Notice of Strategic Planning and Development Policy Committee Meeting
Tuesday 30 August 2016

MEMBERSHIP
Cr Damian Wyld (Presiding Member)
Cr Lucas Jones
Cr Robin Coleman
Cr Stuart Headland
Mayor Kevin Knight (Apology)
Cr Matthew Harbinson

NOTICE is hereby given pursuant to Sections 87 and 88 of the Local Government Act 1999 that the next STRATEGIC PLANNING AND DEVELOPMENT POLICY COMMITTEE MEETING will be held in the Banksia Room, 571 Montague Road, Modbury on TUESDAY 30 AUGUST 2016 commencing at 6.30pm.

A copy of the Agenda for the above meeting is supplied as required.

JOHN MOYLE
CHIEF EXECUTIVE OFFICER
Dated: 25 August 2016
AGENDA

1. Opening and Welcome

Acknowledgement of Country Statement

“The City of Tea Tree Gully recognises this City’s considerable natural and cultural heritage, including thousands of years of Traditional Ownership by the Kaurna people and the more recent contributions from all who live here. We build on this heritage today by respecting and listening to each other, being receptive to new ideas and acting wisely for the current and future well-being of our community”.

2. Attendance Record:

   2.1 Present
   2.2 Apologies
   2.3 Record of Officers in attendance
   2.4 Record of number of persons in the Public Gallery
   2.5 Record of media representatives in attendance

3. Confirmation of Minutes of the Previous Meeting

That the Minutes of the Strategic Planning and Development Policy Committee Meeting held on 21 June 2016 be confirmed as a true and accurate record of proceedings.

4. Public Forum

Available to the public to address the Committee on policy, strategic matters or items that are currently before the Committee. Total time 10 mins with maximum of 2 mins per speaker. For more information refer to Council’s website www.teatreegully.sa.gov.au

5. Deputations - Nil

Requests from the public to address the meeting must be received in writing 5 days prior to the meeting and approved by the Presiding Member. For more information refer to Council’s website www.teatreegully.sa.gov.au

6. Presentations

   6.1 Clovercrest Shopping Centre - Consultation Overview

Ms Helen Dyer, Holmes Dyer will provide an overview of the results from the consultation that was undertaken by the Clovercrest Shopping Centre in relation to the potential redevelopment of their shopping centre.
6.2 Modbury Precinct Performance Evaluation 2016

Mr Brett Steiner, Team Leader Planning Strategy to present on the outcomes of the Modbury Precinct Performance Evaluation as provided in Item 16 - Information Report entitled Modbury Precinct Performance Evaluation 2016.

Requests from the public to present to the meeting must be received in writing 5 days prior to the meeting and approved by the Mayor. For more information refer to Council’s website www.teatreegully.sa.gov.au

7. Petitions - Nil

8. Declarations of Conflicts of Interest

Members are invited to declare any material, actual and/or perceived conflicts of interest in matters appearing before the Committee.

9. Adjourned Business - Nil

10. Motions Lying on the Table - Nil

11. Management Reports

Office of the Chief Executive Officer

*11.1 Review of Commercial, Industry, Mineral Extraction Zones
Statement of Intent..................................................................................................................7

Assets & Environment - Nil

Organisational Services & Excellence - Nil

Community & Cultural Development - Nil

12. Notice of Motions - Nil

13. Motions without Notice

14. Questions on Notice - Nil

15. Questions without Notice
16. Information Reports

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17. Status Report on Council and Committee Resolutions - Nil

18. Status Report on Committee Resolutions - Nil

19. Other Business

20. Section 90(2) Local Government Act 1999 – Confidential Items - Nil

   A record must be kept on the grounds that this decision is made.

21. Date of Next Ordinary Meeting

   29 November 2016

22. Closure

   The Committee meeting shall conclude on or before 10.30pm unless there is a specific motion adopted at the meeting to continue beyond that time.
REPORT FOR STRATEGIC PLANNING AND DEVELOPMENT POLICY COMMITTEE MEETING

MEETING DATE 30 AUGUST 2016

RECORD NO: D16/47142
REPORT OF: OFFICE OF THE CHIEF EXECUTIVE OFFICER
TITLE: REVIEW OF COMMERCIAL, INDUSTRY, MINERAL EXTRATION ZONES STATEMENT OF INTENT

PURPOSE

For the Strategic Planning and Development Policy Committee to consider the Statement of Intent for the Review of Commercial, Industry and Mineral Extraction Zones Development Plan Amendment.

RECOMMENDATION

That the Strategic Planning and Development Policy Committee recommends to Council:

1 BACKGROUND

1.1 Timelines

The following is a summary of the timelines and information that has been presented to the Elected Members in relation to this matter:

15 October 2015

InfraPlan presented to the Strategic Planning and Development Policy Committee (SP&DPC) the findings from their review of current policies in the Industry, Commercial and Centre zones as contained in the Tea Tree Gully Council Development Plan. In addition InfraPlan also presented on the industry trends within the City of Tea Tree Gully. The review was undertaken by InfraPlan to provide independent advice regarding:

• The viability of the existing Industry, Commercial and Centre zones
• New and emerging industry trends
• The potential of attracting these industries to establish within our City.

The findings highlighted there was a need to amend Council’s Development Plan to better respond to the changing market conditions in combination with a decline in manufacturing businesses and employment, and a decline in retail trade employment within the City of Tea Tree Gully.

Some land uses within these zones may continue to decline and our centres are likely to continue to evolve as external trends, including online shopping, have an impact on local traders. The report from InfraPlan highlights potential new and developing industries and businesses that may be attracted to our City and provide local employment opportunities.

29 April 2016

An Information Report entitled “30 Year Plan update and implications for Council’s Section 30 Review” informed Elected Members that staff were preparing the Statement of Intent (SOI) for a Development Plan Amendment (DPA) for Commercial and Industry Zones for consideration by Council in June 2016.

3 May 2016

A presentation at a CEO Workshop covered the process for preparing the SOI and DPA and identified the affected zones, affected land and the reasons for the inclusion of various other sites. Elected Members were also informed of the outcomes of the Minister for Planning’s Development Plan Amendment for Existing Activity Centres Policy Review which updated centres policies in all Development Plans.

13 May 2016

An Information Report entitled “Existing Activity Centres Policy Review – Ministerial Development Plan Amendment” detailed all the aspects of the Minister’s amendments.
21 June 2016

The SP&DPC considered a staff report and the Statement of Intent regarding the Review of Commercial, Industry and Mineral Extraction Zones.

The SP&DPC resolved:
“That the Strategic Planning and Development Policy Committee refers this item to Council after such time as a CEO workshop can be provided to Elected Members.”

15 August 2016

Staff presented at a CEO Workshop as requested by the SPDPC above.

1.2 Statement of Intent - Purpose and Role

The SOI (Attachment 1) is required for a number of reasons:

- It provides the scope for the DPA investigations. It includes the reasons for undertaking the DPA and a description of the changes in circumstances leading to the need for the DPA
- It is a requirement of the Development Act 1993 and needs to be approved by the Minister for Planning. It addresses the Planning Strategy policies, the policies in Council’s Development Plan and relevant local issues, as well as identifying which policy modules Council is likely to use from the Planning Policy Library
- It is the formal agreement between Council and Minister for Planning to proceed with the DPA within a set timeline and scope
- It allows Council to commence formal investigations into the issues pertaining to the DPA including formal consultation with government agencies.

Council was previously advised that the SOI will no longer include investigations in relation to centre zones because the Minister’s DPA sufficiently addressed the issues that needed attention. However, the findings in the InfraPlan Report relating to the centres will assist staff with providing comment on the new planning and design codes being developed by the Department for Planning Transport Infrastructure (DPTI) as part of the new Planning Development and Infrastructure Act 2016.
2 DISCUSSION

There are a number of reasons for commencing this project. These are detailed below.

2.1 Industry sector trends

During the 1950s and 1970s manufacturing represented 1 in 4 jobs nationally, this has now declined to 1 in 12 jobs with the economy shifting primarily towards service based industries (source: Committee for Economic Development Australia, 2015). Employment areas like our Light Industry Zone contained the type of industries that were common place at this time.

The current Light Industry, Commercial and Mineral Extraction zones in Council’s Development Plan were established during these decades and there have been only minor changes to the policies and objectives of these zones since then.

The changes in employment type at a national level are also reflected in our local economy. Local manufacturing has steadily declined both in terms of economic output and local employment, as identified in Figures 1 and 2 below.
Item 11.1

Figure 1: Change in employment

Change in output by industry sector, 2000/01 to 2014/15

Figure 2: Change in output by industry sector
These figures show that in the past 15 years there has been a significant drop in sales and employment in the manufacturing sector within our City.

The trend in the decline of manufacturing is evident from approaches to Council from a number of people wanting to establish new businesses/land uses which are at times incompatible with the policies and objectives in our Development Plan for the Light Industry and Commercial zones. Over time some land uses have established within these zones that are not envisaged by the current zoning.

While these uses may have ultimately been acceptable from an urban planning perspective, and in some cases have been approved, the current policies may create unnecessary red tape for businesses, uncertainty, time delays and increased fees and establishment costs.

Changes to our local economy should be accommodated by policies in our Development Plan i.e. that this City supports existing businesses looking to expand their operations and new businesses looking to establish in our City. This requires an amendment to our Development Plan.

The DPA investigations propose to explore how the Development Plan policies might better facilitate access to local employment for our residents, reduce costs associated with establishing businesses and improve overall prosperity within our community.

2.2 Requests from land owners

In addition to the above, Council has received a number of requests to amend the Development Plan to support current businesses and new proposals in our City which would ultimately result in economic growth and community benefits. Pages 1 to 19 in Attachment 1 contain plans showing the location of these sites. The location of these sites are as follows:

A. The owners of properties located at 1276, 1278 and 1280 North East Road, Tea Tree Gully approached Council during community engagement for the City Master Plan 2011-2040 and the Strategic Directions Report in 2010-2011. They requested that Council consider rezoning these properties from residential to Commercial/Mix Use Zone. The sites are currently zoned for residential development and are adjacent the petrol filling station on the corner of North East Road and Hancock Road. The request for rezoning is aligned with the SOI.

B. The owners of Lot 2 Aristotle Close, Golden Grove have requested that the site be rezoned from light industry to residential as there is minimal demand for industrial sites in the locality and the site is vacant.

As part of the investigations for this DPA the owners of Lot 2 Aristotle Close Golden Grove would provide Council with detailed investigations on matters such as:
- Storm water and civil works investigations
- Traffic impact assessment
- Acoustic or noise attenuation measures required for interface between the Light Industry Zone and the proposed residential land
- Residential form proposed on the subject land to complement the adjoining residential areas
• Assessment against the Housing and Employment Land Supply Program and the 30 Year Plan for Greater Adelaide.

Council staff would then review these findings to inform the preparation for this component of the DPA.

C. The owner of a property on Greenwith Road, Golden Grove has approached Council requesting an amendment to the current Mineral Extraction Zone, to a zone that supports the current industrial and commercial uses that have established over time in this portion of Greenwith Road. The 15 sites identified are: 31-49, 51-55, 57-61, 63-67, 69-73, 75-79, 87-99, 101-105, 107-115, 117-127, 129-137, 139-143, 145-149, 151-155 and 157-169 Greenwith Road, Golden Grove. These sites are in individual ownership and have over time been developed for industrial and other non-extractive industry uses including residential uses with associated businesses operated from the sites. The land owner who has approached Council has advised that due to the current zoning, banks and other financial lenders are apprehensive about lending funds to enable business owners to expand and develop their businesses because of the zoning.

Following the original report to the SP&DPC on 21 June 2016, Council has subsequently been asked to include those properties on the northern side of Greenwith Road Golden Grove in the SOI for the same reasons as outlined above. These properties are: 2-8, 10-18, 20-28, 30-48, 40-48 Greenwith Road Golden Grove.

The land owners considered that the economic viability of these relatively small businesses is being inhibited by the current zoning and has asked for Council to consider reviewing the Mineral Extraction Zoning for their sites to better accommodate their businesses.

D. In recent times Council has received enquiries about future development opportunities for other sites within the Mineral Extraction Zone that are not of a mineral extraction nature, these are:

• Lot 100, Hancock Road, Golden Grove
• Lot 5, 122 Golden Grove Road, Yatala Vale
• Lot 32 1235-1243 Golden Grove Road, Golden Grove.

The current policies in the Development Plan are focused on facilitating mining activities on for these sites

There are limited policies regarding basic development assessment principles to enable staff and the Council Development Assessment Panel to assess development for non-extractive industry land uses on these sites (such as the application for a bus depot a few years ago). Additional policies might cover issues such as:

• Appropriate land uses
• Urban design principles
• Egress and ingress points for vehicles
• Landscaping and buffers
• Building setbacks
• Interface between uses e.g. the residential on the western side of Hancock Road and possible uses on the eastern side of Hancock Road

Reviewing the current policies in the Development Plan will give Council the opportunity to consider measures available in the planning system such a policy area that specifically address the issues mentioned. Once the draft DPA is prepared it will give Council the opportunity to consult with all owners of the sites and residents.

The DPA would also give consideration to creating a policy area for the adjoining church at Lot 30, 1245 Golden Grove Road Golden Grove (a Local Heritage Place).

It is appropriate for Council to consider requests from land owners, particularly when there are potential community benefits that could be generated from changes to planning policies such as more housing opportunities, increased local investment, and additional local businesses and employment opportunities.

The Mineral Extraction Zone has statewide importance as it protects a mineral resource that is important for the development of the state of South Australia. It is prudent, however, to consider the request of the affected land owners to ensure that existing business owners are adequately supported.

It is also important to ensure that land that does not contain valuable mineral resources can generate community benefits by providing employment or other benefits and that there are adequate policies to control these land uses and manage the interface between mining activities and residential areas.

2.3 Other Factors

2.3.1 The City of Tea Tree Gully Strategic Directions Report 2011

Council’s Strategic Directions Report 2011 identifies the DPAs that Council has indicted that it needs to undertake.

It identified a Commercial Precinct Development Plan Amendment (DPA) as a priority for Council. This DPA has now been renamed to Review of Commercial, Industry and Mineral Extraction Zones DPA and will also include the Infrastructure Zone.

