

ATTACHMENT E – DEEP END RETAIL INVESTIGATIONS

DRAFT

Kidman Park (Metcash) Residential and Mixed Use Code Amendment

Retail, commercial & community land use investigations

Prepared for Fairland Group Pty Ltd
7 November 2022



Deep End Services

Deep End Services is an economic research and property consulting firm based in Melbourne. It provides a range of services to local and international retailers, property owners and developers including due diligence and market scoping studies, store benchmarking and network planning, site analysis and sales forecasting, market assessments for a variety of land uses, and highest and best use studies.

Contact

Deep End Services Pty Ltd
Suite 304
9-11 Claremont Street
South Yarra VIC 3141

T +61 3 8825 5888
F +61 3 9826 5331
deependservices.com.au

Enquiries about this report should be directed to:

Chris Abery

Director
Chris.abery@deependservices.com.au

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This report should be read in its entirety, as reference to part only may be misleading.

Contents

1	Background	1
2	Local context & demand drivers	3
2.1	Local setting	3
2.2	Assumed development	6
2.3	Local catchment	6
2.3.1	Population growth	7
2.3.2	Demographic and housing profile	8
2.4	Workforce	10
2.5	Key drivers	11
3	Prospective land uses	12
3.1	Local retail	12
3.2	Medical centre	16
3.3	Flexible commercial space	17
3.4	Childcare	17
3.5	Gym & fitness centres	20
4	Conclusions	25

Tables + Figures

Table 1—Population and housing characteristics	9
Table 2— Local Centre floorspace supply & demand	15
Table 3— Medical centres & GP provision rates	16
Table 4— Childcare supply & demand	18
Table 5— Provision of gyms & fitness clubs	20
Table 6—Kidman Park commercial site recommendations	26
Figure 1— Local context	4
Figure 2—Commercial site - Corner Findon Road & Valetta Road	6
Figure 3— Local catchment area	7
Figure 4— Kidman Park local catchment population & dwelling approvals	7
Figure 5—Workforce by local area - 2016	10
Figure 6— Centres & supermarkets	13
Figure 7—Local Centres	14
Figure 8— Medical centres & GP counts	22
Figure 9— Long Day Child Care Centres & registered places	23
Figure 10— Gyms & Fitness Clubs	24

1

Background

A Code Amendment Process has been initiated for approximately 12.6 hectares of industrial land comprising the former Metcash Distribution Centre at 404-450 Findon Road and two adjoining properties at 5 and 7 Valetta Road (Kidman Park land).

Grocery warehousing and distribution activities on the Kidman Park land ceased in mid-2000 when Metcash shifted its operations to a new 68,000 sqm warehouse facility in Gepps Cross. The Kidman Park land is zoned 'Strategic Employment Zone' however Council's *Industrial Land Study (2008)* and *Urban Employment Land Review (2019)* both found that the land is not a Prime Employment Area, had ongoing residential interface issues and presented a higher long-term value for residential use.

A range of residential zones is being considered for the Kidman Park land including:

- Housing Diversity Neighbourhood Zone
- General Neighbourhood Zone
- Urban Neighbourhood Zone
- Urban Renewal Neighbourhood Zone
- Master Planned Neighbourhood Zone

Preliminary master planning of the Kidman Park land shows an internal road network and subdivision pattern for medium density housing with several mid-rise (3-5 storey) apartment sites. Land is also set aside on the corner of Findon Road and Valetta Road (Kidman Park site) for potential local retail and commercial uses.

Most of the residential zones under consideration allow up to 1,000 sqm of 'shop' use and a range of commercial and community uses including offices, consulting room, pre-school and indoor recreation facility.

The Minister's endorsement of the Proposal to Initiate the Code Amendment for the Kidman Park (Metcash) Residential and Mixed Use Code Amendment sets out a range of further investigations including *"Consideration of the economic potential for population serving retail, commercial or community activities"*.

This report provides an assessment of the supportable retail, commercial and community-based land uses that could be planned for and developed on the Kidman Park site having regard to the demands from new on-site and other local area residents and the distribution of competing facilities in the wider area.

2

Local context & demand drivers

2.1 Local setting

The 12.6-hectare Kidman Park land is central to a large residential area of almost 18,000 people bounded by Tapleys Hill Road (west), Grange Road (north), Holbrooks Road (east) and Henley Beach Road (south) – refer Figure 1.

This area includes:

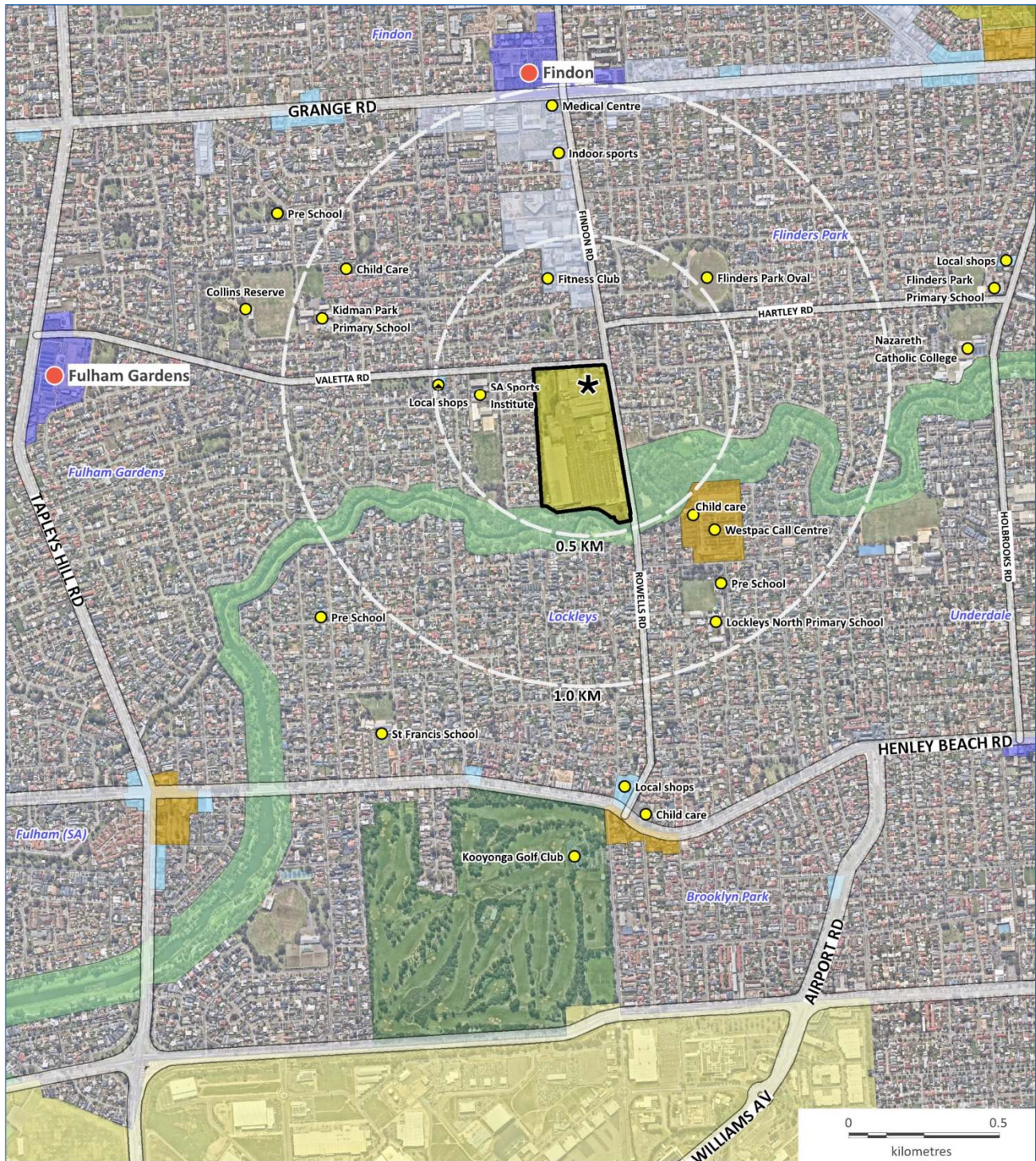
- All of the suburb of Kidman Park (population 3,700)
- All of Flinders Park (pop. 5,318)
- Part of Fulham Gardens, east of Tapleys Hill Road (pop. 2,740)
- Most of Lockleys north of Henley Beach Road (pop. 4,960); and
- Small sections of Underdale and Fulham (pop. 1,500)

