CONNOR
HOLMES

BUCKLAND PARK PROPOSAL

CENTRES PLANNING

Prepared for
WALKER CORPORATION
& DAYCORP

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CONTENTS

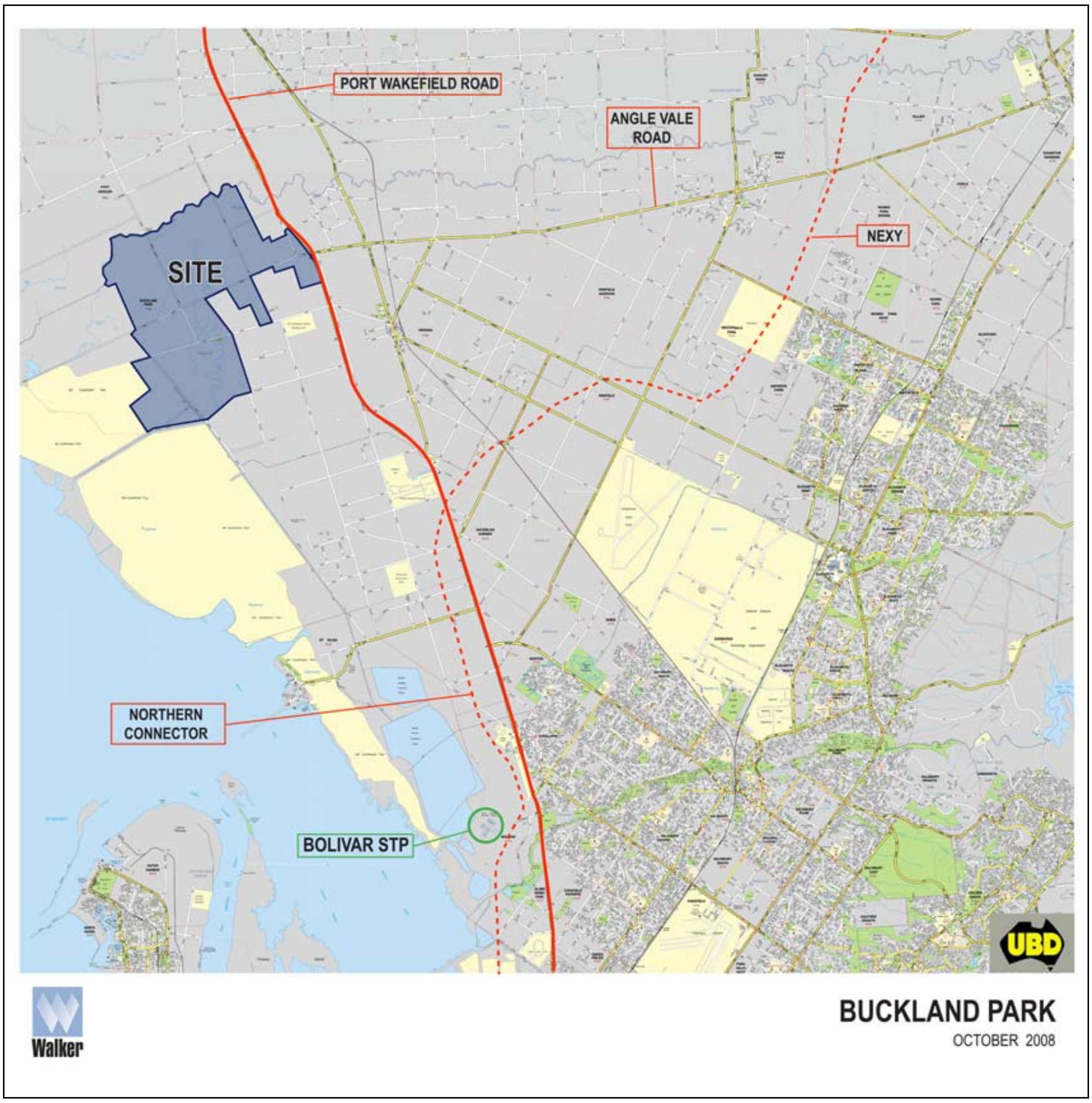
1. INTRODUCTION

This report provides an analysis of Buckland Park's requirements for centres and retail facilities. It considers these requirements within the context of the region's existing centres and the communities which support them.

The Buckland Park proposal is a joint venture of Walker Corporation and Daycorp. The site has an area of 1,308 hectares.

Buckland Park is located in Adelaide's north western region, on Port Wakefield Road within the City of Playford, west of Virginia. It is around 32 kilometres north of the Adelaide CBD and 14 kilometres from Elizabeth, see Figure 1.