2.3.2 Recent amendments to the Development Plan by the State Government

The Minister for Planning has completed the “Existing Activity Centres Policy Review DPA” as reported to Council in the Information Report dated 20 March 2016.

In recent discussions with staff from DPTI, Council staff were advised that Council should only progress with the Commercial Zone and Light Industry Zone components of it’s DPA as the Minister’s “Existing Activity Centres Policy Review’ addressed many of the issues relevant to the centre zones.
The Minister’s DPA introduced changes to the Development Plan including standardisation of car parking requirements, removing mandatory floor level caps, and changes to public notification categories.

The Minister has indicated that the State Government remains keen to unlock further economic opportunities for the retail sector and other business sectors. The Minister’s work is likely to lead to other changes in our centre zones and Council will be asked to participate as a stakeholder rather than initiating its own changes to centre policies.

DPTI representatives have suggested that Council proceed with reviewing its Commercial and Light Industry zones (including the Infrastructure Zone) and include investigations regarding the Mineral Extraction Zone as part of this DPA. This approach aligns with the State Government’s current priorities of supporting business growth and employment.

2.3.3 Summary of proposed changes

The SOI is a formal agreement between Council and the Minister for Planning regarding the matters to be considered and the processes to be undertaken when amending the policies within a Development Plan.

The Review of Commercial, Industry and Mineral Extraction Zones DPA will address the issues identified in our Strategic Directions Report 2011. The DPA will examine the following zones:

- Commercial
- Light Industry
- Infrastructure
- Mineral Extraction

The intent of the Review of the Commercial, Industry and Mineral Extraction Zones DPA will be to review and identify policies that should be included in our Development Plan that will allow increased diversity of land uses within the Commercial, Light Industry, Mineral Extraction and Infrastructure Zones. The new policies would also aim to introduce zoning that is flexible to accommodate changes to the structure of our local economy, and continue to support businesses and local employment.

3 POLICY IMPLICATIONS

3.1 Financial / Budget

Costs associated with preparing the DPA have been budgeted in the draft budget for the financial year 2016-2017. A total of $13,000 has been allocated for specialist external advice and to undertake community engagement.

The intent of the DPA is to improve the prosperity of the local community through facilitating growth in investment, business and local employment. This will have flow on benefits including an improvement in Council’s long term financial sustainability.
3.2 **Legal and Risk Management**

The SOI has been prepared using the standard document template provided by DPTI which Councils are required to use.

The DPA investigations would be undertaken in accordance with the requirements of the *Development Act 1993* as this is a prescribed process set out in the *Development Regulations*. The Development Act and Regulations establish the processes and procedures for councils to follow when preparing a SOI and DPA.

Some of the information required for investigations in relation to Lot 2 Aristotle Place would be provided by the land owner, further reducing costs to Council that would otherwise be incurred for investigations. Council staff and staff from DPTI will need to review the information provided by the land owner to ensure it satisfies the requirements of the investigations process.

3.3 **Staffing / Work Plans**

The preparation of the DPA and investigations can be accommodated within existing staff work plans.

3.4 **Environmental**

The DPA will consider opportunities for environmentally sustainable development principles and policies.

There may be an opportunity for the zones under review to include transition areas that accommodate land uses that have lesser impacts on local amenity than some of the existing light industrial uses. Policies addressing local amenity and the interface between the sensitive residential areas and the Commercial and Light Industry Zones would be considered as part of the DPA investigations.

3.5 **Social**

The DPA would generate a number of social benefits derived from improving the prosperity of the local community, which is a key aspect of community wellbeing.

The DPA would consider the needs of local land owners and businesses and potentially generate income for local residents within the Council area and broader region.

The DPA is likely to rejuvenate economic centres in our City and lead to long term economic and social benefits for our residents by locating employment opportunities close to home.
3.6 **Strategic Plan / Policy**

Council’s strategies relevant to this DPA include:

3.6.1 **Council’s Strategic Plan 2020**

The following Strategic Plan 2020 aspirations and objectives support this initiative:

“**Prosperous and Connected**

**Aspiration:** Our local economy prospers and people feel a sense of purpose and belonging.

**Objective 1:** A community that has a say in decisions that affect them.

**Objective 2:** A community that participates in meaningful community and economic activities.

**Objective 3:** A community with a resilient local economy.

**Objective 4:** A community where people have the resources and capacity to achieve goals.”

The Statement of Intent broadly outlines the community consultation process undertaken for the DPA and seeks to improve local opportunities to grow the local economy and provide local employment opportunities.

“**Vibrant and Liveable**

**Aspiration:** Our City is a desirable and sustainable place to live.

**Objective 1:** A city that is made up of places and spaces that are appealing and easy to access.”

The DPA provides the opportunity to address issues related to local amenity and design that contribute to creating appealing and accessible places.

3.6.2 **City Master Plan 2011-2040**

The City Master Plan 2011-2040 is one of Council’s strategic management plans. It maps out Council’s vision and objectives for our City for the next 30 years.

The DPA is supported by the City Master Plan which provides the following commentary about light industries and service industries within the “sites of economic activity” section of the plan:

“**Businesses in the light industry and service sectors serve the needs of our local community (for example, electrical, plumbing or building) and wholesale retailers. These areas have development potential for:**

- low-impact specialist manufacturing
- defence-related services and advanced technology manufacturing
- clean technology and emerging industries
- digital, knowledge-based and creative businesses capitalising on access to high speed broadband
- business clusters.”
3.6.3 Council Strategic Directions Report 2011 (Section 30 Report)

This report identifies any amendments that Council considers are required to achieve consistencies between the Development Plan and South Australian Planning Strategy.

The reference in the Strategic Directions Report that identifies the matters that this SOI proposes to address is as follows:

*Light and Service Industry*

*The Commercial Precincts DPA will increase the capacity of the existing urban footprint to accommodate low impact specialist manufacturing, defence-related services and advanced technology manufacturing, clean technology & emerging industries digital, knowledge-based and creative business clusters in areas identified by the City Master Plan.*

3.6.4 Tea Tree Gully Development Plan

Recently, staff have noticed that DPTI's decisions/advice in relation to development applications for erecting/installing business signs along main roads seem to be applied inconsistently throughout the metropolitan area. This has resulted in some applications for signs being refused in some locations whilst similar signs in other locations have been approved. It is proposed that staff raise this matter with DPTI (transport) to clarify the reasons for this and seek to achieve a more consistent approach that considers traffic safety as well as the needs of business operators.

3.7 Stakeholder Engagement

Council staff have consulted DPTI staff informally throughout the drafting of the SOI. No formal consultation is required at this stage. During the DPA investigations Council staff will consult with the following stakeholders:

- Department for Transport, Energy and Infrastructure (DPTI)
- State Development Department
- Land owners and business owners in the affected areas.

The Statement of Intent broadly outlines the proposed approach for community engagement and this will become part of the agreement between Council and the Minister for Planning.

A detailed engagement strategy will be presented to the SP&DPC for consideration when the draft DPA is ready for community engagement.

The community engagement strategy will also need to comply with the requirements of sections 25(6), (7) (8) and (9) of the *Development Act 1993*. Consultation Process B (where approval is not required from the Minister prior to undertaking consultation) will be followed with the DPA being released for concurrent agency and public consultation for 8 weeks.
3.8 **Promotion / Communications**

Staff will update Elected Members on the progress of the DPA as it progresses.

A further report will be presented to the SP&DPC containing the draft DPA and a proposed strategy for engagement with the community and other stakeholders.

4 **REPORT CONSULTATION**

The following staff have been included in the consultation process in the preparation of this Report.

<table>
<thead>
<tr>
<th>Name</th>
<th>Position</th>
<th>Issue</th>
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</thead>
<tbody>
<tr>
<td>Joy O'Keefe-Craig</td>
<td>Governance Officer</td>
<td>Recommendation and Purpose</td>
</tr>
<tr>
<td>Anna Draper</td>
<td>Manager Finance &amp; Rating Operations</td>
<td>Financial / Budget (3.1)</td>
</tr>
<tr>
<td>Jon Herd</td>
<td>Environmental Officer</td>
<td>Environmental (3.4)</td>
</tr>
<tr>
<td>Carla Leversedge</td>
<td>Manager Community Development &amp;</td>
<td>Social (3.5)</td>
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<td>Engagement</td>
<td>Stakeholder Engagement (3.7)</td>
</tr>
<tr>
<td>Ingrid Wilkshire</td>
<td>Manager City Strategy</td>
<td>Strategic Plan (3.6)</td>
</tr>
<tr>
<td>Elissa Graves</td>
<td>Manager Customer &amp; Communications</td>
<td>Promotions / Communications (3.8)</td>
</tr>
</tbody>
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**Attachments**


**Report Authorisers**

Rita Giannantonio  
Senior Strategic Planner  8397 7405

Brett Steiner  
Team Leader Planning Strategy  8397 7352

Ingrid Wilkshire  
Manager City Strategy  8397 7292

John Moyle  
Chief Executive Officer  8397 7201
Statement of Intent

By the Council

Development Plan

Review of Commercial, Industry, Mineral Extraction Zones Statement of Intent

by the

City of Tea Tree City of Tea Tree Gully

30 August 2016

Pursuant to section 25 (1) of the Development Act 1993 this Statement of Intent forms the agreed basis for the preparation of the proposed Development Plan Amendment.

John Moyle
CHIEF EXECUTIVE OFFICER

Date:

John Rau
MINISTER FOR PLANNING

Date:
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1. Statement of Intent

Pursuant to section 25(1) of the Development Act 1993 (the Act) the City of Tea Tree Gully (the Council) has reached agreement with the Minister on this Statement of Intent (SOI) prepared by the Council in accordance with the Development Regulations 2008 (the Regulations).

The SOI details the scope, relevant strategic / policy considerations, and nature of investigations to be carried out, the consultation process and timeframes to be followed in preparing the DPA.

1.2 Chief Executive Statement

The Chief Executive Officer of the Council confirms the following:

- The proposed DPA will assist in implementing the Planning Strategy
- The proposed DPA has been endorsed by Council
- All procedures, documentation and mapping will accord with relevant statutory requirements of the Act and Regulations
- Sufficient Council resources will be devoted to completing the DPA within the agreed timeframe. Council acknowledges that the Minister can lapse the DPA if key timeframes are not met by Council pursuant to section 25(19) of the Act
- Council may use the outcome of investigations and other information produced by external sources which will be reviewed by a qualified, independent professional advisor (pursuant to section 25(4) of the Act).

1.2.1 Council Contact Person

The key Council contact person who will be responsible for managing the DPA process and who will receive all official documents relating to the DPA is:

Brett Steiner  
Team Leader Planning Strategy  
Ph.: (08) 8397 7352  
Email: brett.steiner@cttg.sa.gov.au  
City of Tea Tree Gully  
Civic Centre, 571 Montague Road  
Modbury SA 5092

1.2.2 Developer Supported DPA

Not applicable.

While this DPA will not be a developer funded DPA, the current owners of Lot 2 Aristotle Close Golden Grove will be providing Council with the required investigations as outlined in Section 4.1.2 “Investigations Initiated to inform this DPA”. Council will review the reports which will then inform the preparation for this component of the DPA.
2. Scope of the Proposed DPA

2.1 Need for the Amendment

2.1.1 Rationale

The purpose of the Development Plan Amendment is to review the polices and zoning for the Commercial and Light Industry Zones (Including the Infrastructure Zone) as well as a review of portion of the Mineral Extraction Zone at Golden Grove within the Tea Tree Gully Development Plan.

The City of Tea Tree Gully has undergone rapid urban development over the past 40 years.

The Light Industry and Commercial Zones in the Development Plan have had little policy review since their initial establishment other than upgrades as part of the Better Development Plan Development Plan Amendment (DPA) authorised in July 2012. The Mineral Extraction Zone review only refers to portion of the existing zone located in Golden Grove in response to request from landowners or potential business operators for non-mineral extractive land uses to establish or expand within the zone.

In 2011 Council adopted its City Master Plan 2011-2040 as a Strategic Management Plan. The City Master Plan identifies sites of key economic activity which include centres, commercial and light and service industry. The City Master Plan identifies that these sites have the potential to be developed for:

- Low impact specialists / advanced technology manufacture centres
- Defence related services
- Clean technology and emerging industries
- Business clusters
- Digital, knowledge based and creative business capitalising on access to high speed broadband
- Medium density housing co-located with these activities as well as with commercial and retail activity.

The City of Tea Tree Gully Strategic Direction Report 2011 identified the Commercial Precinct DPA, which included our Commercial and Light Industry Zones as a priority for Council.

Council’s economic profile [economy.id](http://economy.id.com.au/tea-tree-gully) identifies some of the challenges facing the City and its economic areas including:

- A reduction in employment and output in manufacturing
- Slow growth across most industry sectors and decline in some sectors
- A lack of diversity in the local economy and heavy reliance on goods related industries and household services

Other external factors such as the decline of manufacturing within the region will impact on businesses and our economic precincts. Council recognises that it needs to have a policy environment that ensures its economic areas are resilient and can adapt to changing external influences, emerging trends and market demands.
Other factors influencing this DPA are as follows:

1. The owners of properties located at 1276, 1278 and 1280 North East Road, Tea Tree Gully approached Council during community engagement for the City Master Plan and the Strategic Directions report requesting that these properties be considered by Council for rezoning from residential to commercial / mixed use developments. The sites are located on an arterial road next to a service station and form a corner site. Amending the zone is unlikely to impact on other residential sites in the vicinity. Refer to Appendix 2.

2. Council has also been approached by the owners of Lot 2 Aristotle Close, Golden Grove requesting the rezoning of the site from Light Industry Zone to a Residential Zone as there is minimal demand for industrial sites in the locality and the site has remained vacant. Refer to Appendix 3.

3. Council wishes to consider two localities within the Mineral Extraction Zone, Golden Grove in this Development Plan Amendment.