The area is dissected by Findon Road / Rowells Road, an important and busy north-south distributor road with a southern connection to Adelaide Airport and a continuous northern link to Port Road. Findon Road / Rowells Road provides the only crossing of Karrawirra Parri (River Torrens) between Tapleys Hill Road (west) and Holbrooks Road (east).

Karrawirra Parri on the Kidman Park land's southern boundary has a meandering, westerly flow through the area and forms the boundary between Kidman Park and Flinders Park to the north and Lockleys to the south. It is a valuable open space and recreation resource for the adjoining suburbs.

Valetta Road and Hartley Road are cross-suburb (east-west) connectors through Findon Park and Flinders Park to Findon Road. The Kidman Park land is strategically positioned at the intersection of Findon Road and Valetta Road extending south to Karrawirra Parri and its linear open space reserve. Most of the 18,000 people within the four outer arterial roads are within 5-minutes' drive of the Kidman Park land.

Figure 1— Local context



Source: Nearmap, SA Planning, Deep End Services

The Kidman Park land is close to a number of commercial and community assets which serve their surrounding local areas and, in some cases, wider user or employment catchments including:

- School, recreation and community facility precincts in Kidman Park around Collins Reserve, in Flinders Park and in Lockleys, all within 1-1.5km of the site.
- A small light industrial / commercial area on Findon Road north of the Kidman Park land which has a local employment base that would utilise local services.
- Shopping centres on Grange Road at Findon (1km north) and Fulham Gardens (1.5 km west) with multiple supermarkets and a range of shops and services catering to most daily and weekly needs. While Fulham Gardens is a stand-alone shopping centre with several external pad sites for other retail food and fuel, Findon has a long section of Grange Road where the Suburban Activity Zone accommodates a broad range of commercial and main road-based uses.
- The South Australian Sports Institute (SASI) which is a training, medical and administration facility for elite sports people, 200 metres west of the Kidman Park land on Valetta Road. SASI will be vacating the site within the next few years to a new complex to be built at Mile End.
- Westpac's mortgage processing facility on Pierson Street, Lockleys. The former warehouse converted to a data and call centre is thought to employ up to 1,000 people and is situated just 350 metres from the southern boundary of the Kidman Park land. The Westpac site is also subject to a Code Amendment process to rezone the land from Employment Zone to a neighbourhood-type zone to facilitate medium density housing and smaller low-scale non-residential uses.

The Kidman Park area is characterised by a broad range of housing styles but mainly brick and tile dwellings originating from the 1950's and 60's when the area was subdivided. The older housing stock is interspersed with replacement homes built in the last 20 years which is gradually changing the quality of housing and character of the area.

Areas of former South Australian Housing Trust (SAHT) land in Kidman Park have been disposed and redeveloped with high quality homes in the last 10 years, changing the profile of the area. SAHT homes still prevalent in some areas are part of an ongoing program of redevelopment or disposal.

The Kidman Park land has good public transport connections with bus routes extending along Findon Road and Valetta Road. Three Valetta Road bus services extend from West Lakes or Henley Beach to the Bonython Park tram stop while the two Findon Road bus services run from the West Lakes and Arndale interchanges to Oaklands Park.

2.2 Assumed development

A preliminary layout for the Kidman Park land (excluding 5 & 7 Valetta Road) shows a local street pattern with connections to Findon Road and Valetta Road, a central open space from Karrawirra Parri and a medium density residential subdivision providing:

- 218 single dwelling and townhouse lots
- 4 apartment sites
- 5 lots labelled as 'other' including two on the Findon Road / Valetta Road corner for 'shop' and 'childcare' uses, one lot on Valetta Road and two adjoining lots on Findon Road. Uses on the mid-block sites are undetermined and could be residential sites.

The unit yield on the apartment sites is unknown at this stage however 3-5 level developments are assumed.

The total single dwelling and apartment yield on the preliminary layout is assumed to be 350 dwellings plus an assumption of 40 dwellings on 5 & 7 Valetta Road. In total, approximately 390 dwellings or a population of between 850 and 900 people.

A commercial or mixed-use site on the controlled corner of Findon Road and Valetta Road will have good exposure to about 19,000-20,000¹ existing vehicles per day on Findon Road and about 8,000 vpd on Valetta Road.

**Figure 2—
Commercial site -
Corner Findon Road
& Valetta Road**

Source: Google
Maps



2.3 Local catchment

For the purpose of population profiling, a local catchment area within a relatively close walk or drive-time of the site is defined (refer Figure 3). The catchment extends approximately 1km and covers most of Kidman Park and Flinders Park and the northern areas of Lockleys.

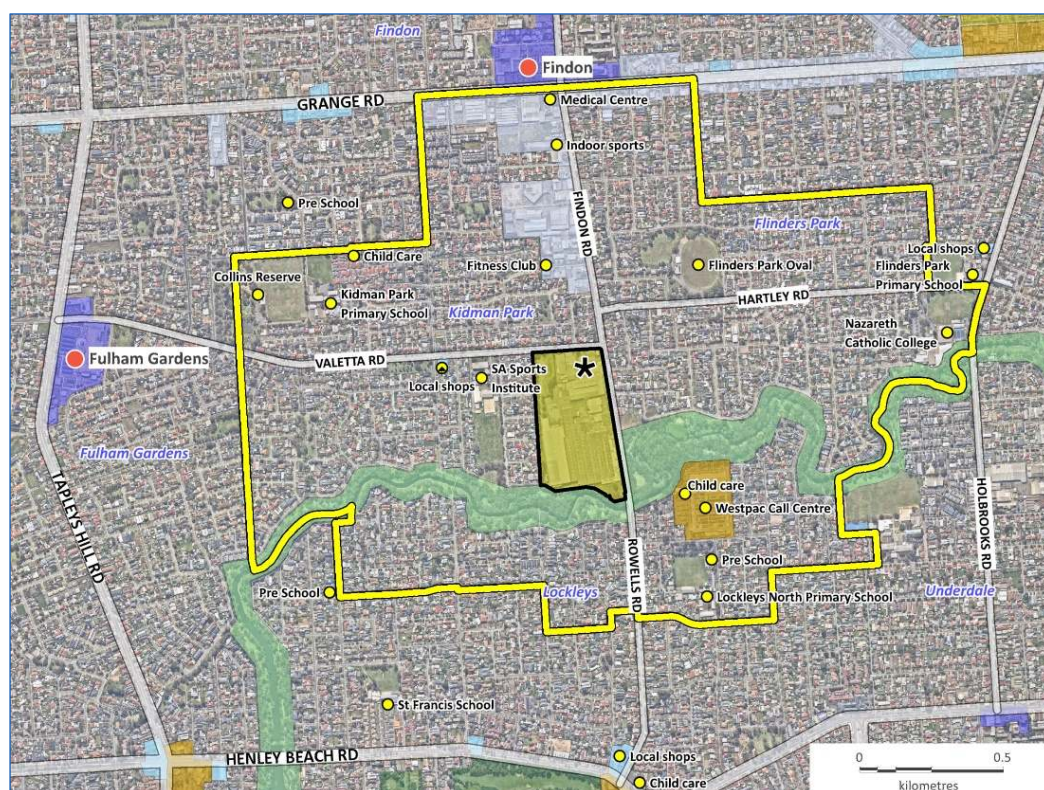
A comfortable walking distance to obtain goods and services is often considered to be 40-500 metres although most areas of the catchment are within 800-1,000 metres which would be a 10-12 minute walk.

