

APPENDIX 11. INVESTIGATIONS – RETAIL CAPACITY ASSESSMENT

Goolwa North Retail Capacity Assessment

Ambo Pty Ltd c/o Future Urban



'Dagura Buumarri'

Liz Belanjee Cameron

'Dagura Buumarri' – translates to Cold Brown Country. Representing Victoria.

The river system illustrated in this visual image is bound in greens and golds to acknowledge the warmth often felt in a colder climate. The rich earth hues of green, reds and browns reflect the local landscapes of this state while the extensive use of rhythmical patterning captures the unique landscapes of flat and mountainous areas. The use of earth colours imparts a sense of strength and serenity while contrasting greens throughout the image reminds us of the lushness of the natural world, where animals and humans once lived in harmony – it reminds us of the importance to protect the lands, waterways and skies and care for our localised environment. Scattered throughout the image are bold colours of oranges – a source of energy that continues to be felt as a life-giving source. The orange hues also portray the varying sunsets in which many Victorians enjoy seeing earth, waterways and skies.

Ethos Urban acknowledges the Traditional Custodians of Country throughout Australia and recognises their continuing connection to land, waters and culture.

We acknowledge the Wurundjeri Woi Wurrung people, of the Kulin Nation, the Traditional Custodians of the land where this document was prepared, and all peoples and nations from lands affected.

We pay our respects to their Elders past, present and emerging.

Contact:	Emma Keller Principal	ekeller@ethosurban.com 0417 558 391	
This document has been prepared by:		This document has been reviewed by:	
Emma Keller	28/07/2023	Sean Stephens	23/08/2023
Version No.	Date of issue	Prepared by	Approved by
1.0 (DRAFT)	24/08/2023	EK	SS
2.0 (FINAL)	28/08/2023	SS	SS

Reproduction of this document or any part thereof is not permitted without written permission of Ethos Urban Pty Ltd. Ethos Urban operates under a Quality Management System. This report has been prepared and reviewed in accordance with that system. If the report is not signed, it is a preliminary draft.



Ethos Urban Pty Ltd | ABN 13 615 087 931 | Level 8, 30 Collins Street, Melbourne VIC 3000, (Wurundjeri Woi Wurrung Land), ethosurban.com

Contents

Executive Summary	i
Project Background and Description	i
Retail Context	i
Retail Capacity Assessment	i
Introduction	1
Background	1
This Report	1
1.0. Project Background and Description	2
1.1. Regional Location	2
1.2. Goolwa North Growth Area	3
1.3. Affected Area	4
2.0. Retail Context	5
2.1. Centres Framework	5
3.0. Retail Capacity Assessment	9
3.1. Dwelling and Population Yields	9
3.2. Retail Spending Capacity	9
3.3. Retail Floorspace Capacity Assessment	10
3.4. Centre Planning Considerations	12
3.5. Centre Land Area Requirements	13
4.0. Recommendations	14

Figures

Figure 1.1	Goolwa Location	2
Figure 1.2	Goolwa North Growth Area Concept Plan	3
Figure 1.3	Goolwa North Growth Area and Affected Area Boundary	4
Figure 2.1	Key Retail Locations	8

Tables

Table 2.1	Relevant Competing Retail	5
Table 3.1	Goolwa North Growth Area Indicative Lot and Population Yield	9
Table 3.2	Average Per Capita Retail Spending, Alexandrina Council, 2023 (\$2023)	10
Table 3.3	Total Retail Expenditure at Development Capacity (\$2023)	10
Table 3.4	Supportable Retail Floorspace at Capacity	11

Executive Summary

Project Background and Description

Coolwa is located within the Alexandrina Council, approximately 16km direct distance east of Victor Harbor and 66km south of Adelaide.

A historic town, Goolwa had a population of approximately 7,370 persons in 2022, representing an increase from 6,440 persons in 2012.

The Goolwa North Growth Area is located on the north-west of fringe Goolwa and covers approximately 565 hectares of land. Recognised as a growth area by Council strategic documents since 2009, Goolwa North growth area is also recognised in the State Government's 30-Year Plan for Greater Adelaide.

In 2016, the Council produced a strategic report titled '*Goolwa North Enquiry by Design Workshop – Outcomes Report*' which prepared a Masterplan to guide the future growth of Goolwa North. The Masterplan identified the core road network, and the general location of facilities and services for the growth area, to provide the framework for future urban growth in Goolwa North.

Under a 2020 Draft Development Plan Amendment (DPA) the Goolwa North Growth Area was proposed to be rezoned to the Suburban Neighbourhood zone and the Deferred Urban zone. However, this DPA did not proceed.

A concept plan introduced by the then proposed DPA identified two 'activity centres' in the Growth Area, which would provide a focus for non-residential development. A retail floor cap of 250m² for individual tenancies was identified for these centres with the rationale that this ensures a fine grain of development and supports the primary role and function of the existing Goolwa Town Centre.

An amendment to the Planning and Design Code is now being sought for an area referred to as the Affected Area. The Affected Area covers 241 hectares of the Goolwa North Growth Area.

The code amendment would rezone the Affected Area from the current Rural Zone to either the Master Planned Township zone or the Neighbourhood zone.