Council has been approached by landowners of these properties. The sites are in individual ownership and have over time developed into industrial and other non-extractive industry uses including residential uses associated with the businesses being run on these sites. The land owners have informed Council that due to the current zoning, banks and other financial lenders are apprehensive about lending. This has meant that it has been difficult for existing businesses to expand and develop. The economic viability of these relatively small businesses may be inhibited by the current zoning.

The second group of sites is on Hancock Road /Golden Grove Road, Golden Grove, specifically:

- Lot 100, Hancock Road, Golden Grove
- Lot 5, 122 Golden Grove Road, Yatala Vale
- Lot 32 1235-1243 Golden Grove Road, Golden Grove
- Consideration should also be given to the adjoining church site at Lot 31, 1245 Golden Grove Road (Local Heritage Place).

Council has also been approached by businesses considering developing on these sites. Often the land uses are for the establishment of industrial land uses but not extractive industry in nature.

Council acknowledges the importance of the Mineral Extraction Zone and its role in the development of the State, however for both localities Council is seeking to consider the introduction of a policy over these sites allowing for non-extractive industry land uses but still maintaining the Mineral Extraction Zone. The policy and associated policies will still have strong linkages to the current zone.
The following issues are to be addressed as part of this DPA:

- Review of all the policies within the Light Industry Zone, Infrastructure Zone and Commercial Zone in order to consider how to encourage the highest and best uses in the context of a changing local economy
- Consideration to improvement to urban design outcomes
- Development of mixed use land uses, including office, commercial and residential
- The possible rezoning of portion of the Golden Grove Light Industry Policy Area 3 currently vacant and that has never been developed
- The possible incorporation of sites along North East Road near the St Agnes District Centre into the Centre as a possible mixed use site
- Review of the existing Light Industry Zone to facilitate emerging potential new uses for the area which are not directly associated with traditional light industry uses
- The development of a policy area over a portion of the Mineral Extraction Zone for areas that currently contain other non-extractive industry land uses.

2.1.2 Affected Area

The following Zones in the current Development Plan are included within the scope of the DPA:

- Commercial Zone
- Light Industry Zone
- Infrastructure Zone
- Mineral Extraction Zone (portion at Golden Grove only)

As contained in the Tea Tree Gully Development Plan. Refer to Appendix 1.

2.1.3 Potential Issues

Potential issues associated with the area have been identified and will be considered as part of the investigations.

The following list is not exhaustive and the proposed investigations may identify additional issues:

- Lack of policy to support innovation, new and developing technologies
- Addressing the interests of stakeholders particularly owners of sites
- Identifying appropriate and compatible land uses
- Limited capacity of the smaller sites
- The need to revitalise the appearance and consolidate the function of commercial and light industry lands
- Potential issues with site contamination
- Potential issues with infrastructure including civil matters such as storm water
- Potential issues with traffic and noise attenuation
- The current Mineral Extractive Zone limiting the full potential of other industries/land uses currently lawfully operating within the Zone
- Impact of non-extractive industries operating and expanding in the Mineral Extraction Zone.
3. Strategic and Policy Considerations

3.1 The Planning Strategy

3.1.1 Targets

The DPA will support the relevant volume of the Planning Strategy (or draft Strategy) by implementing the following targets:

<table>
<thead>
<tr>
<th>Target</th>
<th>How the target will be implemented:</th>
</tr>
</thead>
<tbody>
<tr>
<td>The 30 Year Plan for Greater Adelaide</td>
<td></td>
</tr>
<tr>
<td><strong>Urban design</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Target B</strong>: Develop guidelines for safe, attractive residential streetscapes that provide for vegetation, lighting and, potentially, water-sensitive urban design techniques.</td>
<td>The DPA will assist with the development of precinct plans that can guide good public realm outcomes included but not limited to the following sites corners of:  • Hancock Road / North East Road  • Grand Junction Road / North East Road</td>
</tr>
<tr>
<td><strong>The economy and jobs</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Employment distribution</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Target A</strong>: Provide for 282,000 additional jobs during the next 30 years. The regional distribution of the additional jobs is: 79,000 in Northern Adelaide</td>
<td>The DPA will investigate land suitability with the proposed aim to provide a greater certainty for investment in commercial and industry zones allowing for locations of employment generating activities close to where people live.</td>
</tr>
<tr>
<td><strong>Target B</strong>: Distribute jobs across Greater Adelaide as: -15,000 in key regeneration areas and in activity centres that are outside corridors</td>
<td></td>
</tr>
</tbody>
</table>
### 3.3.2 Policies

The DPA will support the relevant volume of the Planning Strategy (or draft Strategy) by implementing the following policies:

<table>
<thead>
<tr>
<th>Policy</th>
<th>How the policy will be implemented:</th>
</tr>
</thead>
<tbody>
<tr>
<td>The 30 Year Plan for Greater Adelaide</td>
<td>The DPA will investigate and promote economic activities within the specific locations with a mix of business including industry, retail, and mixed-use. It aims to increase business collaboration and innovation whilst sustaining economic investment in the area.</td>
</tr>
<tr>
<td><strong>Policy 26</strong>: Designate specialist centres that contain clusters of key economic and service activity where appropriate. For example, clusters of defence, innovation, and export, legal and educational services.</td>
<td>The DPA will investigate the potential for mix of uses in commercial and industry zones.</td>
</tr>
<tr>
<td><strong>Policy 28</strong>: Provide retail and other services outside designated activity centres where development will contribute to the principles of accessibility; a transit-focused and connected city; world class design and vibrancy; and economic growth and competitiveness.</td>
<td>The DPA will investigate an expansion of land uses to support a broader range of industries and businesses. The mixed-use precincts identified in the City Master Plan have potential to support not only light industry but a combination of land uses such as office, commercial and potentially residential land uses. The Tolley Road Commercial Precinct and Hancock Road, Golden Grove are envisaged to develop into business clusters.</td>
</tr>
<tr>
<td><strong>Policy 29</strong>: Ensure activity centres promote mixed-use development rather than separate residential, commercial and retail developments.</td>
<td>The DPA will encourage mix of land uses that are compatible and will promote re-use of buildings and infrastructure.</td>
</tr>
</tbody>
</table>

### Urban Design

**Policy 7**: Ensure building design can be adapted in the future to minimise new building requirements and maximise the re-use and redevelopment of existing infrastructure.

The DPA will encourage mix of land uses that are compatible and will promote re-use of buildings and infrastructure.

### The economy and jobs

**Policy 4**: Promote mixed-use development in the transit corridors, activity centre and transit-oriented developments to ensure jobs are situated close to where people live. Consideration should be given to

Policies proposed in the DPA will investigate the concept of mixed-use development. The proposed DPA will support the role of employment in multi-purpose well-designed commercial areas.
Review of Commercial, Industry, Mineral Extraction Zones Statement of Intent

3. Strategic and Policy Considerations

<table>
<thead>
<tr>
<th>Policy</th>
<th>How the policy will be implemented:</th>
</tr>
</thead>
<tbody>
<tr>
<td>setting specific targets for the types of services (such as retail) provided around transport interchanges to ensure job availability in major residential centres.</td>
<td>The DPA aims to concentrate commercial and industrial activity existing areas. The DPA will consider clearer clarification for small businesses in the Mineral Extraction Zone to grow but still operate within the intent of the Zone.</td>
</tr>
</tbody>
</table>

**Manufacturing**

**Policy 23:** Ensure planning controls are flexible enough to adapt to new industry structures.

The DPA will support flexibility in planning controls to support the changing manufacturing technologies.

**Green industries**

**Policy 38:** Ensure planning controls for employment lands are flexible enough to allow new green technologies and industries to emerge.

The DPA will support the establishment of new green, emerging and innovative technologies.

3.2 Council Policies

3.2.1 Council's Strategic Directions (Section 30) Report

Council's Strategic Directions (Section 30) Report recommends undertaking a Commercial Precinct DPA and contains the flowing supporting statement:

"The Commercial Precincts DPA will increase the capacity of the existing urban footprint to accommodate low impact specialist manufacturing, defence-related services and advanced technology manufacturing, clean technology & emerging industries digital, knowledge-based and creative business clusters in areas identified by the CMP." (City Master Plan)

3.2.2 Infrastructure Planning

The proposed amendment will be consistent with current infrastructure planning by the Minister or by a relevant government agency. The DPA responds to the 30 Year Plan for Greater Adelaide and targets revitalisation of existing commercial and industrial lands.

Council has adopted Asset Management Plans for infrastructure throughout the City. Council is not currently undertaking infrastructure planning within the areas identified in this SOI.
3.2.3 Other Policies or Local Issues

The policies of this DPA will be consistent with the policies in Council's Strategic Management Plans including:

- Council Strategic Plan 2020
- City Master Plan 2012-2040
- Asset Management Plans

The Council-wide section of the Development Plan (General Section)

- Crime Prevention
- Design and Appearance
- Energy Efficiency
- Hazards
- Industrial Development
- Infrastructure
- Interface between Land Uses
- Land Division
- Natural Resources
- Mineral Extraction
- Open Space and Recreation
- Orderly and Sustainable Development
- Transportation and Access
- Waste

Council's Current DPAs:

- Nil – Council is not currently undertaking concurrent DPAs.

The Development Plans of adjoining areas:

- City of Playford
- City of Salisbury
- Adelaide Hills Council
- Campbelltown City Council
- The City of Port Adelaide Enfield

3.3 Minister's Policies

3.3.1 Planning Policy Library

The DPA will draw on the following SA Planning Policy Library modules:

- Version 6
General Section:

- Design and Appearance
- Infrastructure
- Energy Efficiency
- Industrial Development
- Interface between Land Uses
- Transportation and Access
- Mineral Extraction

Zone Sections:

- Commercial Infrastructure
- Light Industry
- Mixed Use
- Mineral Extraction
- Residential
- Urban Employment.

Council does not anticipate that the DPA will involve the introduction of local additions or variation to the Planning Policy Library, however, should the investigations identify that this form of policy amendment is necessary justification will be provided in the DPA.

3.3.2 Existing Ministerial Policies (Section 25(5), 26 and Section 29)

The following Ministerial policies introduced through section 25(5), 26 or 29 of the Act may be amended by this DPA:

- No Ministerial policies introduced through section 25(5), 26 or 29 of the Act are intended to be amended by this DPA.

Any amendment to these policies will be justified in the DPA and Council confirms that the policies will only be changed in a way that ensures consistency with the Planning Strategy.

3.3.3 Ministerial DPAs

The policies of this DPA will be consistent with and not contradict the policies proposed in the following relevant Ministerial DPAs:

- No current Ministerial DPAs are applicable to this DPA.
4. Investigations and Consultation

4.1 Investigations

4.1.1 Investigations Previously Undertaken

Investigations previously undertaken (prior to the preparation of this SOI) that will inform this DPA include the following:

- InfraPlan and ipData - City of Tea Tree Gully Review of Centres, Commercial and Industry Zones, September 2015

InfraPlan undertook a study to review the viability of the existing Centre, Industry, Commercial and Infrastructure Zones. The study also identified new and emerging industry trends and the potential of attracting such industries to establish within the City.

4.1.2 Investigations Initiated to Inform this DPA

Additional investigations (including those arising from issues not addressed in the Planning Policy Modules) to inform this DPA will include the following:

- Investigations into the economic viability and impact of accommodating small business growth within selected sites in the Mineral Extraction Zone without impeding on to the extractive industries operations
- Investigations into the potential for Lot 2 Aristotle Close, Golden Grove to be zoned for residential development. The current owners of the site are carrying out the investigations and council will consider how to use and implement the finding in this DPA. These investigations will cover:
  - Stormwater and civil works investigations
  - Traffic impact assessment
  - Acoustic or noise attenuation measures required for interface between Light Industry Zone and the proposed residential land
  - Residential form proposed on the subject land which complements the adjoining Golden Grove Residential 15 and Golden Grove South 16 Policy Area
  - An assessment against the Housing and Employment Land Supply Program and the 30 Year Plan for Greater Adelaide.

4.2 Consultation

The following key stakeholders will be consulted during the investigations stage for input into the proposed DPA:

- Department of Planning, Transport and Infrastructure
- Department of State Development.

The following agencies, State Members of Parliament, interested parties, individuals and councils will be consulted during the consultation stage of the DPA:

- Urban Development Institute of Australia - SA Division
- Property Council - SA Division
- Department of Planning, Transport and Infrastructure
- Environment Protection Authority
- Department of Environment, Water and Natural Resources
- Department of Further Education, Employment, Science and Technology
• Department of State Development
• ElectraNet Pty Ltd
• SA Power Networks
• SA Water
• Business Enterprise Centre, Tea Tree Gully
• Invest SA
• Owners and business operators of the local business impacted by the DPA
• Parafield Airport Ltd
• Airfield SA
• ETSA Utilities
• South Australia Police
• South Australia Metropolitan Fire Service
• State Emergency Service
• Adelaide and Mt Lofty Ranges Natural Resources Management Board.

State Members of Parliament:
• Ms Jenifer Rankine, MP Member for Wright
• Ms Dana Wortley, MP Member for Torrens
• Mr Tom Kenyon, MP Member for Newland
• Ms Frances Bedford, MP Member for Florey
• Mr Lee Odenwalder, MP Member for Little Para
• Mr Jack Snelling, MP Member for Playford.

Federal Members of the Parliament:
• Mr Tony Zappia, MP Member for Makin
• Hon Christopher Pyne, MP Member for Sturt.

Adjoining Councils:
• Adelaide Hills Council
• Campbelltown City Council
• City of Salisbury
• The City of Playford
• The City of Port Adelaide Enfield.

Consultation with the public will be undertaken in accordance with the requirements of the Act and Regulations. This will include:

• A notice in the Government Gazette
• A notice in the Advertiser Newspaper
• A notice in Leader Messenger and News Review
• The scheduling of a public meeting at which any interested person may appear to make representation on the proposed amendment
• Information on Council’s website, at the Tea Tree Gully Council Civic Centre
• Notices to the owners or occupiers of any land that is subject to the affected area of the proposed amendment.
In additional to the statutory requirements for public consultation, Council will use the following additional means to communicate with the public:

- Notices and promotion on Council's website – "Have your say" links to all available information
- Media releases
- Have Your Say website feedback
- Fact Sheets
5. Proposed DPA Process

5.1 DPA Process

Council intends to undertake the following DPA process (check box):

☐ Process A

Agencies will be consulted on a draft version of the DPA for a period of 6 weeks. A copy of the DPA, and copies and a summary of agency submissions, will then be sent to the Minister for approval to release the DPA for public consultation.