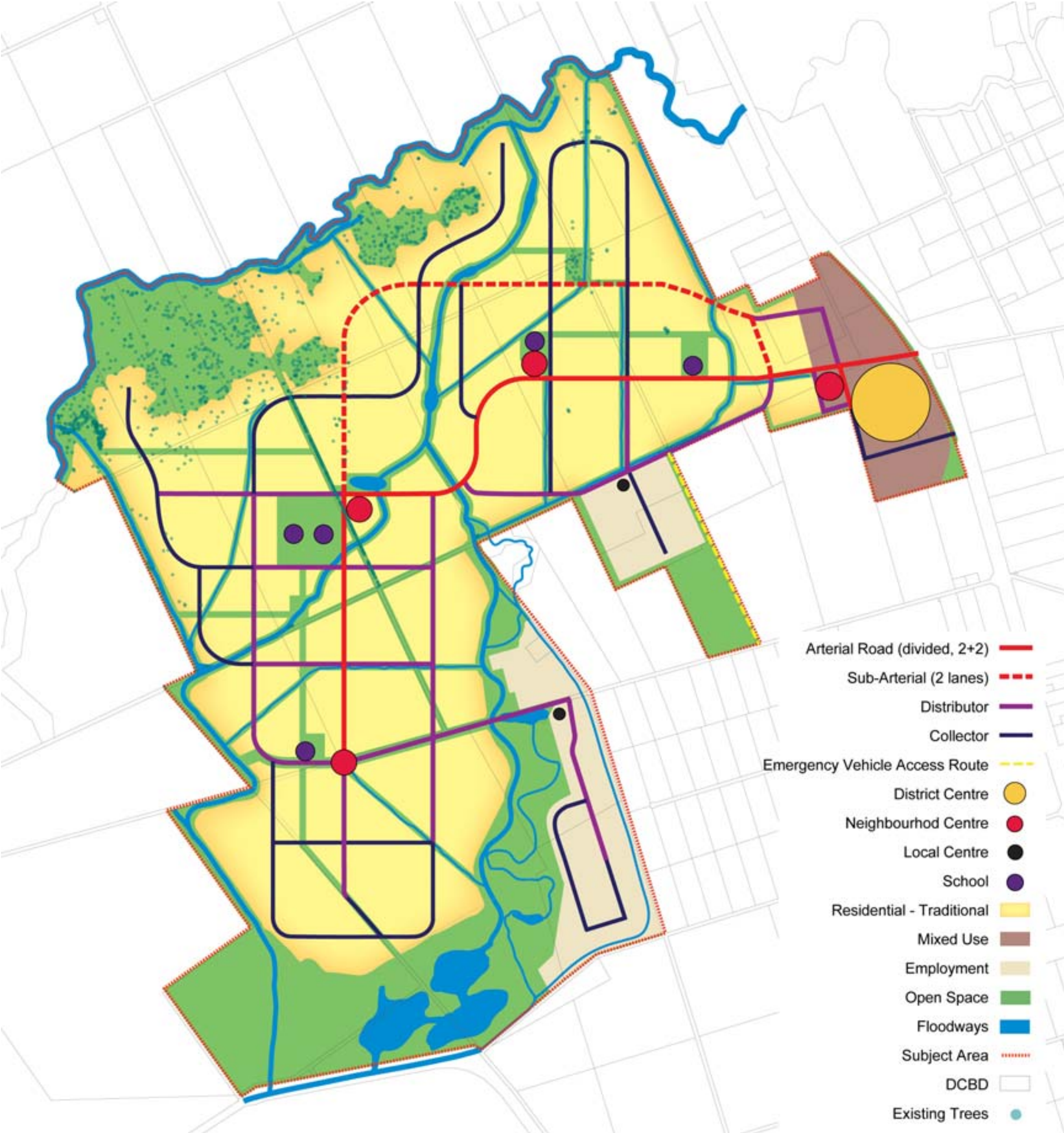
Figure 1: Buckland Park Locality Map



The site is bounded by Port Wakefield Road, the Gawler River, Cheetham Salt Limited saltpans and horticultural activities.

Buckland Park's Masterplan identifies the location of planned retail centres, which are described in more detail in Section 7. The Masterplan is below, at Figure 2.