Retail Context

Retail in the Goolwa North Growth Area will operate alongside a range of existing activity centres and retail destinations. Existing centres relevant to the Growth Area includes:

- **Goolwa Town Centre** provides a variety of retail, commercial, community and tourism services to both local Goolwa residents and a wider tourist population.
- **Goolwa Village Shopping Centre**, a supermarket-based shopping centre serving the everyday grocery needs for the Goolwa population.
- **Middleton**, a limited collection of retail serving a convenience role to the local surrounding population.
- **Port Elliot** provides a limited range of convenience retail to both locals and visiting tourists.
- **Hayborough**, a Coles and Bunnings based centre located in the eastern suburbs of Victor Harbor and providing an alternative to the Victor Harbor town centre for grocery shopping. An ALDI and
- **Victor Harbor**, the largest retail offer on the Fleurieu Peninsula, providing higher-order retail to surrounding towns, serving the touristy and visitor market, as well as supporting a range of everyday retail for local residents.

Retail Capacity Assessment

Assuming an average household size of 2.5 persons, the Affected Area is forecast to yield a total population of 7,480 people upon completion, while the remaining growth area will yield a population of approximately 11,060 people. In total, the Goolwa North Growth Area is forecast to yield a population of 18,540 people from the 7,415 lots based on current planning prepared by Future Urban.

At capacity, total retail spending by residents of the growth area is projected to reach \$304.7m, with \$122.9m generated by residents of the Affected Area.

Demand for approximately 11,280m² of retail floorspace is expected in the Goolwa North Growth Area at full development capacity. This is subject to revision based on final growth area planning outcomes.

The recommended outcome for retail in the Goolwa North Growth Area is for two supermarket-based retail centres on either side of Alexandrina Road. The larger centre on the eastern side has a recommended land budget of 2.4 hectares, with that on the western side requiring a land budget of 1.5 hectares.

These neighbourhood-level retail centres would support between 4,000m² and 6,000m² of retail plus a range of other shopfront commercial uses such as real estate agents, post office etc.

Other facilities such as childcare centres, medical centres, allied health facilities, and other such uses that are often located within or on the fringe of an activity centre will also need to be accommodated outside the above land budget.

Introduction

Background

Future Urban are acting on behalf of Ambo Pty Ltd who own significant landholdings in the Goolwa North Growth Area which have been identified by Council and State Government as an area of future urban development.

As such, Future Urban are seeking an amendment to the Planning and Design Code for an area referred to as the Affected Area. The Affected Area covers 241 hectares of the identified 565 hectare Goolwa North growth area. The code amendment would result in a rezoning of the Affected Area from the Rural Zone to either the Master Planned Township Zone or the Neighbourhood Zone.

As part of this code amendment, Future Urban are seeking advice to inform the level of retail that will be required to support the future population of both the Affected Area and the wider Goolwa North Growth Area. As such, a retail capacity assessment is required which examines the appropriate timing, nature and extent of retail uses proposed in Goolwa North.

This Report

This report contains the following chapters:

Chapter 1: Project Background and Description

Chapter 2: Retail Context

Chapter 3: Retail Capacity Assessment

Chapter 4: Recommendations

1.0. Project Background and Description

This Chapter outlines the background relevant to the Goolwa North Growth Area, including an overview of Goolwa's location, the location and details of the Growth Area, and an outline of the relevant policy context.

1.1. Regional Location

Goolwa is located in the Alexandrina Council, approximately 16km direct distance east of Victor Harbor and 66km south of Adelaide. Goolwa is located at the northern end of Long Bay, on the edge of Lake Alexandrina and adjacent the mouth of the Murray River.

A historic town, Goolwa had a population of approximately 7,370 persons in 2022. The town connects to Hindmarsh Island, a popular tourist destination, via Randell Road.

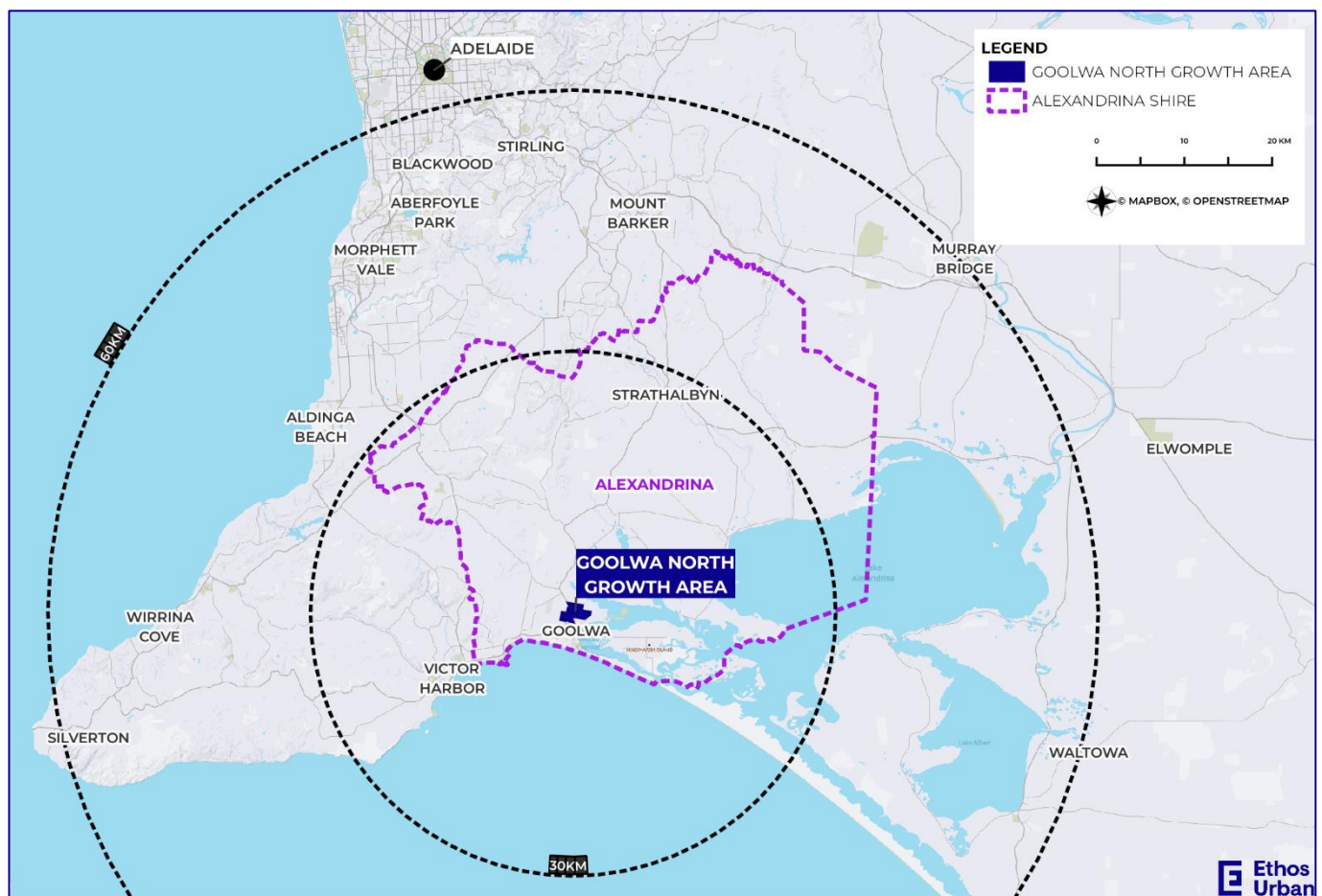
The town of Goolwa comprises the four suburbs, being Goolwa, Goolwa North, Goolwa South and Goolwa Beach.