Small proportions of the population within the defined catchment are marginally closer to the Fulham Gardens or Findon centres. The precise boundary itself is not critical to any analysis but is justified because the relative distances and differences

¹ Government of South Australia, Department of Infrastructure & Transport. <https://location.sa.gov.au/viewer/?map=hybrid&uids=138>

in travel times to either the Kidman Park site or the nearest centre are negligible, the Kidman Park site has advantages of distributor road and local street connections and residents will be attracted to a modern, convenience-based centre with a good mix of local shops and services.

Figure 3— Local catchment area

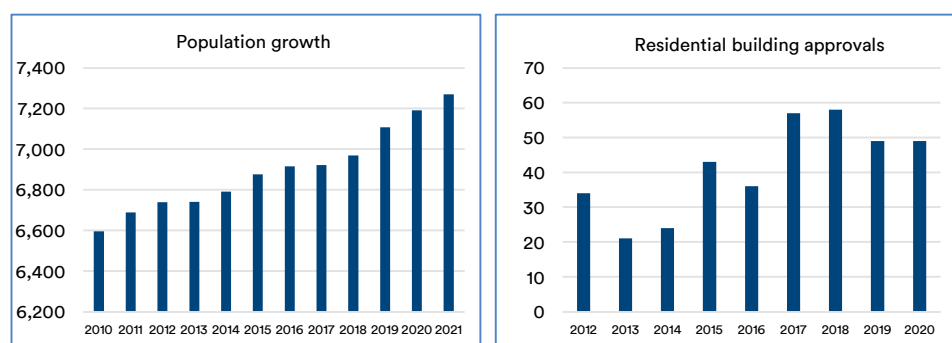


2.3.1 Population growth

The local population has grown steadily in the last 10 years, from 6,600 in 2010 to approximately 7,280 in 2021 (refer Figure 4). The steady growth has come through a consistent rate of new dwelling construction which has increased in the last five years to over 50 per annum (refer Figure 4). Larger homes replacing old dwellings including former SAHT dwellings and townhouse developments are increasing housing densities and population levels.

Figure 4— Kidman Park local catchment population & dwelling approvals

Source: ABS



2.3.2 Demographic and housing profile

The demographic and housing characteristics of the local catchment area at the 2016 Census are presented in Table 1 compared to Adelaide averages.

The area is characterised by:

- A high proportion of ‘couples with children’ and older ‘couples without children’.
- Traditional family structures yield a household size (2.56) slightly above the Adelaide average.
- An older age profile with 23% aged over 65 years (Adelaide 17%) although 11% are aged 0-9 (similar to Adelaide 12%) indicating a need for childcare facilities.
- A higher proportion of (older) Italian-born residents. While many Greek and Italian migrants who settled in the area in the 1950’s and 60’s have moved or passed on, successive generations of European migrants living in the area are evident with 44% of the population citing Southern or Eastern European ancestry compared to a 16% average across Adelaide.
- Many families are long established, evident by the high proportion (71%) living in the same dwelling as 5 years earlier and the high proportion (51%) who fully own their home.
- Household income levels are 11% above the Adelaide average and the SEIFA index (a measure of socio-economic advantage) is 1,024 or 4% above the Adelaide average.
- Detached dwellings (89%) dominate the housing stock. With an ageing population potentially looking to downsize there could be a high demand for townhouses and other small dwellings on the Kidman Park land.

Table 1—Population and housing characteristics

Source: ABS

Demographic characteristic (2016 Census)	Kidman Park trade area	Adelaide
<u>Persons and dwellings</u>		
Usual resident population	6,729	1,295,714
Total private dwellings	2,788	562,089
- % unoccupied	8%	8%
Average household size	2.56	2.46
At same address:		
- 1 year ago	90%	85%
- 5 years ago	71%	61%
<u>Economic indicators</u>		
Participation rate	60%	59%
Unemployment rate	5.3%	7.7%
White collar occupations	54%	49%
Bachelor degree or higher	21%	21%
SEIFA	1,024	983
<u>Age group</u>		
0-9	11%	12%
10-19	12%	12%
20-34	17%	21%
35-49	19%	20%
50-64	19%	19%
65+	23%	17%
Average age	42.9	39.8
<u>Annual household income</u>		
Average household income	\$93,351	\$83,748
Variation from Adelaide average	11%	-
<u>Country of birth</u>		
Australia	76%	72%
Italy	6%	1%
England	3%	7%
Greece	2%	1%
China	2%	2%
India	2%	2%
Other	10%	15%
<u>Top 4 regions of ancestry</u>		
North-West European	48%	68%
Southern and Eastern European	44%	16%
Oceanian	26%	34%
North-East Asian	4%	5%
<u>Occupied private dwelling tenure</u>		
Fully owned	51%	32%
Being purchased	32%	38%
Rented	17%	30%
<u>Dwelling type</u>		
Separate house	89%	75%
Townhouse/semi-detached	9%	17%
Apartment	2%	8%
<u>Household composition</u>		
Couples with children	35%	30%
Couples without children	32%	26%
One parent family	9%	12%
Lone person	21%	28%
Group	2%	4%
<u>Motor vehicles per dwelling</u>		
None	4%	8%
One	33%	38%
Two	42%	37%
Three or more	20%	17%

2.5 Key drivers

In summary, the key drivers for a small retail and commercial node on the Kidman Park site are:

- A large and growing population within a short distance with a favourable demographic and income profile.
- A self-contained community with a wide range of nearby community, recreation and education facilities.
- A significant new population on the site (and potentially on the Westpac site) which limited local shopping facilities
- A relatively large workforce within a short drive-time and high levels of passing traffic.