☐ Process B1 (with consultation approval)

A copy of the DPA will be sent to the Minister for approval to release it for concurrent agency and public consultation (not more than 8 weeks for agency comment and not less than 8 weeks for public comment).

X Process B2 (consultation approval not required)

A copy of the DPA will be released for concurrent agency and public consultation (not more than 8 weeks for agency comment and not less than 8 weeks for public comment).

☐ Process C

A copy of the DPA will be released for concurrent agency and public consultation (not more than 4 weeks for agency comment and not less than 4 weeks for public comment). Landowners and occupiers identified in the SOI will receive direct notification of the DPA.

5.1.1 Rationale

Process B2 has been selected because Council staff will consult with DPTI during the investigations stages of the DPA to ensure alignment with the 30 Year Plan for Greater Adelaide.

5.2 Interim Operation

Interim operation is not sought by Council.
6. Professional Advice and Document Production

6.1 Professional Advice

The professional advice required will be provided by:

Brett Steiner
Team Leader Planning Strategy
Ph.: (08) 8397 7352
Email: brett.steiner@cttg.sa.gov.au
City of Tea Tree Gully
Civic Centre, 571 Montague Road
Modbury SA 5092

This person satisfies the professional advice requirements of the Act and Regulations and will provide advice to the council prior to the preparation of the DPA. This person is not considered to have a conflict of interest or perceived conflict of interest in the DPA.

6.2 Document Production

The DPA (including the structure, amendment instructions and mapping) will be prepared in accordance with the Technical Guide to Development Plan Amendments issued by the Department for Planning, Transport and Infrastructure (the Department) and any templates, except as mutually agreed.

To ensure certainty as to the correct version of the DPA, the DPA will contain a date in the footer (e.g. version 5 July 2007). The footer will be located on every page of the DPA, including the proposed amendments (including mapping).

The Chief Executive Officer of the council will ensure that the policies implement the Planning Strategy, all procedures have been completed within the statutory requirements, and that mapping is correct prior to issuing a certificate in accordance with the Act. If this is not the case, the council will take responsibility for the DPA until the matter has been resolved.

6.3 Mapping

Council will obtain electronic copies of all the affected maps and/or figures from the Department prior to the commencement of mapping amendments to ensure all mapping is amended based on current map bases.

Amendments to maps will be provided in the required format to the Planning Division of the Department. Mapping amendments for this DPA will be undertaken by:

Brett Steiner
Team Leader Planning Strategy
Ph.: (08) 8397 7352
Email: brett.steiner@cttg.sa.gov.au
City of Tea Tree Gully
Civic Centre, 571 Montague Road
Modbury SA 5092
7. Proposed DPA Timetable

Process B2 (consultation approval not required) Timetable

The following timetable is proposed for this DPA based on the selected process. Council will take steps to update this timetable if it appears at any stage that Council will require an extension to complete a task.

<table>
<thead>
<tr>
<th>Steps</th>
<th>Responsibility</th>
<th>Agreed Timeframe from Minister’s Approval</th>
</tr>
</thead>
<tbody>
<tr>
<td>Development Plan Amendment (DPA)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Investigations conducted; DPA prepared</td>
<td>Council</td>
<td>20 weeks</td>
</tr>
<tr>
<td></td>
<td></td>
<td>SOI agreement – DPA commences consultation</td>
</tr>
<tr>
<td>Agency and public consultation concludes</td>
<td>Council</td>
<td>8 weeks</td>
</tr>
<tr>
<td>Summary of Consultation and Proposed Amendment (SCPA)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Public Meeting held; submissions summarised; DPA amended in accordance with Council’s assessment of submissions; SCPA prepared and lodged with the Department</td>
<td>Council</td>
<td>14 weeks</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Public consultation closes – SCPA lodged with the Department</td>
</tr>
<tr>
<td>SCPA assessed and report on DPA prepared for Minister</td>
<td>Department</td>
<td>7 weeks</td>
</tr>
<tr>
<td>Minister considers report on DPA and makes decision</td>
<td>Minister</td>
<td>4 weeks</td>
</tr>
<tr>
<td>Approved amendment gazetted</td>
<td>Department</td>
<td>2 weeks</td>
</tr>
</tbody>
</table>

Following Ministerial approval of the proposed amendment, it is forwarded to the Environment, Resources and Development Committee of Parliament for review.
Attachment 1

Item 11.1
The Modbury Precinct Activation Strategy identified three objectives for the revitalisation of the Modbury Precinct:

1. **Vibrancy** - To facilitate a Modbury Precinct that is a Centre of activity, diversity and culture.
2. **Prosperity** - To cultivate a local economy that attracts new investment in retail, hospitality, entertainment, commerce, health, education and housing.
3. **Livability** – To ensure the Modbury Precinct includes high quality venues and public spaces, and a range of quality housing/residential options.

Council committed to using a range of indicators to measure the success of the project and monitor the performance of the precinct over the medium to long term.

Council engaged `.ID the population experts’ to provide an independent performance evaluation of the precinct against the three objectives identified. .ID currently provides Council’s online community profile, forecast and economic profile available on Council’s website and at the following link - [https://www.teatreegully.sa.gov.au/Council_business_news_and_information/Statistics_maps](https://www.teatreegully.sa.gov.au/Council_business_news_and_information/Statistics_maps).

The evaluation is provided in Attachment 1 – Modbury Precinct Performance Evaluation 2016.

Using .ID to undertake the analysis provided Council with an independent review of the precinct and the added benefit of having an urban economist and a demographer to provide expert advice. The analysis benchmarked the precinct against activity centres in South Australian and interstate that has similar objectives or similar characteristics.

The benchmarking enables Council to identify the current strengths and weaknesses of the precinct in the context of the Council’s objectives for the area. Most of the data is obtained from external data sources (such as the Australian Bureau of Statistics).

Council’s Modbury Precinct Activation Strategy identifies 10 key indicators for Council to monitor to determine whether the objectives for the precinct are being realised.
While the majority of these data sources have been used in the benchmarking, they have been expanded to provide a more accurate insight into the current performance of the precinct.

The analysis can assist Council in prioritising future initiatives for the precinct, for example: How can we use our strengths to deliver our objectives? How can we overcome any current weaknesses?

The report and the indicators are considered a pilot and can be refined over time to improve the analysis and its accuracy. The addition of more benchmark locations and data in future reports may also improve the relevance and richness of the data. It is expected that the next report would be completed in 12 months. This timing will also enable us to access the 2016 census data and provide Council with a more comprehensive analysis and update.

Staff will be presenting a brief summary of the evaluation report to the Strategic Planning and Development Policy Committee on 30 August 2016.

Attachments


Report Authorisers

Brett Steiner  
Team Leader Planning Strategy  8397 7352

Ingrid Wilkshire  
Manager City Strategy  8397 7292

John Moyle  
Chief Executive Officer  8397 7201
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1. Introduction

1.1 Overview

The City of Tea Tree Gully have engaged .id to evaluate the performance of the Modbury Precinct with the view of monitoring performance on an ongoing basis.

The Modbury Precinct is located in Adelaide’s north eastern suburbs in the City of Tea Tree Gully. It is a regional centre offering a wide range of retail, food, administrative and health uses.

The Modbury Precinct Activation Strategy 2015-2040 (Activation Strategy) identifies projects that will meet the objectives and deliver the outcomes of the Modbury Precinct Revitalisation Project. The aim of this project is to develop an evaluation framework that can monitor the performance of the precinct over time against objectives of the Activity Strategy.

Measuring the performance of the Modbury Precinct needs to take into account a number of factors and go beyond traditional economic measures. This need is highlighted by the objectives for the precinct:

- **Objective 1 – Vibrancy**: To facilitate a Modbury Precinct that is a centre of activity, diversity and culture.
- **Objective 2 – Prosperity**: To cultivate a local economy that attracts new investment in retail, hospitality, entertainment, commerce, health, education and housing.
- **Objective 3 – Liveability**: To ensure the Modbury Precinct includes high quality venues and public spaces and a range of quality housing/residential options.

1.2 How is the Modbury Precinct Performing?

To do this, .id have developed an evaluation framework based on the objectives outlines in the Modbury Precinct Activation Strategy. In this report, we identify 10 dimensions of precinct performance. The dimensions have been based on .id’s
experience, a workshop with the City of Tea Tree Gully and a review of related indexes (e.g. SEIFA, Regional Australia Institute Competitiveness Index, Sydney Urban Living Index and Deloitte’s Purpose of Place).

The dimensions used in this report are presented in the figure below:

As illustrated in the figure above, we have used a range of indicators as proxies for each of ten dimensions. The indicators used in this report are listed in Appendix A. Appendix A includes the indicator and its source, reference year and geographic definition used.

1.3 How is the Modbury Precinct Defined?

Given issues with data available across the indicators, .id have used a number of geographic areas to undertake this analysis. The precinct has been defined at the Precinct and Region level. This is explained and illustrated below.

Precinct – is used when the analysis refers to the Precinct definition as defined by the City of Tea Tree Gully. The Precinct definition uses aggregated SA1 level data for demographic/population indicators and aggregated DZ level data for employment indicators.
Region – is used when the analysis is based on the local area around the Precinct, typically on a suburb or SA2 basis. The benefit of using the Region definition is that the data available is much more recent. This is important for understanding how the precinct has performed since the 2011 Census. The limitation of this however is that as the SA2 region includes other employment/residential locations outside the defined Precinct boundaries. This means that the data at this level is indicative only and caution is required when interpreting the results.
1.4 How does the Modbury Precinct compare?

We introduce benchmarking in this report in order to understand how the precinct is performing relative to other locations. Spatial benchmarking is essential to help quantify the significance of a characteristic within a region, to compare areas and regions, and to highlight the role and function of one area compared to another and understand their place within a wider context.

To provide a comparative assessment of the precinct, the Modbury Precinct is compared to the Greater Adelaide average as well as 7 other precinct benchmarks across Australia. The benchmarks selected are based on similar precincts across Australia as well as precincts that act as a model of Transport Orientated Development, something Modbury could aspire to approach.

The precinct benchmarks used for this assessment are:

- Noarlunga, SA
- Mawson Lakes, SA
- Marion, SA
- Elizabeth, SA
- Subiaco, WA
It is noted that the performance of the Precinct is largely dependent on its’ performance against the benchmarks selected. The identification of other precincts would affect how its relative performance. This is a subject for further refinement.

See Appendix B for the geographic definitions used in this report.

1.5 Report structure

This report has been split into two parts.

Part A – Scorecard
This part presents the Modbury Precinct scorecard where we rank each of the 10 dimensions. By doing so, we present a SWOT analysis for the Modbury Precinct. Measuring each of these dimensions will allow Council to identify strategies that are best targeted at improving weaknesses or enhancing strengths.

Part B – Detailed analysis
In this part, we present the performance of the Modbury Precinct against all of the indicators selected for the 10 dimensions. This allows a much more detailed understanding of the performance levels of the precinct. This is presented in three chapters:

- Vibrancy
- Prosperity
- Liveability

It is acknowledged that this evaluation is the first stage of a wider evaluation project. It is envisaged that improvements will be made to the methodology and data availability over time. Appendix E provides some suggestions for improvement.
PART A - SCORECARD

2. Modbury Precinct Scorecard

2.1 Overview

A scorecard approach has been developed to assess how the precinct is performing against the 10 dimensions identified. This provides a SWOT assessment of the precinct.

The scorecard approach is based on a spatial index. The index compares the Modbury Precinct to areas in the broader region (in this case suburbs across Adelaide and selected precinct benchmarks) against the dimensions outlined in Section 1.2. Each indicator is given a score out of 5 based on how the Modbury Precinct is ranked. The index for each dimension combines the relevant indicators into one single score. It is noted that this scorecard approach is considered a pilot and that further refinement is necessary.

2.2 Scorecard approach

The score is based on a quantitative or qualitative basis. The raw scores for each indicator are standardised using quintiles, with a score of 1 (bottom quintile) to 5 (top quintile). In this way a score of 5 on a certain dimension will indicate the best centre(s) on that indicator or the centre is in the top quintile across Greater Adelaide. Professional judgement is also used to score the dimension. Additional evidence from Council is also used to inform this judgement.

To provide a comparative assessment of the precinct, the Modbury Precinct is given a score of 5 for each indicator for how it performs against:

- SA2s across Greater Adelaide
- Precinct Benchmarks
An average of the two scores are then reported. The full list of scores are presented in Appendix D.

It is noted that the performance of the Precinct is largely dependent on how it performs against the benchmarks selected. The identification of other precincts would affect how it is performing. This is a subject for further refinement.

2.3 Scorecard results

The figure below summarises the performance of the Modbury Precinct against the 10 Dimensions, spread across the three objectives of Vibrancy, Prosperity and Liveability. The following pages break down this performance for each objective.

2.3.1 SWOT

This analysis highlights that the precinct has a number of strengths relative to Greater Adelaide and the benchmarks precincts. The key strengths are:

- Technology - driven largely by its NBN and 4G mobile coverage.
- Open space – this is a dominant feature of the precinct compared to the benchmarks.
- Vacancy rates (Westfield Tea Tree) – there are very low vacancy levels showing that demand for space is strong (at least in the shopping centre)
- Housing affordability, rating as one of the most affordable precincts.
- Night time economy – compared to the benchmarks, Modbury had the highest level of night time activity. This reflects the operation of the Cinema complex, Sfera’s Park Suites and Convention Centre and numerous pubs, cafes and restaurants.

The analysis also identified a number of weaknesses that could be the focus of further investigation. The key weaknesses were:

- Share of medium and high density approvals
- Employment diversity
- Historical and forecast population growth
- Access to arts and recreation
- Limited age structure diversity
2.3.2 Opportunities

This analysis highlights the need for projects that can improve the residential attractiveness of the precinct and grow demand for higher density housing. This strategy would promote and build on the relative strengths of the precinct – technology rich; high quality place with open space a feature and affordability. Other issues that could receive attention include accessibility/path finding initiatives (e.g. breaking down the barriers between the major anchors of activity – Council Offices/Open Space – Westfield Tea Tree, Bus Interchange and Health Node).
2.4 Vibrancy results

The vibrancy of the Modbury Precinct was rated as moderate, scoring an average of 3.5 across the vibrancy indicators. Its performance was weighed down by the Diversity Dimension.