Figure 2: Master Plan of Buckland Park

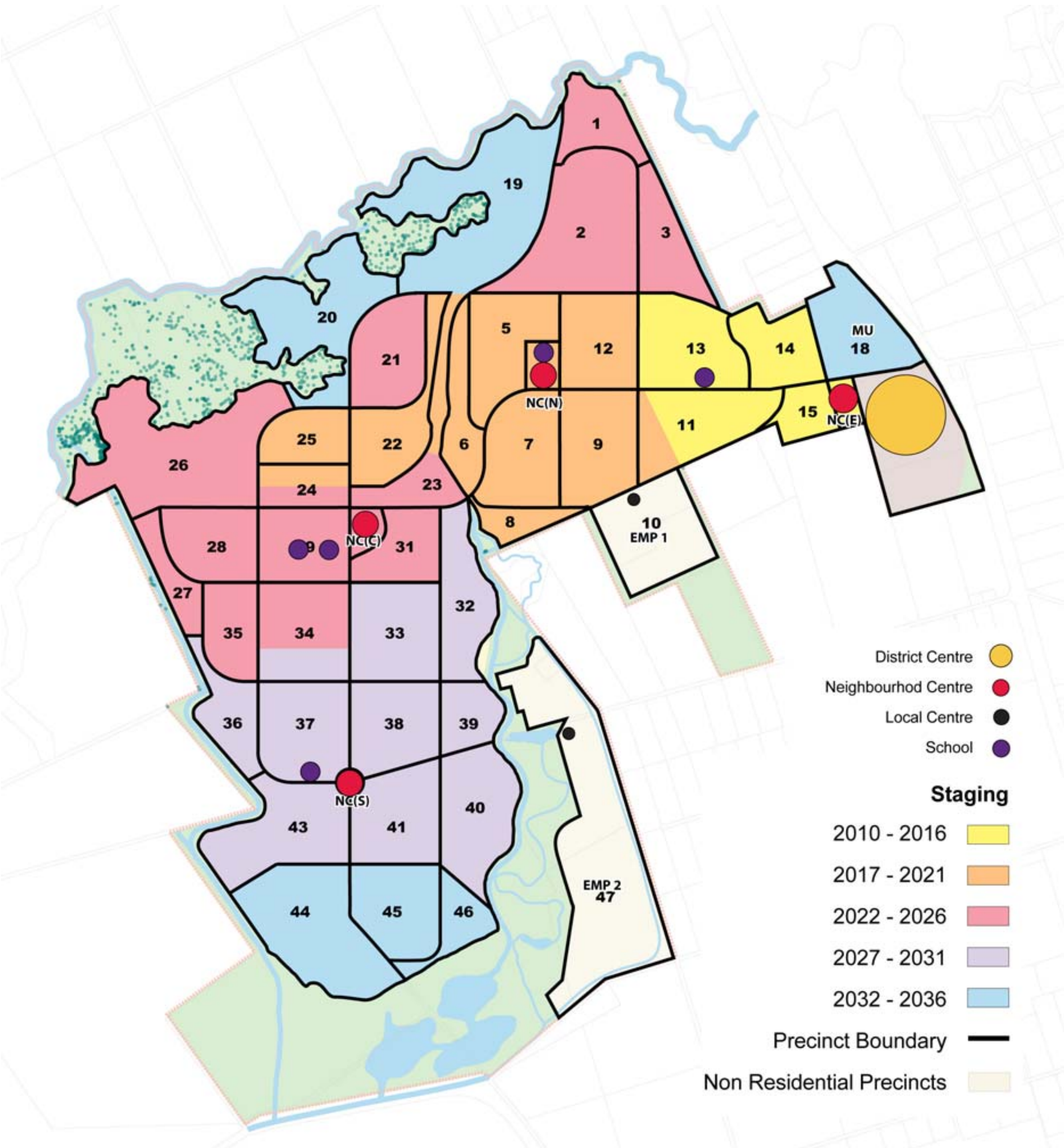


The proposal will be implemented in stages over a period of 25 years, Stage 1 is planned for 2010 to 2016, as illustrated in the staging plan below in Figure 3.

It is anticipated Buckland Park will be fully constructed and occupied by 2036. It is anticipated Buckland Park will comprise 12,000 residential allotments, with an average size of 500m^2, supported with multiple purpose open space, and commercial, retail, community and employment uses.

By 2036, it is anticipated approximately 33,000 residents live at Buckland Park, and 10,687 people will work there. (Connor Holmes 2008)

Figure 3: Proposal Staging



2. CENTRES POLICY FRAMEWORK

The *Planning Strategy for Metropolitan Adelaide* (December 2007), establishes an activity centre hierarchy for metropolitan Adelaide at the broadest level. The hierarchy is detailed through the policies and structure plans contained within each Council's individual Development Plan.

2.1 Planning Strategy for Metropolitan Adelaide

The Planning Strategy broadly defines the roles of centres at each level in the hierarchy. Centres within the site's region are particularised in the Playford (City) Development Plan.

The activity centres hierarchy is as follows:

- **Central City Activity Centre**

  The Adelaide CBD is nominated as the Central City Activity Centre. It is the primary hub of business and government, providing employment opportunities, tourist destinations and a comprehensive range of services and facilities, including public transport, recreation and entertainment.

  It serves the entire metropolitan area.

- **Regional Activity Centres**

  They provide major employment, retail, commercial, administrative, entertainment, education, health, cultural, tourism, recreational facilities, open space and housing.

  Regional Activity Centres are adjacent to multiple public transport routes and public transport interchanges.

  They serve catchments of 60,000 + people.

- **District Activity Centres**

  They are multi-purpose and major employment centres with a wide, but not complete, range of retail, commercial, administrative, entertainment, recreational facilities and housing.

  They provide small to medium sized offices which provide services to the district, for example, banks, consulting rooms, personal services, service trades, petrol stations, motor repair stations, hotel, tavern, recreation and entertainment facilities, including cinemas and theatres, mini-major department stores and supermarkets, speciality shops, retail showrooms, convenience stores, bulky goods retail outlets, cafes and restaurants.

  They are adjacent major public transport route and primary roads.

  They serve catchments of 10,000 – 60,000 people.

- **Neighbourhood Activity Centres**

  They serve the surrounding neighbourhood and incorporate a mix of uses, goods, services and community facilities meeting the daily to weekly needs of the neighbourhood, in locations which minimise the need for people to travel. They should provide convenience goods as well as a limited range of more frequently required comparison goods and a narrow range of facilities.

  They serve catchments of 5,000 – 10,000 people.

- **Local Activity Centres**

  They provide local shopping and community facilities to meet the daily needs of the local community generally located within walking distance.

  They serve the population within walking distance of the centre.

2.2 Playford (City) Development Plan

The Playford (City) Development Plan reinforces the Centres Hierarchy set in the Planning Strategy and designates District, Neighbourhood and Local Centre Zones within the LGA. No Regional Centre zones exist within Playford Council area.

2.3 Planning for Buckland Park

Buckland Park's centres strategy includes a centres hierarchy which is consistent with the Planning Strategy's principles for activity centres, and is compatible with the ongoing functioning of existing centres in the City of Playford.

At 33,000 people, Buckland Park will not have the population required to support a Regional Centre, which is in excess of 60,000.

However, 33,000 people will create a catchment to support a District Centre and a number of Neighbourhood and Local Centres.

3. EXISTING CENTRES

Figure 4 identifies existing centres within the site's region. These centres may influence Buckland Park's centres, and in turn Buckland Park's centres may influence those centres.

Figure 4 Existing Centres

3.1 The Adelaide CBD

As the Central Activity Centre, the Adelaide CBD provides for higher order shopping, entertainment, cultural activities and specialist services and facilities. The CBD is approximately 32km from the site, therefore, it is not expected it will attract significant retail expenditure from Buckland Park, although it is recognised some Buckland Park residents will make higher-order purchases in the CBD.

3.2 Regional Centres

The Planning Strategy designates Elizabeth City Centre as the Regional Activity Centre serving Buckland Park's region. It is located approximately 14km east of Buckland Park. Elizabeth City Centre contains the following key retailers and services:

- Target;
- Big W;
- Harris Scarfe;
- Woolworths;
- Coles;
- Rebel Sport;
- Cinemas complex;

- Function centre;
- Tavern.

Elizabeth City Centre contains nearly 70,300 m^2 of retail floor space (Retail Database, 2007) and has recently undergone a major refurbishment. It is well served by car parking, buses and trains.

3.3 District Centres

Munno Para District Centre is located on Main North Road. It contains the following key retailers and services:

- K Mart;
- Foodland;
- Coles;
- Cheap as Chips;
- Harvey Norman;
- Go-Lo;
- Amart All Sports;
- Spotlight;
- Clark Rubber;
- Bunnings;
- Dan Murphy's;
- Anaconda.