Alexandrina Council has experienced high rates of population growth over the past decade, with this growth forecast to continue in the future. As of June 2022, the municipality had a resident population of approximately 29,780 persons, an increase of +5,090 persons on the population of 24,690 persons in 2012.

The population of Goolwa increased from 6,440 persons to 7,370 persons over the same decade.

An overview of the locational context for of Goolwa is shown in Figure 1.1.

Figure 1.1 Goolwa Location



Source: Ethos Urban

1.2. Goolwa North Growth Area

The Goolwa North Growth Area is located to the north-west fringe of Goolwa and covers approximately 565 hectares of land, as shown in Figure 1.2. Recognised as a growth area by Council strategic documents since 2009, Goolwa North Growth Area is also recognised in the State Government's *30-Year Plan for Greater Adelaide*.

An Enquiry by Design workshop undertaken for Council in 2016 resulted in the development of a masterplan intended to provide the framework for the future urban growth in the Goolwa North Growth Area. Under the Masterplan, the Growth Area was forecast to support a population of approximately 10,000 people.

The Enquiry by Design Masterplan identified two 'village hubs' in the areas either side of Alexandrina Road. These 'village hubs' are to act as community focal points while not detracting from the primacy of the Goolwa Town Centre.

Figure 1.2 Goolwa North Growth Area Concept Plan



Source: Alexandrina Council

Subsequent to further investigations and analysis, a Development Plan Amendment (DPA) was prepared by Alexandrina Council in 2020. The DPA sought to rezone the Growth Area in order to facilitate the orderly expansion of Goolwa township. Applying the following planning zones was proposed:

- **Suburban Neighbourhood Zone** for the land located south of Stuart Road and east of Skewes Road, primarily supporting residential development with opportunity for new local activity centres to service the new residential area (approximately 200 hectares).
- **Deferred Urban Zone** for land to the north of Stuart Road and west of Skewes Road, identifying the future intention to rezone this land for urban development at some point in the future (approximately 365 hectares).

Under the DPA, a concept plan was introduced which identified two 'activity centres' in place of the previously identified 'village hubs' from the Enquiry by Design Masterplan. These centres were identified to provide a focus for non-residential development, including shops, offices, and consulting rooms.

A retail floor cap of 250m² for individual tenancies was proposed for these centres. This was included to allow a range of small to medium scale shops, while excluding larger shops such as a supermarket.

Public consultation was undertaken for the DPA including a call for submissions process. However, the DPA was not ultimately pursued by Council.

Council has released an updated set of concept plans for the Growth Area, including suggested zoning, as is shown in Figure 1.2.

