

APPENDIX 12. INVESTIGATIONS – EMPLOYMENT LAND ANALYSIS

30 March 2022

Project Number: 3220078

Mr Nick Emmett
Managing Director
Emmett
230 Halifax Street
Adelaide, SA 5000

Via email: NickEmmett@emmett.com.au

Dear Nick,

RE: 550-560 Main North Road, Evanston Park

Emmett (the client) control land at 550-560 Main North Road, in Evanston Park (the Subject Site), north of Adelaide at Gawler.

The Gawler region has significant amounts of land available for future residential development. On this basis, the client has identified that the Subject Site has attributes which make it suitable for consideration for employment land.

As such, the client is seeking a Code Amendment for the Subject Site from the current “General Neighbourhood” designation to “Employment” land. Such an outcome would support future employment uses on the Subject Site and provide services and jobs to the rapidly growing community in and around Gawler.

As part of the Code Amendment proposal, the client is seeking guidance on the economic context for a Code Amendment of the Subject Site to accommodate employment land. This Letter of Advice responds to this requirement.

1.0 Location Context

The Subject Site is located at 550-560 Main North Road, Evanston Park, approximately 2km south of Gawler town centre and 36km north-east of Adelaide CBD. The site is approximately 4.1ha in size with 160 metres of prominent frontage to Main North Road.

Currently, the subject site is covered by the General Neighbourhood zone which supports the desired outcome of “low-rise, low and medium-density housing that supports a range of needs and lifestyles located within easy reach of services and facilities” (PlanSA, Planning and Design Code).

At present, the Subject Site is primarily used as a gardening centre. The opportunity exists to continue and enhance on-site jobs through the future appropriate development of other employment uses on what is a relatively large and strategic site for Gawler.

Another key employment location, the Gawler Green shopping centre is located approximately 250 metres south-west of the Subject Site. This centre includes Coles, ALDI, Bunnings, and a number of supporting retail specialties.

An existing area of employment zoned land is located approximately 700 metres south-west of the Subject Site. This land includes the Gawler Park Village shopping mall, a bulky goods retail centre which includes BCF, Supercheap Auto, Cheap as Chips, and other large format retailers.

Both of the above employment land areas are close to fully developed.

An overview of the locational context for the Subject Site is shown in Figure 1.