Current retail floor space provision is around 65,000 m^2 (Retail Database, 2007) following the centre's recent expansion, making it one of the largest District Centres in metropolitan Adelaide.

Munno Para District Centre is notable for its bulky goods retailing component and, accordingly, can expect to capture some comparison expenditure **from Buckland Park**. It has a good cross-section of convenience shopping so therefore caters for the weekly grocery shopping needs of its surrounding community.

Gawler Town Centre is the next largest District Centre in the region, comprising some 50,121m^2 of retail floor space (Retail Database, 2007). It also contains commercial and service floor space.

Key retail facilities include:

- Coles;
- Foodland;
- Captain Snooze;
- Homestead Hardware;
- Cinema;
- Woolworths;
- Big W.

A new retail centre is currently being constructed in the Gawler Town Centre, which will deliver an additional 6,500m^2 of retail floor space, including a discount department store, 18 specialty stores, office tenancies and a 300 space multi-deck car park (Gawler Town Council)

Although designated as a District Centre, Gawler Town Centre (Murray Street) serves some regional functions. Its catchment is physically large, encompassing the Barossa and Lower North Regions and it accommodates financial services, medical services, government agencies and commercial enterprises.

3.4 Neighbourhood Centres

The Virginia Neighbourhood Centre is the closest neighbourhood centre to Buckland Park. It comprises retail floor space of 5,582 m^2 (Retail Database, 2007). Key facilities within this centre include:

- Woolworths;
- Mitre 10.

Angle Vale Neighbourhood Centre is approximately 9km from Buckland Park and includes a recently constructed shopping centre of approximately 4,000 $m^2$of retail floor space including a 2,500 m^2 Foodland supermarket (Retail Database, 2007). This is additional to existing the small retail area of 1,472 m^2.

Angle Vale provides only very limited non-retail functions within the centre.

3.5 Local Centres

Two Wells is located approximately 5km north of Buckland Park, however it is very small scale and therefore will exert little influence on Buckland Park.

Residents of Two Wells may be attracted to Buckland Park for some retail purchases once a centre is established in the new development.

4. CATCHMENT AREAS

The establishment of a centre's catchment is a function of:

- the centre's planned scale and function;
- the quality and type of facilities provided within the centre;
- the centre's accessibility; and
- the nature and location of competing centres.

Primary and secondary catchment areas for Buckland Park's centres and retail facilities have been identified (see Figure 5) after consideration of the above factors, as specifically relevant to Buckland Park and the characteristics of the surrounding area.

4.1 Primary Catchment

We have defined the primary catchment for Buckland Park as the geographical area from which 80% or more of a centre's trade will be drawn. This is a commonly accepted parameter for defining trade catchments and has been used in trade catchment studies spanning 30 years.

4.2 Secondary Catchment

A secondary catchment is the geographical area beyond the primary catchment over which a centre exerts some influence, however the proportion of its households regularly visiting the centre is substantially lower than from within the primary catchment. Typically, the centre is only one of a number of choices for these households and may not be the dominant choice of centre within the secondary catchment.

4.3 Buckland Park's Catchments and Centres

The primary catchment for Buckland Park's centres and retail facilities will be Buckland Park itself but may include immediately surrounding areas. Buckland Park's road and bus networks' focus on the District Centre will facilitate access to it by residents.

Population densities in the region surrounding Buckland Park are generally very low and competing centres are widely spaced, so its secondary catchment is physically large in size (see Figure 5). The total population of the secondary catchment was 11,747 persons at the 2006 Census.

The majority of the secondary catchment is located within the Mallala and Playford LGAs, including the Playford West Statistical Local Area.

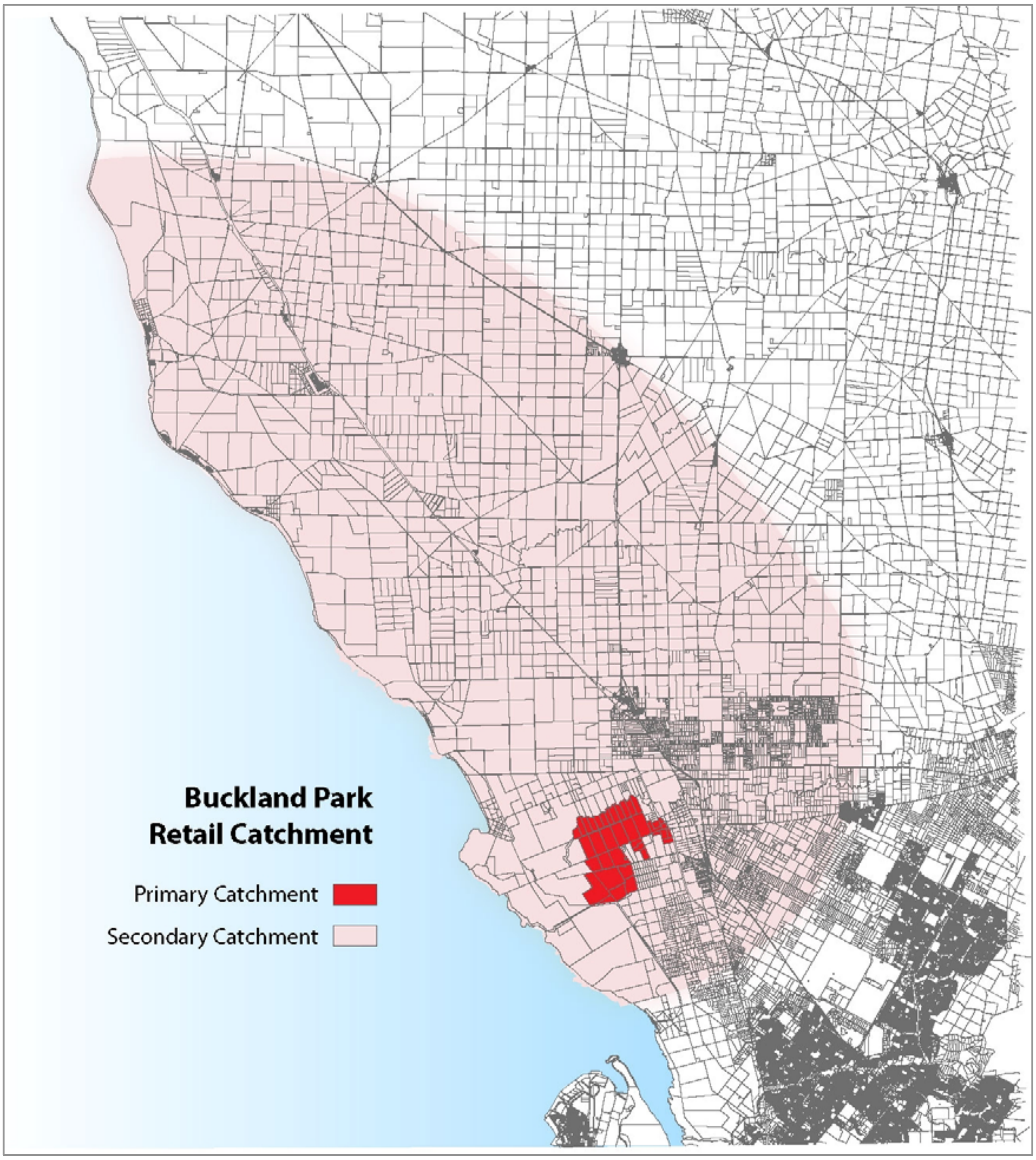
Based on Planning SA population projections, substantial population growth in the secondary catchment is expected by 2036. However, for the purpose of calculating Buckland Park's influence over this area, it is assumed any population growth in the secondary catchment will be matched by commensurate development of retail floorspace in that area. Accordingly, it is not expected Buckland Park will increase its absolute level of trade capture with the secondary catchment area.