1.3. Affected Area

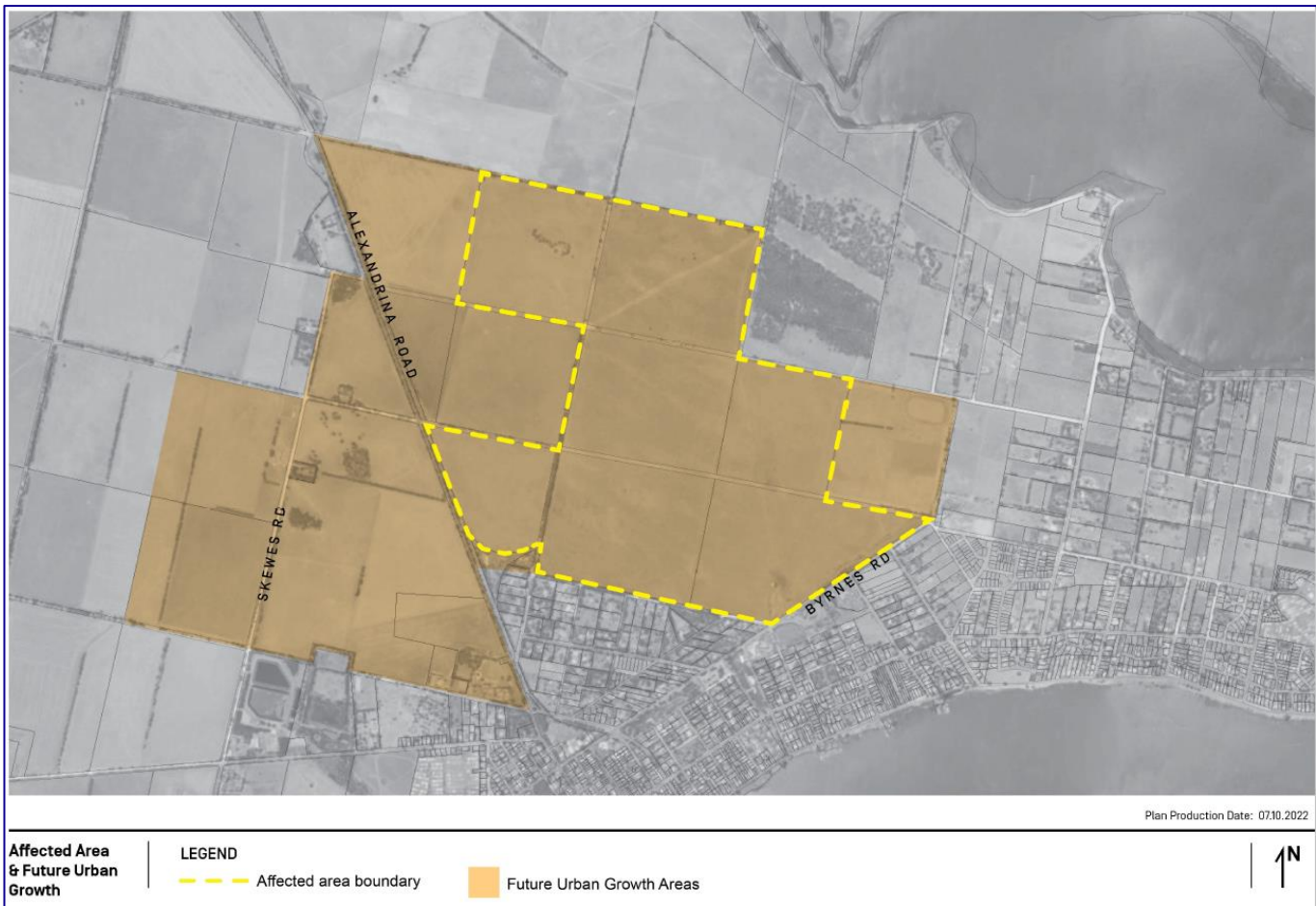
An amendment to the Planning and Design Code is now being sought for an area of 241 hectares in the Goolwa North Growth Area - referred to as the Affected Area.

Comprising slightly less than half of the Goolwa North Growth Area, the code amendment would rezone the Affected Area from the current Rural Zone to either the Master Planned Township Zone or the Neighbourhood Zone.

The rezoning of the Affected Area will allow for the land to accommodate low density residential, along with associated non-residential uses, including retail and community facilities, which will support the future population of the area.

The Affected Area is shown in Figure 1.3.

Figure 1.3 Goolwa North Growth Area and Affected Area Boundary



Source: Future Urban

2.0. Retail Context

This Chapter considers the existing locations for retail floorspace in the region surrounding the Goolwa North Growth Area, including the Goolwa Town Centre.

2.1. Centres Framework

Retail centres in the Goolwa North Growth Area will compete with a range of existing activity centres and retail destinations for a share of the Growth Area retail spending. These range from higher-order centres serving large regional catchments, through to smaller centres primarily serving local residents only.

A summary of the key competing retail locations, including their approximate distance from the Growth Area, retail floorspace, and major traders, are shown in Table 2.1 below. Their location is also shown in Figure 2.1.

Table 2.1 Relevant Competing Retail

Centre	Approx. Direct Distance from Goolwa North Growth Area (km)	Estimated Retail Floorspace (m ²)	Major Traders
Goolwa Town Centre	1.9km	4,500m ²	-
Goolwa Village Shopping Centre	2.1km	7,400m ²	Woolworths, Foodland
Middleton	6.3km	1,000m ²	IGA
Port Elliot	9.7km	4,500m ²	Friendly Grocer
Hayborough	13.4km	10,800m ²	Coles, Bunnings*, ALDI ¹
Victor Harbor	15.7km	45,000m ²	Big W, KHub, Woolworths, Drakes, IGA

Source: Ethos Urban; various sources

Note Bunnings floorspace is not included in retail floorspace figure

1. ALDI located on cnr Adelaide Road and Agnes Gillespie Drive

Goolwa Town Centre

Goolwa Town Centre is focussed on Cadell Street, reaching from Gardiner Street in the north to Porter Street in the south. The centre is comprised of land in the Township Main Street zone, and provides a variety of retail, commercial, community and tourism services to both local Goolwa residents and a wider tourist population.

Retail in Goolwa Town Centre is in a traditional main street retail format. This includes a diverse range of traders including:

- Bakery
- Newsagent
- Florist
- Second hand goods
- Chemist
- Various food options (take away, cafes and restaurants)
- Apparel
- Hairdresser and beauty.

As a destination for tourists and other visitors, Goolwa Town Centre also includes a variety of accommodation operators, with a visitor information centre located at the southern end of the retail strip.