Figure 1 Subject Site Location Context



Source: Nearmap with Mapinfo

2.0 Employment Analysis

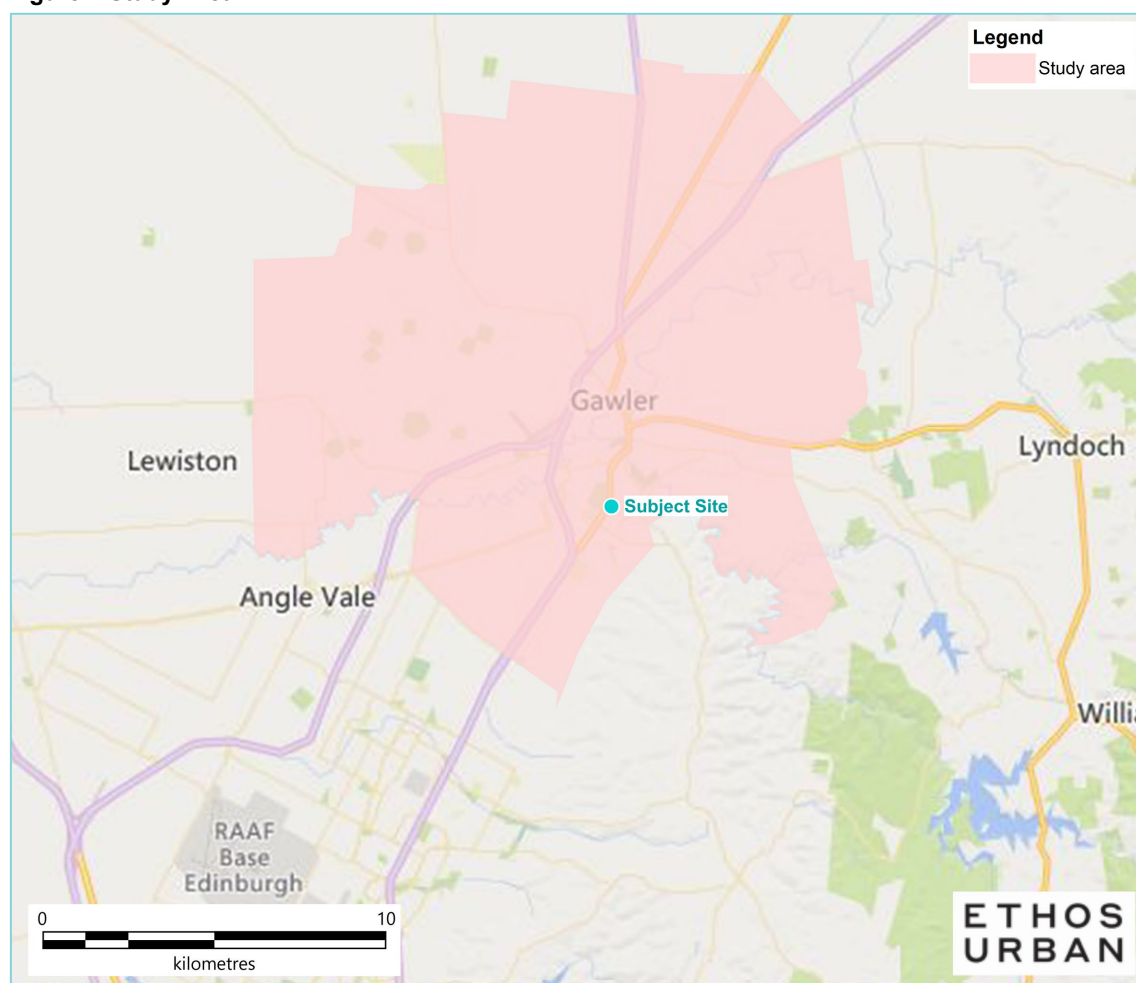
Study Area Definition

A Study Area has been defined in order to assess current and forecast demographic and employment outcomes relevant to the future of the Subject Site.

The defined Study Area includes the Gawler–North and Gawler–South ABS defined Statistical Area 2 (SA2) geographic definitions. This effectively includes the urban areas of Gawler and immediate surrounds, as well as the smaller township of Roseworthy to the north.

This Study Area is shown in Figure 2.

Figure 2 Study Area



Produced by Ethos Urban using MapInfo and BingMaps

Population

The current population of the Study Area is approximately 31,350 persons. This population represents an increase of +4,430 people since 2011 at a rate of +1.5% per annum over the decade. This compares with growth for Greater Adelaide of +1.0% per annum over the same period, Population growth for the Study Area has been driven by residential growth on the northern, southern, and eastern edges of the Gawler urban area.

The Study Area population is forecast to see continued strong growth to 34,280 persons by 2026, or a total increase of +2,930 persons. Beyond 2026 the population is forecast to grow to 42,350 people by 2036, an increase of +11,000 persons on 2021 levels, as shown in Table 1 below.