By 2036, Buckland Park's primary catchment is planned to accommodate 12,000 households, 33,000 residents and 10,687 workers (Connor Holmes 2008).

Using the planning principles for activities centres, described in the Planning Strategy, and summarised in Section 2 of this report, Buckland Park's primary catchment can support the following centres:

- One District Centre – required catchment 10,000 to 60,000 people;
- 3 Neighbourhood Centres – required catchment per centre 5,000 to 10,000 people; and
- Some local centres will also be provided, in new residential neighbourhoods, particularly those furthest from Neighbourhood Centres, and in the employment precincts.

Figure 5 Buckland Park Centres Catchment Area



5. HOUSEHOLD AND PERSONAL EXPENDITURE CHARACTERISTICS

Household expenditure characteristics are a function of a range of factors, most notably household income, but also household structure and age characteristics.

The average household retail expenditure in Metropolitan Adelaide in 2003/04 was $23,726 (Household Expenditure Survey, 2007). Over the period June 2004-June 2008, retail turnover increased by 22.9% in South Australia (ABS Cat No. 65300). Around 3.8% of this growth can be attributed to population increase, and 13.7% to inflation. The remaining growth of 5.3% represents real growth in retail spending. Current average household retail expenditure is therefore estimated at around $28,500 per annum, or approximately $11,875 per person.

5.1 Primary Catchment

The average household income within Buckland Park is expected to be around 22% higher than the metropolitan average (Connor Holmes 2008). Therefore retail expenditure is also anticipated to be higher.

However, increases in income and expenditure do not match dollar for dollar. While the incomes at Buckland Park are projected to be 22% higher than the metropolitan average, expenditure is expected to be only around 14.6% higher than the metropolitan average, using information provided in the 2003-04 Household Expenditure Survey.

This equates to an average household expenditure of $32,670 per annum**.**

Assuming 2.75 persons per household (Connor Holmes 2008), the average expenditure per person within the primary catchment will be $11,880 per annum. This is consistent with the metropolitan average expenditure of $11,875 per person per annum.

Total retail expenditure in Buckland Park's primary catchment area in 2036 when there will be 12,000 households is estimated at $392 million per annum.

This analysis is based on 2008 expenditure rates, and does not allow for possible growth or decline in retail expenditure to 2036 as a result of inflation, economic cycles or a real growth or decline in retail spending.

5.2 Secondary Catchment

Income levels vary throughout the secondary catchment. Households in Lewiston and Angle Vale have higher household incomes compared to other locations in the secondary catchment. Given this variation, it is reasonable to apply the Adelaide metropolitan average retail expenditure per person of $11,875 per annum.

Total retail expenditure of the secondary catchment area is estimated at $139.5 million per annum. This figure is based on the secondary catchment's current population of 11,747, and 2008 metropolitan expenditure rates of $11,875 per person per annum.

Population growth, inflation and real growth in retail spending to 2036 have not been considered in this estimation, on the assumption growth in population and spending will be matched by new centres and retail facilities, or centre expansions, within the secondary catchment.

5.3 Total Expenditure

Total retail expenditure within Buckland Park's primary and secondary catchment areas is estimated at $531.5 million per annum.

6. PENETRATION LEVELS

The catchments of retail centres tend to overlap, especially where centres operate at different levels of service provision, for example, a number of neighbourhood centres would typically operate within the catchment of a district centre. As a result, it is extremely unlikely a centre will capture all of the retail spending generated by its catchment population. It is therefore necessary to establish the level at which a centre is likely to penetrate its catchment.

Retail spending at one centre rather than another is a function of:

- the nature and quality of the centre’s facilities;
- the centre’s accessibility (including parking availability);
- the centre’s amenity; and
- the availability and quality of competing shopping facilities.

Establishment of penetration levels is largely derived from the observation and experiences of other centres, having regard to the unique influences of a particular locality.