Retail uses also reflect the strong visitor market with the Town Centre including a gift store, lolly shop, along with the food options aligned to serving the tourist population of the town.

A range of non-retail uses are also located through the town centre including multiple real estate agencies, medical uses including GPs, dentist, pathology, and other para-medical uses, as well as a community centre and library.

Development of retail uses in the Goolwa North Growth Area will need to recognise the role of the Goolwa Town Centre as the focus for a wide range of retail and other activities serving a mix of residents and the visitor market.

Goolwa Village Shopping Centre

Goolwa Village shopping centre is located to the south-east of the intersection of Hutchinson Street and Beach Road, approximately 600m south-west of the Goolwa Town Centre. A supermarket-based shopping centre, Goolwa Village is located in the Township Activity Centre zone.

Anchored by a Woolworths supermarket of 3,200m², the shopping centre includes a range of retailers, including a smaller Foodland supermarket of 650m², BWS liquor store, bakery, butcher, café, discount store, newsagency, post office, chemist, and hair and beauty.

The centre serves the everyday grocery and retail needs for the Goolwa population, including the only full-line supermarket (Woolworths) located between Strathalbyn in the north and Hayborough in the west.

Middleton

Middleton is a small town of less than 2,000 people located to the west of Goolwa. Within the Township Activity Centre zone the Middleton town centre supports a limited retail offer focussed on Goolwa Road.

This includes a small IGA of 350m², and a limited range of relatively dispersed specialty retailers including a pharmacy, surf shop, café, and a beauty salon.

Retail in Middleton serves a convenience role for the limited surrounding population, with residents having to travel in order to access a full range of grocery and other everyday retail needs.

Port Elliot

Port Elliot is located west of Middleton and is a town of less than 3,000 people.

Port Elliot supports a limited range of convenience retail, including a 500m² Friendly Grocer, fresh food store, organic shop, butcher, bakery, pharmacy, various food catering retailers, antique and furniture stores, a gift shop, and a hair and beauty operator. These uses are located along the retail high street of North Terrace and fall within the Township Main Street zone.

The retail offer of Port Elliot caters to both locals and visiting tourists, with a number of beach-oriented tourism retail apparent along with various accommodation providers. Similar to Middleton, residents and visitors are required to travel to larger centres in order to access a full range of everyday retail uses.

Hayborough

Hayborough is an eastern suburb of Victor Harbor which supports retail uses under the Suburban Activity Centre zone. Retail uses are located north of the intersection of Adelaide Road and Port Elliot Road, including a Coles, Liquorland, Bunnings, and Reject Shop developed in 2018.

Employment zone land on the eastern side of Adelaide Road also supports a Tradelink store, along with a range of light industrial retail uses including a curtain and blinds store, and a carpet store.

A short distance to the north is an ALDI supermarket. This is currently a standalone store although it is anticipated that a range of showrooms and other larger tenants (potentially including retail) will locate on adjacent land with shared carparking.

Retail in Hayborough offers an alternative option to the Victor Harbor town centre for residents of Victor Harbor seeking everyday retail. This is particularly the case for residents located east of the town centre, and in areas extending further east and north including Port Elliot and Middleton.

Victor Harbor

Victor Harbor is a regional city of approximately 17,000 people and the largest population centre on the Fleurieu Peninsula.

Due to this, the town centre has the largest retail offer in the region and acts as a regional centre for surrounding smaller population areas.

Retail in Victor Harbor is primarily located on and around Torrens Street, with retail falling under either the Urban Activity Centre zone or the Suburban Main Street zone.

This retail includes the Victor Central shopping centre of over 19,000m² which includes Big W and KHub discount department stores and a Woolworths supermarket.

