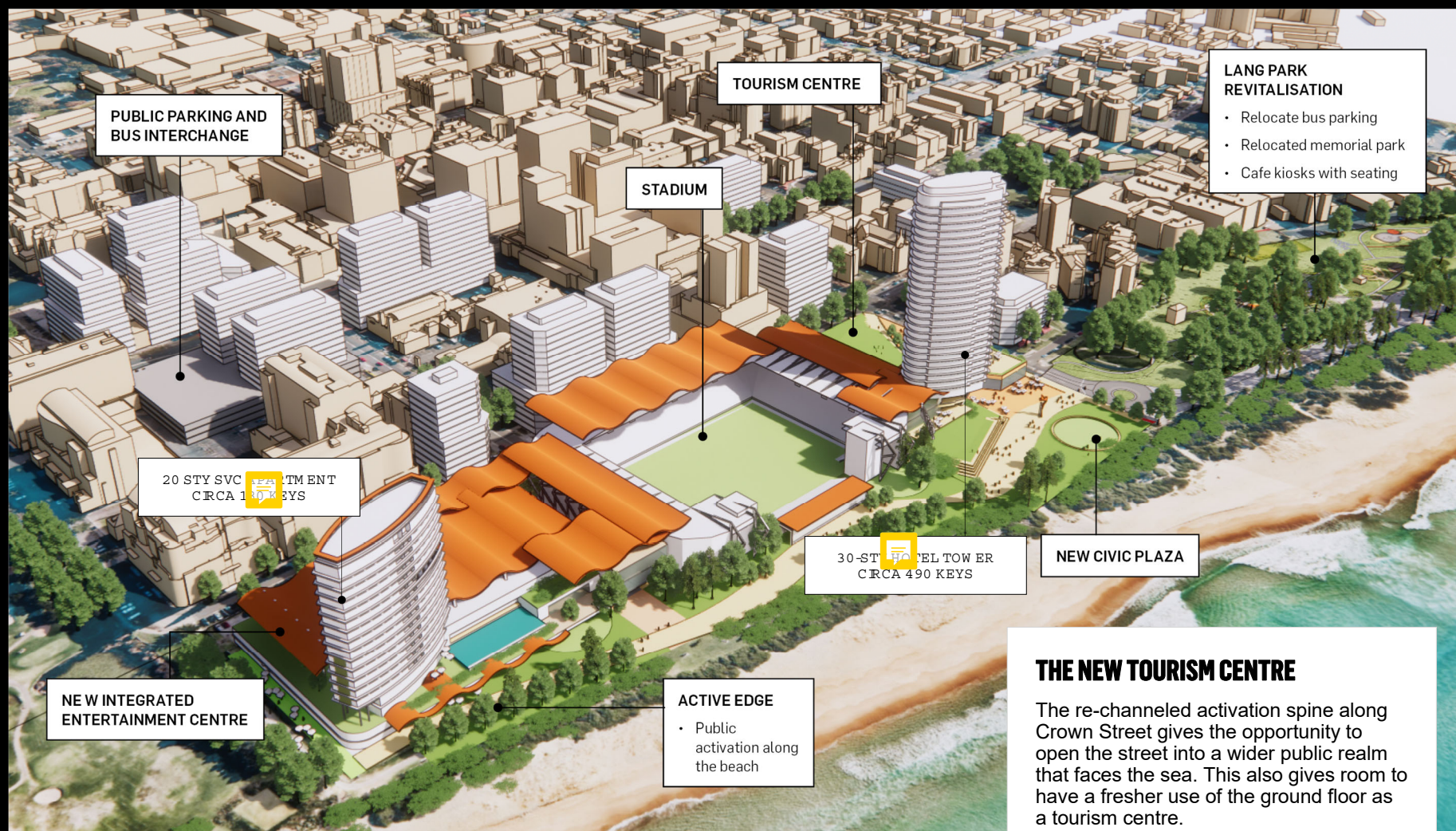


SCENARIO 2: OVERALL VIEW



SCENARIO 3 OVERVIEW: ENTERTAINMENT PRECINCT ACTIVATION

Note: The Andrew Lysaght Park headstones Heritage Impact Statement is needed prior to being relocated to Lang Park.



SCENARIO 3: MAXIMUM POTENTIAL SCHEDULE OF AREAS FOR COEX FACILITY

KEY FUNCTIONAL AREA	AREA (M2)
Entertainment Arena Floor & Tiered Seating Bowl – 11,400 pax	7,500
Exhibition Halls – 6 No. Halls	6,000
Banquet Capacity in 3 No. Exhibition Halls – 1,500 pax**	(3,000)**
Arena & Exhibition Hall Circulation & FOH Support Areas	5,700
Arena & Exhibition Hall BOH Support Areas	3,000
Exhibition Hospitality Suites – 6 No. (additional to Meeting Rooms)	480
Meeting Rooms – 16 No. (depending on minimum size req.)***	(1,100)@50% ***
Optional Outdoor Event Deck FOH Support*	(4,500)*
Meeting Rooms BOH Support***	(520)@50% ***
Main Production Kitchen***	(1,200)***
Approx. Truck Apron, Loading & Circulation Area*/***	(3,500)*/***
BOH Service & Staff Rooms***	(2,300)***
Mechanical & Electrical Plant – approx. 15% GFA	5,000
Vertical & BOH Circulation – approx. 5% GFA	1,750
Total Net Enclosed Area	34,550
(Not included in Net Enclosed Area)	(8,000)
** (Part of Exhibition Hall Area)	(3,000)**
*** (Part or Approx. Shared Areas with Stadium)	(7,810)***
Site Boundary Area	60,822
Potential Arena & COEX Development GFA	34,550
Enclosed areas – Truck Apron, Loading & Circulation Area (excluded from GFA)	3,500
Basement Car Parking – approx. 600 spaces (excluded from GFA)	21,000

COMPARABLE VENUE SIZE AND FACILITIES

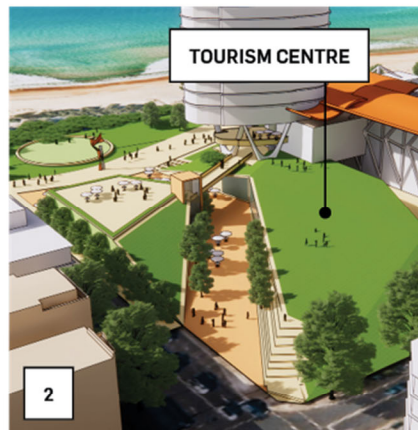
- Gold Coast Convention & Exhibition Centre

Please note: Assumptions on the Functional Area Provisions are subject to further market demand analysis on event types, content, frequency and market size.

Note on warm up area: Warm up area could be located underneath the stand. Approximate area required is 150sqm per team.

Refer to Appendix B – Populous Report for considerations in the development of the schedule of areas.

SCENARIO 3: ACTIVATION AREAS



FOCUS AREAS

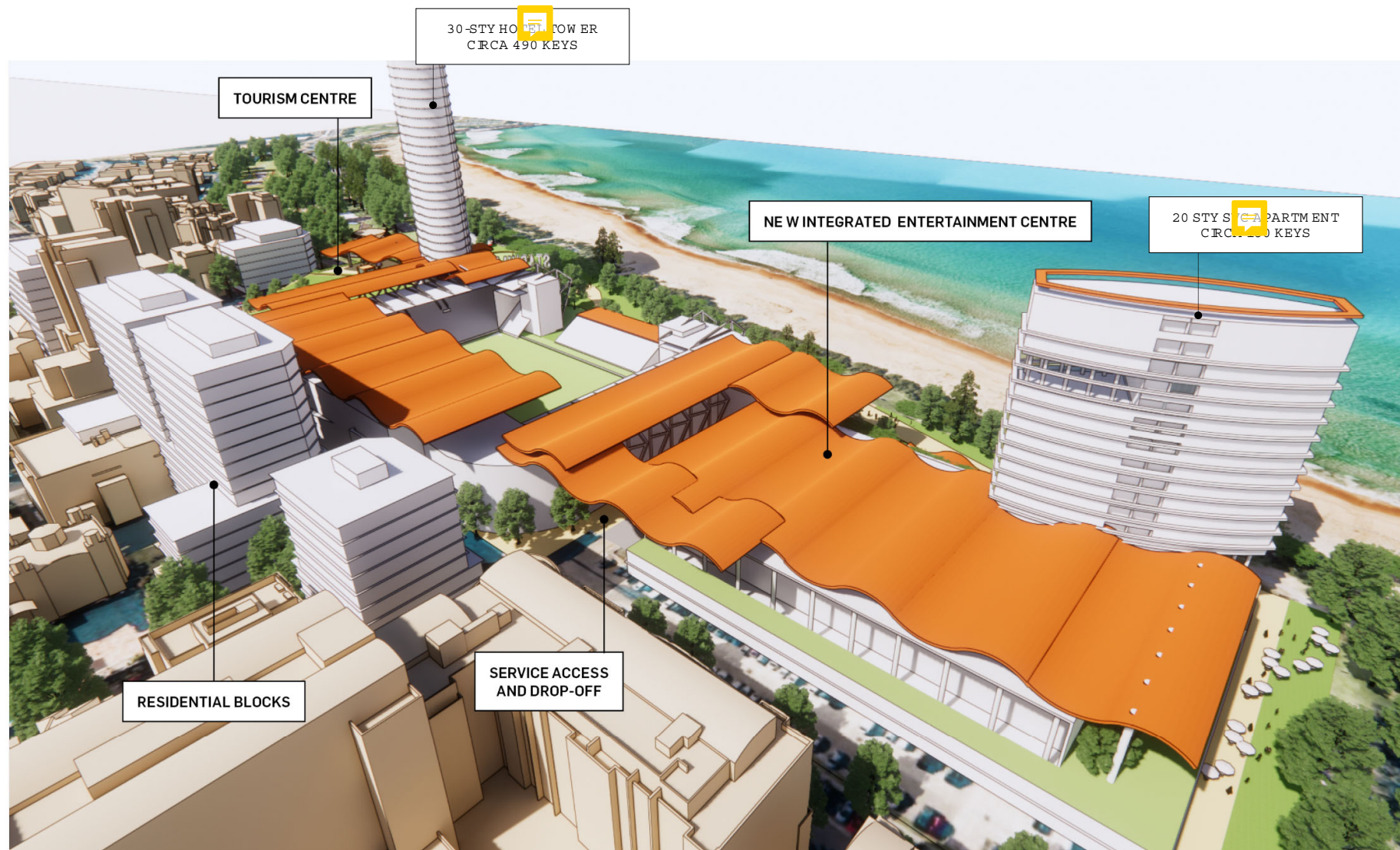
1. Activation along rechannelled activation spine.
2. Activation along the park that opens up to the beach.
3. Activation fronting the sea new eastern low-level tiered seating.
4. Activation of uses in convention centre fronting the sea.

LEGEND

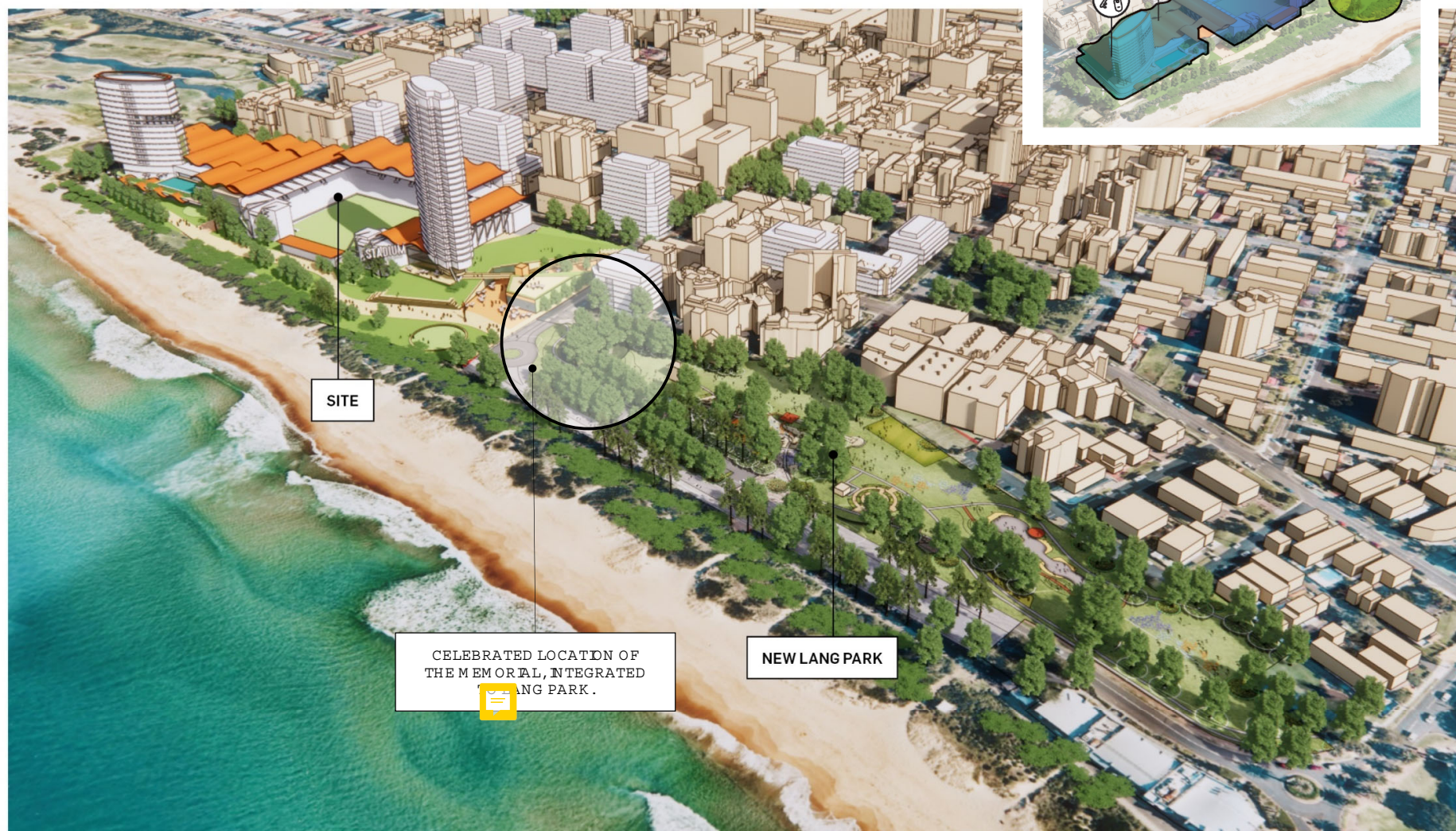
■	Activation
■	Building
■	Open space



SCENARIO 3: VIEW TOWARDS THE SEA



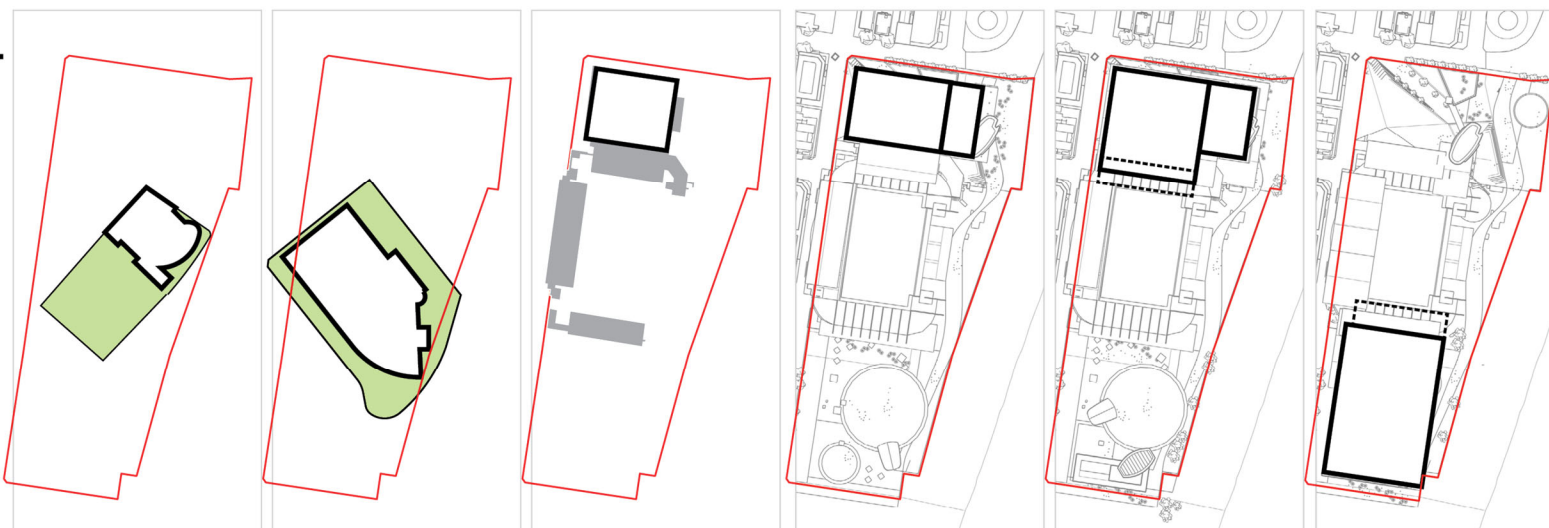
SCENARIO 3: OVERALL VIEW



SCALE COMPARISON OF PRECEDENT CONVENTION / ENTERTAINMENT CENTRES

LEGEND

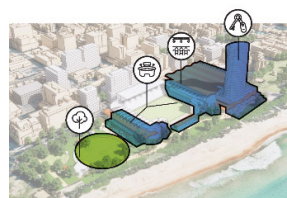
- ISEP study area
- Building footprint
- Case study site area



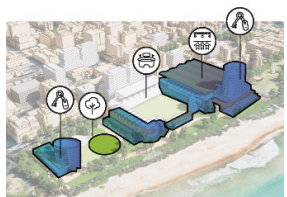
Name	Hobart Convention Centre	Cairns Convention Centre	Existing WIN Entertainment centre	Scenario 1	Scenario 2	Scenario 3
GBA*	12,600 sqm	28,500 sqm	21,000 sqm	30,000 sqm	39,100 sqm	50,200 sqm
GFA (includes F&B)	no data	no data	TBD	22,700 sqm	27,950 sqm	34,550 sqm
Building Envelope	4,200 sqm	14,250 sqm	7,000 sqm	10,500 sqm	12,000 sqm	13,500 sqm
Storeys	G+2	G+1	G+2	G+2	G+2	G+2
Est. Site area	12,200 sqm	22,000 sqm	60,822 sqm	60,822 sqm	60,822 sqm	60,822 sqm
Building Dimension	60x75 m	95x185 m	75x90 m	75x150 m	100x120 m	90x150 m
Building Height	3 storeys	2 storeys	3 storeys	3 storeys	3 storeys	3 storeys
Capacity	1,100 seats	5,300+ pax	6,000 pax	7,500 pax	8,900 pax	11,400 pax
Exhibition Space	3,800 sqm	no data	no data	4,000 sqm	4,700 sqm	6,080 sqm
Banquet Capacity	1,000 pax	1,300 pax	no data	1000 pax	1,200 pax	1,520 pax
Meeting Rooms	n.a.	22	no data	13	16	20

* GBA - High level measurement of Gross Building area

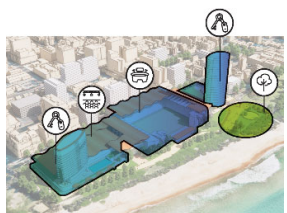
CONSIDERATIONS OF THE THREE OPTIONS



SCENARIO 1: NEW SOUTHERN PUBLIC OPEN SPACE



SCENARIO 2: SOUTHERN PARTIAL REDEVELOPMENT



SCENARIO 3: ENTERTAINMENT PRECINCT ACTIVATION

Scale comparison of proposed Coex centre	Different hotel offerings	Other Considerations	Overall Comment
<ul style="list-style-type: none"> Represents a substantial increase on current entertainment facility and adds exhibition halls. Comparable size to the Darwin and Cairns Convention & Exhibition Centres. 	<ul style="list-style-type: none"> This relies on one 30 storey hotel building located to the northern end of the site. A single building form may limit the type of accommodation that is offered and the diversity of markets that can be serviced. 	<ul style="list-style-type: none"> The additional open space provides additional circulation space for larger crowds attending events. Concentrated development on the northern end. Open space at south end provides a public benefit. 	<ul style="list-style-type: none"> Entertainment & exhibition centre scale aligned to similar markets. Retail activation to beach front adjacent Crown Street will enhance the activity. Hotel offer may be too focused on one market segment for its scale.
<ul style="list-style-type: none"> Slightly more ambitious in scale compared to Scenario 1. While still comparable to Darwin and Cairns, it is approaching the scale of the Gold Coast Convention & Exhibition Centre that has a wide market draw. 	<ul style="list-style-type: none"> Short stay accommodation is split across two facilities at the northern and southern ends of the site. This provides an opportunity to serve different markets (i.e. hotel to the north and serviced apartments to the south). 	<ul style="list-style-type: none"> Retains benefit of open space, however, may be better scaled to complement stadium based activities. Partial redevelopment towards the south creates an opportunity for activation and interface with the park. 	<ul style="list-style-type: none"> Larger scale entertainment & exhibition centre will introduce some occupancy risk. Accommodation better aligned to markets (tourist, conference, business). Retains strong retail activation near the beach.
<ul style="list-style-type: none"> Provides a substantial increase over Scenario 1. The larger scale of the facility introduces increased demand risk relative to the size of the market and would require an in-depth market testing exercise to confirm need. 	<ul style="list-style-type: none"> This maintains the benefits of the differentiated short stay accommodation offer provided under Scenario 2, however, increases the overall scale of accommodation provided. This may be justified if larger. 	<ul style="list-style-type: none"> Reduction in retail activation near Crown Street may reduce pedestrian activation outside of main events. All of current training ground redeveloped as Coex limiting the extend to open space as a public benefit. 	<ul style="list-style-type: none"> This option presents a higher level of risk given the scale of proposed facilities relative to potential market scale. May limit ability to activate Crown Street and beach frontage. Maintains two types of short stay accommodation offerings.