Empirical evidence collected through the undertaking of shopping centre surveys over the last 30 years demonstrates the majority of food expenditure occurs at the Neighbourhood and District Centre levels, whereas the majority of non-food expenditure occurs at the CBD, Regional and District Centre levels.

Buckland Park’s centres are expected to include a range of both food and other types of shops.

As shown in Table 6.1, it is anticipated that 85% of Buckland Park’s primary catchment retail expenditure will be captured by its centres. This high penetration level is a result of the site’s distance from existing regional and district centres which will encourage the creation of centres within Buckland Park offer an extensive range of retailing and services. In other words, Buckland Park will be relatively self contained, retaining a significant portion of its residents’ retail spending.

Notwithstanding, some escape expenditure is inevitable and likely to occur in the higher order Regional Centres and the CBD. It is anticipated 15% ($58.8 million) of Buckland Park’s residents’ expenditure will escape to the secondary catchment and the region.

This amount outweighs the anticipated expenditure from the secondary catchment anticipated to be drawn to Buckland Park’s centres. 30% ($41.85 million) of the secondary catchment’s expenditure is expected to be drawn to Buckland Park’s centres.

It is therefore concluded, Buckland Park will make a net positive contribution to the region’s businesses of $16.95 million per annum, by 2036.

It is expected 30% ($41.85 million), of the secondary catchment’s annual expenditure will be spent in Buckland Park’s centres. It is anticipated most of this expenditure will be made at the District Centre, for the purchase of higher order goods. Established shopping patterns for lower order goods, such as food shopping, are likely to remain largely unchanged and occur primarily within existing local centres.

Table 6.1: Expenditure per Annum in Buckland Park's Centres

Primary Catchment Expenditure			Secondary Catchment Expenditure			Total
Total Expenditure Available $million	Spent in Buckland Park %	Spent in Buckland Park $million	Total Expenditure Available $million	Spent in Buckland Park %	Spent in Buckland Park $million	Buckland Park Centres $million
$392M	85%	$333.2M	$139.5M	30%	$41.85M	$375M

The level of expenditure available at Buckland Park shown in Table 6.1 is considered to be a conservative estimate. Additional sources of expenditure which have not been considered in these figures include:

- passing trade;
- expenditure from non-resident employees;
- real retail growth; and
- secondary catchment population growth.

Key factors which could influence expenditure over the period to 2036 include:-

- population growth or decline;
- real retail expenditure growth or decline; and
- new centres or expanded or refurbished centres in the region.

South Australia has experienced both strong population growth and strong real retail expenditure growth in recent years (ABS Cat. No 3101.0; 8501.0) and it is expected these trends will continue into the foreseeable future, albeit with economic cycles creating periods of greater or lesser growth. Real increases in retail spending tend to be driven by economic growth and by real improvements in the overall wealth of the population. These trends have generally prevailed since the industrial revolution.

There is potential for further expansion within the higher order centres in the region, specifically Elizabeth Regional Centre, Munno Para District Centre and Gawler Town Centre. Expansion within these centres is not likely to greatly impact Buckland Park's centres, or vice versa. This will be further explained in Section 8.

Connor Holmes is not aware of any proposed new centres or centre expansions which are likely to have a significant impact on Buckland Park.

7. BUCKLAND PARK'S CENTRES STRATEGY

Given the site's distance from existing regional and district centres, it is anticipated Buckland Park's centres will offer an extensive range of retailing and services, ensuring retention of high amount of the residents' spending and therefore self containment.

From a social, environmental and economic sustainability perspective, there are potentially benefits associated with a Centres Strategy which maximises self containment. These benefits include:

- reduced car dependency;
- increased local economic and employment opportunities;
- increased opportunities for social interaction among residents.

Buckland Park's Master Plan includes a centres hierarchy, comprising a District Centre and three Neighbourhood Centres.

By 2036, Buckland Park's primary catchment is planned to accommodate 12,000 households, 33,000 residents and 10,687 workers.

Using the planning principles for activities centres, described in the Planning Strategy, and summarised in Section 2 of this report, Buckland Park's primary catchment can support the following centres.

- one District Centre – required catchment 10,000 to 60,000 people;
- 3 Neighbourhood Centres – required catchment per centre 5,000 to 10,000 people;
- local centres as may be required.

7.1 District Centre

Buckland Park's Master Plan includes a District Centre, with associated Mixed Use precinct, which is expected to attract a combination of core and bulky goods retail facilities, and commercial and community facilities.

The District Centre is strategically located adjacent to Port Wakefield Road, on the Masterplan's main entry boulevard. This location will:

- maximise visibility;
- maximise and facilitate car and truck access;
- maximise public transport access, by allowing co-location of the Centre with a bus interchange, at the main entry for regional bus services and the termination point for local bus services.

7.2 Neighbourhood Centres

Prior to 2036, it is expected three Neighbourhood Centres will be established, in the locations shown on the Masterplan. These will contain retail and commercial facilities, plus community uses. The Neighbourhood Centres have been located to:

- Maximise the number of households within walking distance;
- Facilitate access by foot, bike and bus;

- Maximise their role as a neighbourhood focus by:
    - Including schools in the centre, or nearby;
    - Locating centres adjacent to open space and sporting fields;
    - Including potential for shared use of facilities such as schools, playing fields, libraries and community buildings.

Within Buckland Park's Stage 1, provision has been made for a temporary Neighbourhood Centre as shown in Figure 6.

Figure 6 Buckland Park Stage 1 Concept Plan

It is intended the Stage 1 Neighbourhood Centre will be created in two phases. The first will include a small amount of retailing to ensure the first residents can buy small convenience items. It will include:

- A small supermarket for convenience shopping. The proponent will negotiate suitable lease agreements with potential tenants, in the event a supermarket is not financially viable at opening;
- A community space equipped with office and meeting facilities – a community worker will be based in the space;
- Six specialty shops suitable for a café, private medical and dental surgeries and other small businesses. The proponents will negotiate with suitable potential tenants, in the event a supermarket is not be financial viable at opening;
- A sales and display centre operated by the proponents;
- Landscaping, including an entry statement and children's playground;
- 200 car parking spaces;

- Signs, including the entry statement and business identification signs.