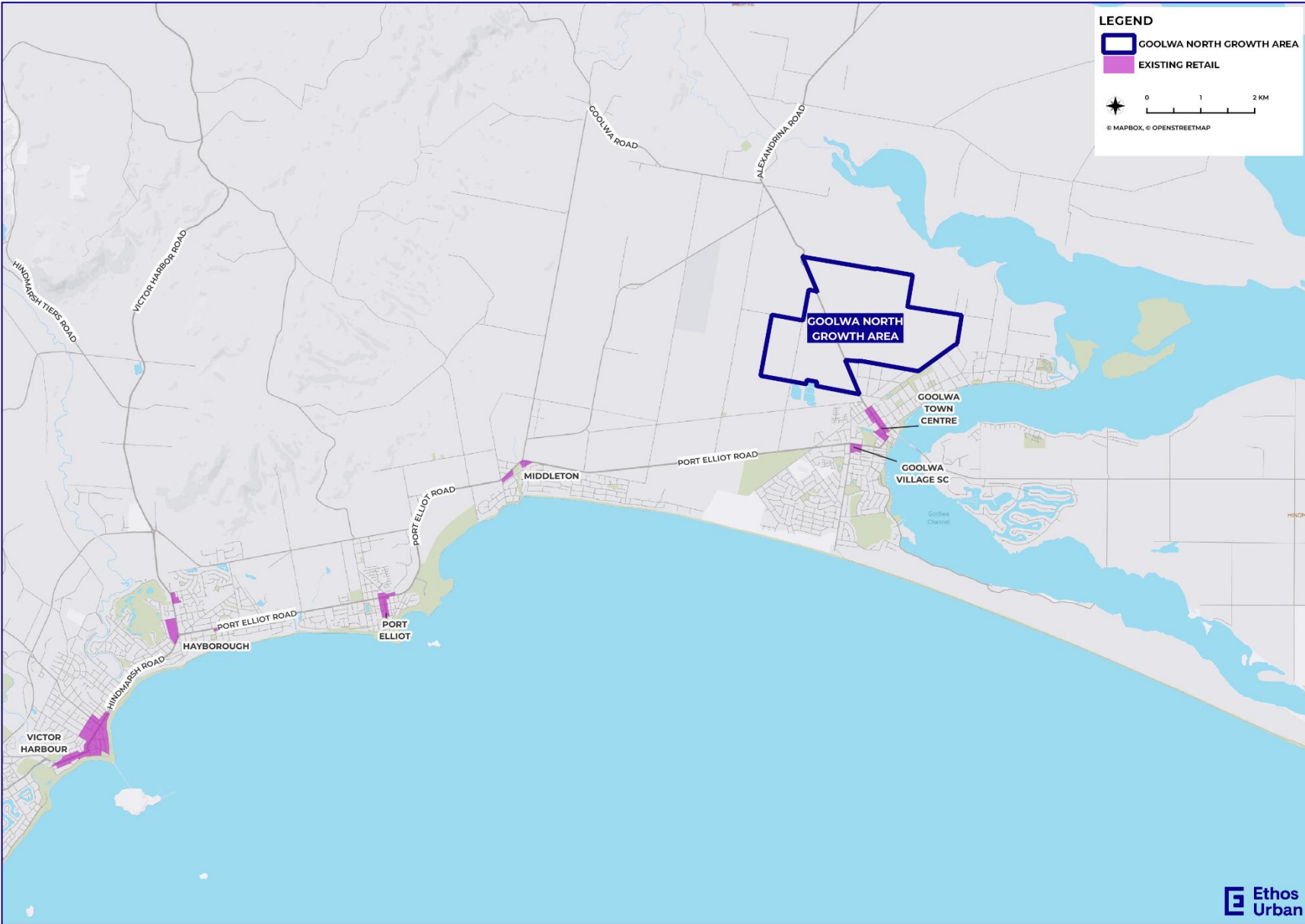
A Drakes supermarket is also located in a centre at the intersection of Torrens Street and Seaview Road.

Being the largest city in the surrounding region, Victor Harbor provides higher-order retail and other facilities to surrounding towns as well as having a range of everyday retail for local residents.

Other

Some spending will also be directed to centres located further afield, including to the north at Strathalbyn and the Adelaide Hills region, as well as in metropolitan Adelaide for more occasional or large purchases.

Figure 2.1 Key Retail Locations



Source: Ethos Urban

3.0. Retail Capacity Assessment

This Chapter undertakes an assessment of supportable retail floorspace for the Goolwa North Growth Area through assessment of dwelling and population yields, retail spending capacity, and retail floorspace capacity. Centre planning considerations and land area requirements are also highlighted.

3.1. Dwelling and Population Yields

An assessment of residential supply and demand has been undertaken by Future Urban to determine the likely residential yield of the Affected Area and the wider Goolwa North Growth Area.

This residential supply assessment includes two scenarios:

- **Scenario A** assumes allotment sizes in accordance with current market preferences in the region.
- **Scenario B** assumes a marginally higher yield that reflects a reduction in typical lot sizes as has been experienced in some other growth areas of Australia.

The Future Urban assessment indicates that Scenario B will be used for infrastructure planning purposes. As such, **Scenario B is the basis for retail floorspace forecasting in this Report.**

Scenario B outlines a total yield for the Affected Area of 2,990 residential lots. The balance Growth Area is identified as having a potential yield estimated 4,425 lots. Lots sizes are assumed to vary in size from 300m² to 800m².

A total yield of 7,415 residential lots is forecast for the Goolwa North Growth Area under scenario B.

Development of the Affected Area could take anywhere between 14 and 25 years to complete according to the Future Urban assessment.

Currently, Alexandrina Council has an average household size of 2.3 people per household. The assessment notes that the Goolwa North Growth Area will accommodate a greater share of family households than the aging population of the existing Goolwa area. As such, an average household size of 2.5 has been adopted for the Growth Area.

Assuming an average household size of 2.5, the Affected Area is forecast to yield a total population of 7,480 people upon completion, while the remaining growth area will yield a population of approximately 11,060 people. In total, the Goolwa North Growth Area is forecast to yield a population of 18,540 people from the 7,415 lots, as shown in Table 3.1.

Table 3.1 Goolwa North Growth Area Indicative Lot and Population Yield

Area	Lots	Population
Affected Area	2,990	7,480
Remaining Growth Area	4,425	11,060
Total	7,415	18,540

Source: Future Urban (Scenario B); Ethos Urban

3.2. Retail Spending Capacity

The following provides an analysis of the retail spending behaviour for future growth area residents, based on average retail spending levels in Alexandrina Council.

Estimates of retail spending have been prepared with reference to the MarketInfo retail spending model. MarketInfo is a micro-simulation model which uses data from the ABS Household Expenditure Survey (HES), the ABS Census of Population and Housing, ABS Australian National Accounts, and other relevant sources.

The retail spending data is presented across four major spending categories:

- **Food, Liquor and Groceries (FLG)**, which includes fresh food, groceries and take-home liquor, including supermarkets.

- **Food Catering**, which includes cafes, restaurants and takeaway food.
- **Non-Food**, which includes apparel, homewares, bulky merchandise and general merchandise.
- **Retail Services**, including hairdressers, beauty salons and similar services.

Estimates of average per capita retail spending in 2023 for Alexandrina Council, compared with Greater Adelaide, are shown in Table 3.2.