KEY

- Benefits of the scenario
- Concerns relating to the scenario

CASE STUDY OPTION MASTER PLAN

Following consultation with key stakeholders in Illawarra First and the Steering Committee, a preferred option was agreed for further assessment and refinement based on the Master Plan Scenario 2 and Co-ex Option 1.

This combined scenario is seen to provide the most market capable opportunity for an improved area, northern grandstand and convention-exhibition space for the Illawarra.

Due to the importance of a feasibility assessment of the Co-ex space, Populous was engaged to develop a detailed assessment and configuration of the space to support the master plan. As result, the masterplan features typical massing components while the redeveloped WEC site is detailed.

04

CASE STUDY MASTER PLAN

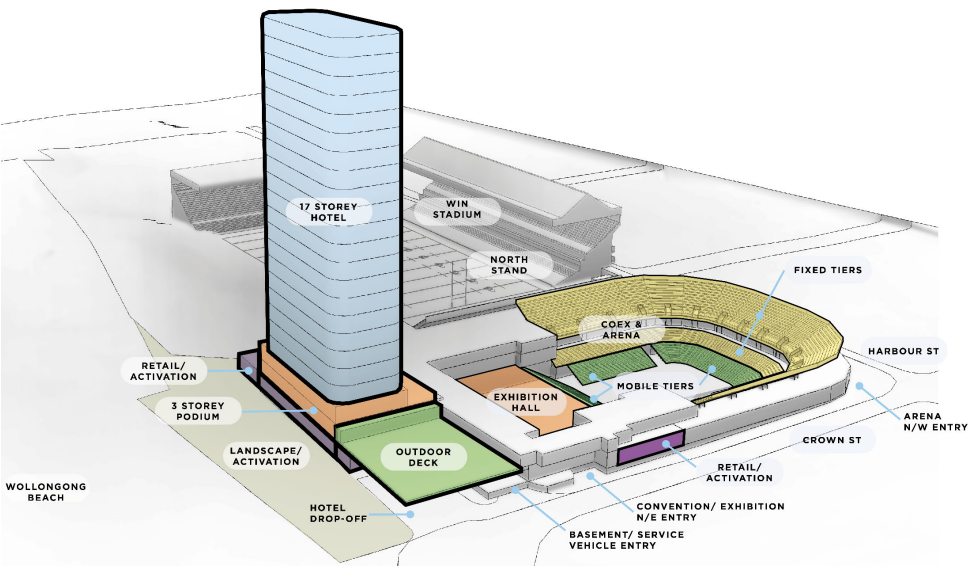
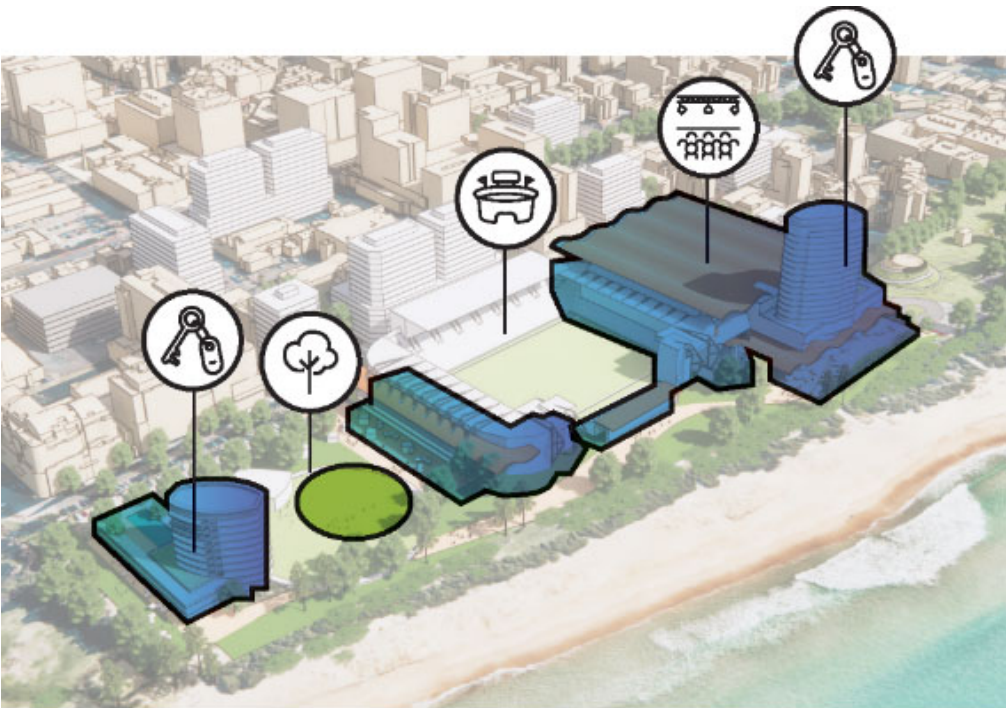
Business Illawarra, members of Illawarra First and other key stakeholders were consulted, and it was agreed that a Case Study would be completed for a combination of Scenario 2 for the overall site and Scenario 1 for the arena and convention/exhibition space.

Scenario 2 for the overall site Master Plan including:

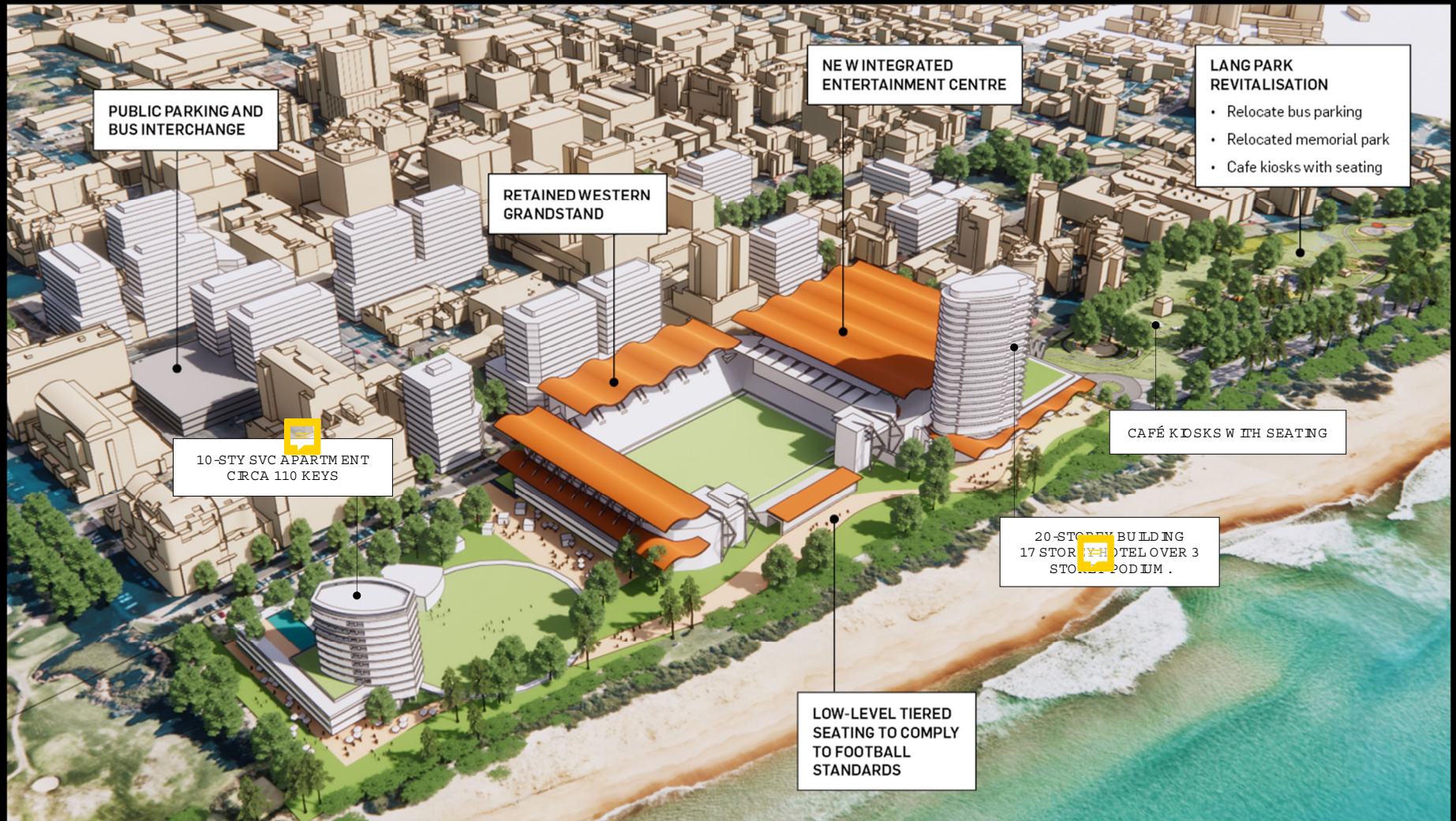
- Two accommodation towers (17 and 10 storeys over 3 podium levels).
- New northern and eastern grandstands.
- New southern public space.
- New public spaces.
- Activated foreshore.
- Renewed Lang Park.
- Relocated bus layover and new multideck car park with development above.

Scenario 1 for the Convention and Exhibition space based on market demand and proximity to Sydney including:

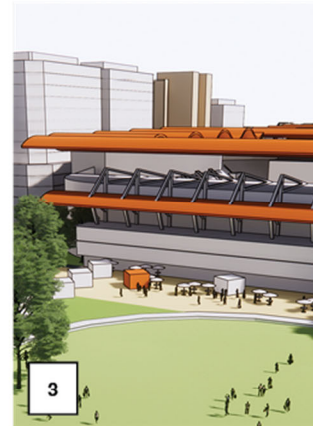
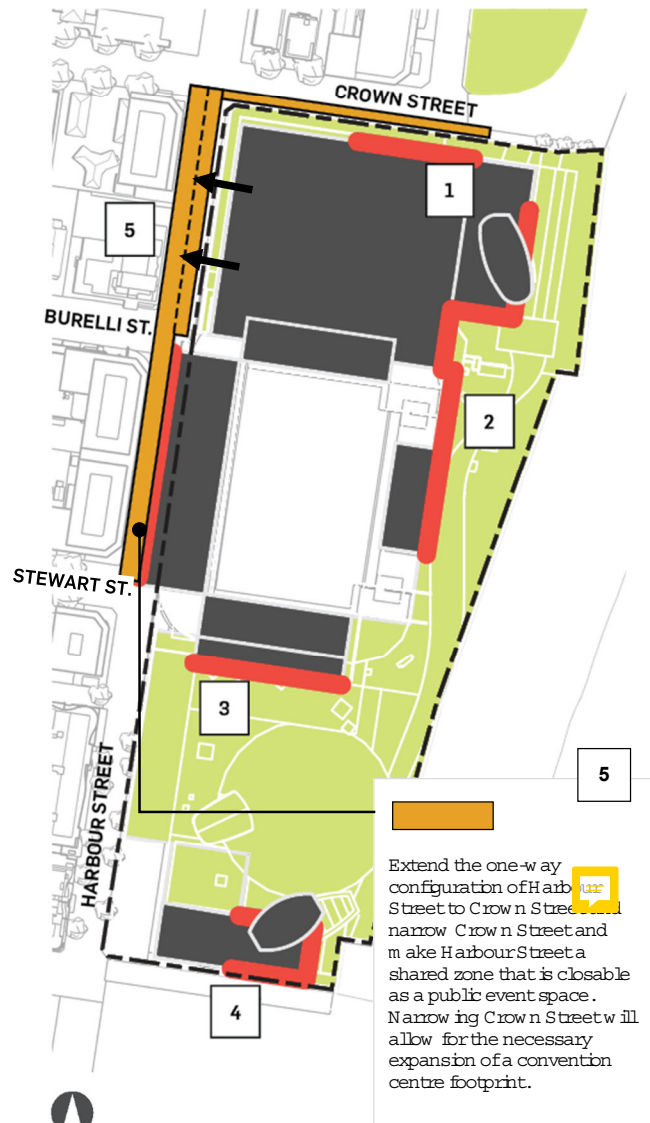
- Tiered bowl seating for 7,485 attendees in sports mode and capacity for 8,311 in concert mode.
- Exhibition/ convention operation for 2,000 people.
- New northern grandstand with seating for 2,818 people.



CASE STUDY OVERVIEW: REVITALIZING THE PRECINCT



CASE STUDY: ACTIVATION AREAS



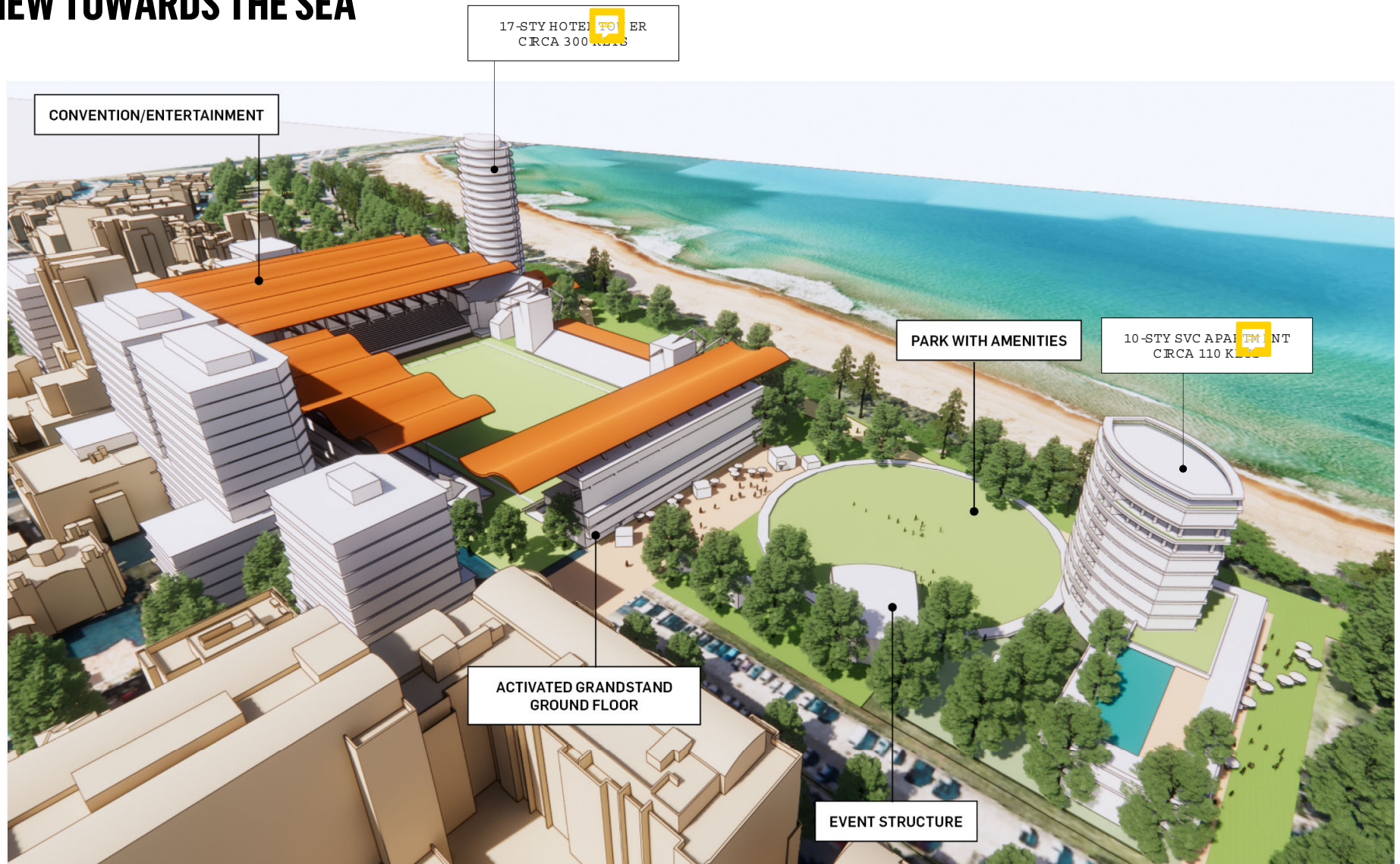
FOCUS AREAS

1. Activation in the corner of Crown St. and Marine Drive.
2. Activation fronting the sea new eastern low-level tiered seating.
3. Utilization of Southern grandstand's ground floor for park-facing F&B.
4. Activation below the new southern development, focus on facing the sea.

LEGEND

Red	Activation
Grey	Building
Green	Open space
Orange	Shared Zone

CASE STUDY: VIEW TOWARDS THE SEA



CASE STUDY: OVERALL VIEW



CASE STUDY: MAXIMUM POTENTIAL SCHEDULE OF AREAS FOR COEX FACILITY

KEY FUNCTIONAL AREA	AREA (M2)
Entertainment Arena Floor & Tiered Seating Bowl – 7,500 pax	5,125
Exhibition Halls – 4 No. Halls	4,000
Banquet Capacity in 2 No. Exhibition Halls – 1,000 pax**	(2,000)**
Arena & Exhibition Hall Circulation & FOH Support Areas	3,500
Arena & Exhibition Hall BOH Support Areas	2,100
Exhibition Hospitality Suites – 4 No. (additional to Meeting Rooms)	320
Meeting Rooms – 8 No. ***	(650)@50% ***
Optional Outdoor Event Deck FOH Support*	(3,200)*
Meeting Rooms BOH Support	(300)@50% ***
Main Production Kitchen***	(700)***
Approx. Truck Apron, Loading & Circulation Area*/***	(2,500)*/***
BOH Service & Staff Rooms***	(1,805)***
Mechanical & Electrical Plant – approx. 15% GFA	3,000
Vertical & BOH Circulation – approx. 5% GFA	1,250
Total Net Enclosed Area	22,750
(Not included in Net Enclosed Area)	(5,700)
(Part of Exhibition Hall Area)	(2,000)
*** (Part or Approx. Shared Areas with Stadium)	(5,480)***
Site Boundary Area	60,822
Potential Arena & COEX Development GFA	22,700
Enclosed areas – Truck Apron, Loading & Circulation Area (excluded from GFA)	2,500
Basement Car Parking – approx. 400 spaces (excluded from GFA)	14,000

COMPARABLE VENUE SIZE AND FACILITIES

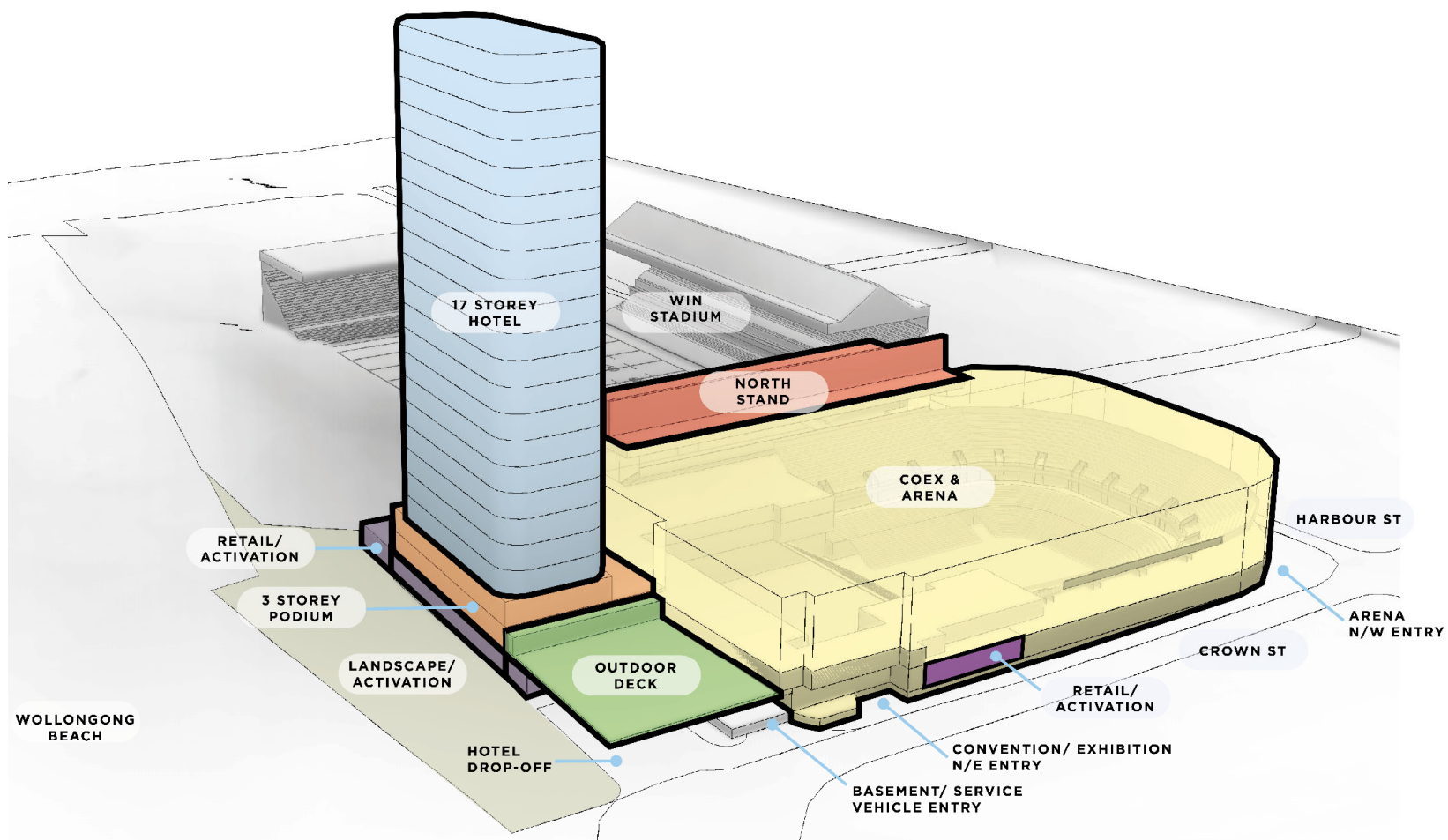
- Darwin Convention & Exhibition Centre
- Cairns Convention & Exhibition Centre

Please note: Assumptions on the Functional Area Provisions are subject to further market demand analysis on event types, content, frequency and market size.