Table 1: Study Area Historic and Forecast Population, 2011 to 2036

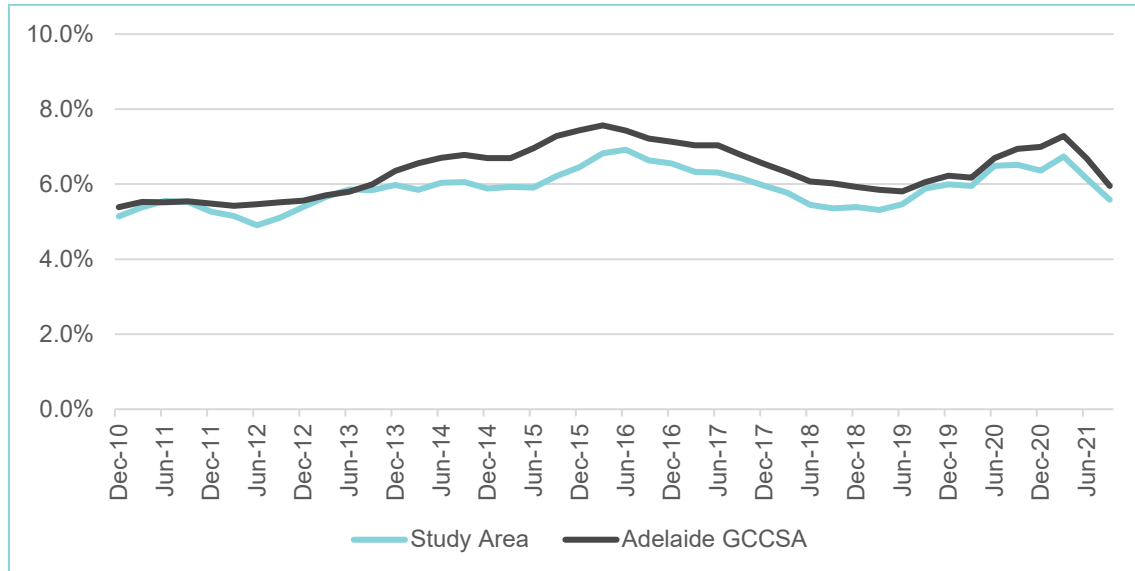
	2011	2016	2021	2026	2031	2036
Population (no.)	26,920	29,410	31,350	34,280	38,250	42,350
Average Annual Growth (no.)		+500	+390	+590	+790	+820
Average Annual Growth (%)		+1.8%	+1.3%	+1.8%	+2.2%	+2.1%

Source: Ethos Urban; ABS, *Estimated Resident Population*, 2021; Department of Planning, Transport and Infrastructure, Government of South Australia, *Population Projections for South Australia*, 2019

Unemployment

Unemployment rates for the Study Area are generally marginally below that observed for Greater Adelaide. As of the September quarter of 2021, the unemployment rate in the Study Area was 5.6%, down from a recent peak of 6.7% in the March 2021 quarter, as shown in Figure 3.

Figure 3 Unemployment Rate, Study Area and Adelaide GCCSA, Dec-10 to Sept-21



Source: Australian Government, *Small Area Labour Markets*, September Quarter 2021

Ongoing employment growth will be required to ensure that the working population of the Study Area continues to experience below-average rates of unemployment and enhanced economic engagement into the future.

Industry of Employment

A relatively high 31% share of workers employed in the Study Area are in the retail trade and health care and social assistance industries.

Growth in the number of workers occurred in nearly all industries in the Study Area between 2011 and 2016, with the only exception being a decline in the number of workers employed in the manufacturing industry.

Overall, the number of workers employed in the Study Area increased by +1,634 jobs between 2011 and 2016, as shown in Table 2.

This reflects total local employment growth of over 300 jobs per annum.