The second phase will be constructed when demand for additional facilities is generated by new residents occupying Stage 1, or during later phases. It will include additional community space, additional supermarket space and four additional specialty shops.

Within the neighbourhood centre, an “extension area” has been included for other private facilities, for example, a childcare centre, recreation facilities, a hotel, offices, or housing. The proponent will negotiate with potential businesses.

The Stage 1 neighbourhood centre is not part of the proposal’s ultimate centre hierarchy. When the adjoining district centre is commissioned, the neighbourhood centre will be redundant.

At that time, the neighbourhood centre buildings will be either:

- removed and the site redeveloped, or
- refurbished for another use, ancillary to the district centre, or
- incorporated into the district centre.

Table 7.1 provides a breakdown of the components anticipated within the Stage 1 Neighbourhood Centre.

Table 7.1 Stage 1 Neighbourhood Centre

Component	**Phase 1**	**Phase 2**	**Total**
Supermarket	1,500 m^2	1,000 m^2	2,500 m^2
Specialty shops (6 in Phase 1, 4 in Phase 2)	600 m^2	400 m^2	1,000 m^2
Community space	200 m^2	200 m^2	400 m^2
Sales office (two storey)	225 m^2	00 m^2	225 m^2
Sub-total	***2,525m²***	***1,600m²***	***4,125 m²***
Car park 200 maximum x 30 m^2	6,000 m^2	00 m^2	6,000 m^2
Town Square	500 m^2	00 m^2	500 m^2
Sub-total	***6,500 m²***	***00m²***	***6,500 m²***
TOTAL	**9, 025 m²**	**1,600 m²**	**10,625 m²**
Neighbourhood Centre – Extension Area			
Component			**Total**
Residential, private recreation or private service (eg childcare centre, commercial)			10,500 m^2
TOTAL			**10,500 m²**
Neighbourhood Centre – Open Space			
TOTAL			**10,375 m²**
TOTAL NEIGHBOURHOOD CENTRE AREA			**31,500 m²**

7.3 Local Centres

A number of Local Centres will be provided within Buckland Park's future residential areas. These Centres are expected to have only a small amount of retail space, of around 150m², but will contribute to the community by being within walking or bicycling distance from homes, and being located on bus stops, or by serving local employment precincts. Local Centres will also be provided in the Employment Precincts to provide workers with their day to day needs.

Detailed planning of future residential areas will include location of Local Centres, and any planning controls applying to Buckland Park should permit their provision.

7.4 Summary of Centres Hierarchy

Table 7.2 shows the cumulative total of retail floor area to be provided within each type of centre. Turnover levels are based upon the annual amount of retail spending required per square metre of floor area in order to underpin a successful centre. Turnover levels will vary from shop type to shop type. Table 7.2 provides averages for the centres as a whole.

All dollar values are in constant $2008.

Table 7.2: Summary of Retail Provision within Buckland Park

Centre	Retail Floor Space	Average Turnover* $/m² pa	Total Turnover $M pa
Neighbourhood Centres x 3	16,650 m²	$5,750	$95.7
Local Centres x 6	900 m²	$5,750	$5.2
District Centre – Bulky Goods	30,000m²	$2,450	$73.5
District Centre – Core Retail	35,000 m²	$5,750	$201.3
TOTAL	**82,550m²**	**$4,548**	**$375.7**

*estimated turnover required to underpin a successfully trading centre

These figures show the amount of retail floor space proposed for Buckland Park can be supported by projected expenditure and penetration levels within the primary and secondary catchments, when measured at industry accepted turnover benchmarks.

The total annual expenditure in Buckland Park's centres established in Section 6, is $375 million.

It can be seen that this expenditure is sufficient to support the potential retail floor space to be provided in Buckland Park's centres, which will require an annual turnover over of $375 million.

7.5 Implementation of Centres Strategy

It is intended centres will be established as early as possible in a stage's occupation phase. This will ensure new residents have access to facilities, services and social focal points from the time of their arrival. The first phase of Stage 1's neighbourhood centre will be programmed for 2013, when Stage 1's residents are anticipated to arrive.

Establishment of the District Centre is likely to commence when Buckland Park's population reaches approximately 10,000. The District Centre is also expected to be established in stages as the population of the urban area expands.

8. IMPACT ON OTHER CENTRES

Buckland Park's centres hierarchy is planned to serve the new population within its primary catchment. Only limited expenditure is expected to be drawn from the secondary catchment.

Buckland Park's new residential areas will add significantly to the population in the region and it is projected that around 15% of retail expenditure generated by these new residents will escape to other centres in the region and to the CBD.

Therefore the proposal is likely to have a positive impact on trade within higher order centres such as Elizabeth Regional Centre, Munno Para District Centre and Gawler Town Centre. In addition, substantial residential growth and regeneration is planned in the Playford North and Blakeview area which will increase the catchment population of these centres by 30,000 over the next 15 years (Connor Holmes, 2007).

The Virginia and Angle Vale Neighbourhood Centres, are more likely to be impacted by Buckland Park's centres.

However, Angle Vale is 7 kilometres from major retail facilities at Munno Para and will be influenced by the impending urban expansion of Munno Para West and Penfield (Connor Holmes, 2007). It is therefore considered likely Buckland Park's centres will not make a perceptible impact on trading at Angle Vale.

At the 2006 Census, Virginia had a population of 1,433 persons, but a retail floor space of 5,582m². To support this amount of floor space the Virginia neighbourhood centre is reliant on a catchment that extends well beyond Virginia's town boundaries. This catchment would overlap with Buckland Park's secondary catchment.

It is anticipated shops in Virginia's neighbourhood centre are more likely to be impacted by Buckland Park's centres, in particular the District Centre, as Virginia is close to Buckland Park, and its catchment will overlap with Buckland Park's secondary catchment.