Average per capita retail spending by Alexandrina Council residents is estimated at \$16,440, which is -1.4% below the Greater Adelaide median. All spending estimates in this report are expressed including GST and in constant 2022 dollars.

Table 3.2 Average Per Capita Retail Spending, Alexandrina Council, 2023 (\$2023)

Area	FLG	Food Catering	Non Food	Services	Total Retail
Alexandrina Council	\$7,490	\$1,670	\$6,700	\$580	\$16,440
Greater Adelaide	\$7,220	\$1,980	\$6,870	\$600	\$16,680
Alexandrina Council variation from Greater Adelaide average	3.7%	-15.7%	-2.5%	-3.3%	-1.4%

Source: MarketInfo; Ethos Urban

The Alexandrina Council per capita spending level provides a 'best estimate' for the per capita spending of the Goolwa North Growth Area population at capacity (i.e. at completion of development). This has consideration for the likely future socio-economic characteristics of the area, particularly the greater share of family households relative to the demographics of Goolwa in isolation.

Estimates of total retail expenditure by residents of the Affected Area and the remaining Growth Area at full development capacity are detailed in Table 3.3 and have been calculated by applying average per capita spending levels to the capacity population from Table 3.1.

Note, retail spending figures are expressed in constant 2023 terms, excluding retail inflation and GST. Figures also do not include an allowance for real growth in per capita spending over time. This is due to the uncertainty around the timing of when the Goolwa North Growth Area will reach capacity.

At capacity, total retail spending by residents of the growth area is projected to reach \$304.7m, with \$122.9m generated by residents of the Affected Area.

Table 3.3 Total Retail Expenditure at Development Capacity (\$2023)

Retail Category	Affected Area	Remaining Growth Area	Total Goolwa North Growth Area
FLG	\$56.0m	\$82.8m	\$138.8m
Food Catering	\$12.5m	\$18.5m	\$31.0m
Non-Food	\$50.1m	\$74.1m	\$124.3m
Services	\$4.3m	\$6.4m	\$10.7m
Total Retail	\$122.9m	\$181.8m	\$304.7m

Source: MarketInfo; Ethos Urban

3.3. Retail Floorspace Capacity Assessment

An assessment of the potential demand for retail floorspace in the Goolwa North Growth Area when population capacity is achieved, taking into account the retail context, is presented in Table 3.4.

This assessment is based on the following assumptions:

- Growth area population capacity as outlined in Section 3.1 of this report.
- Growth area retail spending capacity as outlined in Section 3.2 of this report.
- High level market share of 25% for retail located in the growth area, including:
 - 50% for FLG retail

- 25% for food catering retail
- 5% for non-food retail
- 30% for retail services.
- An estimated 10% of retail turnover to come from residents outside the growth area.
- An average supportable trading level of \$7,500 per m², reflecting a healthy retail offer with a range of quality retailers.

Based on this analysis, demand for approximately 11,280m² of retail floorspace is expected in the Goolwa North Growth Area at full development capacity.

Note that this reflects an outcome where 75% of spending by residents is directed to retail located outside the Growth Area, including the Goolwa Town Centre and other centres identified in Chapter 2.

Table 3.4 Supportable Retail Floorspace at Capacity

Category	Affected Area	Remaining Growth Area	Goolwa North Growth Area
Spending at Capacity	\$122.9m	\$181.8m	\$304.7m
Spending Retained (%)	25%	25%	25%
Spending Retained (\$)	\$30.7m	\$45.4m	\$76.2m
Share of Sales from Beyond Trade Area	10%	10%	10%
Retail Sales Available for Trade Area Retailers	\$34.2m	\$50.5m	\$84.6m
Average Supportable Trading Level	\$7,500/m ²	\$7,500/m ²	\$7,500/m ²
Retail Floorspace Demand	4,550m²	6,730m²	11,280m²

Source: Ethos Urban

The 2020 DPA recommended two activity centres be included in the Goolwa North Growth Area as a focus for non-residential development, including acting as ‘community focal points’.

This recommendation also included consideration of a retail floorspace cap of 250m² for individual tenancies. The rationale provide is that this:

“would allow a range of small to medium scale shops while excluding larger shops such as a ‘typical’ supermarket.” (Goolwa North Growth Area Development Plan Amendment – Explanatory Statement and Analysis Draft #2 Page 42)

The analysis undertaken at that time also considered that at full development, the development capacity of the Goolwa North Growth Area would accommodate slightly over 10,000 people. This was on the basis of urban densities well-below what is expected to be delivered based on current expectations, and significant land devoted to non-residential uses which is unlikely to be required in practice.

More detailed planning and evolving expectations of the desired urban density which reflect changes in community preferences and affordability considerations mean the Growth Area is now forecast to host over 18,500 people at capacity. This is nearly double the 10,000 people previously forecast under the 2020 DPA.

We consider that the two centres identified in the 2020 DPA are manifestly insufficient to ensure that the projected Growth Area population is appropriately served by local retail facilities. This takes into account the ability of the Goolwa Town Centre and Goolwa Village SC to contribute to meeting the needs of these residents.

Retail Centre Recommendations

Based on the forecast retail floorspace demand, the recommended outcome for retail in the Goolwa North Growth Area is as follows:

- Two retail centres of between 4,000m² and 6,000m² of retail floorspace each.
- Each centre would be anchored by a supermarket, with at least one of the centres likely to contain a full-line supermarket of 3,000m²-plus, and the other centre at least a mid-sized supermarket of 2,000m²-plus
- In general terms a location on each side of Alexandrina Road is appropriate
- A minimum distance between the centres of approximately 1 kilometre is required.