**Strengths**
- Number of jobs
- Night time economy
- Volunteering

**Weaknesses**
- Employment diversity
- Population growth
- Share of cultural related jobs

**Vibrancy Ratings**

Source: .id, the population experts.

Please refer to section 3 for detailed results for each indicator and how the Modbury Precinct rates against the benchmarks.
2.5 Prosperity results

The prosperity of the Modbury Precinct was rated as moderate, scoring an average of 3.5 across the prosperity indicators. The precinct performed very highly against the Productivity and Technology Dimensions (largely due to technology indicators). The performance of the Investment Dimension was mixed with low to moderate levels of investment based on the identified indicators.

**Strengths**
- NBN Coverage
- 4G Mobile Coverage
- Shopping centre vacancies

**Weaknesses**
- Forecast population growth
- Property values
- Personal incomes

### Prosperity ratings

- **Investment:** 3.1
- **Bus & emp growth:** 3.5
- **Prod & Tech:** 4.0
- **Performance levels:** 3.55

Source: .id, the population experts.

Please refer to section 4 for detailed results for each indicator and how the Modbury Precinct rates against the benchmarks.
2.6 Liveability results

The liveability of the Modbury Precinct was rated as moderate, scoring an average of 3.6 across the liveability indicators. The precinct performed well against the Accessibility Dimension and High Quality Place Dimension but was weighted down by the Housing Diversity Dimension.

**Strengths**
- Open space
- Housing affordability
- Boardings at Tea Tree Gully Interchange

**Weaknesses**
- Share of medium and high density approvals
- Access to arts and recreation
- Share of public and active transport trips to precinct

**Liveability Ratings**

- **Dimensions**
  - High quality place: 3.7
  - Housing diversity: 3.0
  - Accessibility: 3.6

Source: .id, the population experts.

Please refer to section 5 for detailed results for each indicator and how the Modbury Precinct rates against the benchmarks.
PART B – DETAILED ANALYSIS

3. Vibrancy

This section presents the performance of the Modbury Precinct against each vibrancy indicator.

3.1 Activity

3.1.1 Number of jobs

The Modbury Precinct had 6,867 jobs at the time of the 2011 Census. The jobs in this area accounted for 34.9% of all jobs in the Tea Tree Gully Local Government Area. The Precinct accounted for 1.2% of all jobs in Greater Adelaide. Compared to the benchmarks, Modbury Precinct was one of the larger centres analysed. The only centre to have more jobs than Modbury was Subiaco.

Number of Jobs, Precinct Benchmarks, 2011

![Graph showing number of jobs in different centers]

Source: ABS Census of Population and Housing 2011, prepared by .id, the population experts.
Data notes: Analysis based on Precincts - DZ definition.

3.1.2 Number of businesses
In 2015, there were 1,757 businesses located within the Modbury Region. This was much higher than the benchmark average of 1,615 businesses. Modbury Region had the largest number of businesses of all the Adelaide centres examined. Business activity increased between 2013 and 2015 with net addition of 39 businesses.

Data note: Analysis based on Region – SA2 definition.

3.1.3 Population growth
In 2015, there were 5,827 people living in the Modbury Precinct. The level of activity based on population size was on par with the benchmark average, but well below the number of people living within Mawson Lakes (11,009 people).

The population living in the Modbury Precinct is relatively stable, with little growth between 2011 (5,775) and 2015 (5,827). Much of the area was developed in the 1960s and 1970s, and young family households that moved in during this time are now empty nester households. Compared to the benchmarks, the population growth in Modbury is very slow. The average growth across the other benchmarks was much higher, at 455 people between 2011 and 2015.

Source: ABS Estimated Resident Population, 2015, prepared by .id, the population experts.

Data notes: Analysis based on Precincts - SA1 definition.

3.1.4 Population density

The population density within the Modbury Precinct at 2015 is 13.41 persons per hectare. The density of the area falls within the lowest quartile of population density across Greater Adelaide. Most of the other centres examined had a higher level of population density, with the benchmark average being 18.43 per hectare.
Population density, Precinct Benchmarks, 2015

Source: ABS Estimated Resident Population, 2015, prepared by .id, the population experts.

Data notes: Analysis based on Precincts - SA1 definition.

3.1.5 Tourism Visitation

Visitation levels were 168,648 in 2015, higher than the benchmark average. However, it did not have the highest level of visitation, this occurred in Subiaco. Visitation has increased strongly since 2011, when the annual visitor number was 107,000. The vast majority of visitors to the area were visiting family or friends (66%).
Tourism visitation, Region Benchmarks, 2015

Source: Tourism Research Australia, prepared by .id, the population experts.

Date notes: Analysis based on Region (SA2)

3.1.6 Night time activity and licensed premises

The night time economy generated around 731 jobs in the Modbury Precinct in 2011 (a definition is included in Appendix C). This represents around 10.6% of all jobs in the Precinct. This is greater than the average for all jobs across Greater Adelaide, 7.6%. The businesses that support this industry include the Hoyts Cinema complex, Sfera’s Park Suites and Convention Centre and numerous pubs, cafes and restaurants.

The number of night time economy jobs is higher than the benchmark average, and only Subiaco has a larger number of jobs in this sector.
Night Time Economy Jobs, Precinct Benchmarks, 2011

Source: ABS Census of Population and Housing 2011, prepared by .id, the population experts.

Data notes: Analysis based on Precincts - DZ definition.

Licensed premises

Another indicator of the night time economy are the number of licensed premises. The Modbury Precinct has a total of 19 licensed premises including the following breakdown provided by Tea Tree Gully Council:

- 2 hotels and convention centre
- 11 restaurants and cafes
- 5 clubs and recreation facilities
- 1 cinema

Data notes: Analysis based on Precincts (SA1) definition.

3.2 Diversity

3.2.1 Age structure diversity score

This diversity score has been calculated by looking at the difference between the age structure of the Modbury Precinct and Greater Adelaide. The diversity score is relatively low, showing that in 2014 the age structure of Modbury Region was 5.8% different to the Greater Adelaide average.
In comparison to the Modbury Region, the benchmark centres had more diverse age structures, with an average index of dissimilarity in 2015 of 8.3%. The area that had the most dissimilar age structure was Highpoint, which differed by 13.4% to the Greater Melbourne age structure.

**Age Structure, Modbury Region and Greater Adelaide, 2015**

![Age Structure Chart](chart.png)

Source: ABS Estimated Resident Population, 2015, prepared by .id, the population experts.

*Data notes: Analysis based on Region (SA2)*

### 3.2.2 Residents born overseas

At the time of the 2011 Census, 31% of Modbury Precinct residents were born overseas. This was an increase from the 27.7% reported at the 2006 Census. The top countries of birth are the United Kingdom, China, India, Italy and Germany. This level of cultural diversity was higher than the Greater Adelaide average. Across the other centres examined, the average proportion of population born overseas was 34.3%, just a little higher than that seen in Modbury Precinct. The area with the highest level of cultural diversity was Doncaster at 50.9%.
Residents Born Overseas, Precinct Benchmarks, 2011

Source: ABS Census of Population and Housing 2011, prepared by .id, the population experts.

Data notes: Analysis based on Precincts (SA1) definition.

3.2.3 Employment diversity score

The employment diversity score shows that the industry distribution in the Precinct is considerably different to that of Greater Adelaide, highlighting its specialisation with a large share of retail and other service jobs (46% of all jobs) and health (22% of all jobs). Together, these two industries make up 68% of all jobs in the Modbury Precinct.
Industry distribution, Precinct Benchmarks, 2011

Source: ABS Census of Population and Housing 2011, prepared by .id, the population experts.

Data notes: Analysis based on Precincts - D2 definition.

3.3 Culture

3.3.1 Share of cultural related jobs

At the time of the 2011 Census, 2% of jobs in the Modbury Precinct were culture related (a definition is included in Appendix C). This is a little lower than the Greater Adelaide average, and much lower than the benchmark average. The centre with the largest number of cultural related jobs was Marion, due to the Marion Cultural Centre being located within the centre.
3.3.2 Residents as volunteers

At the time of the 2011 Census, 14.4% of residents in the Modbury Precinct volunteered in their community. This was on par with the Greater Adelaide average, and higher than the benchmark average. Modbury Precinct had one of the highest proportion of volunteers of the centres examined, just lower than Subiaco.
3.3.3 Number of arts projects

During 2015/16 Tea Tree Gully Council ran 13 art projects, with an approximate value of $75,000.

Data notes: Analysis based on Precincts – SA1 definition.

3.3.4 Annual attendance at events

Over the past year, there were 5 Council organised or sponsored events held within the Modbury Precinct. These events had a total attendance of 56,000.

Data notes: Analysis based on Precincts – SA1 definition.

3.3.5 Library visits and events

In 2015/16, there were a total of 400,366 visitors (door counts and event visitors) to the library.
4. Prosperity

This section presents the performance of the Modbury Precinct against each prosperity indicator.

4.1 Investment

4.1.1 Building approvals

The value of building approvals in the Modbury Region was $55.1 million in the FYTD (9 mth). With 3 months still to go, building approval activity is already at the same levels as 2014/15. Non-residential building approvals increased by 12% in the FYTD (9 mth) to reach $20.6 million.

Value of building approvals, Modbury Region

![Graph showing the value of building approvals for Modbury Region from 2013-14 to FYTD (9 mth). Non-residential and residential values are depicted.]

Source: Australian Bureau of Statistics, Building Approvals, Australia, catalogue number 8731.0. Compiled and presented in economy.id by .id The population experts

Date notes: Analysis based on Region (SA2)

Compared to the benchmarks, the Modbury Precinct was ranked 4th out of 8 with similar activity to Doncaster and Mawson Lakes but well below the activity observed at Subiaco and Noarlunga.
Value of non-residential building approvals, 2014-15 and 9 months 2015-16, Region Benchmarks

Source: Australian Bureau of Statistics, Building Approvals, Australia, catalogue number 8731.0. Compiled and presented in economy.id by .id The population experts

Data notes: Analysis based on Region (SA2)

Based on data from Council, some recent non-residential developments include:

1. 75 Smart Road, Modbury – Health Care Building – 2300m² – Development cost: $8,000,000
2. 962 North East Road, Modbury – Shop Extension at Modbury Triangle – 220m² – Development cost: $250,000
3. 972-976 North East Road – ALDI Shop – 1540m² retail floor space – Development cost: $4,000,000
4. 954-960 North East Road – Alterations/Upgrade to Modbury Triangle Shopping Centre – no significant increase to floor space – Development cost: $10,000,000
5. 993 & 993A North East Road, Modbury – Alterations/Additions to Modbury Hotel (Pickled Duck restaurant and drive-thru bottle shop) – 853m² total floor space – Development cost: $2,000,000
6. 41-69 Smart Road, Modbury – Emergency Department Redevelopment (Modbury Hospital) – 170m² additional floor area – Development cost: $9,500,000
4.1.2 Forecast population growth

The Modbury Region is forecast to grow by around 0.7% per year over the next five years. This rate of growth is faster than Tea Tree Gully LGA, but slower than State Government population projections for Greater Adelaide (1.0% p.a.).

**Population forecasts, Modbury Region**

Source: Population and household forecasts, 2011 to 2036, prepared by .id, the population experts, August 2014.

Date notes: Analysis based on Region (Forecast small areas)

4.2 Business and employment growth

4.2.1 Business entries and exits

There were around 700 business located in the Modbury Precinct in 2015. Within the wider Modbury Region, there were 1,757 businesses.

---

1 Based on business register data and adjusted for Westfield Tea Tree tenancies (232). Further investigation of the business register data is required to better inform this estimate.
Since 2013, the number of businesses in the Modbury Region has increased by 39 businesses. At an industry level, the following was observed over the period 2013-2015:

- +20 construction businesses
- +15 Transport, Postal and Warehousing businesses
- +12 Professional, Scientific and Technical Services businesses
- +10 Health Care and Social Assistance
- +10 Accommodation and Food Service businesses
- -11 Retail trade businesses

Compared to the benchmarks, Modbury Region was ranked 4th out of 8. Precincts with stronger business growth included Subiaco (+234), Doncaster (+155), Mawson Lake (+105). Moderate business growth was observed at Marion (+23) and Highpoint (+14).

**Net Business Growth by Precinct, 2013 – 2015**

![Net Business Growth by Precinct, 2013 – 2015](image)

Date notes: Analysis based on Region (SA2)

4.2.2 Indicative employment change

Our analysis suggests that there has been a small to moderate increase in the number of jobs within the Modbury Precinct between 2011 and 2015. The
performance by industry is very mixed however. Strong performers included Health Care and Social Assistance and Arts and Recreation Services.

This indicative employment analysis was based on an analysis of:

- Employment by industry trends across Tea Tree Gully LGA (2 digit level)
- Modbury Precinct share of Tea Tree Gully LGA employment by industry
- Business entries and exits by industry for Modbury Region – with adjustments made for the Precinct and weighted for changes in employment size
- Non-residential building approvals from the ABS and non-residential building developments since 2011 from Council.