3

Prospective land uses

3.1 Local retail

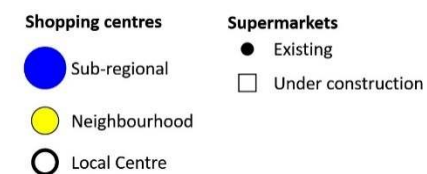
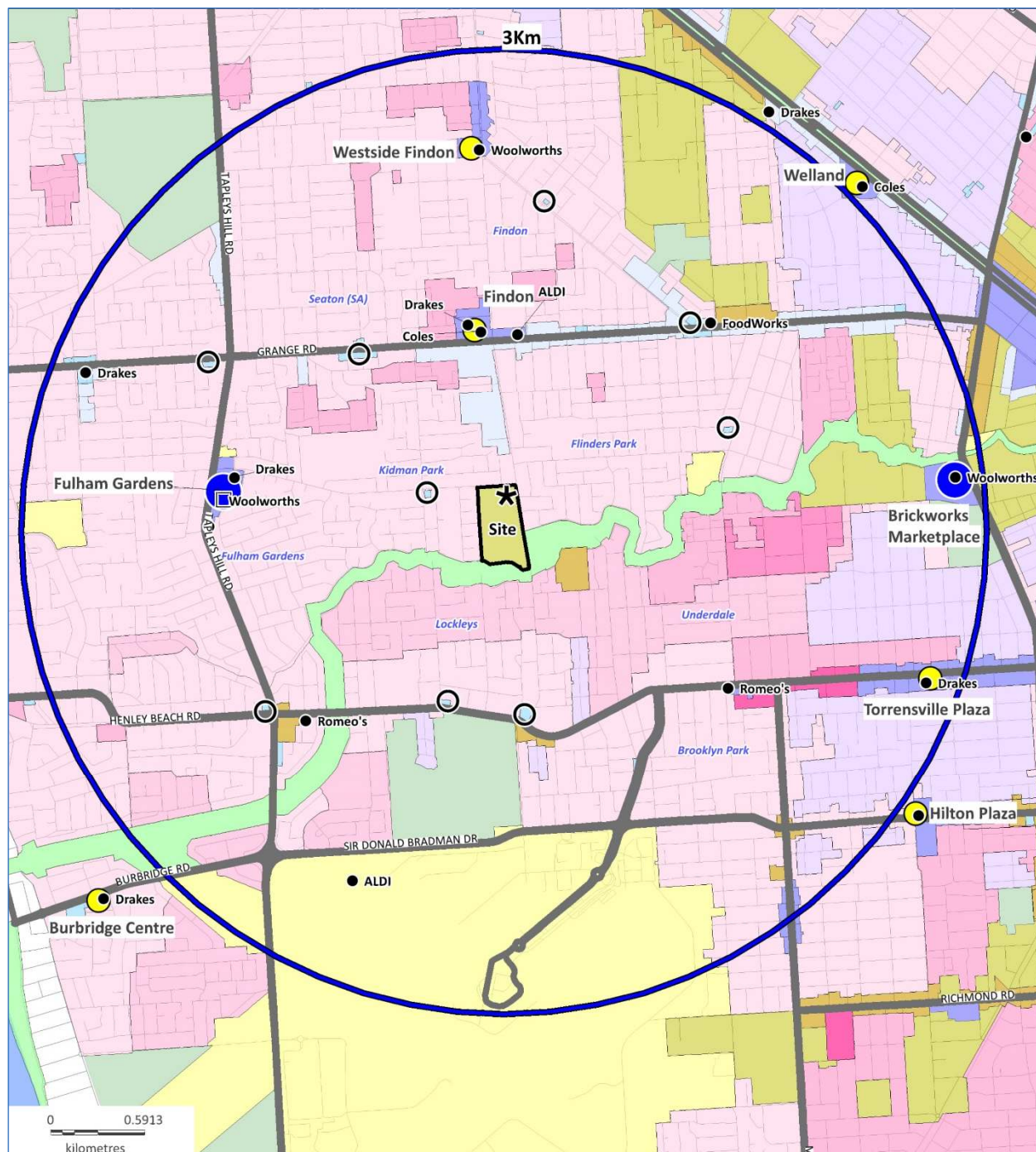
The Kidman Park site lies in an area with good access to major and independent supermarkets and neighbourhood-level retailing. The primary catchments of the Fulham Gardens Centre on Tapleys Hill Road (1.6 km west of the site) and the Findon Centre on Grange Road (0.9 km north) intersect and overlap through Kidman Park with both centres within a 2-minute drive of the site from most areas of Kidman Park and within 4-5 minutes from most areas of Flinders Park, east of Findon Road.

The **Fulham Gardens** centre is a 14,700 sqm GLA mall-based complex with a large Drakes supermarket and 17 shops. With Target vacating its 8,200sqm tenancy in August 2020, the centre is now undergoing a \$10 million redevelopment with Woolworths, Dan Murphy's and a mini-major moving into the former Target premises. These changes will significantly increase foot traffic and strengthen the centre against its main competitor, Findon. Fulham Gardens has some pad site and peripheral commercial uses including fast food, fuel, a fitness centre and offices.

Findon Shopping Centre (9,820 sqm GLA) is an external facing strip complex with Coles and Foodland supermarkets and 28 shops. It sits within a broader commercial strip on Grange Road where ALDI developed and opened a freestanding store in December 2020. Grange Road has a range of other showroom and commercial uses including medical and childcare centres.

Between Fulham Gardens and Findon there will soon be five supermarkets and a good range of existing shops and supporting services within a short distance of the Kidman Park site. These are major influences on the range and style of retailing that can be supported on the site.

Figure 6— Centres & supermarkets



Source: Deep End Services

Figure 6 shows the distribution of Local Centres on the surrounding arterial roads where small businesses provide for local residential areas and high levels of through traffic. Within the Kidman Park and Flinders Park residential areas there are two Local Centre nodes (refer Figure 6 and Figure 7).

Just 500 metres west of the Kidman Park site, on the corner of Valetta Road and Frogmore Road, is a small but dated development of five shops with upper-level residential units. The complex would date back to the 1960's when the area was subdivided. Current tenants are a sign writer, hairdresser, Chinese takeaway food, Kumon tuition office and a vacancy (former café).

In Flinders Park to the east, a small group of shops on Holbrooks Road, just north of Flinders Park Primary School, contains a bakery, two hairdressers, a beautician and an office. On Hartley Road Flinders Park, two standalone shops comprise a butcher and hairdresser.

Figure 7—Local Centres



Valetta Rd / Frogmore Rd, Kidman Park



Holbrooks Road, Flinders Park

The relevant considerations for the provision of local shops and services at the Kidman Park site are:

- The suite of residential zones within the Planning & Design Code generally allows up to 1,000 sqm of 'shop' floorspace.
- The current provision of local centre floorspace in Kidman Park and Flinders Park is low and dated although competition from centres at Findon and Fulham Gardens is high.
- New residents on the site itself will generate demands for local services which could be provided within an attractive local node designed into the development.
- To the south, Lockleys has lower access to neighbourhood and local shopping and the site could be a convenient option for a range of basic services.
- The area is self-contained with schools, community and sporting / recreation facilities which can encourage other services (if available) to be sourced from the local area.

- The range of tenants that can viably trade in local centres is limited to a range of fresh / convenience store tenants, takeaway food, cafes & restaurants, personal services and some office tenants.
- The COVID-19 period is creating a revival in local shopping as consumers seek safe and simplified shopping experiences close to home.
- The new housing development(s) will reimagine the area and will present a new face to an ageing area and a local shopping / service node.
- The Westpac Mortgage Centre less than 10 minutes' walk from the Kidman Park which could be developed in the short term as a significant in-fill housing site.