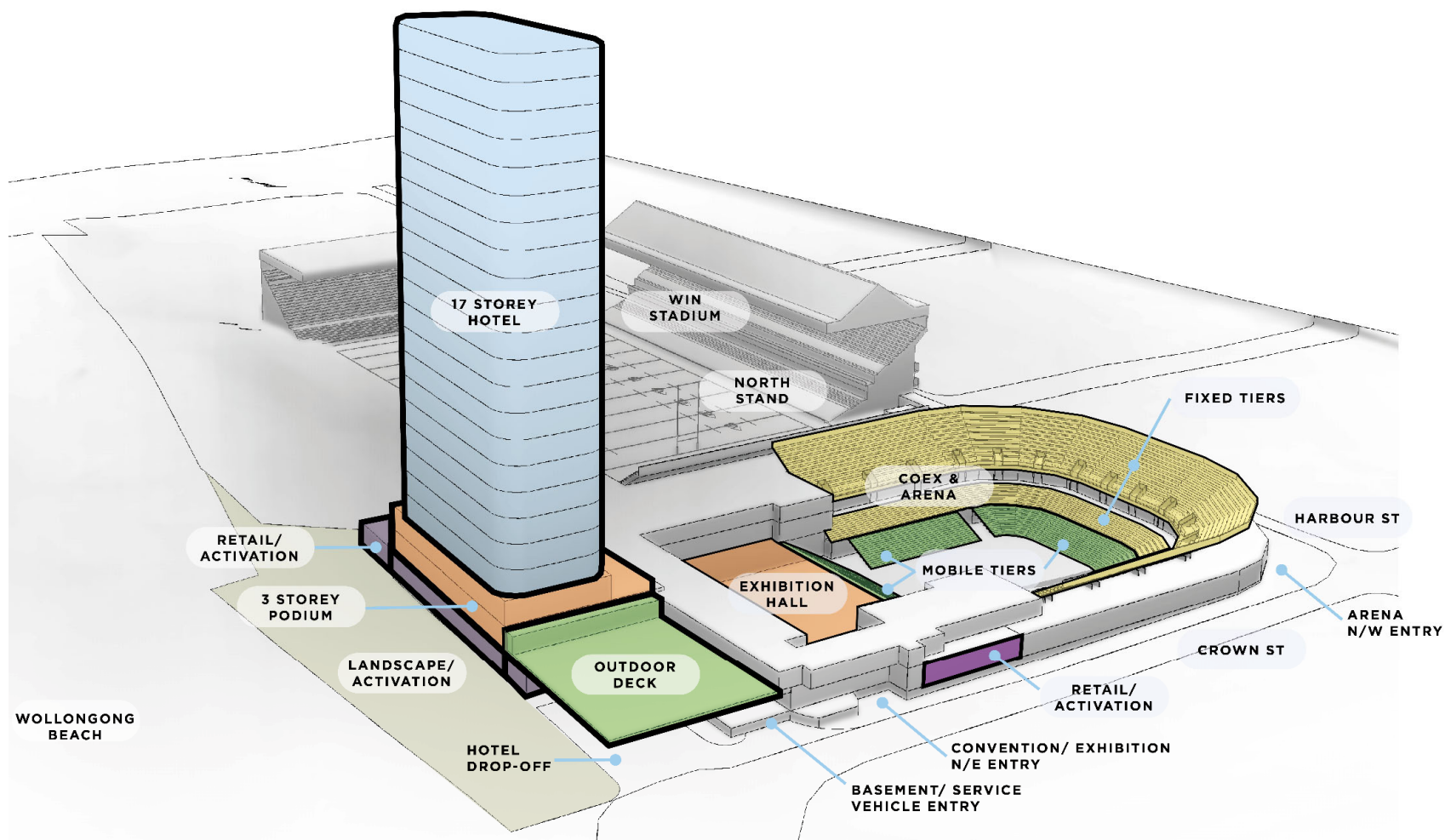


Note on warm up area: Warm up area could be located underneath the stand. Approximate area required is 150sqm per team.

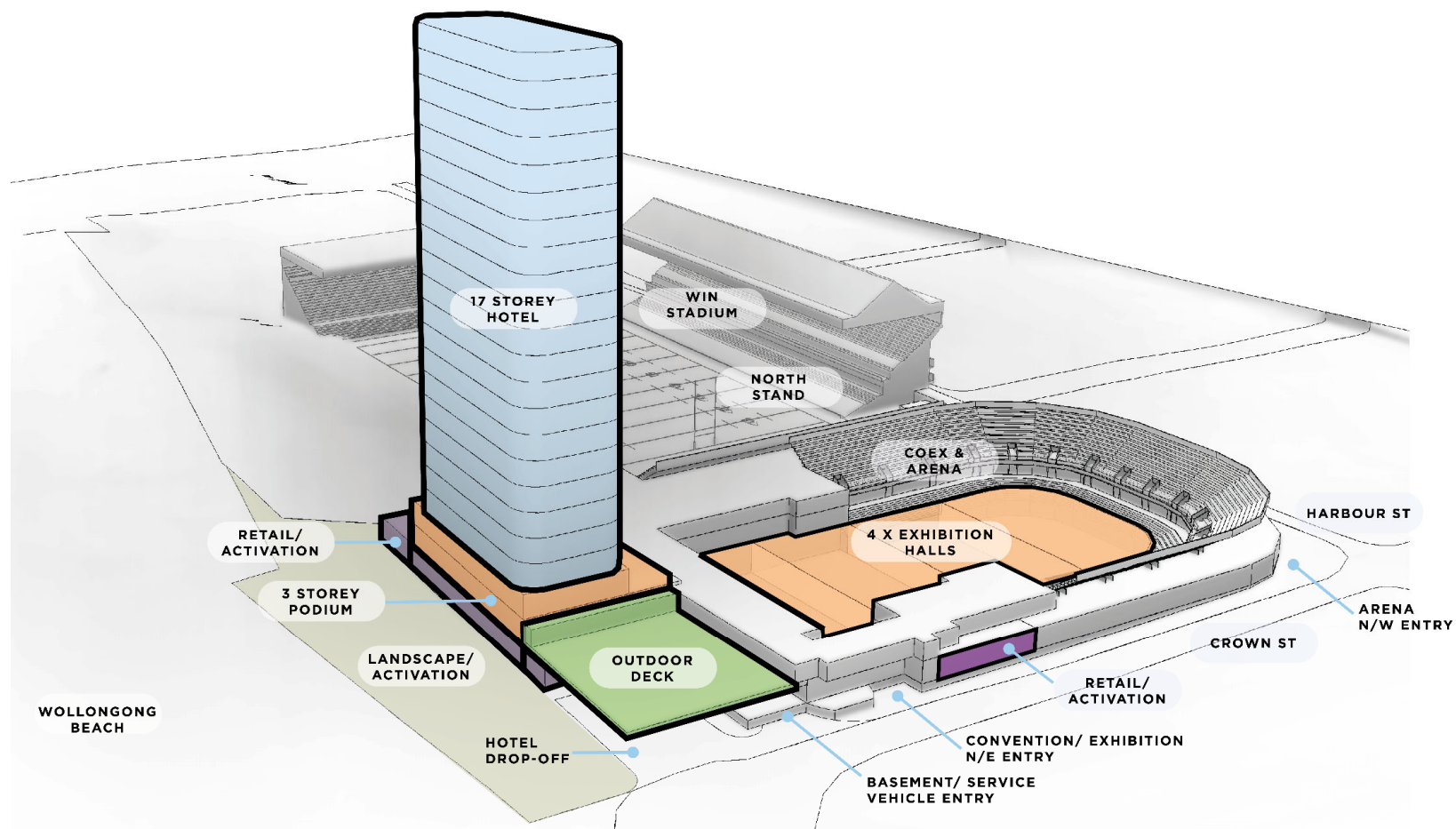
3D VIEW – CO-EX AND ARENA SITE



3D VIEW – THE ARENA



3D VIEW – THE EXHIBITION SPACE



CASE STUDY:

NEW VENUE KEY AREA SCHEDULE

KEY FUNCTIONAL AREAS	LEVEL B1	LEVEL 00	LEVEL 01	LEVEL 02	LEVEL 03	LEVEL 04-20	TOTAL	AREA/ PERSON	PAX
ARENA & CONVENTION & EXHIBITION CENTRE	Area m ²	Area m ²	Area m ²	Area m ²	Area m ²	Area m ²	Area m ²		
Arena Tiered Seating Bowl - Sport Mode		1241	703	2173			4117	0.55	7485
Arena Tiered Seating Bowl - Concert Mode		771	703	2173			3647	0.55	6631
Arena Floor - Concert Mode		672					672	0.4	1680
Total Concert Mode		1443	703	2173			4319		8311
Exhibition Halls (4 No.)		3900					3900		
BOH Staff Servicing Areas		1067	1171				2238		
Amenities & Food & Beverage		276	533				809		
Storage		1151					1151		
Players/ Performers Facilities		492					492		
Prefunction & Circulation Spaces		955	2695				3650		
Exhibition Hospitality Suites			473				473		
Meeting Rooms							0		
Outdoor Event Deck							0		
Main Production Kitchen		600					600		
Vehicle Loading, Parking & Circulation		2936					2936		
Outside Broadcast		357					357 ^a		
Mechanical & Electrical Plant							0		
BOH Circulation		615					615		
Vertical Transport		306	234				540		
Waste Management		201					201		
TOTAL COEX		12856	5106	0	0	0	17962		
STADIUM NORTH STAND	Area m ²	Area m ²	Area m ²	Area m ²	Area m ²	Area m ²	Area m ²		
Tiered Seating Bowl			560	1019			1579	0.55	2871
Concourse & Vertical Circulation		90	321				411		
Amenities & Food & Beverage			197				197		
Lounges			586				586		
TOTAL STADIUM NORTH STAND		90	1104	0	0	0	1194		
HOTEL	Area m ²	Area m ²	Area m ²	Area m ²	Area m ²	Area m ²	Area m ²		
Basement Car Park	6109	929					7038	35	201
Lobby & Podium (3 Storeys)			1425	1425	907		3757		
Hotel Accommodation (17 Storeys - 300 Rooms)						15045	15045		
Retail Activation			685				685		
TOTAL HOTEL	6109	929	2110	1425	907	15045	26525		
TOTAL ALL	6109	13875	8320	1425	907	15045	45681		

*Not included in area calculations

MARKET-LED OPPORTUNITY

This section outlines the feasibility of a market-led opportunity to support the development of the site, including potential funding sources and processes for investigating and developing the site.

05

exit

MARKET-LED OPPORTUNITY

Why a Market-led Opportunity

The proposal to redevelop the Illawarra Sports and Entertainment Precinct provides a unique opportunity to revitalise the Wollongong Foreshore and promote the region as a key destination for major events. Australia is known for its love of sport and live entertainment, and with the announcement of the Olympic Games to be hosted in Brisbane in 2032, this reputation will be further enhanced across our major cities and regions. Wollongong 2022 will bring in new dimensions for sport in Wollongong with the UCI Road World Championships.

The economic value of venues capable of supporting large events is well recognised by the government, with many major projects being undertaken nationally over the past decade, with a significant pipeline still to be developed. A recent example in NSW includes the Sydney International Convention Centre at Darling Harbour; Sydney Football Stadium Redevelopment at Moore Park and CommBank Stadium at Parramatta.

The Penrith Panthers Stadium was announced for redevelopment at an estimated \$200-300 million in December 2021 and Venues NSW are also investigating future strategic initiatives for the Hunter Sports & Entertainment Precinct (Hunter Park) in Newcastle. The NSW Government has committed \$6.7 million in June 2021 to fund the development of the master plan and Final Business Case for the renewal of the precinct. In many ways, Hunter Park is comparable to the Illawarra Sports and Entertainment Precinct.

The private sector has successfully delivered major venues through Public-Private Partnerships (PPP), finding innovation and cost savings while optimising community outcomes. These types of investments have been attractive due to government support for the projects and commercial opportunities supported by robust business cases.

The Sydney International Convention Centre was procured through a competitive market led Public-Private Partnership and delivered by the successful consortium of Lend Lease, Capella Capital, ASM Global and Spotless.

The Market-led Opportunity

The options outlined in this study provide for a range of commercial revenue opportunities that may help to offset some of the costs associated with the redevelopment of the Illawarra Sports and Entertainment Precinct. These opportunities include:

- Development of short-stay residential accommodation within airspace above the core sports and entertainment infrastructure.
- Retail and tourism tenancies on Harbour Street, Crown Street, Marine Drive, Lang Park and within the venues.
- Development rights associated with other Council / NSW Government landholdings within Wollongong that could be packaged with the proposal.

In pursuing a market-led opportunity, there are steps that need to be put in place to ensure the project will meet the needs of the community and market; is financially viable; and provides the expected economic return in support of any required government investment.

Market-led Opportunity Process

The table on the following pages summarises the likely steps required to seek a commercial development partner for the proposal. These phases include:

- Business Case Preparation.
- Financial, Legal and Operating Structure.
- Expression of Interest (EOI) Campaign.
- Short List of Participant.
- RFT / Design Competition.
- Assessment.
- Implementation.

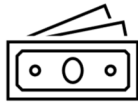
This process requires a high level of commitment from all stakeholders, including to the process and project objectives. A timeframe for delivery will be established during the Business Case phase that is likely to be four to five years from commencement to completion.

MARKET-LED OPPORTUNITY PROCESS



Business Case

- Preparation of a business case is the first stage of the process.
- The business case will include a detailed market assessment, financial feasibility assessment, economic assessment and constructability assessment.
- A positive business case assessment will support the proposal moving to the next stage.
- This should consider various options of delivery from full government funding to a Public Private Partnership.



Financial, Legal & Operating Structure

- The financial, legal and operating structure of the proposed market-led proposal is finalised.
- The terms of the offer for the EOI will also be established.
- The extent and conditions attached to any government funding to be finalised.
- The key contractual arrangements and legal documents for the EOI are finalised.
- Transaction and probity advisors appointed.



EOI Campaign

- The first phase of the formal process to secure a commercial partner will be an expression of interest campaign.
- This will be based on an information memorandum on the project.
- Typically an EOI will be based on project experience of the proponent, financial capacity to deliver and vision for the project.
- It is becoming increasingly common for non-binding financial offers to be requested to test the potential outcome against the business case.



Participant shortlist

- This phase will involve a thorough assessment of the respondents to the EOI, typically shortlisting to 3-4 final bidders.
- The focus of this shortlisting process is to manage risk around the potential partners ability to delivery the project to specification and within expected financial parameters.
- A detailed probity plan will be required for the process.
- RFT and proposed contract documentation will be finalised.



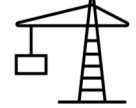
RFT / Design Competition

- The shortlisted proponents will be asked to submit binding financial offers.
- Bidders may be asked to prepare their own preferred design solution for the project.
- As with the EOI process, it will be important to retain transaction and probity advisors to ensure the proper conduct of the tender.



Assessment

- This phase will include a detailed assessment of RFT submission to determine the preferred tenderer based on an assessment of the financial offer and proposed design solution.
- Often an independent panel of experts is commissioned to review the bids.
- Once a preferred tenderer is identified, there is a period time of exclusive negotiation to finalise the agreement.



Implementation

- Execution of development and operational contracts and delivery of the proposed development.
- This phase can include the planning approvals process, which is often commenced at concept stage before the formal EOI/RFT process.
- Construction and initialisation will be managed by the proponent, however there will be scope for Government to review progress.

6 to 12 months

3 to 6 months

6 to 9 months

24+ months

FINANCIAL IMPLICATIONS

While our work does not constitute a full business case, we have considered some of the key factors that will influence funding of the development of the Illawarra Sports and Entertainment Precinct. As noted, a fully detailed business case will be the next stage in the development process.

Development Costs

Populous have provided a high-level commentary on a broad range of development costs for the project based on industry benchmarks. Both Populous and Urbis emphasise that caution needs to be applied in considering these costs as they do not consider site-specific conditions that need to be assessed through a full design and engineering program. These preliminary costs are outlined in the table below.

Table 9: Preliminary costs

	COMPONENT COSTS	TOTAL COMPONENTS	CONSTRUCTION VALUE
The Arena and Grandstand	\$8,000 to \$20,000 per seat for the Arena and similar for the Grandstand	13,000 seats (both venues)	\$104 M to \$260 M
The Co-ex	\$4,500 to \$6,000 per m2	9,750 m2 approx.	\$44 M to \$59M
The Basement Carpark	\$2,000 to \$2,500 per m2	7038 m2 approx.	\$14 M to \$18 M
Total Construction Value (Excluding demolition + other development)			\$162 M to \$336 M

- The cost estimate does not include demolition works for the existing facility (noting demolitions costs for the Sydney Football Stadium were estimated at \$40,000,000) or any works associated with unforeseen issues such as contamination or archaeological significance.
- **Given the levels of uncertainty associated with this early stage, it is possible that the total cost could exceed \$400,000,000.**
- These costings also do not include construction of other revenue generating elements such as retail or short stay accommodation. We note however that these items are expected to generate a profit from their construction and therefore would assist in adding value to offset some of the core costs.

Revenue

Revenue from the redevelopment will be generated through the following means:

- Operating revenue from the core Area / COEX spaces – this would be through ticket sales, venue hire fees and a share of concession sales or rental. From this, operating costs would be deducted to produce a net income from the core facilities. A well utilised facility may generate sufficient operating revenue to support its development, however this is not always the case with community focused development.
- Retail / commercial rental – it is expected that the development will include some externally facing spaces that will be leased as retail / commercial tenancies. Whilst not part of the core operations, this spaces could generate rental income that would add to the overall return.

Source: Populous

FUNDING SOURCES

Funding for the proposed development could potentially be derived from public, private, or a mixture of private and public funding.