### Indicative employment change – Modbury Precinct 2011-2015

<table>
<thead>
<tr>
<th>Industry</th>
<th>Qualitative performance 2011-2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agriculture, Forestry and Fishing</td>
<td>Limited change</td>
</tr>
<tr>
<td>Mining</td>
<td>Limited change</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>Limited change</td>
</tr>
<tr>
<td>Electricity, Gas, Water and Waste Services</td>
<td>Limited change</td>
</tr>
<tr>
<td>Construction</td>
<td>Limited change</td>
</tr>
<tr>
<td>Wholesale Trade</td>
<td>Limited change</td>
</tr>
<tr>
<td>Retail Trade</td>
<td>Strong decline</td>
</tr>
<tr>
<td>Accommodation and Food Services</td>
<td>Limited to Moderate growth*</td>
</tr>
<tr>
<td>Transport, Postal and Warehousing</td>
<td>Moderate growth</td>
</tr>
<tr>
<td>Information Media and Telecommunications</td>
<td>Limited change</td>
</tr>
<tr>
<td>Financial and Insurance Services</td>
<td>Moderate decline</td>
</tr>
<tr>
<td>Rental, Hiring and Real Estate Services</td>
<td>Limited change</td>
</tr>
<tr>
<td>Professional, Scientific and Technical Services</td>
<td>Moderate growth</td>
</tr>
<tr>
<td>Administrative and Support Services</td>
<td>Limited change</td>
</tr>
<tr>
<td>Public Administration and Safety</td>
<td>Moderate growth</td>
</tr>
<tr>
<td>Education and Training</td>
<td>Moderate decline</td>
</tr>
<tr>
<td>Health Care and Social Assistance</td>
<td>Strong growth</td>
</tr>
<tr>
<td>Arts and Recreation Services</td>
<td>Moderate to strong growth*</td>
</tr>
<tr>
<td>Other Services</td>
<td>Limited change</td>
</tr>
<tr>
<td>Total</td>
<td>Limited to Moderate growth</td>
</tr>
</tbody>
</table>

Source: .id, the population experts.

Notes about qualitative score: Strong decline (less than -50); Moderate decline (-20 to -50); Limited change (-20 to 20); Moderate growth (20-50 jobs); Strong growth (+50 jobs)

Data from Council shows that there has been around 5,000 sqm of non-residential development since 2011. Preliminary analysis suggests that this could have generated around 80-120 jobs (gross) in the precinct.
The analysis suggests that there has been a strong decline in Retail Trade jobs over this period. While the vacancy rate for Westfield Tea Tree is strong (only 0.2% vacancy), there was a significant decline in Food Retailing and Other Store-Based Retailing jobs in Tea Tree Gully LGA over the past 4 years. This suggests that other factors have impacted retail employment levels (e.g. shift of consumption expenditure to other items including food services; online-retailing; operational factors, etc).

**Retail employment by selected sectors, City of Tea Tree Gully**

![Graph showing retail employment by selected sectors from 2011 to 2015]

Source: National Institute of Economic and Industry Research (NIEIR) ©2016. Compiled and presented in economy.id by .id, the population experts.

### 4.3 Productivity and technology

#### 4.3.1 Employment density (agglomeration)

In 2011, the Modbury Precinct had an employment density of around 13.22 jobs per hectare. This level of density is relatively low and reflects the size and dispersed nature of the precinct that includes a large shopping centre, hospital and council offices with significant levels of at-grade car parking.
4.3.2 Share of knowledge workers

In 2011, 21% of jobs in the Modbury Precinct were categories as knowledge workers. This is below the precinct benchmark average of 24%, and well below the levels observed at Mawson lakes and Subiaco (both driven by a higher share of professional workers, and in the case of Mawson Lakes – tertiary education).
4.3.3 Access to labour - % of labour force within 30 minutes

The Modbury Precinct has a catchment of 63% of Adelaide’s metropolitan labour force that live within a 30 minute drive of the precinct. This was the highest level of labour force access of all the centres examined, closely followed by Mawson Lakes and Subiaco.

<table>
<thead>
<tr>
<th>Area</th>
<th>% of capital city labour force within 30 minute drive of centre</th>
</tr>
</thead>
<tbody>
<tr>
<td>Noarlunga</td>
<td>28.7%</td>
</tr>
<tr>
<td>Marion</td>
<td>47.3%</td>
</tr>
<tr>
<td>Mawson Lakes</td>
<td>58.1%</td>
</tr>
<tr>
<td>Elizabeth</td>
<td>41.3%</td>
</tr>
<tr>
<td>Subiaco</td>
<td>57.8%</td>
</tr>
<tr>
<td>Highpoint</td>
<td>29.6%</td>
</tr>
<tr>
<td>Doncaster</td>
<td>42.6%</td>
</tr>
</tbody>
</table>

2 Based on NIEIR definition of High Technology Workers. See Attachment C for ANZSIC definition.
Data notes: Based on a GIS drive time analysis and Department of Employment Labour Force Estimates by SA2.

4.3.4 NBN connections

The Modbury Precinct has ready access to broadband infrastructure with NBN services built and currently available. Most of the broader Modbury region is also covered by NBN services. This compares favourably to other benchmark regions which currently have little or no NBN service coverage.

**Map of NBN Service Availability in Modbury Region – June 2016**

![Map of NBN Service Availability](image)


**NBN Service Availability in Benchmark Regions – June 2016**

<table>
<thead>
<tr>
<th>Benchmark</th>
<th>NBN Service Availability</th>
</tr>
</thead>
<tbody>
<tr>
<td>Doncaster</td>
<td>Minimal availability</td>
</tr>
<tr>
<td>Elizabeth</td>
<td>Minimal availability</td>
</tr>
<tr>
<td>Highpoint</td>
<td>Minimal availability</td>
</tr>
<tr>
<td>Marion</td>
<td>No availability in precinct but some availability in broader region</td>
</tr>
</tbody>
</table>
4.3.5 Mobile data – 4G access

The Modbury Precinct performs well compared to the other benchmarks against 4G mobile coverage. As at December 2013, the Modbury Precinct had 100% 4G mobile coverage. It was one of four precincts with this level of coverage.

<table>
<thead>
<tr>
<th>Precinct</th>
<th>3G &amp; 4G coverage</th>
<th>3G coverage</th>
<th>4G coverage</th>
<th>Grand Total</th>
<th>% 4G coverage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Doncaster</td>
<td></td>
<td>2,544</td>
<td>2,544</td>
<td></td>
<td>100%</td>
</tr>
<tr>
<td>Elizabeth</td>
<td></td>
<td>519</td>
<td>519</td>
<td></td>
<td>0%</td>
</tr>
<tr>
<td>Highpoint</td>
<td></td>
<td>2,325</td>
<td>2,325</td>
<td></td>
<td>100%</td>
</tr>
<tr>
<td>Marion</td>
<td>1,250</td>
<td>3,008</td>
<td>4,258</td>
<td></td>
<td>29%</td>
</tr>
<tr>
<td>Mawson Lakes</td>
<td>3,535</td>
<td></td>
<td>3,535</td>
<td></td>
<td>0%</td>
</tr>
<tr>
<td>Modbury</td>
<td></td>
<td>2,526</td>
<td>2,526</td>
<td></td>
<td>100%</td>
</tr>
<tr>
<td>Noarlunga</td>
<td>1,316</td>
<td></td>
<td>1,316</td>
<td></td>
<td>0%</td>
</tr>
<tr>
<td>Subiaco</td>
<td></td>
<td>7,785</td>
<td>7,785</td>
<td></td>
<td>100%</td>
</tr>
</tbody>
</table>

Source: MyBroadband, December 2013

4.4 Performance levels (turnover, sales and incomes)

4.4.1 Shopping centre turnover

According to the Shopping Centre Directory (Property Council of Australia), Westfield Tea Tree’s turnover was almost $500 million in 2015. On retail turnover density basis, the centre was trading at $5,306/sqm, around 2.1% above the average levels for similar centres across South Australia.

Data notes: Based on Shopping Centre Directory information for Westfield Tea Tree
4.4.2 Shopping centre vacancies

Vacancy levels at Westfield Tea Tree were extremely low in 2015 with only 180sqm of retail space vacancy, equating to a vacancy rate of just 0.2%. This was well below the average (1.4%) across similar centres across South Australia.

Data notes: Based on Shopping Centre Directory information for Westfield Tea Tree

4.4.3 Property values

Property values in the Modbury Region are generally lower than the rest of Adelaide. In the last three years, median house prices have been between 60-70 thousand dollars less than the metropolitan Adelaide average. The region is also growing less strongly with the weighted median price increasing by 9.2% during this period, compared to the metropolitan average of 13.2%. St Agnes appears to have slightly higher priced housing than the rest of the region, recording the highest median sale price out of all four suburbs 11 times out of the last 13 quarters.
4.4.4 Personal incomes

Income levels in the Modbury Region are generally lower than the broader Tea Tree Gully region and Metropolitan Adelaide. The weighted average median income of the two SA2s in the Region was $42,956 in the year 2012/13, compared to the metropolitan average of $44,672. St Agnes - Ridgehaven recorded the highest medium income level in the Region of $44,138, whereas Hope Valley – Modbury recorded a substantially lower median income of only $41,963.
Median Personal Annual Incomes - 2012/13

Source: ABS 6524.0.55.002 - Estimates of Personal Income for Small Areas (Total Income), 2012-13, prepared by id, the population experts.

Data notes: Analysis based on Region (SA2) definition.

When compared to other benchmark regions, Modbury resident’s income levels are in the middle range. They are well below Subiaco’s high median income levels of almost $64,000 per annum, but moderately above three other regions (Noarlunga, Elizabeth and Doncaster) which were over $3,000 per annum less than Modbury’s.
Median Personal Annual Incomes by Benchmark Region - 2012/13

Source: ABS 8524.0.55.002 - Estimates of Personal Income for Small Areas (Total Income), 2012-13, prepared by .id, the population experts. Modbury region based on two SA2s.

Where region includes multiple SA2s, a weighted average of medians has been applied.

Data notes: Analysis based on Region (SA2) definition.
5. Liveability

This section presents the performance of the Modbury Precinct against each liveability indicator.

5.1 High quality place

5.1.1 Open space

There is a total of 434.4 hectares of open space located within the Modbury Precinct. This equates to 0.07 hectares (or 746 square metres) per resident. This was the highest level of open space of all the centres examined. The next closest rate of open space per capita is in Elizabeth, with 184 square metres per resident. Marion had no open space located within its precinct.

**Open space, hectares by Precinct**

Source: ABS Mesh Block Categories

Data notes: GIS analysis based on Precinct (SA1) definition using mesh block category – park.
5.1.2 Access to services

In 2011, the Modbury Precinct had a higher share of jobs (73%) in the household service industries (retail, accommodation, education, health care) than the precinct benchmark average (65%). This is largely due to the presence of Westfield Tea Tree and the Modbury Hospital. These are both regional level facilities that cater to a much broader population than the local catchment.

Household Service Workers Share of Jobs, Precinct Benchmarks, 2011

Source: ABS Census of Population and Housing (2011), prepared by .id, the population experts.

Data notes: Analysis based on Precinct (DZ) definition.

5.1.3 Access to arts and recreation

In 2011, only 0.6% of jobs in the Modbury Precinct were categorised as Arts and Recreation workers. This is below the precinct benchmark average of 1.9%, and well below the levels observed at Marion and Highpoint.
5.1.4 Crime

Crime rate data is not currently available at the sub-LGA level. The following analysis is based on crime rates observed in the City of Tea Tree Gully.

Crime rates in the City of Tea Tree Gully have declined from 91.95 per 1,000 population to 69.04 per 1,000 population. There has been a significant decline in property related (largely property damage and environmental offences) and driving related offences. However there has been a recent increase in the rate of drug related offences.
Crime in Tea Tree Gully, Rate per 1,000 population* of offences recorded by police

![Graph showing crime rates per 1,000 population by year and type of offence]

Source: Office of Crime Statistics and Research, 2014

5.2 Housing diversity

5.2.1 Housing stock

In 2011, there were 2,646 dwellings located within the Modbury precinct. Separate houses are the dominant form of housing in the precinct. Of these, 35% (916) were medium density dwellings\(^3\). There were no high density dwellings in the precinct. The share of higher density dwellings in the Modbury Precinct was below the benchmark average of 39%.

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\(^3\) Medium density includes all semi-detached, row, terrace, townhouses and villa units, plus flats and apartments in blocks of 1 or 2 storeys, and flats attached to houses. High density includes flats and apartments in 3 storey and larger blocks.
Share of Median and High Density Dwelling Units - 2011

Source: ABS Census of Population and Housing (2011), prepared by .id, the population experts.

Data notes: Analysis based on Precinct (SA1) definition.

5.2.2 Medium and high density building approvals – number

The dwelling stock in the Modbury Region is unlikely to change in the near future as the current number of building approvals show. In the most recent period, the area had the lowest number of medium and high density dwelling units approved for construction out of all benchmarked areas. Only 12 were approved, compared to Doncaster which had 1,263 for the period 2014/15 to the end of 2016 Q1.
Share of Medium/High Density Building Approvals, 2014/15 – 2016 Q1

ABS 8731.0 - Building Approvals, Australia, Apr 2016 prepared by .id, the population experts.

Data notes: Analysis based on Region (SA2) definition.

5.2.3 Medium and high density building housing – share

When looking at the share of building types approved, once again Modbury Region has the lowest proportion of recent building approvals as medium and high density developments. Only 4% of all dwelling approval units were in this category, compared to an average of 58% amongst benchmark precincts.
5.2.4 Housing affordability

The Modbury Region is relatively affordable when compared to the rest of Metropolitan Adelaide. The average weighted median house price in 2013/14 was 7.6 times the average annual South Australian disposable household income. This was substantially lower than the metropolitan average median price which was 9 times household income. Hope Valley and St Agnes had slightly lower affordability than the other suburbs but were still below the metropolitan average and well below the Australian ratio (estimated at 10.7 in 2013/14)\(^6\).

\(^6\) Note: The Australian estimate is based on house price data from a different source – based on ABS 6416.0 - Residential Property Price Indexes: Eight Capital Cities, Jun 2014
5.3 Accessibility

5.3.1 Public and Active Transport

To the Region

Overall, the Modbury Region as a destination is largely a car based centre. In 2011, only 7.5% of journeys to the Modbury Region involved some form of public transport (train, bus, tram) or physical activity (walking, cycling). The region appears slightly more accessible by these methods than some areas of Adelaide (e.g. Mawson Lakes), but is well behind Subiaco where 20.5% of journeys occurred by active or public transport means.
Share of Employment Journeys to Regions by PT or Active Methods - 2011

Source: ABS Census of Population and Housing (2011), prepared by .id, the population experts.
N.B. ‘Active or PT’ includes any journey to work that has a component of walking, cycling or using public transport. Total employment journeys exclude those working from home, or who have not stated a mode of travel.