A simple supply and demand assessment of the local catchment area (refer Table 2) can determine the potential for additional local centre floorspace. Using the local catchment area in Figure 3, the key calculations are:

- The 2021 population of 7,270 will increase by underlying growth (+75 persons per annum) and the Kidman Park DPA site development (+850 people) to approximately 8,500 people by 2026. This is a conservative estimate and could be significantly higher if the Westpac Mortgage Centre site is rezoned and developed in the same period.
- Previous analysis by Deep End Services of the *SA Retail Database* found that Adelaide's average rate of retail floorspace provision in 2007 – being the last comprehensive survey of Adelaide's retail floorspace - was 2.12 sqm per capita across all centre and retail floorspace categories. It is conservatively estimated to be 2.20 sqm per capita in 2021. The supply of retail floorspace in Local Centres was calculated at 10% in 2007 or 0.22 sqm per capita in 2021.
- Applying 0.22 sqm to the 2026 population (8,495 persons) generates a theoretical demand for 1,869 sqm of local centre floorspace in 2026.
- Excluding the supply level (861 sqm) in three small existing centres, the residual opportunity is 1,008 sqm. This will likely be higher factoring further population from the Westpac site.

The analysis shows that a Local Centre of up to 1,000 sqm on the Kidman Park site is supportable by the projected population in 2026.

Table 2— Local Centre floorspace supply & demand

Source: Deep End Services; SA Retail Database

Variable	Unit	
Catchment population		
2021	Persons	7,270
2026 inc. Kidman Park	Persons	8,495
Retail floorspace provision		
All retail (Adelaide)	sqm per capita	2.20
Local centres	(@10% total)	0.22
Local Centre demand (2026)	sqm (pop.x0.22)	1,869
Local Centre supply		
Frogmore & Valetta	sqm	431
Holbrooks Rd / Hartley Rd	sqm	430
Total existing	sqm	861
Local centre opportunity	sqm (demand - supply)	1,008

On balance, a shop area of 800-1,000 sqm should be planned for the site. An aspirational but achievable tenant profile would include:

- Pharmacy – 200 sqm (ideally located close to a medical centre on-site)
- 2x Café / lunch bar / bakery – 200 sqm
- 2 x basic or franchised lunch /evening take away food operators – e.g., Subway, pizza, chicken, fish & chips – 200 sqm
- 1 x restaurant (Italian, Chinese, Thai) – 150 sqm
- 1 x hairdresser – 70 sqm
- 1 x nails / massage / beautician – 60
- 1 x liquor – 120 sqm

3.2 Medical centre

The distribution of medical centres with the number of attending general practitioners (GPs) within a 3km radius of the Kidman Park site is set out in Figure 8.

In total, there are 11 medical centres with 43 GPs at an average of 3.9 GPs per clinic. The 3km radius has 60,050 people (2020) which indicates an average provision of 1 GP for every 1,397 people (refer Table 3).

In the broader region of Western Adelaide (pop. 275,250), extending from Port Adelaide to Glenelg and east to South Road, there are 78 medical centres with 348 GPs at an average on one GP for every 791 residents.

Table 3— Medical centres & GP provision rates

Source: Deep End Services,

	Kidman Park (3km radius)	Adelaide western suburbs
Population	60,050	275,250
Medical Centres		
No.	11	78
GPs	43	348
GPs per clinic	3.9	4.5
Population per GP	1,397	791

While there are several large medical centres just outside the 3km radius (e.g., Western Hospital GP Clinic and others on Port Road), they are offset by a large clinic of 12 GPs just within the radius at Torrensville. On balance, the 3km radius is considered to have a relatively low provision of GPs compared to the wider regional average.

The local distribution of medical centres close to the site shows a strong presence of four clinics along Findon Road (including two with 5 and 8 GPs) however elsewhere clinics are widely spaced with particular gaps in the following areas:

- In or adjoining the Fulham Gardens centre on Tapleys Hill Road. The residential area from the Kidman Park site through to Tapleys Hill Road and the Fulham Gardens centre has no local medical centre and a population of 3,200 people.

- Residential areas of Lockleys east and west of Rowells Road through to Henley Beach Road with a population of 2,800 people. Other than the large medical centre at Torrensville (3km east) this area has a low provision of GPs.

An indicative catchment area for a medical centre on the Kidman Park site is overlaid on Figure 8. The local area has a 2020 population of 7,080 people with the furthest homes within a 5-minute drive of the site. While most residents will have existing GP relationships, some may opt to switch to a new centre close to home while new residents moving to the site may seek a new or additional GP to visit.

The commercial and industrial workforce in Kidman Park and in, or near, the Airport are potential users of a local medical centre, given the light distribution of GPs to the south.

Findon Road carries sufficient traffic to attract the interest of a medical centre as part of a modern, mixed-use local centre. Based on the current population and size and distribution of existing clinics, a medical centre of 3-4 practitioners could be supported on the site.

The medical centre could be developed with additional consulting rooms to accommodate a range of para-medical services or specialists that chose to operate as a single practitioner or service within a broad health and wellness practice. While dentists tend to operate from separate premises, compatible sessional services well-suited to a medical centre are:

- Physiotherapy
- Psychiatry
- Dietician
- Podiatry
- Audiology
- Blood collection

3.3 Flexible commercial space

The take-up of small (ground or upper level) office tenancies is difficult to predict however there appears to be limited available space at Fulham Gardens and Findon. An attractive, well planned local centre could provide some flexible office or commercial space attractive to small professional services firms, health practitioners, service businesses, NGOs or instructional services /classes such as educational tuition, self-defence, music or dance classes.

3.4 Childcare

The Kidman Park land presents an opportunity for a long day childcare centre (LDC) to service the surrounding commercial and industrial areas, new families on site and for workers commuting through the area who may find the site convenient, being either close to home or work (such as the airport).

An assessment of the demand and supply for LDC places within the defined catchment area is set out in Table 4. It draws conclusions on the supportable number of LDC places that could be provided on the site. Figure 9 identifies the existing LDC centres and their registered places with a catchment area for the

Kidman Park site based on the pattern of residential and industrial land use in the area, access to the site and the size and the location of existing LDC centres.

It should be noted that the catchment area is for the site and does not apply to the surrounding child care centres that are either on the boundary, or beyond it. The demand for child care places within the catchment area cannot be directly compared to the supply of places in centres that are on the boundary or beyond it, as those centres (including two on arterial roads and a third in the Westpac call centre) will operate from different catchments than the Kidman Park site.

Table 4— Childcare supply & demand

	2016	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
Kidman Park Catchment population	9,090	9,464	9,503	9,559	9,616	9,672	9,728	9,784	9,844	9,903	9,962	10,021
Childcare demand analysis												
Children - % 0-4	5.3%	5.3%	5.3%	5.3%	5.3%	5.3%	5.3%	5.3%	5.3%	5.3%	5.3%	5.3%
No. of children 0-4 yrs	482	502	504	507	510	513	516	519	522	525	528	531
Modelled proportion 0-4 yrs in childcare (%)		48.3%	49.3%	49.8%	50.3%	50.8%	51.3%	51.8%	52.3%	52.9%	53.4%	53.9%
Children 0-4 yrs in formal childcare (No.)		243	249	253	257	261	265	269	273	278	282	286
Avg. SA weekly hours of care per child		26.6	26.6	26.6	26.6	26.6	26.6	26.6	26.6	26.6	26.6	26.6
Avg. hours per LDC day		10.0	10.0	10.0	10.0	10.0	10.0	10.0	10.0	10.0	10.0	10.0
Total child care days per week		646	662	673	684	694	705	716	726	739	750	761
Weekly demand for 0-4 yr old places		129	132	135	137	139	141	143	145	148	150	152
Total inc. children aged > 4 yrs (@5%)		136	139	142	144	146	148	151	153	156	158	160
LDC supply opportunity (@ 80% place occupancy)		170	174	178	180	183	185	189	191	195	198	200
Childcare supply in or near the catchment												
Stepping Stone Kidman Park			150	150	150	150	150	150	150	150	150	150
Kidman Park Community Child Care Centre			53	53	53	53	53	53	53	53	53	53
Lockleys Child Care & ELC			70	70	70	70	70	70	70	70	70	70
Kidman Park site												
Supportable places (@ 25% share of supply opport.)						45	46	46	47	48	49	50
Plus children from outside catchment (@25%)						15	15	15	16	16	16	17
Total recommended ELC size						60	61	62	63	64	65	66