Table 2: Industry of Employment within Study Area, 2011 and 2016

	2011		2016		Difference	
	no.	%	no.	%	no.	Share
Retail Trade	1,078	16.3%	1,284	15.6%	+206	-0.7%
Health Care and Social Assistance	995	15.0%	1,277	15.5%	+282	+0.4%
Education and Training	961	14.5%	1,014	12.3%	+53	-2.2%
Accommodation and Food Services	472	7.1%	716	8.7%	+244	+1.5%
Manufacturing	637	9.6%	620	7.5%	-17	-2.1%
Construction	408	6.2%	608	7.4%	+200	+1.2%
Professional, Scientific and Technical Services	319	4.8%	326	4.0%	+7	-0.9%
Public Administration and Safety	222	3.4%	302	3.7%	+80	+0.3%
Administrative and Support Services	193	2.9%	284	3.4%	+91	+0.5%
Agriculture, Forestry and Fishing	165	2.5%	254	3.1%	+89	+0.6%
Wholesale Trade	169	2.6%	189	2.3%	+20	-0.3%
Transport, Postal and Warehousing	177	2.7%	187	2.3%	+10	-0.4%
Financial and Insurance Services	153	2.3%	169	2.0%	+16	-0.3%
Rental, Hiring and Real Estate Services	103	1.6%	123	1.5%	+20	-0.1%
Arts and Recreation Services	106	1.6%	114	1.4%	+8	-0.2%
Information Media and Telecommunications	54	0.8%	92	1.1%	+38	+0.3%
Mining	14	0.2%	30	0.4%	+16	+0.2%
Electricity, Gas, Water and Waste Services	22	0.3%	28	0.3%	+6	+0.0%
Other Services	323	4.9%	383	4.6%	+60	-0.2%
Inadequately described	47	0.7%	183	2.2%	+136	+1.5%
Not stated	0	0.0%	69	0.8%	+69	+0.8%
Total	6,618	100.0%	8,252	100.0%	+1,634	-

Source: ABS, *Census of Population and Housing*, 2011, 2016

Place of Work

Notwithstanding the growth in local employment between 2011 and 2016 (2021 Census data available later in 2022), the Study Area has a significant mismatch between local employment and the size of the local labour force.

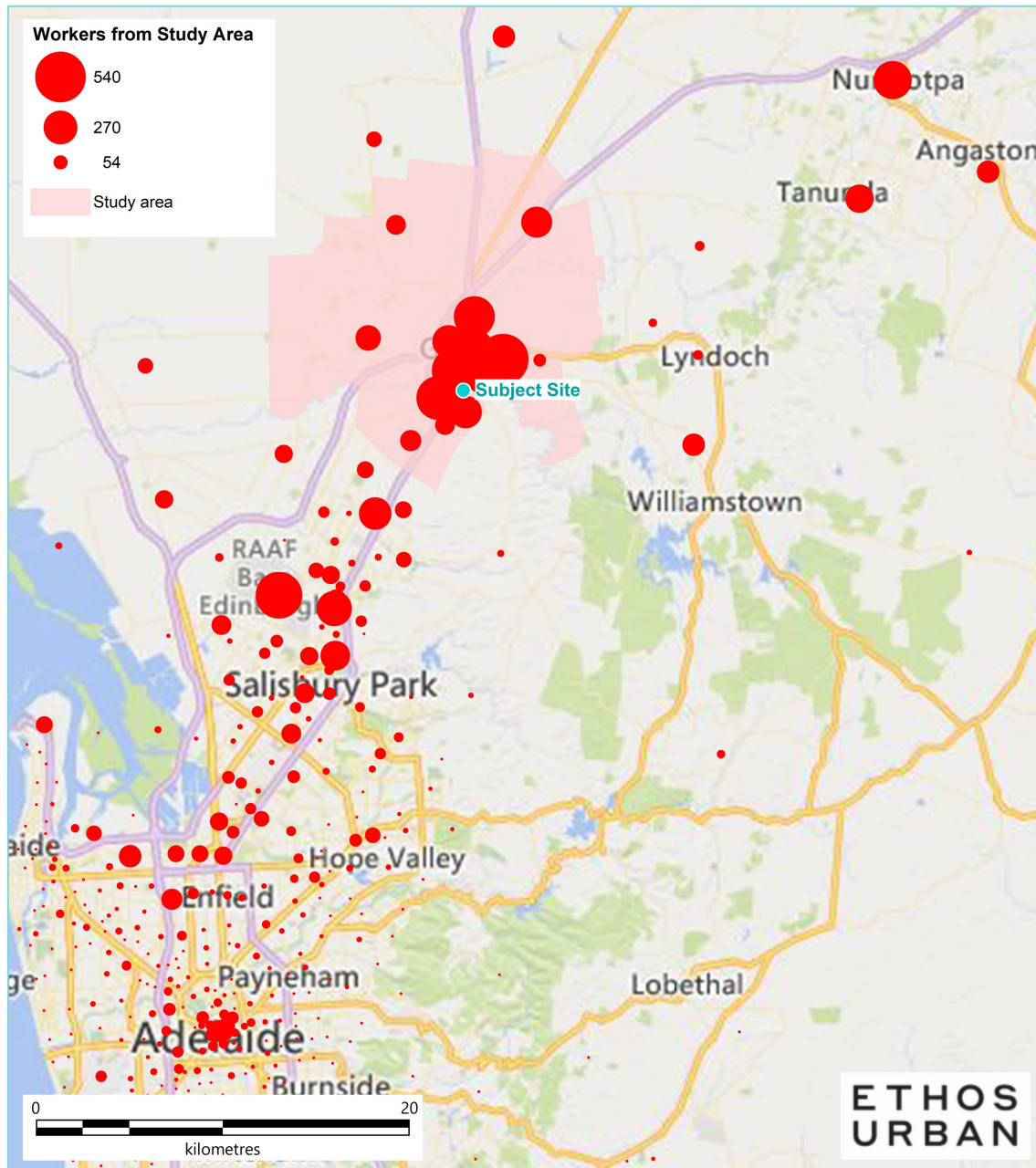
In 2016, just 31.7% of employed persons living in the Study Area had a local job. As such, over 68% of the local workforce has to travel outside of Gawler to access employment. The location of this employment is summarised in Figure 3. This trend is unlikely to have changed significantly since 2016.