Data notes: Analysis based on Region (SA2) definition.

From the Region
When looking at journeys to work starting in the Modbury Region, the level of active or public transport is higher than compared to the Modbury Region as a destination. This highlights the greater importance local residents place on other modes of transport than workers in the precinct. In 2011, 16% of residents in the Modbury Region used public or active transport to get to work. This is below the benchmark average of 19%,

.id the population experts
Share of Employment Journeys from Region by PT or Active Methods - 2011

Source: ABS Census of Population and Housing (2011), prepared by .id, the population experts. N.B. ‘Active or PT’ includes any journey to work that has a component of walking, cycling or using public transport. Total employment journeys exclude those working from home, or who have not stated a mode of travel.

Data notes: Analysis based on Region (SA2) definition.

5.3.2 Boardings at the Tea Tree Gully Bus Interchange

There were 995,227 boardings recorded at the Tea Tree Gully Bus Interchange between October 1 2015 and May 31 2016. Over this period, the average number of boardings per weekday was 4,862 with a peak of 5,348 per weekday in May.
5.3.3 Car ownership

At the time of the 2011 Census, 31% of households within Modbury Precinct owned two or more cars. This was in line with the benchmark average.

Share of households with 2 or more cars

Source: ABS Census of Population and Housing
Data notes: Analysis based on Precinct (SA1) definition.

5.3.4 Access to people – population located within 30 minutes from the precinct
The Modbury Precinct has a catchment of 64% of Adelaide’s metropolitan population that live within a 30 minute drive of the precinct.
The table below shows the access to population for each of the benchmark areas. Modbury has the largest proportion of population available by far, closely followed by Mawson Lakes and Subiaco.

<table>
<thead>
<tr>
<th>Area</th>
<th>% of capital city population that live within 30 minute drive of centre</th>
</tr>
</thead>
<tbody>
<tr>
<td>Noarlunga</td>
<td>29.1%</td>
</tr>
<tr>
<td>Marion</td>
<td>46.8%</td>
</tr>
<tr>
<td>Mawson Lakes</td>
<td>58.8%</td>
</tr>
<tr>
<td>Elizabeth</td>
<td>42.6%</td>
</tr>
<tr>
<td>Subiaco</td>
<td>55.5%</td>
</tr>
<tr>
<td>Highpoint</td>
<td>29.4%</td>
</tr>
<tr>
<td>Doncaster</td>
<td>41.9%</td>
</tr>
</tbody>
</table>
5.3.5 Access to jobs – jobs located within 30 minutes from the precinct

Residents who live in the Modbury Precinct can access 74% of Adelaide’s employment within a 30 minute drive from the precinct. In comparison to the benchmarks outlined in the table below, Modbury has a high level of access to jobs. Subiaco has similar access, and in Adelaide, the next highest centres are Mawson Lakes and Marion. These high levels of access are due to being able to reach the CBD within a 30 minute drive time.

<table>
<thead>
<tr>
<th>Area</th>
<th>% of capital city employment within 30 minute drive of centre</th>
</tr>
</thead>
<tbody>
<tr>
<td>Noarlunga</td>
<td>20.6%</td>
</tr>
<tr>
<td>Marion</td>
<td>62.7%</td>
</tr>
<tr>
<td>Mawson Lakes</td>
<td>68.3%</td>
</tr>
<tr>
<td>Elizabeth</td>
<td>32.4%</td>
</tr>
<tr>
<td>Subiaco</td>
<td>75.0%</td>
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<tr>
<td>Highpoint</td>
<td>44.0%</td>
</tr>
<tr>
<td>Doncaster</td>
<td>52.9%</td>
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</tbody>
</table>

5.3.6 Walkability

A high level walkability analysis has been undertaken for the Modbury Precinct. This was based on a 10 minute walking catchment from the corner of Smart Road and Reservoir Road using ArcGIS Walking Time Analysis. Based on this analysis, the ten minute catchment had around 2,721 people in 2011. This represents around 47% of the population living within the Modbury Precinct.
10 minute walk from the corner of Smart Road and Reservoir Road

Source: ArcGIS

Further refinement of this indicator is recommended to include other variables such as net residential density; street connectivity; land-use mix. This would require more detailed GIS analysis.
6. Appendix A – Indicators by Dimension

<table>
<thead>
<tr>
<th>Vibrancy</th>
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<td></td>
<td></td>
</tr>
<tr>
<td>Number of jobs</td>
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<td>ABS Census 2011</td>
<td>2011</td>
</tr>
<tr>
<td>Number of business</td>
<td>Region – SA2</td>
<td>ABS Cat. No. 8165.0</td>
<td>2014-15</td>
</tr>
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<td>Population size</td>
<td>Precinct – SA1</td>
<td>ABS Cat. No. 3218</td>
<td>2014-15</td>
</tr>
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<td>2014-15</td>
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<td>Region – SA2</td>
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<td>2011</td>
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<td>Number of licensed premises</td>
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<td>2011</td>
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<td>Share of cultural related jobs</td>
<td>Precinct – DZ</td>
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<td>2011</td>
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</tr>
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<td>Prosperity</td>
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<td>ABS Census 2011</td>
<td>2011</td>
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<td>Share of knowledge workers</td>
<td>Precinct - DZ</td>
<td>ABS Census 2011</td>
<td>2011</td>
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<td>Access to labour within 30 minutes</td>
<td>SA2 catchment</td>
<td>Dept of employment</td>
<td>2015</td>
</tr>
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<td>NBN</td>
<td>2016</td>
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<td></td>
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<td><strong>Performance levels</strong></td>
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<td>Westfield Tea Tree</td>
<td>PCA 2015</td>
<td>2015</td>
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<tr>
<td>Shopping centre vacancies</td>
<td>Westfield Tea Tree</td>
<td>PCA 2015</td>
<td>2015</td>
</tr>
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<td>2015</td>
</tr>
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<td>2012/13</td>
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<td>Geography</td>
<td>Source</td>
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<td>High quality place</td>
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<td>Open space</td>
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<td>2016</td>
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<td>2011</td>
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<td>Access to arts and recreation</td>
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<td>2011</td>
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<td>Share of dwelling units by structure type</td>
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<td>2011</td>
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<tr>
<td>Share of medium/high density approvals</td>
<td>Region – SA2</td>
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<tr>
<td>Share of public and active transport trips to precinct</td>
<td>Region – SA2</td>
<td>ABS Census 2011</td>
<td>2011</td>
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<td>Share of public and active transport trips from precinct</td>
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<td>Avg Bus Boardings per weekday at Tea Tree Gully Interchange</td>
<td>Tea Tea Gully Interchange</td>
<td>DTPI</td>
<td>Oct 2015 to May 2016</td>
</tr>
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<td>Car ownership</td>
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<td>ABS Census 2011</td>
<td>2011</td>
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<td>Access to jobs</td>
<td>SA2 catchment</td>
<td>ABS Census 2011</td>
<td>2011</td>
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</table>
7. Appendix B – Overview of Benchmarks

Noarlunga

Noarlunga is a retail, commercial and public administration centre located in the City of Onkaparinga in the southern suburbs of Adelaide. The centre is home to Centro Colonnades shopping centre and the Noarlunga Hospital which services the surrounding suburbs which include Christie Downs, Christies Beach and Noarlunga Downs. The area is predominately low rise residential with some industrial and commercial zones. Noarlunga was chosen as a benchmark because the precinct is in Greater Adelaide and has comparative retail and health facilities similar to Modbury. It also has a major bus interchange within close proximity which is connected to rail services to Adelaide.

Location: Adelaide
Distance to CBD 25km
Population 6,093
Jobs 4,514
Top 3 industries
1. Retail Trade;
2. Health Care and Social Assistance;
3. Public Administration and Safety
Public transport offer: Serviced by several buses and train to central Adelaide.

<table>
<thead>
<tr>
<th>Geographic definitions</th>
<th>Areas included</th>
</tr>
</thead>
<tbody>
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<td>Region - SA2</td>
<td>Christie Downs</td>
</tr>
<tr>
<td></td>
<td>Christies Beach</td>
</tr>
</tbody>
</table>
Mawson Lakes

Mawson Lakes is a recently developed residential suburb in northern Adelaide that has grown around Technology Park Adelaide and a campus of UniSA. The suburb is predominately low rise residential, however medium density residential and mixed use commercial and public service facilities have been developing around Mawson central shopping centre next to the university campus. Mawson Lakes was chosen as a benchmark because the precinct is in South Australia and is an example of a modern precinct development which can be compared to Modbury’s older style development. It also has a major bus interchange within close proximity which is connected to rail services to Adelaide.

Location: Adelaide

Distance to CBD 13km

Population 11,009

Jobs 4,536

Top 3 industries

- Education;
- Manufacturing;
- Professional, Scientific and Technical Services

Public transport offer:

Serviced by several buses via Mawson Bus Interchange.

<table>
<thead>
<tr>
<th>Geographic definitions</th>
<th>Areas included</th>
</tr>
</thead>
<tbody>
<tr>
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</tr>
<tr>
<td>Region - SA2</td>
<td>Pooraka</td>
</tr>
</tbody>
</table>
Marion

Marion is the largest shopping centre in Adelaide and is actually located in the southern suburb of Oaklands Park. The surrounding area is predominantly residential but the centre is also very close to Flinders University and Tonsley, a newly developed innovation precinct at the former Mitsubishi Motors manufacturing and assembly site. Marion was chosen as a benchmark because the precinct is in South Australia and houses a shopping centre comparable to Modbury. It also has a major bus interchange within close proximity.

Location: Adelaide
Distance to CBD 11km
Population 2,958
Jobs 4,747
Top 3 industries
- Retail Trade;
- Accommodation and Food Services;
- Health Care and Social Assistance
Public transport offer:
Serviced by Shopping Centre Bus Interchange and nearby Oaklands train station

<table>
<thead>
<tr>
<th>Geographic definitions</th>
<th>Areas included</th>
</tr>
</thead>
<tbody>
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<tr>
<td>Region - SA2</td>
<td>Warradale</td>
</tr>
</tbody>
</table>
Elizabeth

Elizabeth is the third largest shopping centre in Adelaide located in the outer northern suburb of Elizabeth. The centre and nearby health and administrative offices service a number of surrounding suburbs including Elizabeth Park, Elizabeth East and Elizabeth North. Elizabeth was chosen as a benchmark because the precinct is in South Australia and houses a shopping centre comparable to Modbury. It also has a major bus interchange within close proximity which is connected to rail services to Adelaide.

Location: Adelaide
Distance to CBD 24km
Population 4,828
Jobs 4,702

Top 3 industries
- Retail Trade;
- Public Administration and Safety;
- Health Care and Social Assistance

Public transport offer:
Serviced by Shopping Centre Bus Interchange and nearby Oaklands train station

<table>
<thead>
<tr>
<th>Geographic definitions</th>
<th>Areas included</th>
</tr>
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<tr>
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</table>
| Region - SA2                 | Elizabeth  
Elizabeth East  
Smithfield - Elizabeth North |
Subiaco

Subiaco is an inner Perth suburb offering extensive retail and commercial services in a dense urban environment rather than a central shopping complex, although it does have a smaller centre called Subi Square. Subiaco is also home to the King Edward Memorial Hospital, Perth’s largest maternity hospital. The suburb is predominately medium to high density residential and mixed use development. It was chosen as a benchmark as it is a model of Transport Orientated Development, something Modbury could aspire to approach.

**Location:** Perth  
**Distance to CBD:** 24km  
**Population:** 3,796  
**Jobs:** 18,832  
**Top 3 industries:**  
- Health Care and Social Assistance;  
- Professional, Scientific and Technical Services;  
- Accommodation and Food Services

**Public transport offer:**  
Serviced by numerous buses and also train services to Perth

<table>
<thead>
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<th>Geographic definitions</th>
<th>Areas included</th>
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<tr>
<td>Region - SA2</td>
<td>Subiaco - Shenton Park</td>
</tr>
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</table>
Highpoint

Highpoint is a major shopping centre located in a middle ring western residential suburb 8 km from Melbourne’s CBD. The suburb (Maribyrnong) is predominately low rise residential with multiple commercial space surrounding the shopping centre. Highpoint was chosen as a benchmark because the precinct is a similar size and also houses a shopping centre comparable to Modbury. It also has a major bus interchange within close proximity.

Location: Melbourne  
Distance to CBD 8km  
Population 5,488  
Jobs 4,631  
Top 3 industries:  
- Retail Trade;  
- Accommodation and Food Services;  
- Health Care and Social Assistance  
Public transport offer:  
Serviced by several buses and tram

<table>
<thead>
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<th>Geographic definitions</th>
<th>Areas included</th>
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<tr>
<td>Region - SA2</td>
<td>Maribyrnong</td>
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</tbody>
</table>
**Doncaster**

Doncaster is a large Westfield Shopping centre located in a middle ring residential suburb 15 km from Melbourne’s CBD which can be accessed via the nearby Eastern Freeway. The suburb is predominately low rise residential with some recent high rise development around the shopping centre. Doncaster was chosen as a benchmark because the precinct is a similar size and is a comparable distance to a metropolitan CBD as Modbury. It also has a major bus interchange within close proximity.