Source: ABS, Department of Education

The inputs and calculations to the assessment of the **demand** for childcare places are as follows:

- The catchment population is based on published ABS small area data at the Statistical Area 1 (SA1) level to 2020. The current population of approximately 9,500 people is growing slowly with small additions assumed until the Kidman Park site is developed and occupied over a 2-3 year period.
- The 0-4 year age cohort of about 500 infants and children made up 5.3% of the catchment population at the 2016 Census – a proportion slightly below the Adelaide average of 5.9%. This proportion is held constant for future years.
- The proportion of children using long day care is drawn from state-based data in *Early Childhood and Child Care in Summary* (ECCC), a quarterly publication by the Federal Department of Education, Skills and Training. Within the catchment,

the estimated proportion of children placed in long day care (48.3% in 2020) is adjusted up from the 2019/20 SA state average (44.0%) to allow for:

- A higher propensity to use childcare in metropolitan areas than regional areas.
- More affluent families compared to state and Adelaide average.
- A higher proportion of families where the single parent or both parents work.
- The proportion of children using long day childcare is grown gradually across the forecast period to reflect and continue the recent historic increases in formal childcare use in the State.
- The estimated number of 0-4 year old children seeking long day care grows from 249 in 2021 to 278 in 2028.
- The daily demand for places is based on:
 - a state average of 26.6 hours in care per child per week or the equivalent of 2.66 days per week (assuming 10 hours of care per day)
 - The estimated 0-4-year-old children in childcare in 2021 (249) multiplied by 2.66 days per week generates total weekdays in demand (662). This is divided by 5 to generate the average daily places in demand by 0-4-year old's (132 places in 2021) from Monday to Friday.
 - The demand level from 0-4 year old's is grossed up by 5% to account for the smaller demand from children aged over 4 years.
- Total place demand assumes that all childcare centres have an average 80% occupancy rate – a benchmark based on surveys for Australian Childcare Alliance (ACA).

On these assumptions and calculations, the total number of daily places in demand from the catchment area is **174** places in 2021 increasing to **195** in 2028.

Current LDC centres within or just outside the catchment area include:

- Stepping Stone Kidman Park Childcare & Early Development Centre at 346 Grange Road. This is the largest LDC centre in the region licensed for 150 places on a 3,900 sqm site. It has a strong position on the edge of the Findon Centre and would partly service the coastal suburbs which have low rates of childcare provision and commuters moving to and from central city.
- Kidman Park Community Child Care Centre, centrally located in the suburb beside Kidman Park Primary School. The facility is licensed for 53 places.
- The new Montessori House LCD centre at 399 Tapleys Hill Rd Fulham Gardens. Built in 2017, it is licensed for 80 children on a site of 2,600 sqm.
- Lockleys Child Care and Early Learning Centre at 25 Pierson Street - a 70-place employer-sponsored facility on the grounds of the 5-hectare Westpac call centre. Westpac appears to have a workforce of well over 700 people which would largely support the on-site childcare centre. It is unknown at this stage whether the childcare centre would be replaced in a medium density residential redevelopment of the site proposed under the current Lockleys Code Amendment.

Three of these four centres are listed in Table 4 however their total space capacity cannot be directly compared to the level of assessed demand within the catchment because of their different catchment characteristics. In other words, only a proportion of the children in these centres would be sourced from the Kidman Park catchment.

The Kidman Park site is central to the catchment and will be visible for the 19,000 – 20,00 existing vehicles per day on Findon Road. A contemporary, well designed and operated childcare centre could attract 25% of the LDC supply opportunity of 183 places in 2024 – or 45 places. A further 25% of total places (or 15 places) could be generated from families outside the catchment, from the nearby workforce and commuters on Findon Road.

On this basis a small-midsized LDC centre of 60-70 places is supportable on the site with a land area requirement in the range of 1,500-2,000 sqm.

3.5 Gym & fitness centres

The distribution of gyms, fitness clubs and instructional fitness classes held within commercial premises and located within 3km of the Kidman Park site is mapped in Figure 10. These venues exclude Pilates and yoga studios.

There are 17 gym / fitness clubs within 3km at an average density of one for every 3,532 people (refer Table 5). This is a slightly higher density than for the broader western suburbs of Adelaide where the average is close to one for every 4,000 people – although rates across Adelaide are not uniform and vary according to income and age structures.

Table 5— Provision of gyms & fitness clubs

Source: Deep End Services

	Kidman Park (3km radius)	Adelaide western suburbs
Population	60,050	275,250
Gyms / Fitness Clubs		
No.	17	70
Population per gym	3,532	3,932

The local area is generally well supplied with large franchised and national chain fitness clubs such as Anytime Fitness (3), EFM Health Clubs (3), Zap (1), Curves (1), Derrimut 24:7 (1) and F45 (2).

Clusters have emerged in the area with major operators around centres and along major roads and some smaller independents in secondary locations and industrial areas. The centre and main road sites are probably drawing on commuter traffic to and from the central city area.

The obvious clusters are in or adjoining:

- Fulham Gardens Centre (2)
- Findon Centre (2)
- East end of Grange Road (Flinders Park & Welland)
- East end of Henley Beach Road (Mile End & Torrensville)