However, District Centres and Neighbourhood Centres play distinctive roles within centre hierarchies. It is widely experienced, and specifically encouraged in the Planning Strategy and Development Plan, that a number of Neighbourhood Centres would be located within the catchment of a more widely spaced District Centre network.

The Virginia Neighbourhood Centre would be expected to play a similar role to Buckland Park's Neighbourhood Centres, providing primarily weekly, daily and convenience purchases to their surrounding communities.

It is not anticipated Buckland Park's District Centre will draw expenditure away from the Virginia Neighbourhood Centre. The Neighbourhood Centres' role is different and compatible with the provision of District Centre, which provides for higher order comparison and specialty shopping.

Buckland Park can be expected to actually generate additional expenditure at other centres within its region. In the case of the Virginia Neighbourhood Centre, this benefit is likely to fluctuate. Firstly, the establishment of the new Buckland Park community will boost spending at Virginia, but this would fall away with the establishment of new centres in Buckland Park.

The impact of these fluctuations will be mitigated by the following measures:

- Stage 1's Neighbourhood Centre will be constructed in phases, so only the minimum amount of retail floor space is provided to meet only the needs of Buckland Park's first occupants.

- Neighbourhood Centres provided in Buckland Park's future stages will only be provided as the population, and demand, grows. These Centres will therefore have their own catchment to draw on, and will not seek custom from the Virginia Neighbourhood Centre's catchment.

It should be noted, projected penetration levels into Buckland Park from the secondary catchment are only 30%($42 million per annum) of its projected retail expenditure. 70% ($98 million) remains available to centres within the secondary catchment.

In addition, the projected level of escape expenditure from Buckland Park, 15% ($59million per annum) , is greater than the $42 million expected to be drawn from the secondary catchment.

It is therefore concluded Buckland Park's new population and centres will have a net positive effect on other centres in the region.

9. SUMMARY

This report has outlined the Buckland Park's Centres Strategy, which sets a hierarchy, of type, size and locations of centres, and the timing for their provision.

Using the planning principles for activities centres, described in the Planning Strategy, and summarised in Section 2 of this report, Buckland Park's primary catchment can support the following centres.

- one District Centre – required catchment 10,000 to 60,000 people;
- 3 Neighbourhood Centres – required catchment per centre 5,000 to 10,000 people.

The District Centre is strategically located adjacent to Port Wakefield Road, on the Masterplan's main entry boulevard. This location will:

- maximise visibility;
- maximise and facilitate car and truck access;
- maximise public transport access, by allowing co-location of the Centre with a bus interchange, at the main entry for regional bus services and the termination point for local bus services.

The Neighbourhood Centres have been located to:

- maximise the number of households within walking distance;
- facilitate access by foot, bike and bus;
- maximise their role as a neighbourhood focus by:
  - including schools in the centre, or nearby;
  - locating centres adjacent to open space and sporting fields;
  - including potential for shared use of facilities such as schools, playing fields, libraries and community buildings.

These centres will be progressively created over the 25 years Buckland Park will take to construct and occupy. They will be timed to meet the demands of the new residential population at each stage.

Buckland Park's centres, and their planned retail floor area, can be supported by its residents' projected expenditure, supplemented by expenditure escaping from the region into those centres.

A conservative estimate of the amount of retail expenditure available to Buckland Park's centres in 2036 is $375million.

The study concludes Buckland Park's new population will have a net positive effect on other centres in the region. The projected penetration levels into Buckland Park from the secondary catchment's retail expenditure is only 30%($42 million per annum). 70% ($98 million) remains available to centres within the secondary catchment.

However, 15% ($59million per annum) of Buckland Park's total expenditure is expected to be escape out of Buckland Park to centres in the region and secondary catchment.

There will therefore be a net benefit to other centres in the region of $17 million per annum.

This benefit will not be evenly distributed between all those centres. It is anticipated the higher order Elizabeth Regional Centre, Munno Para District Centre and Gawler Town Centre will attract more of Buckland Park's escape expenditure than the region's Neighbourhood Centres.

The staged provision of Buckland Park centres will minimise potential negative impacts on the nearby Virginia Neighbourhood Centre.

As a result of this strategy, combined with the relatively low proportion of retail expenditure expected to be drawn from the secondary catchment, it is considered Buckland Park's centres will not have a material detrimental effect on Virginia Neighbourhood Centre's traders.

10. REFERENCES

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11. GLOSSARY

ABS: Australian Bureau of Statistics

Bulky Goods Retail Facilities: Premises that predominantly sell bulky items such as furniture, floor coverings, tiles, whitegoods, electronics and hardware.

Comparison Expenditure: Expenditure on items that are typically purchased infrequently and generally involve a comparison between brands, models, prices etc. before purchase.

Convenience Shopping: Expenditure on items that are typically purchased regularly and are relatively inexpensive and may not involve comparison of prices.

Core Retail Facilities: Retail facilities that are fundamental to the operation of a centre, as defined by the intended function of that Centre.

Escape Expenditure: Expenditure that is spent outside of a centre's catchment area by residents residing within the catchment area and has therefore 'escaped' that centre.

Higher-Order Spending: Spending on luxury items, infrequent purchases, comparison goods and items not generally found in all shopping centres.

Higher Order Centres: Centres providing luxury items, infrequently purchased items, comparison goods and items not generally found in all shopping centres, but not excluding a centre's ability to also provide for daily and weekly shopping needs.

Higher Order Goods: Luxury items, infrequent purchases, comparison goods and items not generally found in all shopping centres.

LGA: Local Government Area

Lower Order Goods: Goods found at most centres and typically comprising frequently purchased daily or weekly purchases.

Penetration Levels: The share of expenditure within a defined catchment area which is captured by a centre.

Speciality Shops: Individual shops, usually relatively small in area, that specialist in one type of product or set of products.