Both centres - with timing of delivery determined by the rate of urban development that is achieved - would ensure that the contemporary day-to-day shopping needs of Growth Area residents are met in an accessible location.

The two centres would operate as part of the wider hierarchy of centres serving the wider Goolwa urban area, which is likely to see a total population of 26,000 to 30,000 people at full development of the Growth Area.

Additional Opportunities

In addition to retail floorspace, activity centres in the Growth Area will also support some shopfront commercial floorspace. As a general guide, shopfront commercial floorspace is generally at between 10% to 20% of total retail floorspace. As such, allowing for 15% of floorspace to be shopfront commercial uses, neighbourhood level retail centres of 4,000m² to 6,000m² would support in the range of 600m² to 900m² of commercial floorspace such as small offices, non-retail shops etc.

Note that this does not include uses such as childcare centres, medical centres, or dedicated office uses.

Additional opportunities will also be generated in the form of childcare centres, medical centres, allied health facilities, and other such uses that are often located within or on the fringe of an activity centre.

3.4. Centre Planning Considerations

In considering the planning and development of retail in the Goolwa North Growth Area, the following is relevant:

- The need to ensure that future residents of the Growth North Growth Area identified are appropriately served by a convenient and accessible range of retail and commercial functions that support their contemporary lifestyle requirements
- Ensuring that the role and function of the Goolwa Town Centre is retained and that the centre also grows and evolves to meet emerging demand driven, at least in part, by development of the Growth Area
- Delivering retail and commercial development that supports local employment growth, business development and economic opportunity
- That the proposed centres in the Growth Area are of a scale and function that emphasises meeting the day-to-day food and other needs of the population, in particular supermarkets of appropriate scale supported by a range of specialty shops
- That other large-format uses such as bulky goods retail etc are not considered appropriate for the centres, although the potential may exist to deliver some bulky goods at another location in the wider Goolwa urban area.

In order to best serve the incoming Growth Area population, it is recommended that centres are placed either side of Alexandrina Road as is generally identified for the Local centres identified in the 2020 PDA. These centres should be placed central to the incoming Growth Area population, preferably at the intersection of major roads through the area.

The higher population to be delivered on the eastern side of this Alexandrina Road (based on current preliminary planning) means that this is the more likely location for a larger centre including a full-line supermarket. In the case of the eastern side of the Growth Area, a centre would be best located where consideration is made to serve the Affected Area initially, while still allowing for a location able to serve the wider Growth Area when that is subsequently developed.

It is recommended that as the planning for the wider growth area progresses, the exact location and size of these centres be determined in relation to the planned road network and final expectations of population yield.

In our experience, the implications of allowing for insufficient land for the development of retail meeting local day-to-day needs include:

- A lack of amenity for local residents in terms of the speed and convenience of meeting their basic needs
- Additional travel requirements of residents resulting from a lack of localised options
- Excess demand at other retail locations resulting in congestion and loss of convenience and amenity for all users
- Reduced local jobs and economic opportunity.

This needs to be balanced against ensuring the operation of an efficient centres hierarchy, including ensuring the primacy of centres such as the Goolwa Town Centre in meeting a diverse range of retail and other needs is retained.

3.5. Centre Land Area Requirements

Site coverage of 30% is considered typical for neighbourhood-level activity centres having regard for typical car parking and landscaping requirements. However, this may vary marginally depending on individual circumstances, and assuming a single -level development is delivered.

The above analysis results in a preliminary recommendation (subject to detailed planning for the Growth Area) as follows:

- **Retail Centre East:** Located east of Alexandrina Road and including approximately 7,000m² of shopfront floorspace including both retail and non-retail components. Expected to include a full-line supermarket of n 3,000m²-plus.

Assuming a 30% site coverage, an appropriate allowance is for approximately 2.4 hectares of land.

- **Retail Centre West:** Located west of Alexandrina Road and including approximately 4,500m² of shopfront floorspace including a mid-sized supermarket of 2,000m²-plus.

Allowing for a 30% site coverage, a land budget of approximately 1.5 hectares is appropriate.

Note that this is an allowance for 'shopfront' floorspace only. It will also be appropriate to consider the potential for non-shopfront related commercial uses, potentially including:

- Gyms and other health/fitness activities
- Community centres and other social infrastructure often co-located with retail centres
- Medical consulting rooms and other para-medical services
- Childcare and other child-based infrastructure and services
- Dedicated office space, often located above shops.

4.0. Recommendations

Based on the preceding analysis, the following key findings and recommendations are provided in relation to the development of retail in the Goolwa North Growth Area.

Site Location

Given the early stages of planning the Goolwa North Growth Area is currently in, it is hard to specifically note where retail should be located. However, it is recommended that an activity centre be located central to the growth population on each side of Alexandrina Road, and that an appropriate location for these centres would be at the intersection of major roads through the Growth Area.

Nature and Scale of Retail

A retail floorspace assessment considering the capacity of the Growth Area to support retail floorspace found that the Goolwa North Growth Area could support approximately 11,280m² of retail floorspace, with this recommended to be provided in the form of two neighbourhood level activity centres of 4,000m² to 6,000m² retail floorspace.

In addition to this, opportunities including commercial floorspace of 600m² to 900m² will be supported at each centre, along with childcare centres, medical centres, allied health facilities, and other such uses that are often located within or on the fringe of an activity centre.

Land Area Requirements

Based on the above assessment and neighbourhood level activity centres of 4,600m² to 6,900m² floorspace, it is recommended that 1.5 to 2.3ha of land be reserved to accommodate each of the identified centres.