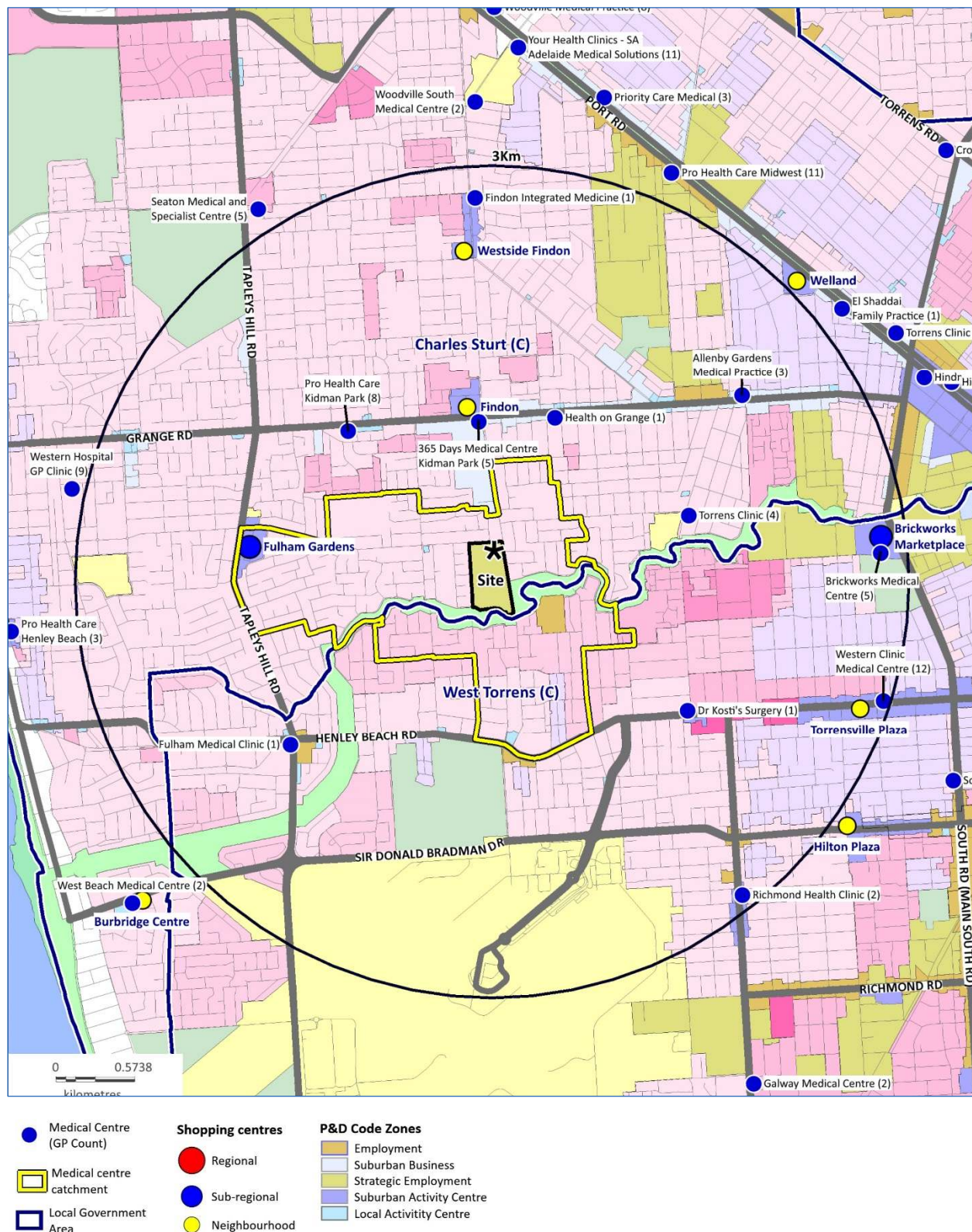
Just north of the Kidman Park site is an independent operator (Viva Fitness) located at the end of a cul-de-sac in the Kidman Park industrial area, off Findon Road.

The Kidman Park site is likely to have less appeal to the major franchised groups that seek high exposure and passing traffic and often in, or close to, centres. However, with the re-imaging of the Kidman Park site with a modern town house and apartment product and the establishment of a small commercial node, a small independent fitness club potentially specialising in instructional classes than offering large fully equipped training and exercise rooms could be attracted.

The residential area of Lockleys to the south is an area of opportunity where access to fitness clubs is a lower than areas north of Karrawirra Parri.

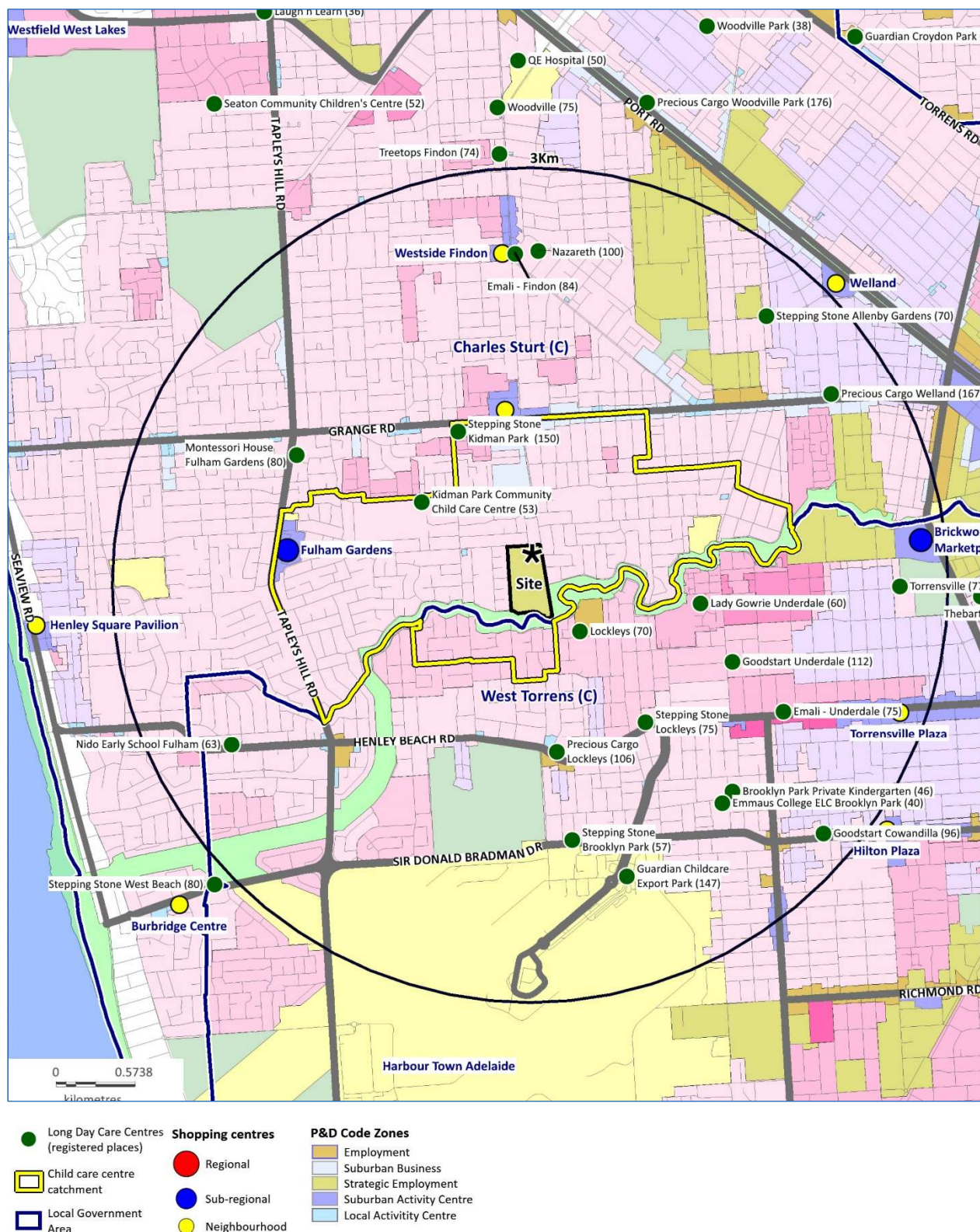
The area has a positive and improving income profile that can support the higher provision of fitness clubs in the area. Planning for the site should make allowance for a 300-400 sqm multi-purpose and flexible fitness / health instruction studio. This could incorporate Pilates, Zumba, yoga or meditation-type programs. The space could be provided at ground or upper level.