As a result, given the rapid growth in population forecast for the Study Area over coming years, it is vital for the economic well-being of the local community that sufficient land and opportunities for local employment are delivered to:

- Maximise local employment opportunities
- Reduce the need to travel outside of Gawler to access employment
- Ensure the economic engagement and well-being of the local community is being supported
- Deliver services and facilities that meet the needs of a rapidly growing population.

The Subject Site potentially has a significant role to play in supporting the above outcomes.

Figure 3 Place of Work for Study Area Residents, 2016



Produced by Ethos Urban using MapInfo, BingMaps, and data from ABS, *Census of Population and Housing*, 2016

Preliminary Assessment of Economic Benefits

On a preliminary basis (and subject to detailed design), the development of the Subject Site for employment uses could result in a total building footprint of approximately 14,000m² if a 30% site coverage is assumed.

This would, again on a preliminary basis, have a total construction cost in the order of \$20 million.

An investment of this scale has the potential during the construction phase to generate approximately 35 direct job years on a full-time equivalent basis. That is, approximately 35 full-time jobs would be located on-site for a construction period of 12-months. Further benefits would also accrue to the local trade and building sector.

Once operational, the ongoing jobs would be highly dependent upon the nature of the tenants. Assuming a mix of bulky goods and showroom type uses, ongoing direct employment would be in the order of 175 ongoing jobs assuming an average of 1 job per 80m² of floorspace.

This represents a significant increase on existing on-site employment associated with the garden centre, and reflects a tangible contribution to local business and employment growth.

3.0 Summary and Conclusion

The analysis indicates that the Subject Site offers attributes which are well-suited to an employment use, including scale and prominent extended frontage to Main North Road. Nearby employment land is almost fully developed, while the surrounding region is experiencing strong population growth.

Although the unemployment rate in Gawler is generally marginally below that for Greater Adelaide, for this to continue significant local employment opportunities will need to be delivered. This should aim to be at a level which reduces the substantial outflow of employed persons from the Study Area that is required to access employment opportunities.

In this regard, the Subject Site provides an opportunity to support local employment growth in a manner that provides tangible support for economic engagement and well-being at Gawler.

I trust this letter of advice is of assistance and I would be happy to provide further advice as required.

Kind Regards,



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