Private Sector Investment

Development funds put forward by a potential investor to secure the rights to build, own and operate the Illawarra Sports and Entertainment Precinct. While this may provide most of the funding, the quantum of available funds invested will be directly influenced by the revenue expected to be generated from the facilities. If this revenue is insufficient to cover an adequate return on the full development costs, then there is precedent for contributions from the government to make up this funding shortfall based on the facilities having a broader economic and social benefit.

Government Investment

There are examples of similar developments where the government will provide full funding for the development, with the view to directly own and operate the facilities (e.g., Sydney Football Stadium redevelopment). As mentioned, the government may act as a co-investor with a private sector participant, either on a commercial basis (i.e., for a share of income) or to help to make up for a commercial shortfall provided that the overall economic and social benefits of the project justify this government investment.

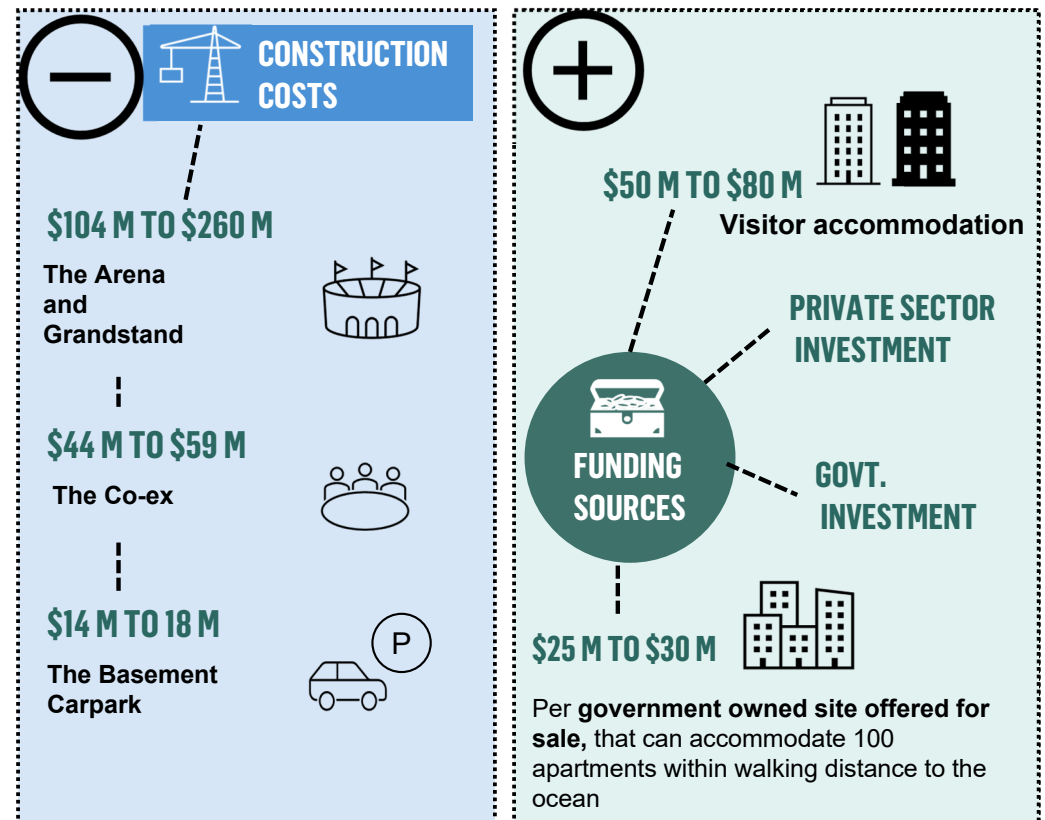
Development site offsets

Often within public-private partnership funded projects, non-core development elements or standalone development sites are incorporated into the overall transaction to help offset potential funding shortfalls. For the Illawarra Sports and Entertainment Precinct, this could include the short-stay accommodation building identified on-site and other government-owned lands with development potential that could be incorporated into the project. In the case of Wollongong, residential development site sales in close proximity to the subject site have demonstrated values in excess of \$3,500 / sq.m of GFA or \$250,000 to \$300,000 per potential apartment.

Based on the two proposed hotels nominated for the Illawarra Sports and Entertainment Precinct, these could contribute funding of circa \$50,000,000 to \$80,000,000 through their airspace value.

We are aware that there are other government-owned sites in the precinct that could be offered up for sale/development to help fund the overall project. If additional funding was required, approximately \$25,000,000 to \$30,000,000 could be raised through every additional site that could accommodate approximately 100 apartments, provided they were within walking distance of the ocean. However, these sites could not all be released at the same time and would have to be timed to allow the market to absorb current and new development.

There is an opportunity cost that does apply to government-owned sites that are potentially sold to help fund projects such as the Illawarra Sports and Entertainment Precinct. The value associated with these sites could be applied to other government uses and therefore the overall economic and social value of the project, validated in the business case, would have to be sufficient to warrant this transfer of value to the project (like direct government funding).



RECOMMENDATIONS

This section outlines the recommended form for the renewal and redevelopment of the precinct, including the next steps.

06

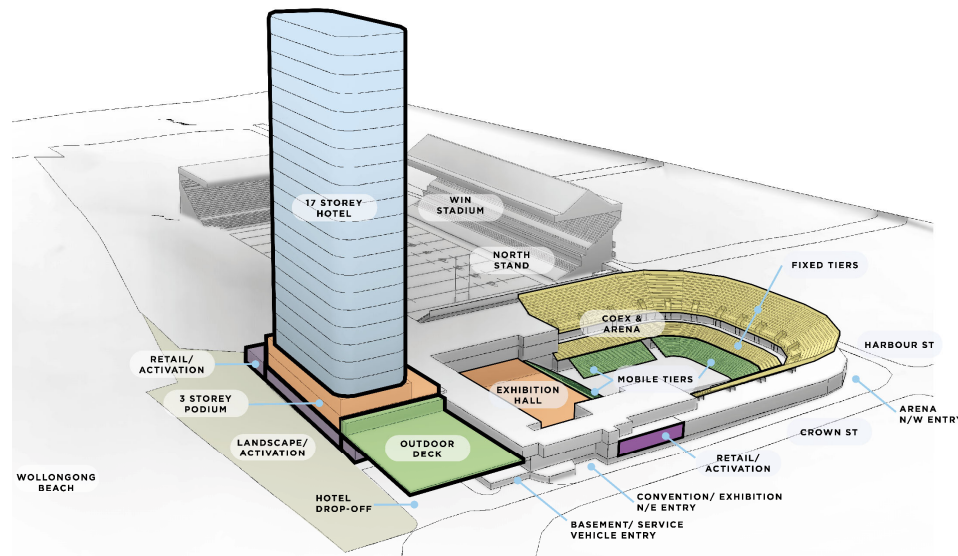
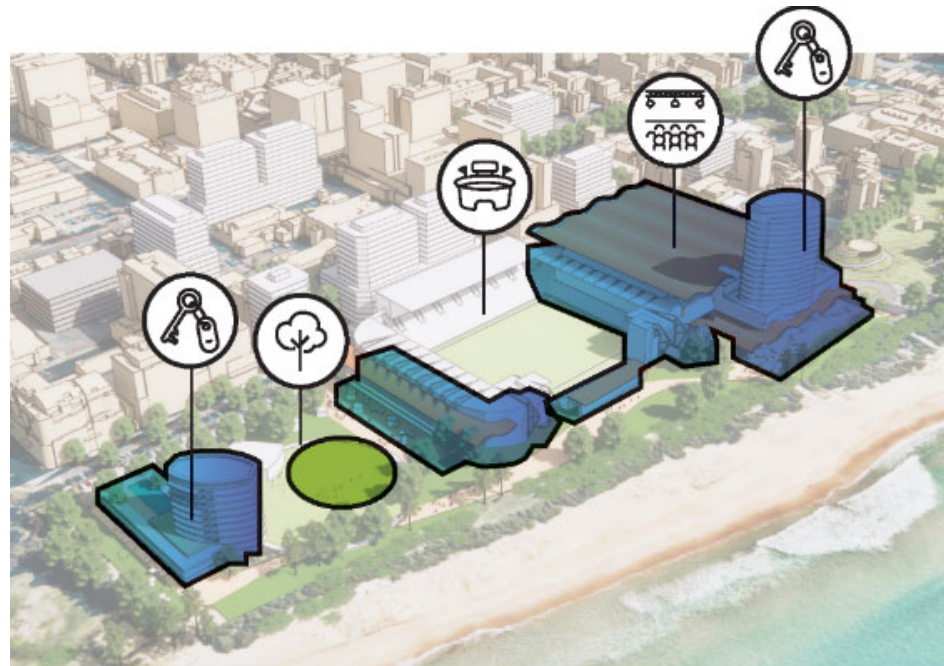
RECOMMENDATIONS

The next steps for the project, as outlined in the Market Led proposal should be:

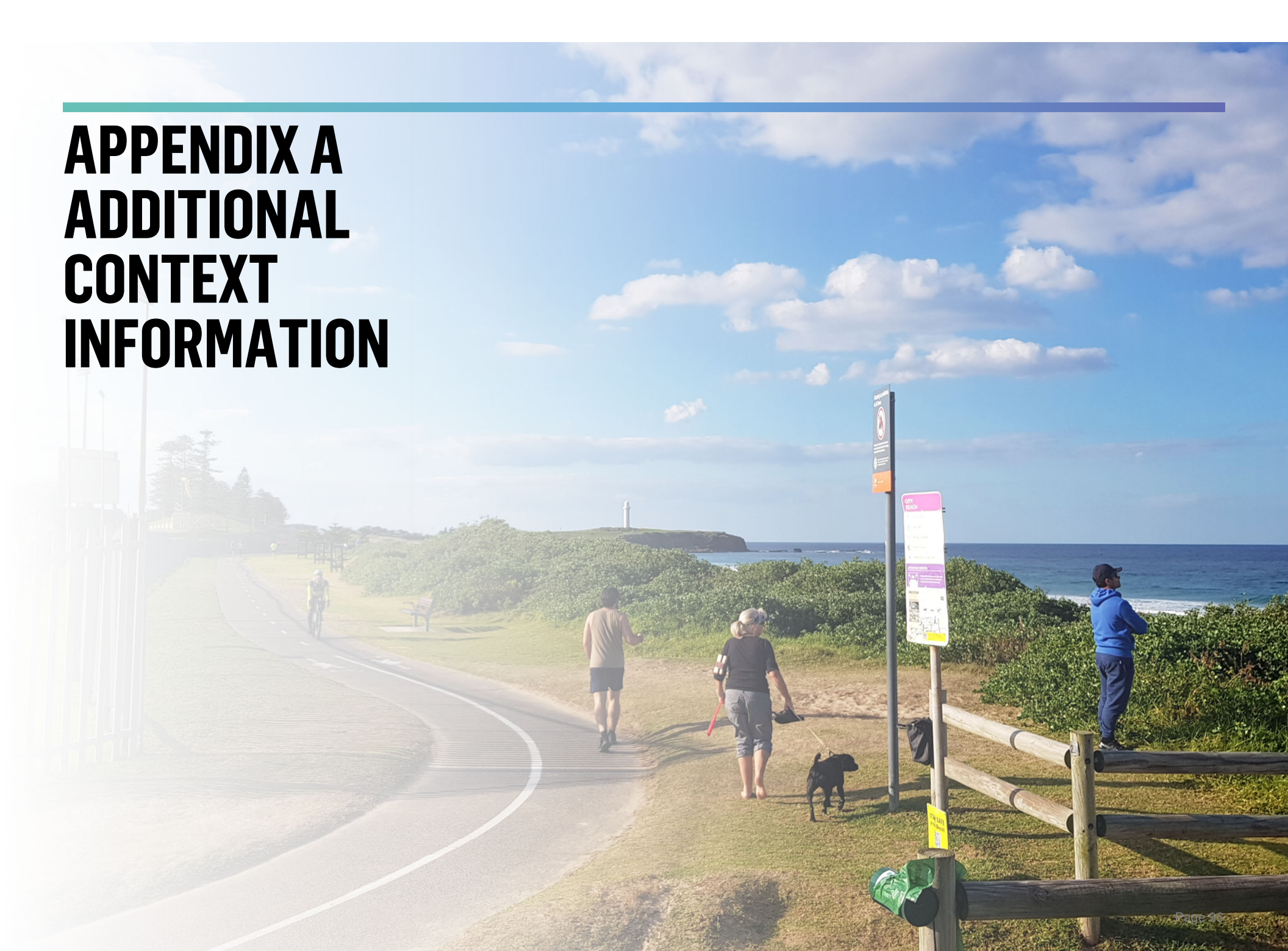
- NSW Government funding for a business case.
- Develop detailed studies, reference design and economic analysis.
- Market sounding, including land bundling opportunities.

These steps will enable the development of a prime, entertainment, sporting and tourist venue for Wollongong comprising:

- An arena space with tiered bowl seating for 7,485 attendees in sports mode, capacity for 8,311 in concert mode and for 2,000 people in exhibition/convention mode.
- New northern grandstand with seating for 2,818 people.
- New northern and eastern grandstands.
- New public spaces.
- Activated foreshore.
- Renewed Lang Park.
- Relocated bus layover and new multideck car park with development above.
- Harbour Street converted to a shared zone to be closed on event/game days and additional pedestrian space on Crown Street.
- Two accommodation towers (17 and 10 storeys over 3 podium levels).



APPENDIX A ADDITIONAL CONTEXT INFORMATION



PLANNING CONTEXT

	Site Detail
Address	5-11 Crown Street
Legal Description	Lot 143 DP 786508 – WIN Entertainment Centre Lot 101 DP 872951 – WIN Stadium Lot 1, 2, 3, 4 and 5 DP 1091530 – The Illawarra Brewery, Andrew Lysaght Rest Park and private parking Lot 96 DP 151299 - portion of road
Site Area	6ha
Zone	SP3 Tourist RE3 Public Recreation B4 Mixed Use Zone
Local Government Area	Wollongong City Council
Key Planning instruments	Statutory <ul style="list-style-type: none"> Wollongong Local Environmental Plan 2009 Wollongong Development Control Plan Strategic <ul style="list-style-type: none"> Illawarra Shoalhaven Regional Plan 2014 Wollongong Local Strategic Planning Statement 2020 Wollongong City Centre Urban Design Framework Wollongong Foreshore Plan of Management Plan of Management for Andrew Lysaght Park 2002

FURTHER DETAILS OF STRATEGIC CONTEXT

Illawarra Shoalhaven Regional Plan 2041

The Illawarra Shoalhaven Regional Plan 2041 (Regional Plan) sets out the strategic goals and vision to recognise opportunities and potential growth for the region over the next 20 years.

A key objective of the Regional Plan is to strengthen Wollongong as a connected, innovative and progressive city by **revitalising the sports and entertainment precinct and activating the foreshore**.

The Illawarra Sports and Entertainment Precinct (ISEP) could transform into a first-choice multipurpose business, entertainment, cultural and sporting hub.

Through strategic and local plans, the precinct could:

- *improve visual and physical access to the foreshore, including improving the pedestrian interface with the WIN Stadium, the beach and Lang Park; WEC,*
- *encourage broader uses of the Precinct outside of events;*
- *better utilise the WEC and WIN Stadium;*
- *improve access to public and active transport networks including links to Wollongong Train Station and event transport;*
- *embrace the location's environmental setting by protecting key views, improving and activating public spaces and managing exposure to climate hazards.*

Wollongong Local Strategic Planning Statement 2020

The Wollongong Local Strategic Planning Statement 2020 (WLSPS) was finalised in June 2020 with the vision: "From the mountains to the sea, we value and protect our natural environment and we will be leaders in building an educated, creative and connected community".

The ISEP revitalisation will enable support of the vision and aspirations for the next 20 years, to maintain and encourage the importance of culture, recreation and entertainment in the commercial core. Contributing to the community values, character and identity. Strengthening the cultural and entertainment precincts and activating the foreshore area for the growing local population and visitors.

Further consideration of the 'jobs and economic growth' goals of the WLSPS will be achievable with the support of the revitalisation of the precinct.

The WLSPS will inform future amendments to local environmental plans and development control plans to achieve the vision.

Wollongong City Centre Urban Design Framework

Wollongong City Centre is the cultural and economic hub of the growing region. The Wollongong City Centre Urban Design Framework (WUDF) was adopted in September 2020 and aims to ensure the delivery of high-quality buildings, streets and public spaces.

The ISEP is within the foreshore precinct, which ultimately needs to provide a seamless transition of activation from the city centre to the beach .

The precinct will need to overcome:

- That the foreshore is disconnected from the city;
- Crown Street as the only street connection to the city;
- Poor pedestrian prioritisation;
- Limited attractors to enjoy the beach;
- Lang Park interface with bus interchange.

The WUDF recommends providing access to beach views to alleviate that feeling of disconnect. Further, priority should be given to people, not vehicles (currently road infrastructure divides the connection).

The ISEP should seek to enhance the visibility of the foreshore's natural beauty and create a thriving outdoor culture.

WOLLONGONG DEVELOPMENT CONTROL PLAN 2009 (DCP)

Character Statement

The Wollongong City Centre is the retail and commercial core providing a mix of land uses including entertainment, tourism, leisure and recreation. To provide for these uses there is a focus on high quality buildings, streetscapes, public art and attractive public spaces to best deliver uses to the region.

The desired future character is for the City Centre to continue as the regional centre for Illawarra and focus on employment, key regional services, cultural activity, entertainment and tourism. The city has great potential with its high-quality location, infrastructure and spaces but can further increase its appeal through revitalising the City Centre and strengthening the city's unique characteristics.

Development principles that the city centre aims to achieve that are relevant to the site include:

- Encourage diverse precincts around the city centre;
- Develop a distinct role and character for the centre;
- Ensure high quality design of buildings and public areas.

Entertainment uses will complement the centre and increase opportunities to provide for locals and tourist visitors. Key actions that will facilitate growth include:

- Managing the foreshore to enhance its appeal while protecting its natural assets;
- Growing activity in cultural industries; and
- Enhancing movement in and around the city centre.

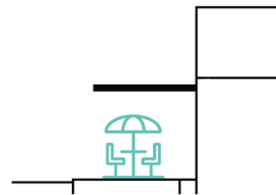
Precinct Plan

The Wollongong Development Control Plan outlines the built form controls that guide development within the region along with the WLEP and other planning instruments. The aims and objectives hope to support and guide development to contribute to quality natural and built form environments, quality public spaces, positive influence on the local character and a safe, liveable and desired future locality.

The DCP identifies the site within the city centre locality in chapter **D13: Wollongong City Centre**. Within this chapter it recognises the land use zones of the area and provides specific requirements for these land use zones.

The ISEP is located within the Tourist and Private Recreation zone. Built form is encouraged which will activate the area and connect the foreshore to the core of the city.

To encourage development, three key design principles are identified:



Building Form

Provide generous street setbacks (2-4 metres) to encourage improvements to the public domain.



Pedestrian Amenity

Encourage active street frontages to promote interesting and safe environments for pedestrian movement.



Views and view corridors

Protect existing views and encourage view lines towards to foreshore.