Figure 8— Medical centres & GP counts



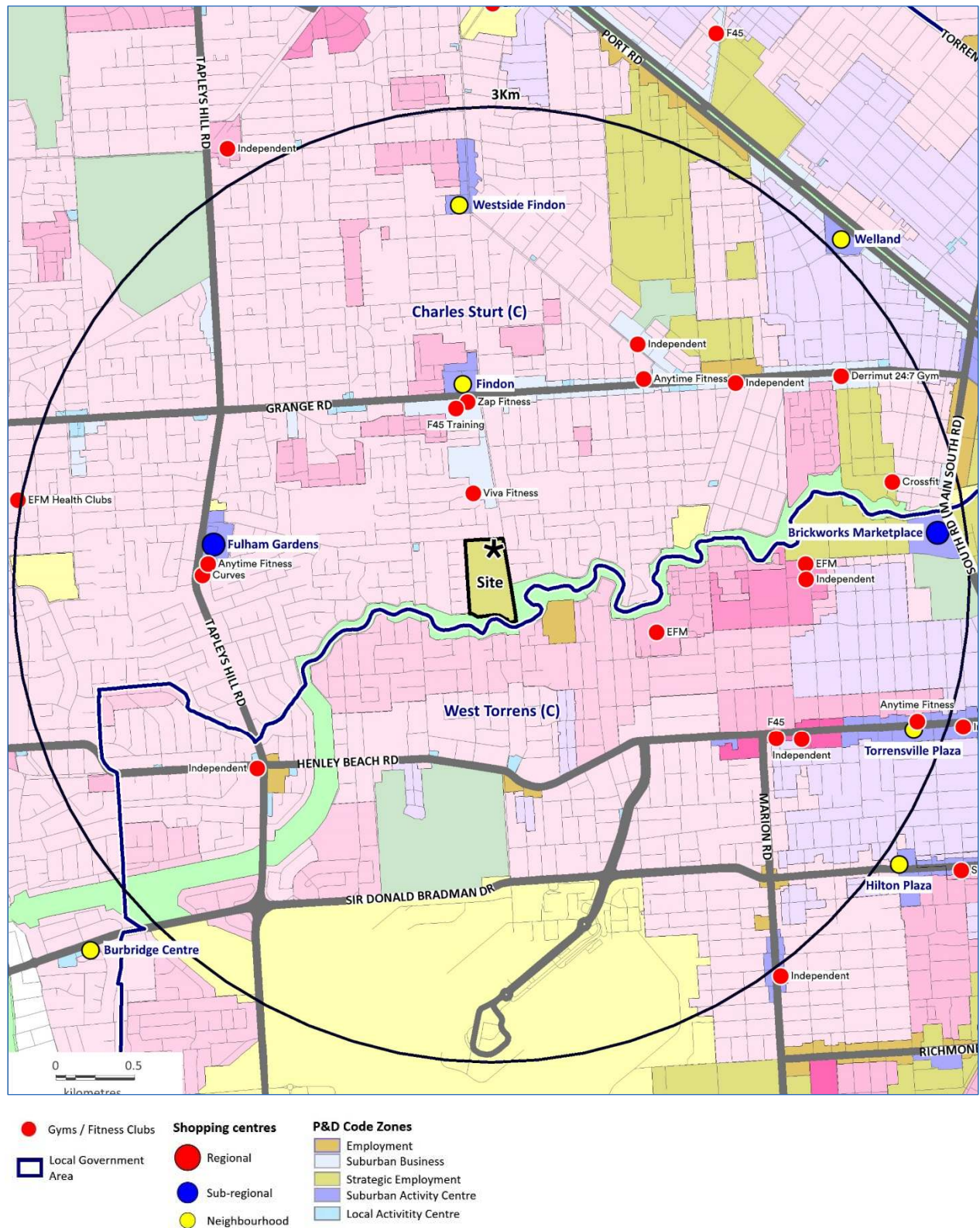
Source: Deep End Services

Figure 9— Long Day Child Care Centres & registered places



Source: Deep End Services

Figure 10— Gyms & Fitness Clubs



Source: Deep End Services

4

Conclusions

The Kidman Park PDA land and its local catchment area have a range of positive attributes which support a small local retailing and commercial node on the high-profile corner of Findon Road and Valetta Road. The favourable characteristics are:

- An established but growing local population with above average income levels and up to 850-900 new residents on the DPA site.
- A further potentially significant population increase on the Westpac Mortgage Centres site (subject to the current DPA process) 350 metres from the Kidman Park land. The Westpac site is less suited to providing a local centre than the Kidman Park land.
- A high-profile site, central and well connected to the broader housing area with residential interfaces, linear river reserves and strong levels of passing traffic.
- A low provision and quality of local centre floorspace in Kidman Park, Flinders Park and Lockleys.
- A good range of local schools and leisure facilities encouraging a level of self-containment for some services and activities.

The supportable commercial and community land uses and indicative land area requirements for the Kidman Park site are summarised in Table 6.

To optimise the available land area, a small Local Centre comprising a shop / retail area of 1,000 sqm with upper space for a gym (400 sqm) and other flexible commercial areas (300 sqm) should fit on a 4,000 sqm site.

A medical centre of 400 sqm (potentially on a separate title) will need a land area of approximately 1,000 sqm.

These uses would fill out the corner site of approximately 5,000 sqm with a two-level building that will provide a focal point and feature design element for the wider project.

A 60-70 place childcare centre would require a land area of approximately 1,500-1,800 sqm. A larger site of 2,000 sqm provides flexibility if an operator elects to develop a facility with a larger capacity.

Table 6—Kidman Park commercial site recommendations

Land use	Gross leasable floor area (sqm)	Estimated land area (sqm)
Shops/ retail	1,000	4,000
Gym (upper level)	400	-
Commercial space (upper level)	300	-
Medical centre	400	1,000
Total Local Centre	2,100	5,000
Childcare centre	-	1,500 - 2,000

The retail floor area and other recommended uses on the Kidman Park site will have little or no overall effect on the Suburban Activity Centres of Findon and Fulham Gardens because:

- The recommended retail floorspace (up to 1,000 sqm GLA) is minor in the context of the combined 24,500 sqm GLA in the Fulham Gardens and Findon shopping centres. Other retail and commercial floorspace at Fulham Gardens and Findon outside the supermarket-based malls of these centres serves to further dilute any small effect of the additional floorspace.
- The Fulham Gardens centre is presently undertaking a major redevelopment adding new high traffic generators (Woolworths and Dan Murphy's) in place of the former Target store while the Findon centre recently added ALDI.
- The Kidman Park DPA will support a small range of shops and services, some of which will be duplicated in the Suburban Activity Zones however the significant traffic generators (supermarkets) and most shops and service tenants will have no direct competition.
- Very low impacts will be spread around other centres that draw across the area including Brickworks Marketplace and Torrensville (Henley Beach Road)
- The area is deficient in some uses such as medical centres and childcare facilities.

The retail floor area and other recommended uses on the Kidman Park site will have little or no overall effect on the two small Local Centres in Kidman Park and Flinders Park because:

- These centres have some specialised tenancies (unlikely to be duplicated) and would appear to operate on highly localised catchments and passing traffic.
- The floorspace across the two centres is very small, amounting to a low level of local centre floorspace provision compared to metropolitan averages.

- The Flinders Park centre on Holbrooks Road is on parallel main road with different traffic movements and has its own local traffic generators including a primary school and secondary school.
- The small Kidman Park local centre offers only a low level of service to the area.

A small local retail and community node on the Kidman Park land will have a range of positive benefits including:

- It will provide an active focus and community hub for the key corner site of the DPA land and deliver on the concept of a true mixed-use development.
- The opportunity for new and existing residents to access essential retail stores and potentially childcare and medical services by foot. This enhances the efficiency and sustainability credentials of a future development.
- It will generate up to 75 full and part-time local employment opportunities.
- That part of the floorspace will be sustained by the new on-site population.
- The proposal improves the efficiency and serviceability of the activity centre network in the southern areas of the City of Charles Sturt.