APPENDIX B POPULOUS REPORT





Illawarra Sports & Entertainment Precinct Development Scenarios

DEVELOPMENT SCENARIO REPORT

DOCUMENT NUMBER

AD.11.0010

POPULOUS



WOLLONGONG NSW, AUSTRALIA

PROJECT NUMBER

21.7766.00

CLIENT

URBIS
FOR BUSINESS ILLAWARRA

DOCUMENT NUMBER: AD.11.0010
PROJECT NUMBER: 21.7766.00
CREATED BY: BG
APPROVED BY: BG

REV.	DATE	DESCRIPTION
01	07.10.2021	DRAFT FOR INFORMATION
02	13.10.2021	DRAFT FOR INFORMATION
03	14.12.2021	CONCEPT ISSUE
04	16.12.2021	CONCEPT ISSUE

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WOLLONGONG NSW, AUSTRALIA

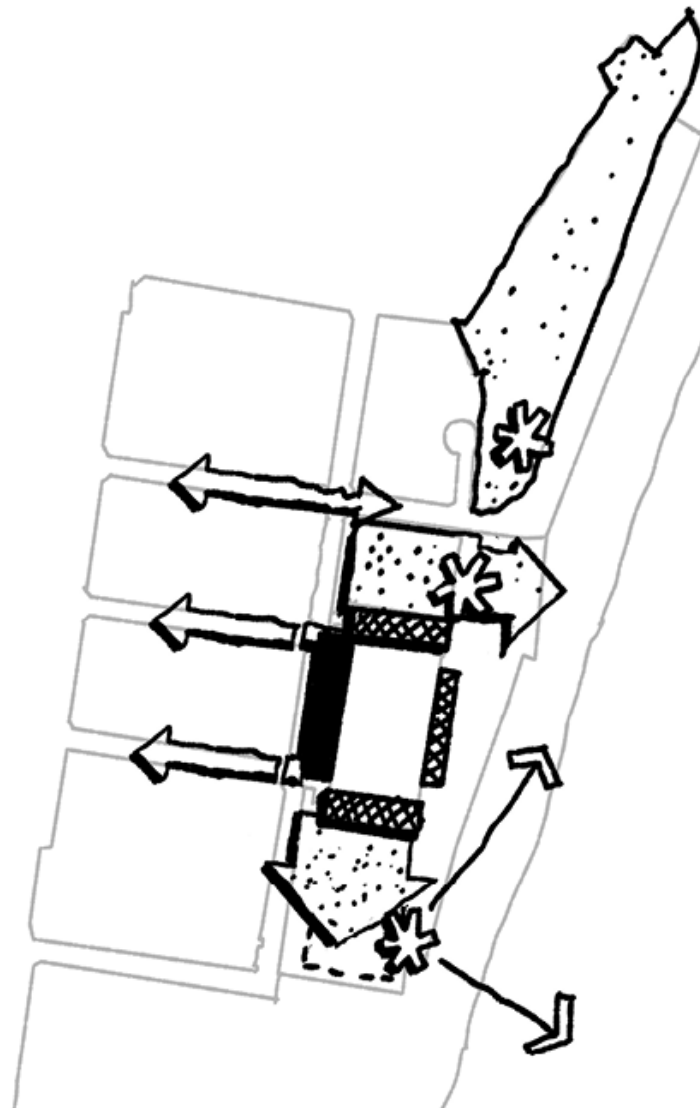
Contents

01/	Development Scenario Commentary	09
02/	High Level Area Schedules	13
03/	Preferred Scenario 2	18

01/

Scenario **Commentary**

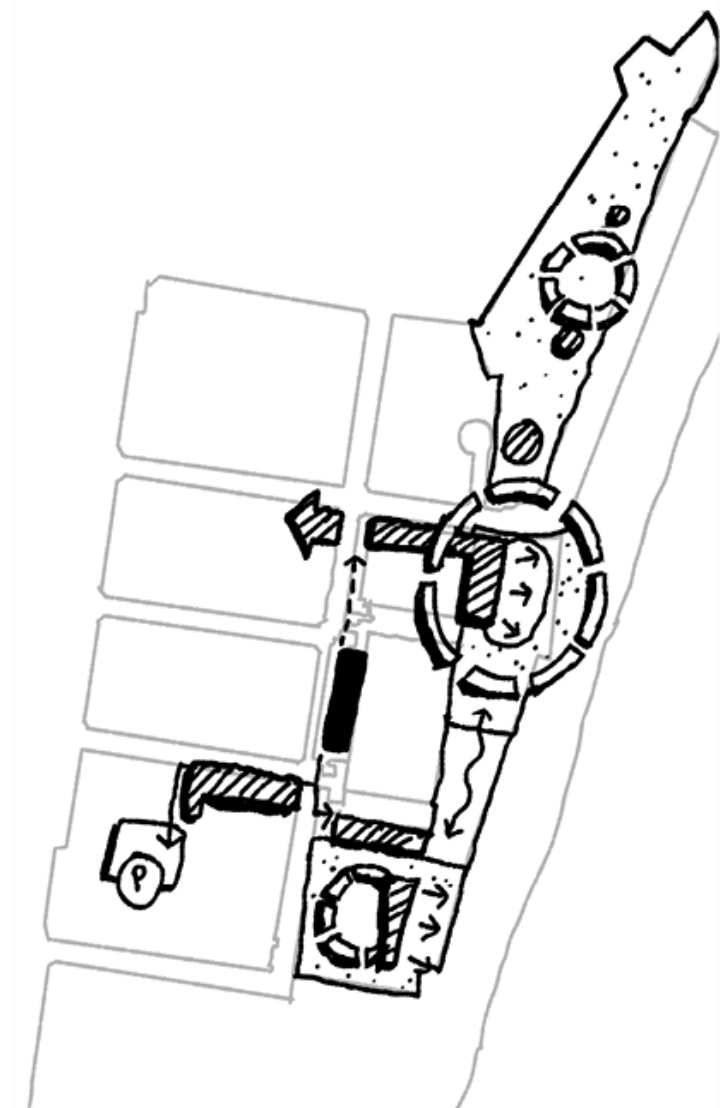
KEY SITE PLANNING DIRECTIONS



EXPAND/REDEVELOP THE ENTERTAINMENT CENTRE AS A PRECINCT DESTINATION



INTEGRATE THE SITE INTO THE PUBLIC DOMAIN INTERFACE



ACTIVATE THE WATERFRONT AND THE SURROUNDING AREAS

**Extracts taken from the Illawarra Sport and Entertainment Study undertaken by Urbis.*

Introduction

Purpose

The following draft report provides an initial review of the advantages and disadvantages of the three proposed development scenarios that form part of the Illawarra Sport and Entertainment Study undertaken by Urbis. The report also provides a draft high-level functional area schedule for review for each of the proposed scenario developments and other comparable/competition convention centre venue benchmarks and facilities for consideration for the proposed precinct development.

The Illawarra Sport and Entertainment Precinct Study prepared by Urbis provides a review of background and existing context of the precinct and site.. The report provides further site analysis of the following:

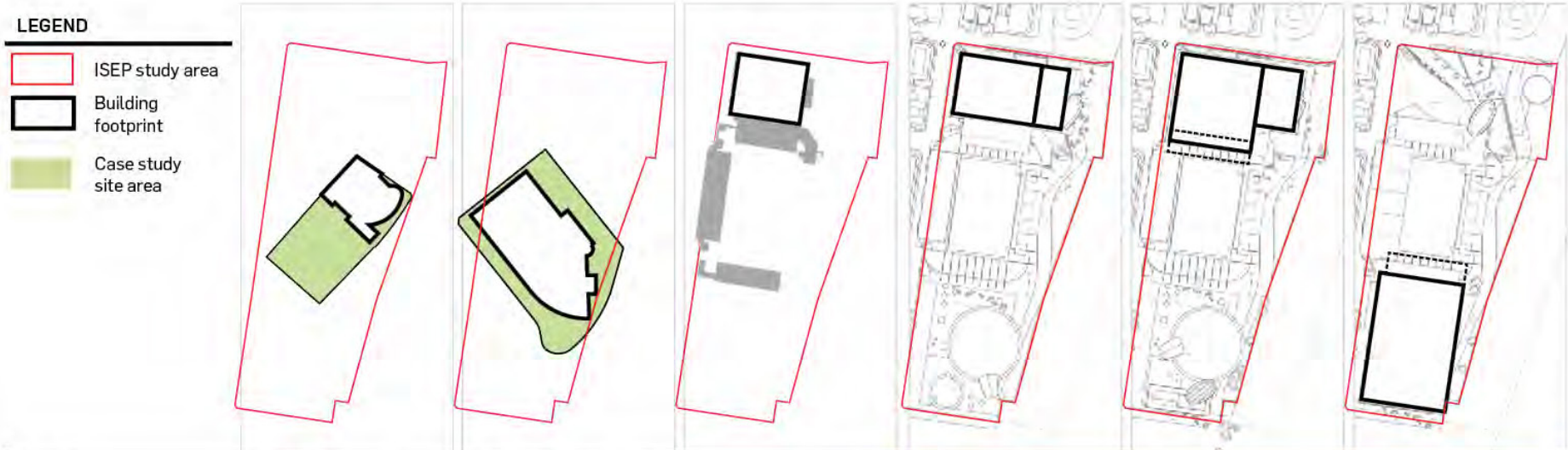
- Urban Design and Masterplanning Context
- Economic Context
- Transport Context
- Planning and Heritage Context

Within Section 2 of the Study - Masterplan Development, the following diagrams identifies 3 key masterplan principles or directions to drive the precinct redevelopment. as listed below:

1. Expand/Redevelop the Entertainment Centre as a Precinct Destination
2. Integrate the Site into the Public Domain Interface
3. Activate the Waterfront and the Surrounding Areas

Our first section of the draft report aims to provide some initial commentary on each of the proposed development scenarios in relation to the general approach in relation to the design and scale. The second section provide a high-level schedule of facilities and areas for each of the proposed developments for further client consideration of the Masterplan Case Study Development Option to be further developed in a second stage of works based on client feedback.

SCALE COMPARISON OF PRECEDENT CONVENTION CENTRES

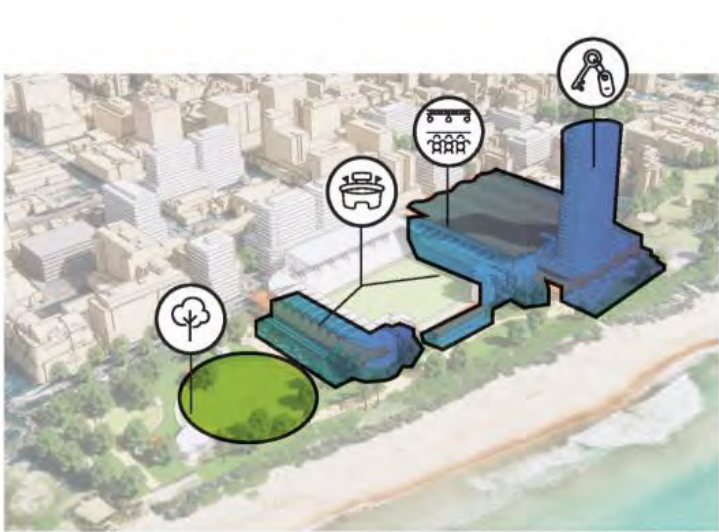


Name	Hobart Convention Centre	Cairns Convention Centre	Existing WIN Convention centre	Scenario 1	Scenario 2	Scenario 3
GBA*	12,600 sqm	28,500 sqm	21,000 sqm	30,000 sqm	39,100 sqm	50,200 sqm
GFA (includes F&B)	no data	no data	TBD	22,700 sqm	27,950 sqm	34,550 sqm
Building Envelope	4,200 sqm	14,250 sqm	7,000 sqm	10,500 sqm	12,000 sqm	13,500 sqm
Storeys	G+2	G+1	G+2	G+2	G+2	G+2
Est. Site area	12,200 sqm	22,000 sqm	60,822 sqm	60,822 sqm	60,822 sqm	60,822 sqm
Building Dimension	60x75 m	95x185 m	75x90 m	75x150 m	100x120 m	90x150 m
Building Height	3 storeys	2 storeys	3 storeys	3 storeys	3 storeys	3 storeys
Capacity	1,100 seats	5,300+ pax	6,000 pax	7,500 pax	8,900 pax	11,400 pax
Exhibition Space	3,800 sqm	no data	no data	4,000 sqm	4,700 sqm	6,080 sqm
Banquet Capacity	1,000 pax	1,300 pax	no data	1000 pax	1,200 pax	1,520 pax
Meeting Rooms	n.a.	22	no data	13	16	20

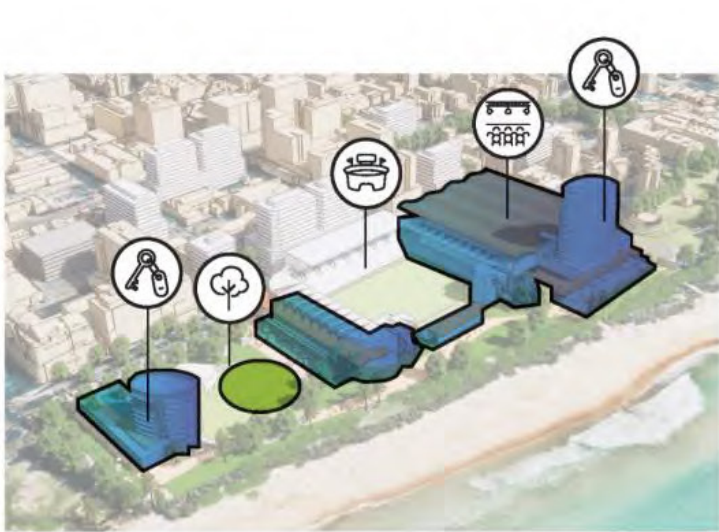
* GBA - High level measurement of Gross Building area

*Extracts taken from the Illawarra Sport and Entertainment Study undertaken by Urbis.

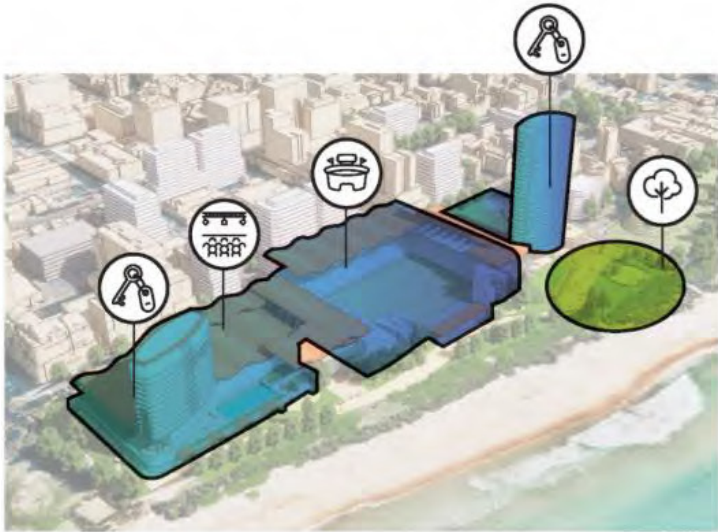
SUMMARY OF OPTIONS



SCENARIO 1: NEW SOUTHERN PUBLIC OPEN SPACE



SCENARIO 2: SOUTHERN PARTIAL REDEVELOPMENT



SCENARIO 3: ENTERTAINMENT PRECINCT ACTIVATION

MAJOR ZONES			
Entertainment (North)	Focus on redeveloping northern side, Hotel in corner of Harbour and Crown St.	Integrated entertainment centre on the north with hotel facing the sea in the east.	To redevelop as a new development parcel that can potentially be aa tourism centre/museum below an iconic hotel.
Stadium (Middle)	Activate southern grandstand, addition of eastern low-level tiered seating.	Activate southern grandstand, addition of eastern low-level tiered seating.	Redevelop the new stadium as part of the integrated development.
Training Field (South)	Relocated, to develop as a new public open space	Relocated, replaced with partial redevelopment and public open space.	Relocate the entertainment centre towards the south.

TOTAL GFA: 36,875 SQM

TOTAL FSR: 0.61

MAX HEIGHT: RL 110 M @

30 STOREYS MAX

TOTAL GFA: 40,080 SQM

TOTAL FSR: 0.66

MAX HEIGHT: 46 M @

11 STOREYS MAX

TOTAL GFA: 61,300 SQM

TOTAL FSR: 1.01

MAX HEIGHT: RL 110 M @

30 STOREYS MAX

**Extracts taken from the Illawarra Sport and Entertainment Study undertaken by Urbis.*

Scenario Commentary

SCENARIO 1 |

New Southern Public Open Space

Size of Entertainment and COEX facilities appropriate in scale for a Regional City matching the size of Darwin CEC and Cairns CEC. Further market demand analysis on event types, content, frequency and market size is recommended to be undertaken to determine required size and functional requirements

Advantages

- Good adjacency of Entertainment and COEX facilities to Large Scale Hotel Development
- Good adjacency of Entertainment and COEX facilities to F & B Retail Activation
- Potential use /hire of hospitality/function spaces in Hotel and Stadium is possible for large events being hosted in the Entertainment and COEX facility.

Disadvantages

- Development scale and height of development is very high and dense close to open space to the north of the development
- Overshadowing of the Stadium FOP of the Hotel Development
- Limited activation of the whole precinct
- New relocated Public open space could be better connected to the Entertainment and COEX Facility
- The development precinct lacks visual and pedestrian permeability from the City CBD to the ocean front

SCENARIO 2 |

Southern Partial Development

Size of Entertainment and COEX facilities as Regional City slightly above other benchmarks of the size of Darwin CEC and Cairns CEC. Further market demand analysis on event types, content, frequency and market size is recommended to be undertaken to determine required size and functional requirements.

Advantages

- Good adjacency of Entertainment and COEX facilities to Medium Scale Hotel Development and further overflow serviced apartments located within precinct development
- Good adjacency of Entertainment and COEX facilities to F & B Retail Activation
- Development scale and height of development has been considered to open space to the north of the development
- Overshadowing of the Stadium FOP of the Hotel Development is limited based on scale of proposed Hotel development
- Potential use /hire of hospitality/function spaces in Hotel and Stadium is possible for large events being hosted in the Entertainment and COEX facility.
- Improved activation of the whole precinct in comparison to Development Scenario 1.

Disadvantages

- New relocated Public open space could be better connected to the Entertainment and COEX Facility
- The development precinct lacks visual and pedestrian permeability from the City CBD to the ocean front

SCENARIO 3 |

Entertainment Precinct Activation

Size of Entertainment and COEX facilities as Regional City well above other benchmarks of the size of Darwin CEC and Cairns CEC and more comparable with Gold Coast CEC. Further market demand analysis on event types, content, frequency and market size is recommended to be undertaken to determine required size and functional requirements.

Advantages

- Good adjacency of Entertainment and COEX facilities to Medium Scale Hotel Development
- Good adjacency of Entertainment and COEX facilities to F & B Retail Activation
- Potential use /hire of hospitality/function spaces in Hotel and Stadium is possible for large events being hosted in the Entertainment and COEX facility.
- Improved activation of the whole precinct in comparison to Development Scenario 1 and 2.

Disadvantages

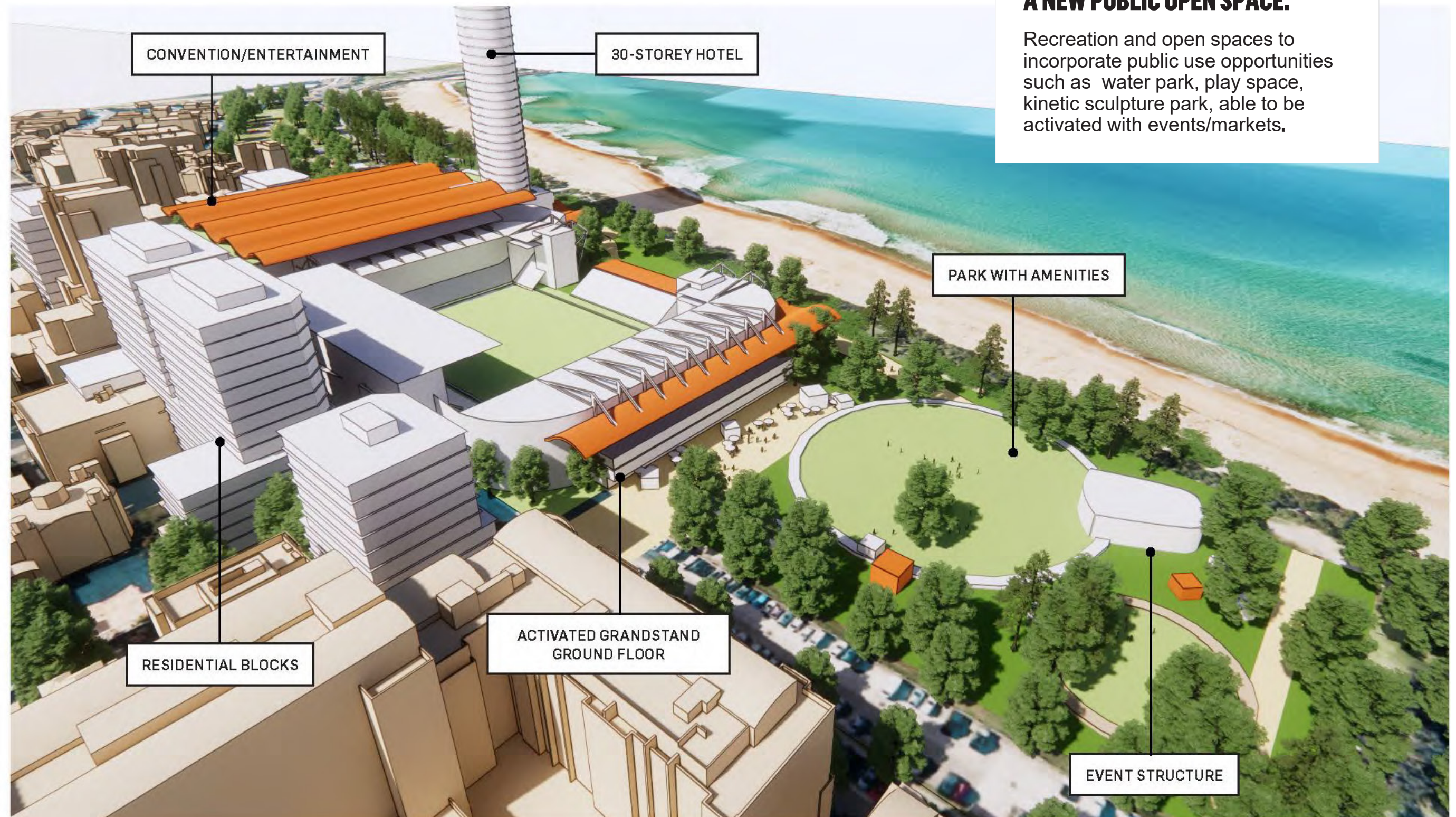
- Development scale and height of the Large Scale Hotel development could be better considered to open space to the north of the development
- Overshadowing of the Stadium FOP of the Large Scale Hotel Development
- Only the oceanfront public open space provided adjacent to the Entertainment and COEX Facility
- The development precinct lacks visual and pedestrian permeability from the City CBD to the ocean front

02/

High-Level Scenario Areas

SCENARIO 1: VIEW TOWARDS THE SEA

**Urbis Master Plan scenario images taken from the Illawarra Sport and Entertainment Study undertaken by Urbis.*



RELOCATION TRAINING FIELD FOR A NEW PUBLIC OPEN SPACE.

Recreation and open spaces to incorporate public use opportunities such as water park, play space, kinetic sculpture park, able to be activated with events/markets.

Scenario 1 - Functional Areas

Development Scenario 1

Comparable Venue Size & Facilities
- Darwin Convention & Exhibition Centre
- Cairns Convention & Exhibition Centre

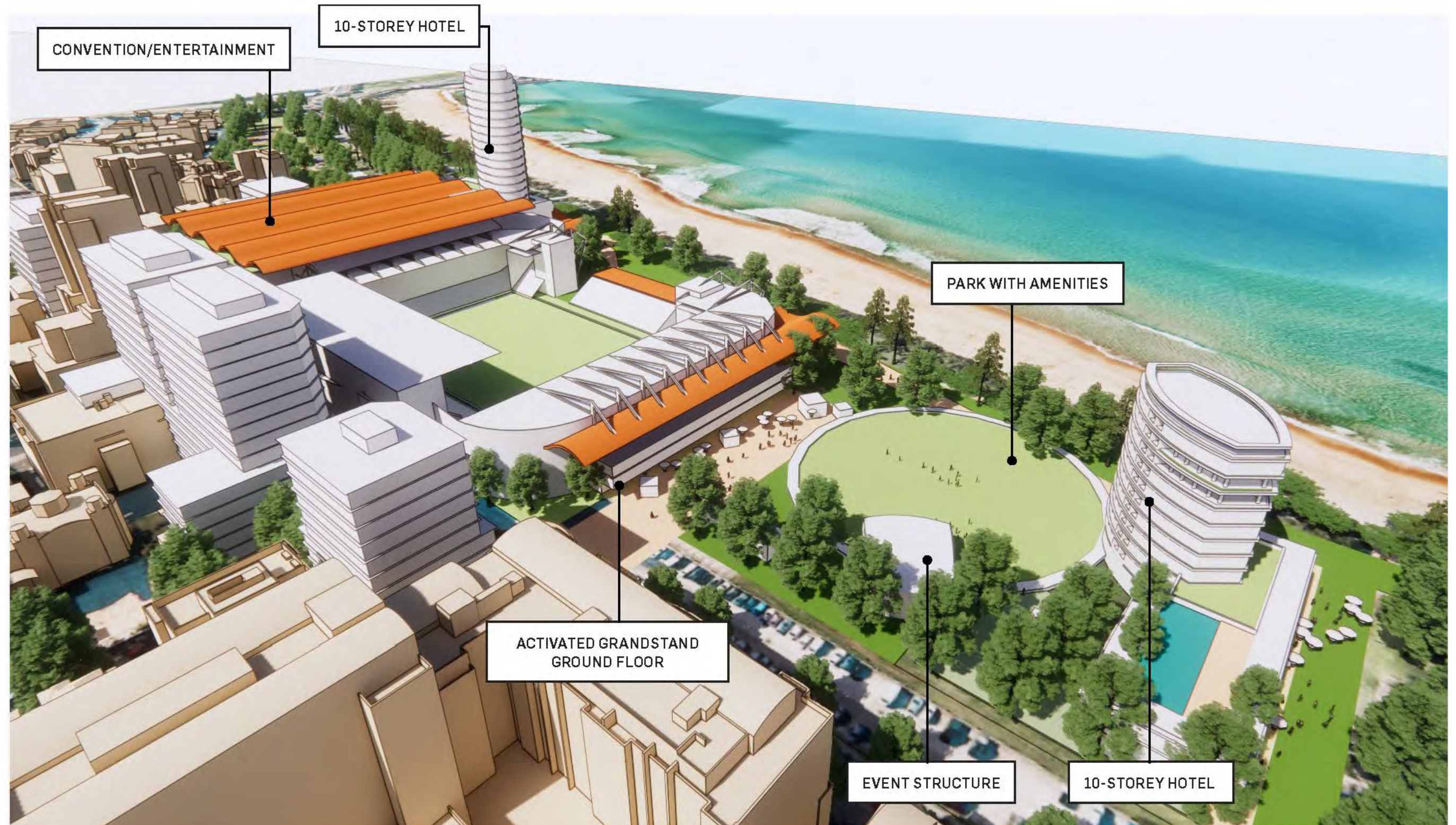
The following table provides a High Level Functional Area Schedule typical of a COEX of this development size.

Please note: Assumptions on the Functional Area Provisions are subject to further market demand analysis on event types, content, frequency and market size

DEVELOPMENT SCENARIO 1	
Key Functional Area	Area (m2)
Entertainment Arena Floor & Tiered Seating Bowl – 7,500 pax	5,125
Exhibition Halls – 4 No. Halls	4,000
Banquet Capacity in 2 No. Exhibition Halls – 1,000 pax**	(2,000)**
Arena & Exhibition Hall Circulation & FOH Support Areas	3,500
Arena & Exhibition Hall BOH Support Areas	2,100
Exhibition Hospitality Suites – 4 No. (additional to Meeting Rooms)	320
Meeting Rooms – 8 No. ***	(650)@50% ***
Optional Outdoor Event Deck FOH Support*	(3,200)*
Meeting Rooms BOH Support	(300)@50% ***
Main Production Kitchen***	(700)***
Approx. Truck Apron, Loading & Circulation Area*/***	(2,500)*/***
BOH Service & Staff Rooms***	(1,805)***
Mechanical & Electrical Plant – approx. 15% GFA	3,000
Vertical & BOH Circulation – approx. 5% GFA	1,250
Total Net Enclosed Area	22,750
(Not included in Net Enclosed Area)	(5,700)
(Part of Exhibition Hall Area)	(2,000)
*** (Part or Approx. Shared Areas with Stadium)	(5,480)***
Site Boundary Area	60,822
Potential Arena & COEX Development GFA	22,700
Enclosed areas – Truck Apron, Loading & Circulation Area (excluded from GFA)	2,500
Basement Car Parking – Approx 400 spaces (excluded from GFA)	14,000

SCENARIO 2: VIEW TOWARDS THE SEA

**Urbis Master Plan scenario images taken from the Illawarra Sport and Entertainment Study undertaken by Urbis.*



Scenario 2 - Functional Areas

Development Scenario 2

Venue Size & Facilities Between
- Darwin/Cairns Convention & Exhibition Centre
- Gold Coast Convention & Exhibition Centre

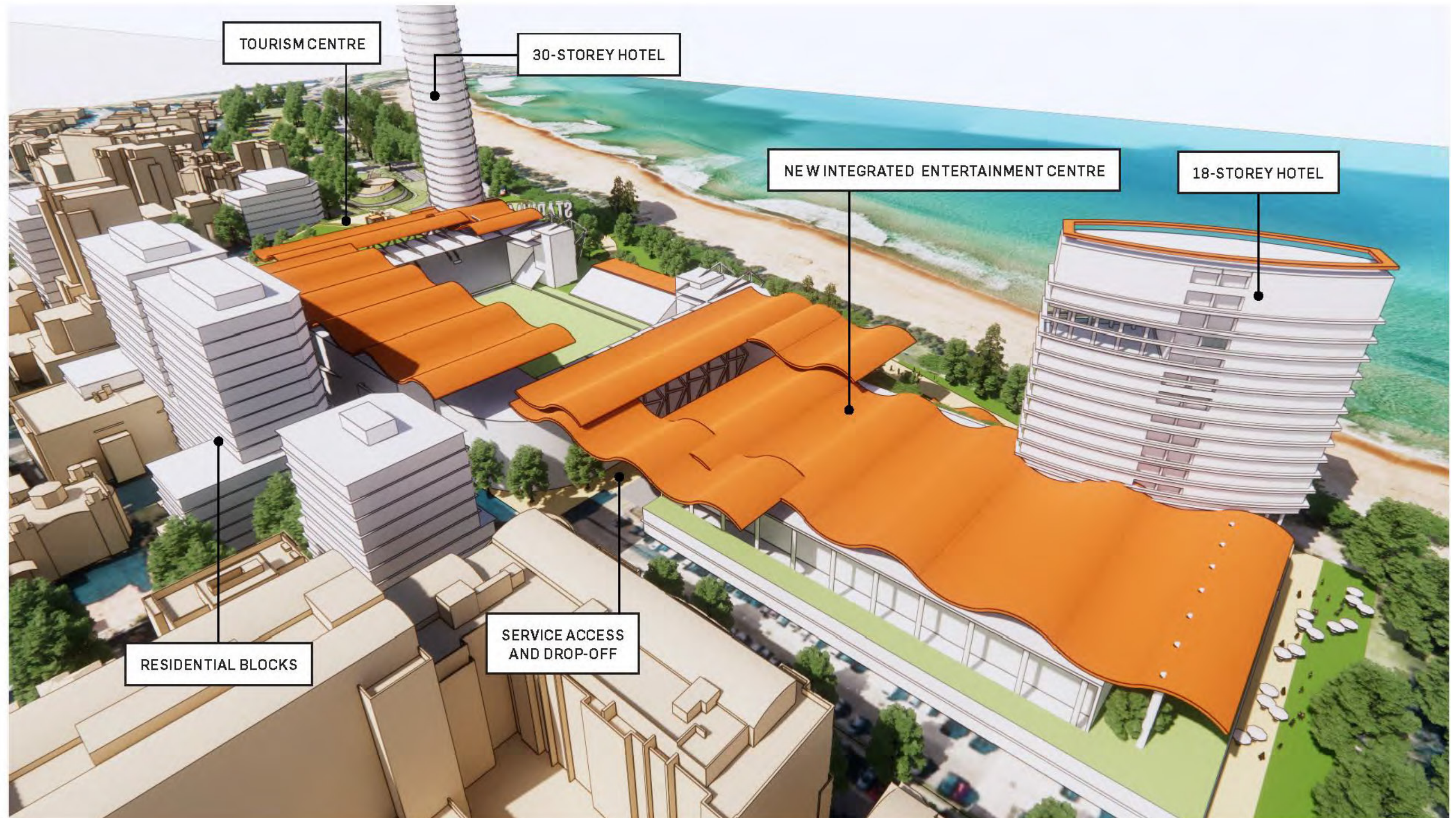
The following table provides a High Level Functional Area Schedule typical of a COEX of this development size.

Please note: Assumptions on the Functional Area Provisions are subject to further market demand analysis on event types, content, frequency and market size

DEVELOPMENT SCENARIO 2	
Key Functional Area	Area (m2)
Entertainment Arena Floor & Tiered Seating Bowl – 8,900 pax	6,000
Exhibition Halls – 5 No. Halls	5,000
Banquet Capacity in 3 No. Exhibition Halls – 1,200 pax**	(3,000)**
Arena & Exhibition Hall Circulation & FOH Support Areas	4,500
Arena & Exhibition Hall BOH Support Areas	2,700
Exhibition Hospitality Suites – 5 No. (additional to Meeting Rooms)	400
Meeting Rooms – 12 No. (30m2 to 200m2)***	(750)@50%***
Optional Outdoor Event Deck FOH Support*	(3,800)*
Meeting Rooms BOH Support	(500)@50%***
Main Production Kitchen***	(1,000)***
Approx. Truck Apron & Circulation Area*/***	(3,000)*/***
BOH Service & Staff Rooms***	(2,000)***
Mechanical & Electrical Plant – approx. 15% GFA	3,700
Vertical & BOH Circulation – approx. 5% GFA	1,400
Total Net Enclosed Area	27,950
(Not included in Net Enclosed Area)	(6,800)
(Part of Exhibition Hall Area)	(3,000)
*** (Part or Approx. Shared Areas with Stadium)	(6,625)***
Site Boundary Area	60,822
Potential Arena & COEX Development GFA	27,950
Enclosed areas – Truck Apron, Loading & Circulation Area (excluded from GFA)	3,000
Basement Car Parking – approx. 500 spaces (excluded from GFA)	17,500

SCENARIO 3: VIEW TOWARDS THE SEA

**Urbis Master Plan scenario images taken from the Illawarra Sport and Entertainment Study undertaken by Urbis.*



Scenario 3 - Functional Areas

Development Scenario 3

Comparable Venue Size & Facilities
- Gold Coast Convention & Exhibition Centre

The following table provides a High Level Functional Area Schedule typical of a COEX of this development size.

Please note: Assumptions on the Functional Area Provisions are subject to further market demand analysis on event types, content, frequency and market size

DEVELOPMENT SCENARIO 3	
Key Functional Area	Area (m2)
Entertainment Arena Floor & Tiered Seating Bowl – 11,400 pax	7,500
Exhibition Halls – 6 No. Halls	6,000
Banquet Capacity in 3 No. Exhibition Halls – 1,500 pax**	(3,000)**
Arena & Exhibition Hall Circulation & FOH Support Areas	5,700
Arena & Exhibition Hall BOH Support Areas	3,000
Exhibition Hospitality Suites – 6 No. (additional to Meeting Rooms)	480
Meeting Rooms – 16 No. (depending on minimum size req.)***	(1,100)@50%***
Optional Outdoor Event Deck FOH Support*	(4,500)*
Meeting Rooms BOH Support***	(520)@50%***
Main Production Kitchen***	(1,200)***
Approx. - Truck Apron & Circulation Area*/***	(3,500)*/***
BOH Service & Staff Rooms***	(2,300)***
Mechanical & Electrical Plant – approx. 15% GFA	5,000
Vertical & BOH Circulation – approx. 5% GFA	1,750
Total Net Enclosed Area	34,550
(Not included in Net Enclosed Area)	(8,000)
** (Part of Exhibition Hall Area)	(3,000) **
*** (Part or Approx. Shared Areas with Stadium)	(7,810)***
Site Boundary Area	60,822
Potential Arena & COEX Development GFA	34,550
Enclosed areas – Truck Apron, Loading & Circulation Area (excluded from GFA)	3,500
Basement Car Parking – approx. 600 spaces (excluded from GFA)	21,000

03/

Case Study Scenario - **Revised Concept**

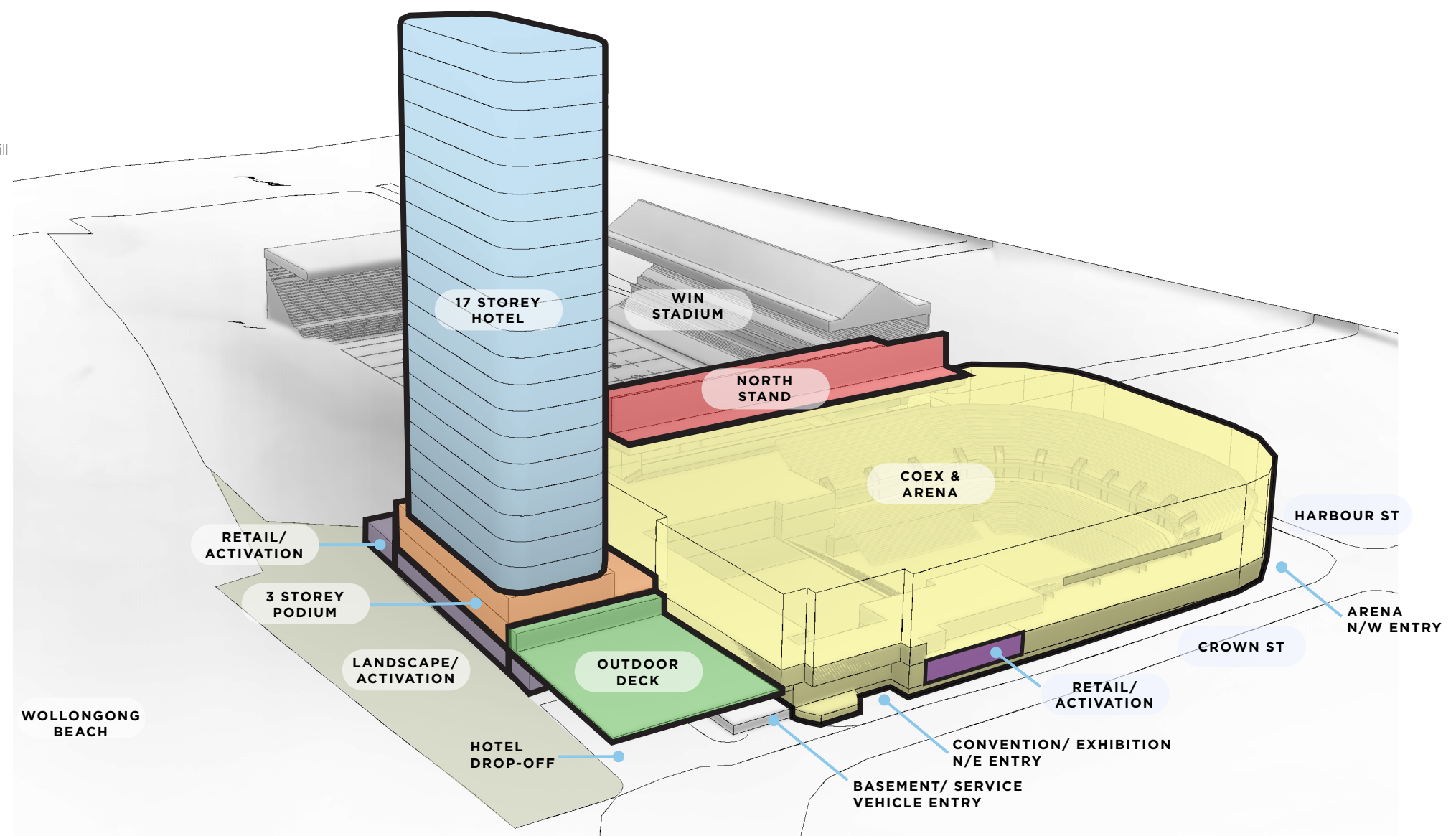
Case Study Scenario - Revised Concept

The Revised Concept

Scenario 2 has been identified as the preferred scenario for the precinct and a Revised Scenario 2 has been further developed as part of this case study. A conceptual block planning study has been undertaken to determine the feasibility of the COEX & Arena, Hotel and WIN Stadium North Stand portion of the site.

Below are some of the additional consideration identified during the concept planning:

- WIN Stadium North Stand and the existing COEX building will need to be demolished as part of this scenario.
- A roadway reduction will need to be considered to both Crown St & Harbour St to increase the site footprint for the scale of the facility.
- Basement/ vehicle servicing and car parking no longer at the eastern edge of the COEX. Relocated access via Crown St allows for landscape and public activation zones on the waterfront.
- A Hotel including 17 Storeys (300 rooms) of accommodation over 3 common podium levels is proposed.



Case Study Scenario - Revised Concept

Key Functional Area Schedule

The following table indicates the functional areas incorporated into the block plans for Revised Scenario 2.

Please note: Assumptions on the Functional Area Provisions are subject to further market demand analysis on event types, content, frequency and market size

KEY FUNCTIONAL AREAS	LEVEL B1	LEVEL 00	LEVEL 01	LEVEL 02	LEVEL 03	LEVEL 04-20	TOTAL	AREA/ PERSON	PAX
ARENA & CONVENTION & EXHIBITION CENTRE	Area m²	Area m²	Area m²	Area m²	Area m²	Area m²	Area m²		
Arena Tiered Seating Bowl - Sport Mode		1241	703	2173			4117	0.55	7485
Arena Tiered Seating Bowl - Concert Mode		771	703	2173			3647	0.55	6631
Arena Floor - Concert Mode		672					672	0.4	1680
Total Concert Mode		1443	703	2173			4319		8311
Exhibition Halls (4 No.)		3900					3900		
BOH Staff Servicing Areas		1067	1171				2238		
Amenities & Food & Beverage		276	533				809		
Storage		1151					1151		
Players/ Performers Facilities		492					492		
Prefunction & Circulation Spaces		955	2695				3650		
Exhibition Hospitality Suites			473				473		
Meeting Rooms							0		
Outdoor Event Deck							0		
Main Production Kitchen		600					600		
Vehicle Loading, Parking & Circulation		2936					2936		
Outside Broadcast		357					357	a	
Mechanical & Electrical Plant							0		
BOH Circulation		615					615		
Vertical Transport		306	234				540		
Waste Management		201					201		
TOTAL COEX		12856	5106	0	0	0	17962		
STADIUM NORTH STAND	Area m²	Area m²	Area m²	Area m²	Area m²	Area m²	Area m²		
Tiered Seating Bowl			560	1019			1579	0.55	2871
Concourse & Vertical Circulation		90	321				411		
Amenities & Food & Beverage			197				197		
Lounges			586				586		
TOTAL STADIUM NORTH STAND		90	1104	0	0	0	1194		
HOTEL	Area m²	Area m²	Area m²	Area m²	Area m²	Area m²	Area m²		
Basement Car Park	6109	929					7038	35	201
Lobby & Podium (3 Storeys)			1425	1425	907		3757		
Hotel Accomodation (17 Storeys - 300 Rooms)						15045	15045		
Retail Activation			685				685		
TOTAL HOTEL	6109	929	2110	1425	907	15045	26525		
TOTAL ALL	6109	13875	8320	1425	907	15045	45681		

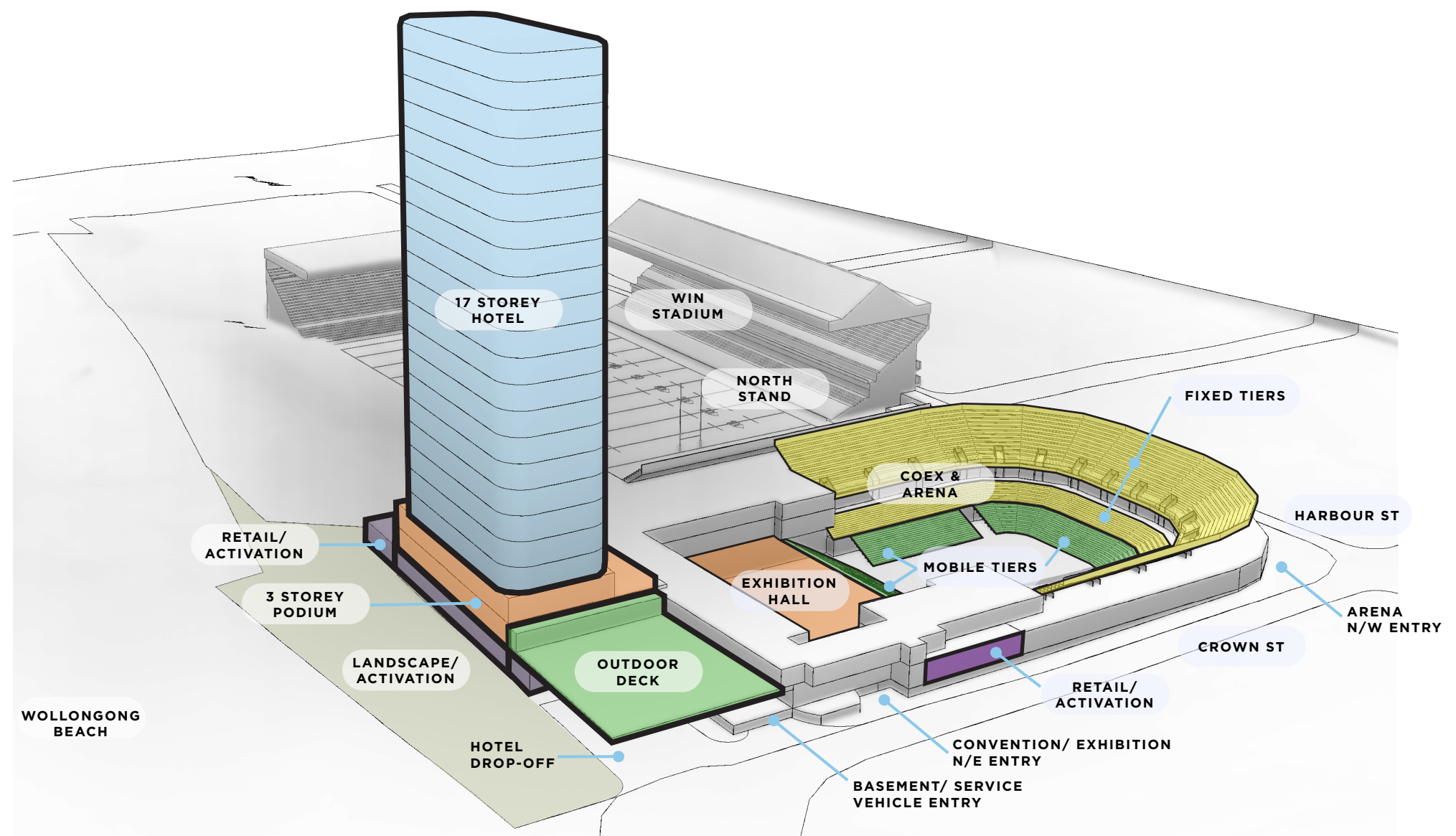
*Not included in area calculations

Car Parks

Case Study Scenario - Revised Concept

3D View - The Arena

In Sports Mode the Arena has the retractable and mobile lower tiers in place while also retaining a portion of exhibition space.

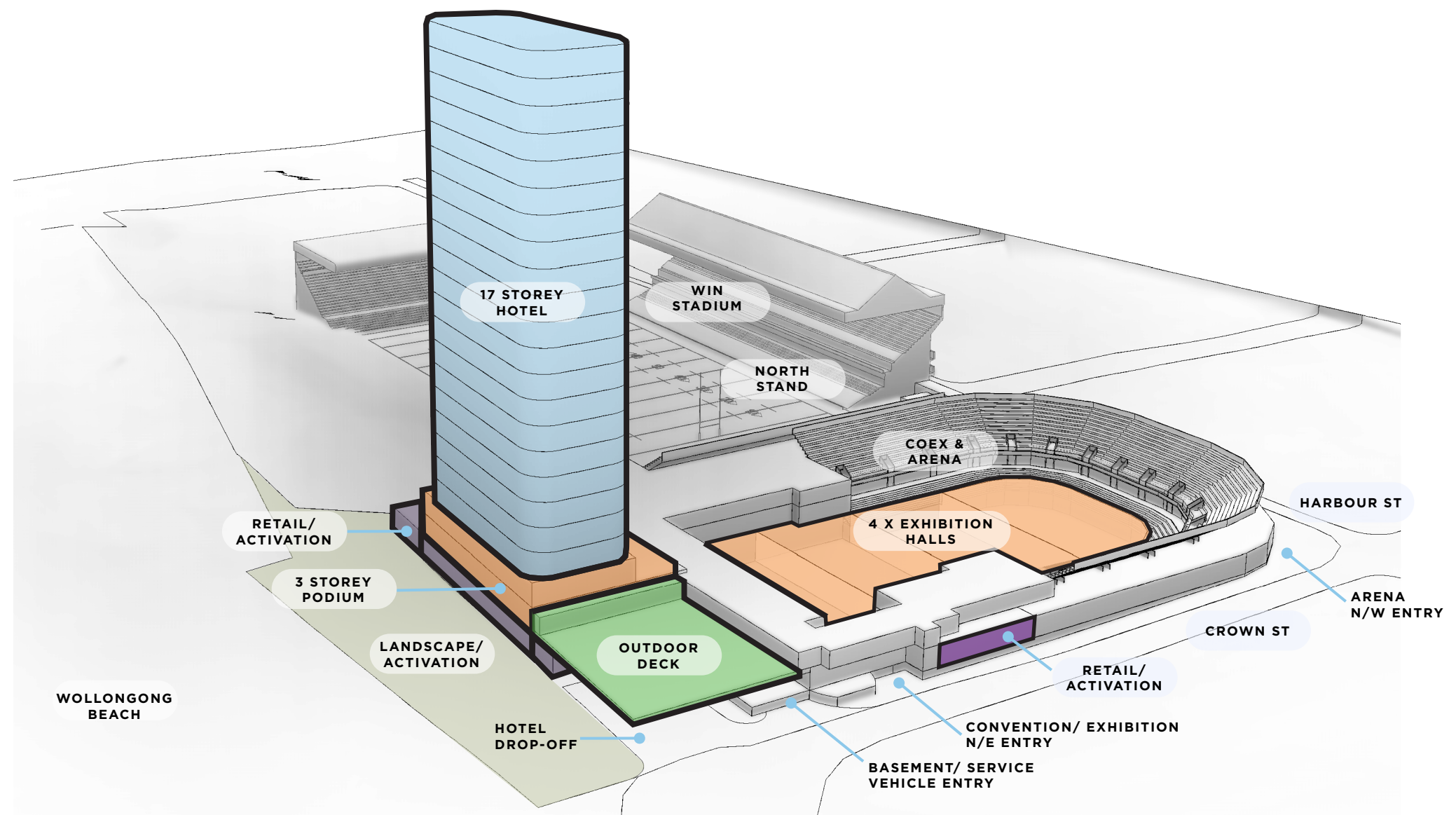


Case Study Scenario - Revised Concept

3D View - The Exhibition Space

The Arena floor is designed in such a way that in full Exhibition Mode the lower tiers are retracted and store to enable a total exhibition space of 3,900m² which can be divided up into 4 or 5 separate exhibition halls.

The flexibility of this design makes it ideal for locations that have a demand for multi-purpose community and professional functions and events to maximise the venues yearly use.



Case Study Scenario - Revised Concept

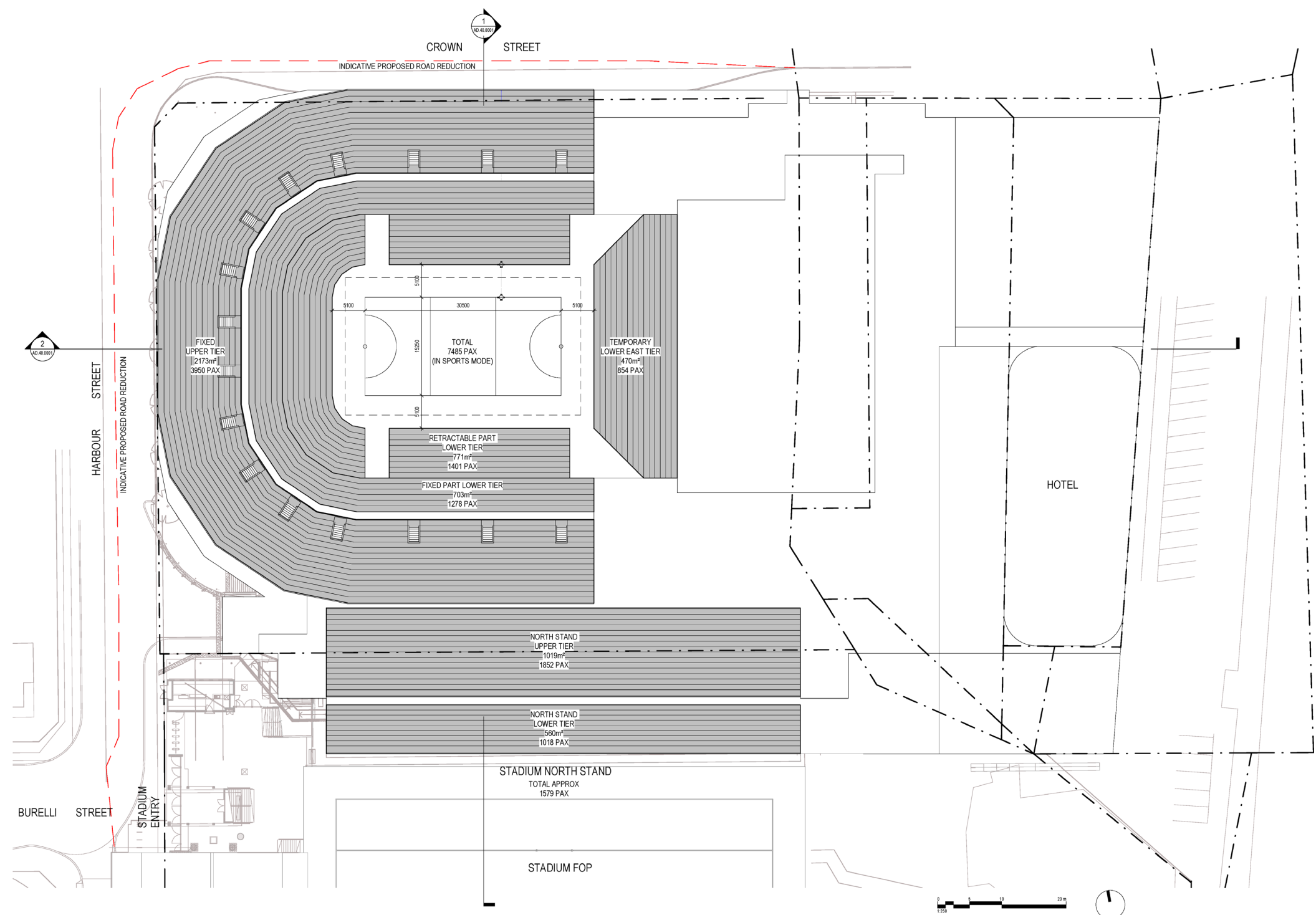
Arena - Sports Mode

The arena is conceptually design to accomodate approximately 7485 seated spectators in sports mode. This concept is designed around the maximum dimensions of a single netball court as the largest field of play, with basketball also nominated as the predominant sport function.

The arena consists of a fixed upper tier and part fixed lower tier all accessed via the Level 01 Concourse which is on grade with the north western entry. The lower portion of the lower tier is to be retractable and mobile for flexibility. The lower east tier will also be retractable and mobile to be stored when the arena is in concert mode.

The arena floor can be used as an additional 2 exhibition halls or it can be opened up to use as one 3900m² space with seats retracted.

The Stadium North Stand seating numbers are indicative only and would require more investigation following a site survey to determine levels.

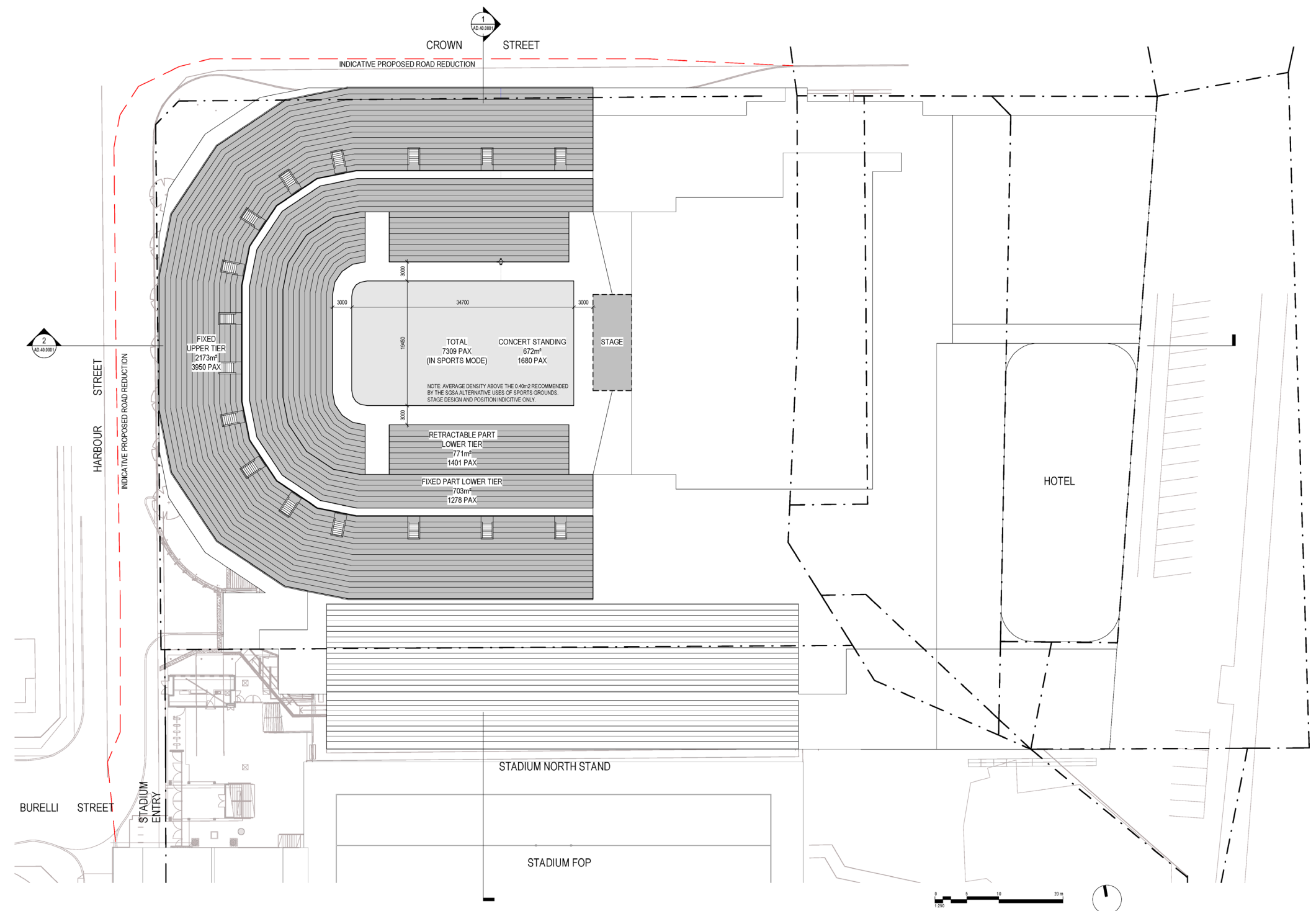


Case Study Scenario - Revised Concept

Arena - Concert Mode

The arena is conceptually design to accomodate approximately 8311 spectators in concert mode (6631 seated and 1680 standing).

Arena BOH storage is easily accessible through the pitch access vomitories and the BOH/ loading areas which are on the same level as the arena floor.

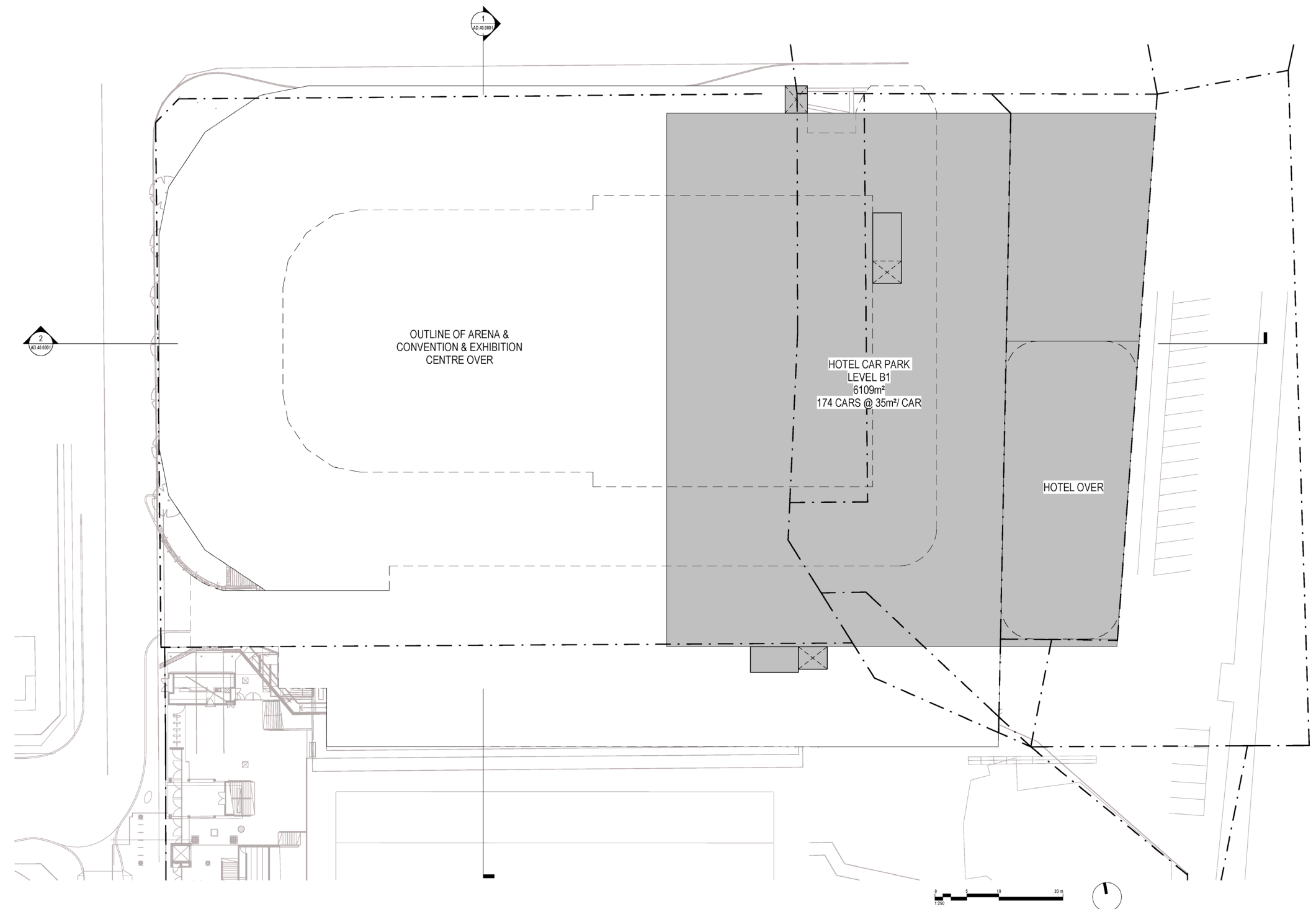


Case Study Scenario - Revised Concept

Basement Level

A basement car park for the Hotel to accommodate 200 cars has been indicatively shown below the hotel and a portion of the COEX (this includes an additional level of hotel basement carpark above at L00).

Further investigation will be required to determine water table levels, egress and other considerations.



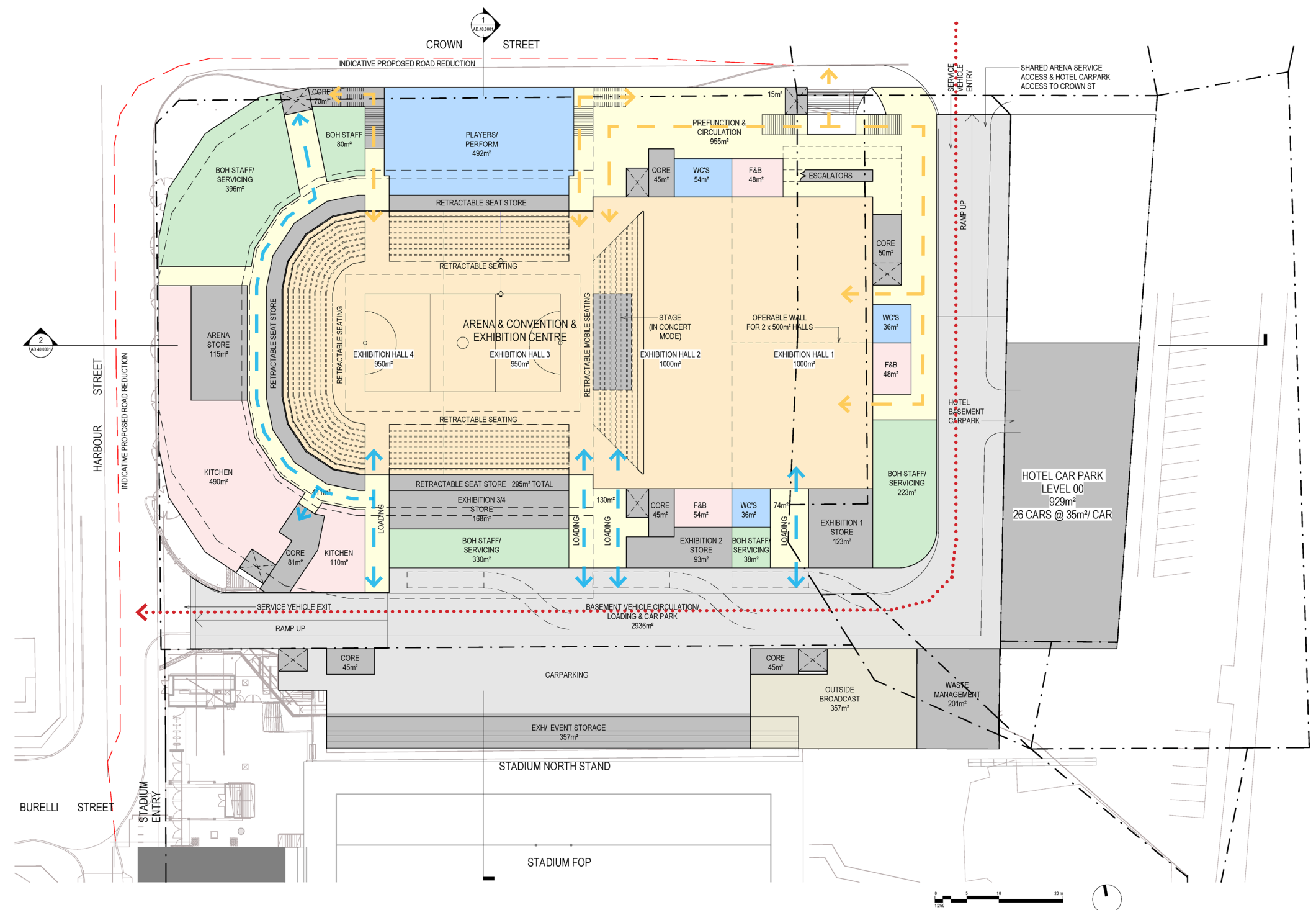
Case Study Scenario - Revised Concept

Level 00 - Field of Play/Event Floor

Level 00 is the main arena and exhibition hall floor. A 600m² kitchen has been provided to the south west to allow access to both the Arena & Stadium. Players/ performance space has direct access from the floor. Each exhibition hall has direct loading access and storage. Indicative food and beverage, amenities, vertical transport and back of house/ admin. areas are all conceptually indicated.

The back of house facilities and circulation are separated from the public access and the main pre-function space is towards the north eastern corner entry.

- ← → FOH Circulation
- ← → BOH Circulation/ Loading
- ← → Service Vehicle Circulation



Case Study Scenario - Revised Concept

Level 01 - Main Concourse/Venue Entry

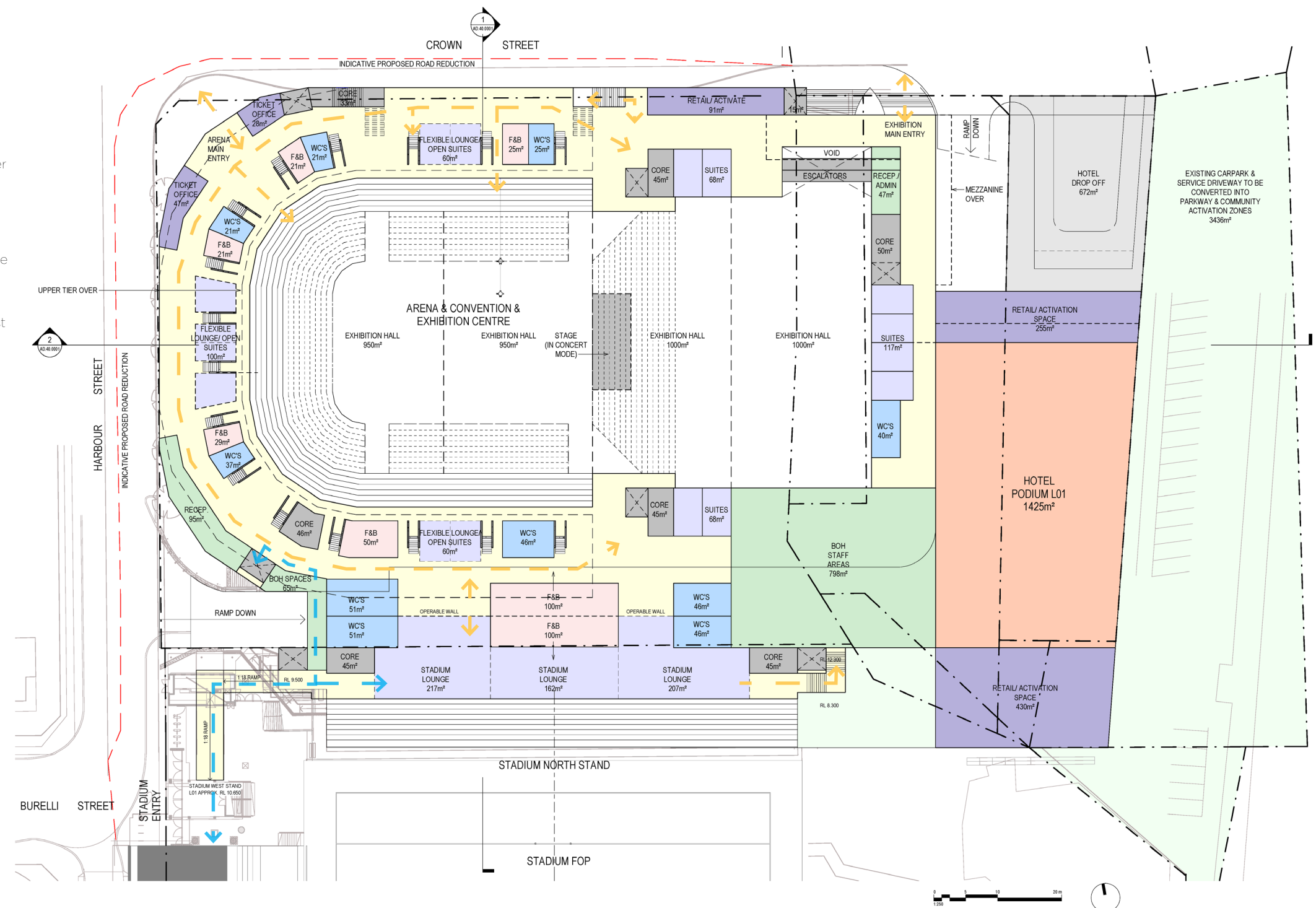
L01 is the main concourse level for both the Arena/ COEX and the Stadium North Stand with the main entry at the north western corner, which is configured as a ground floor entry to the venue from street level. Facilities are back-to-back with the stadium to enable the possibility to open up between the two venues. Open Suites/ Lounges have been incorporated between upper tier vomitories which would be glazed and acoustically treated.

Indicative food and beverage, amenities, vertical transport and back of house/ admin. areas are all conceptually indicated.

The first Hotel podium level and lobby plus activation & retail space are shown at this level along with their connection back to the COEX.

The Stadium North Stand will require ramping up to meet the West Stand along a covered link. Level confirmation required prior to further assessment.

- ← → FOH Circulation
- ← → BOH Circulation/ Loading
- ← → Service Vehicle Circulation



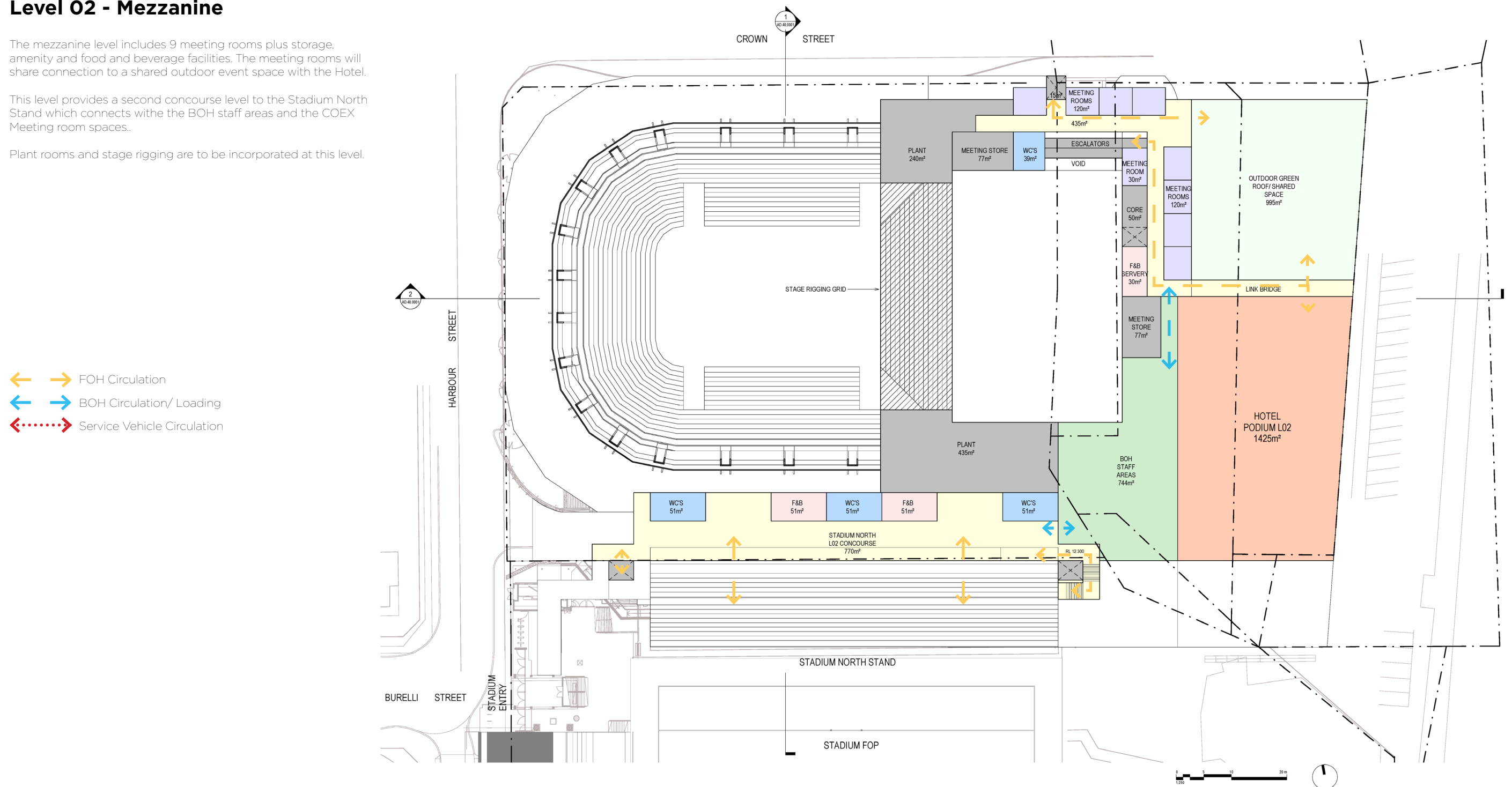
Case Study Scenario - Revised Concept

Level 02 - Mezzanine

The mezzanine level includes 9 meeting rooms plus storage, amenity and food and beverage facilities. The meeting rooms will share connection to a shared outdoor event space with the Hotel.

This level provides a second concourse level to the Stadium North Stand which connects with the BOH staff areas and the COEX Meeting room spaces.

Plant rooms and stage rigging are to be incorporated at this level.



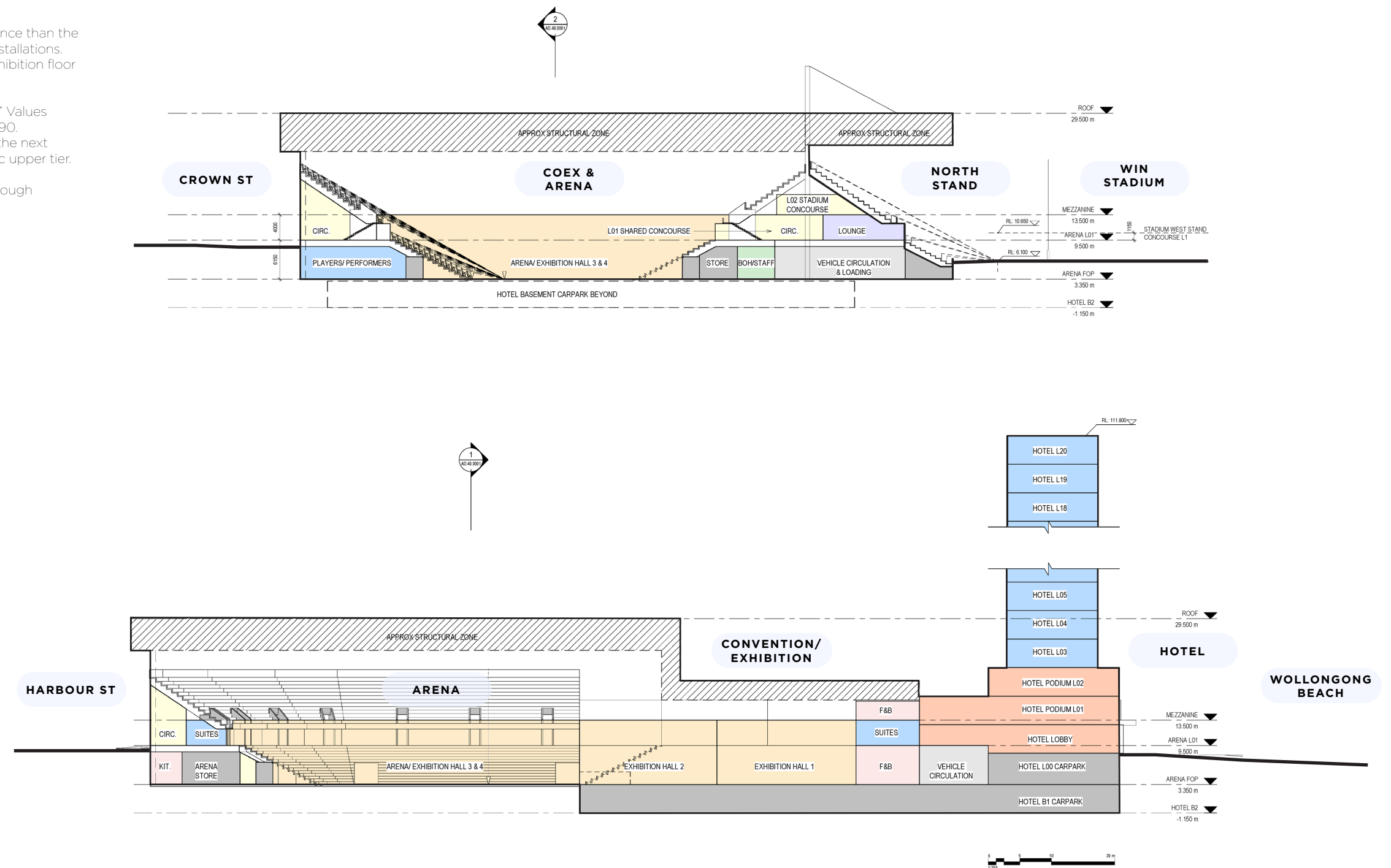
Case Study Scenario - Revised Concept

Sections

The vehicle circulation and loading has a higher clearance than the existing facility to allow for larger concert and event installations. All Arena & Exhibition storage is also at the Arena/ Exhibition floor level for ease of loading.

Based on the maximum single court size of Netball, "C" Values for spectators are conceptually designed to achieve C-90. Opportunities for greater C-Values will be explored in the next stage with a possibility to increase this with a parabolic upper tier.

Connections to the Hotel are indicatively indicated through podium levels at Levels L01 and L02.





WOLLONGONG NSW, AUSTRALIA

POPULOUS®

COVID-19 AND THE POTENTIAL IMPACT ON DATA INFORMATION

The data and information that informs and supports our opinions, estimates, surveys, forecasts, projections, conclusion, judgments, assumptions and recommendations contained in this report (Report Content) are predominantly generated over long periods, and is reflective of the circumstances applying in the past. Significant economic, health and other local and world events can, however, take a period of time for the market to absorb and to be reflected in such data and information. In many instances a change in market thinking and actual market conditions as at the date of this report may not be reflected in the data and information used to support the Report Content.

The recent international outbreak of the Novel Coronavirus (COVID-19), which the World Health Organisation declared a global health emergency in January 2020 and pandemic on 11 March 2020, is causing a material impact on the Australian and world economies and increased uncertainty in both local and global market conditions.

The effects (both directly and indirectly) of the COVID-19 Outbreak on the Australian real estate market and business operations is currently unknown and it is difficult to predict the quantum of the impact it will have more broadly on the Australian economy and how long that impact will last. As at March 2020, the COVID-19 Outbreak is materially impacting global travel, trade and near-term economic growth expectations. Some business sectors, such as the retail, hotel and tourism sectors, are already reporting material impacts on trading performance now and potentially into the future. For example, Shopping Centre operators are reporting material reductions in foot traffic numbers, particularly in centres that ordinarily experience a high proportion of international visitors.

The Report Content and the data and information that informs and supports it is current as at the date of this report and (unless otherwise specifically stated in the Report) necessarily assumes that, as at the date of this report, the COVID-19 Outbreak has not materially impacted the Australian economy, the asset(s) and any associated business operations to which the report relates and the Report Content. However, it is not possible to ascertain with certainty at this time how the market and the Australian economy more broadly will respond to this unprecedented event. It is possible that the market conditions applying to the asset(s) and any associated business operations to which the report relates and the business sector to which they belong could be (or has been) materially impacted by the COVID-19 Outbreak within a short space of time and that it will have a lasting impact. Clearly, the COVID-19 Outbreak is an important risk factor you must carefully consider when relying on the report and the Report Content.

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