**Location:** Melbourne

**Distance to CBD:** 18km

**Population:** 5,112

**Jobs:** 6,277

**Top 3 industries**

- Retail Trade;
- Accommodation and Food Services;
- Public Administration and Safety

**Public transport offer:**
Serviced by several buses via Park and Ride facility.

<table>
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<tr>
<td>Region - SA2</td>
<td>Doncaster</td>
</tr>
</tbody>
</table>
8. Appendix C – Definitions

8.1 Knowledge intensive jobs

The following 2 digit ANZSIC industries codes were used to define knowledge intensive jobs:

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
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</thead>
<tbody>
<tr>
<td>01</td>
<td>Tertiary Education</td>
</tr>
<tr>
<td>02</td>
<td>Professional, Scientific and Technical Services (Except Computer System Design and Related Services)</td>
</tr>
<tr>
<td>19</td>
<td>Hospitals</td>
</tr>
<tr>
<td>31</td>
<td>Telecommunications Services</td>
</tr>
<tr>
<td>42</td>
<td>Fabricated Metal Product Manufacturing</td>
</tr>
<tr>
<td>51</td>
<td>Creative and Performing Arts Activities</td>
</tr>
<tr>
<td>53</td>
<td>Exploration and Other Mining Support Services</td>
</tr>
<tr>
<td>55</td>
<td>Machinery and Equipment Manufacturing</td>
</tr>
<tr>
<td>61</td>
<td>Agriculture, Forestry and Fishing Support Services</td>
</tr>
<tr>
<td>62</td>
<td>Computer System Design and Related Services</td>
</tr>
<tr>
<td>63</td>
<td>Transport Equipment Manufacturing</td>
</tr>
<tr>
<td>22</td>
<td>Basic Chemical and Chemical Product Manufacturing</td>
</tr>
<tr>
<td>52</td>
<td>Internet Service Providers, Web Search Portals and Data Processing Services</td>
</tr>
<tr>
<td>58</td>
<td>Library and Other Information Services</td>
</tr>
<tr>
<td>59</td>
<td>Motion Picture and Sound Recording Activities</td>
</tr>
<tr>
<td>63</td>
<td>Internet Publishing and Broadcasting</td>
</tr>
<tr>
<td>65</td>
<td>Publishing (except Internet and Music Publishing)</td>
</tr>
<tr>
<td>81</td>
<td>Petroleum and Coal Product Manufacturing</td>
</tr>
<tr>
<td>82</td>
<td>Polymer Product and Rubber Product Manufacturing</td>
</tr>
<tr>
<td>83</td>
<td>Broadcasting (except Internet)</td>
</tr>
<tr>
<td>89</td>
<td>Adult, Community and Other Education</td>
</tr>
<tr>
<td>91</td>
<td>Auxiliary Finance and Insurance Services</td>
</tr>
<tr>
<td>93</td>
<td>Insurance and Superannuation Funds</td>
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### 8.2 Cultural

The following 4 digit ANZSIC Industries codes were used to define cultural jobs:

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<tr>
<td>4811</td>
<td>Motion Picture Exhibition</td>
</tr>
<tr>
<td>7812</td>
<td>Libraries and Archives</td>
</tr>
<tr>
<td>9300</td>
<td>Sports and Physical Recreation Instruction</td>
</tr>
<tr>
<td>9301</td>
<td>Arts Education</td>
</tr>
<tr>
<td>9302</td>
<td>Arts and Recreation Services, nfd</td>
</tr>
<tr>
<td>9312</td>
<td>Heritage Activities, nfd</td>
</tr>
<tr>
<td>9313</td>
<td>Museum Operation</td>
</tr>
<tr>
<td>9314</td>
<td>Parks and Gardens Operations, nfd</td>
</tr>
<tr>
<td>9315</td>
<td>Zoological and Botanical Gardens Operation</td>
</tr>
<tr>
<td>9316</td>
<td>Nature Reserves and Conservation Parks Operation</td>
</tr>
<tr>
<td>9317</td>
<td>Creative and Performing Arts Activities, nfd</td>
</tr>
<tr>
<td>9318</td>
<td>Performing Arts Operation</td>
</tr>
<tr>
<td>9319</td>
<td>Creative Artists, Musicians, Writers and Performers</td>
</tr>
<tr>
<td>9323</td>
<td>Performing Arts Venue Operation</td>
</tr>
<tr>
<td>9324</td>
<td>Sports and Recreation Activities, nfd</td>
</tr>
<tr>
<td>9325</td>
<td>Sports and Physical Recreation Activities, nfd</td>
</tr>
<tr>
<td>9326</td>
<td>Health and Fitness Centres and Gymnasia Operation</td>
</tr>
<tr>
<td>9327</td>
<td>Sports and Physical Recreation Clubs and Sports Professionals</td>
</tr>
<tr>
<td>9328</td>
<td>Sports and Physical Recreation Venues, Grounds and Facilities Operation</td>
</tr>
<tr>
<td>9329</td>
<td>Sports and Physical Recreation Administrative Service</td>
</tr>
<tr>
<td>9330</td>
<td>Horse and Dog Racing Activities, nfd</td>
</tr>
<tr>
<td>9331</td>
<td>Horse and Dog Racing Administration and Track Operation</td>
</tr>
<tr>
<td>9332</td>
<td>Other Horse and Dog Racing Activities</td>
</tr>
<tr>
<td>9333</td>
<td>Amusement and Other Recreation Activities, nfd</td>
</tr>
<tr>
<td>9334</td>
<td>Amusement Parks and Centres Operation</td>
</tr>
<tr>
<td>9335</td>
<td>Amusement and Other Recreational Activities nec</td>
</tr>
<tr>
<td>9336</td>
<td>Religious Services</td>
</tr>
<tr>
<td>9337</td>
<td>Other Interest Group Services nec</td>
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8.3 Night time economy

The following 4 digit ANZSIC Industries codes were used to define night time jobs:

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<tr>
<td>1</td>
<td>Liquor Retailing</td>
</tr>
<tr>
<td>2</td>
<td>Cafes, Restaurants and Takeaway Food Services, nfd</td>
</tr>
<tr>
<td>3</td>
<td>Cafes and Restaurants</td>
</tr>
<tr>
<td>4</td>
<td>Takeaway Food Services</td>
</tr>
<tr>
<td>5</td>
<td>Pubs, Taverns and Bars</td>
</tr>
<tr>
<td>6</td>
<td>Clubs (Hospitality)</td>
</tr>
<tr>
<td>7</td>
<td>Accommodation</td>
</tr>
<tr>
<td>8</td>
<td>Arts and Recreation Services, nfd</td>
</tr>
<tr>
<td>9</td>
<td>Heritage Activities, nfd</td>
</tr>
<tr>
<td>10</td>
<td>Museum Operation</td>
</tr>
<tr>
<td>11</td>
<td>Parks and Gardens Operations, nfd</td>
</tr>
<tr>
<td>12</td>
<td>Zoological and Botanical Gardens Operation</td>
</tr>
<tr>
<td>13</td>
<td>Nature Reserves and Conservation Parks Operation</td>
</tr>
<tr>
<td>14</td>
<td>Creative and Performing Arts Activities, nfd</td>
</tr>
<tr>
<td>15</td>
<td>Performing Arts Operation</td>
</tr>
<tr>
<td>16</td>
<td>Creative Artists, Musicians, Writers and Performers</td>
</tr>
<tr>
<td>17</td>
<td>Performing Arts Venue Operation</td>
</tr>
<tr>
<td>18</td>
<td>Sports and Recreation Activities, nfd</td>
</tr>
<tr>
<td>19</td>
<td>Sports and Physical Recreation Activities, nfd</td>
</tr>
<tr>
<td>20</td>
<td>Health and Fitness Centres and Gymnasia Operation</td>
</tr>
<tr>
<td>21</td>
<td>Sports and Physical Recreation Clubs and Sports Professionals</td>
</tr>
<tr>
<td>22</td>
<td>Sports and Physical Recreation Venues, Grounds and Facilities Operation</td>
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<tr>
<td>23</td>
<td>Sports and Physical Recreation Administrative Service</td>
</tr>
<tr>
<td>24</td>
<td>Horse and Dog Racing Activities, nfd</td>
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<tr>
<td>25</td>
<td>Horse and Dog Racing Administration and Track Operation</td>
</tr>
<tr>
<td>26</td>
<td>Other Horse and Dog Racing Activities</td>
</tr>
<tr>
<td>27</td>
<td>Amusement and Other Recreation Activities, nfd</td>
</tr>
<tr>
<td>28</td>
<td>Amusement Parks and Centres Operation</td>
</tr>
<tr>
<td>29</td>
<td>Amusement and Other Recreational Activities nec</td>
</tr>
<tr>
<td>30</td>
<td>Gambling Activities, nfd</td>
</tr>
<tr>
<td>31</td>
<td>Casino Operation</td>
</tr>
<tr>
<td>32</td>
<td>Lottery Operation</td>
</tr>
<tr>
<td>33</td>
<td>Other Gambling Activities</td>
</tr>
<tr>
<td>34</td>
<td>Brothel Keeping and Prostitution Services</td>
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9. Appendix D – Detailed Results

### Vibrancy

<table>
<thead>
<tr>
<th>Indicators</th>
<th>Modbury</th>
<th>Noarlunga</th>
<th>Mawson Lakes</th>
<th>Marion</th>
<th>Elizabeth</th>
<th>Subiaco</th>
<th>Highpoint</th>
<th>Doncaster</th>
<th>Benchmark average</th>
<th>SA2 Rating</th>
<th>Benchmark Rating</th>
<th>Average ranking</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Activity</strong></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number of jobs</td>
<td>6,889</td>
<td>4,514</td>
<td>4,536</td>
<td>4,747</td>
<td>4,702</td>
<td>18,832</td>
<td>4,631</td>
<td>6,277</td>
<td>6,889</td>
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<td>Number of business</td>
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<td>695</td>
<td>1,584</td>
<td>597</td>
<td>873</td>
<td>4,463</td>
<td>836</td>
<td>2,111</td>
<td>1,615</td>
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<td>11,009</td>
<td>2,958</td>
<td>4,828</td>
<td>3,796</td>
<td>5,488</td>
<td>5,112</td>
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<td>Population density</td>
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<td>12</td>
<td>22</td>
<td>21</td>
<td>12</td>
<td>24</td>
<td>17</td>
<td>22</td>
<td>18</td>
<td>3.1</td>
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<td>Population growth</td>
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<td>408</td>
<td>1,473</td>
<td>207</td>
<td>52</td>
<td>248</td>
<td>686</td>
<td>112</td>
<td>405</td>
<td>2.9</td>
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<td>2.0</td>
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<td>Tourism visitation levels</td>
<td>142,783</td>
<td>188,907</td>
<td>25,816</td>
<td>12,724</td>
<td>172,593</td>
<td>246,173</td>
<td>115,142</td>
<td>141,459</td>
<td>130,700</td>
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<td>3.0</td>
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<td>Night time economy (jobs)</td>
<td>731</td>
<td>413</td>
<td>300</td>
<td>699</td>
<td>533</td>
<td>1512</td>
<td>591</td>
<td>698</td>
<td>685</td>
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<td>4.00</td>
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<td>2.0</td>
<td>2.5</td>
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<tr>
<td>------------------------------</td>
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<td>---</td>
<td>---</td>
<td>---</td>
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<td>---</td>
<td>-----</td>
<td>-----</td>
<td>-----</td>
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<tr>
<td>Diversity</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>5.8%</td>
<td>2.0%</td>
<td>11.7%</td>
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<td>Number of licensed premises</td>
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<td></td>
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<td>31.00%</td>
<td>25.80%</td>
<td>34.80%</td>
<td>23.90%</td>
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<td>Residents born overseas</td>
<td>30.5</td>
<td>38.1</td>
<td>32.3</td>
<td>44.8</td>
<td>29.8</td>
<td>35.7</td>
<td>47.6</td>
<td>41.9</td>
<td>38</td>
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<td>Culture</td>
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<td></td>
<td></td>
<td></td>
<td>2.6%</td>
<td>3.4%</td>
<td>1.6%</td>
<td>6.5%</td>
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<tr>
<td>Share of cultural related jobs</td>
<td>14.4%</td>
<td>11.1%</td>
<td>10.4%</td>
<td>14.2%</td>
<td>10.0%</td>
<td>15.5%</td>
<td>9.7%</td>
<td>14.2%</td>
<td>12%</td>
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<td>5.00</td>
<td>4.00</td>
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<td>Volunteering</td>
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<td></td>
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<tr>
<td>Number of arts projects</td>
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<td></td>
<td></td>
<td>56,000</td>
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<td>Annual attendance at events</td>
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<td></td>
<td>400,366</td>
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<td>Library visitation (events and door counts)</td>
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|
## Prosperity

<table>
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<tr>
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<th>Noarlunga</th>
<th>Mawson Lakes</th>
<th>Marion</th>
<th>Elizabeth</th>
<th>Subiaco</th>
<th>Highpoint</th>
<th>Doncaster</th>
<th>Benchmark average</th>
<th>SA2 Rating</th>
<th>Benchmark Rating</th>
<th>Average ranking</th>
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<tbody>
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<td></td>
<td></td>
<td></td>
<td></td>
<td>3.47</td>
<td>3.00</td>
<td>3.07</td>
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<tr>
<td>Total Building approvals</td>
<td>110,229</td>
<td>141,418</td>
<td>85,686</td>
<td>71,104</td>
<td>86,521</td>
<td>30,244</td>
<td>1,908</td>
<td>118,945</td>
<td>106,442</td>
<td>3.69</td>
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<td>Non-residential Building approvals</td>
<td>38,973</td>
<td>77,970</td>
<td>36,957</td>
<td>7,574</td>
<td>30,484</td>
<td>141,934</td>
<td>28,328</td>
<td>52,683</td>
<td>51,980</td>
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<td>3.00</td>
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<td>2.00</td>
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<td><strong>Business and employment growth</strong></td>
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<td>3.75</td>
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<td>3.50</td>
<td>3.50</td>
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<td>Change in businesses</td>
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<td>-12</td>
<td>106</td>
<td>23</td>
<td>-18</td>
<td>234</td>
<td>14</td>
<td>155</td>
<td>68</td>
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<td>3.50</td>
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<td>Indicative employment change</td>
<td>Limited to Moderate growth</td>
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<td>3.50</td>
<td>3.50</td>
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<td>Productivity and technology</td>
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<td></td>
<td>4.00</td>
<td>3.75</td>
<td>4.00</td>
<td>4.00</td>
</tr>
<tr>
<td>Employment density</td>
<td>13.22</td>
<td>16.47</td>
<td>11.83</td>
<td>12.70</td>
<td>24.48</td>
<td>57.56</td>
<td>30.40</td>
<td>55.11</td>
<td>28</td>
<td>3.25</td>
<td>2.00</td>
<td>2.63</td>
</tr>
<tr>
<td>Share of knowledge workers</td>
<td>21%</td>
<td>21%</td>
<td>59%</td>
<td>10%</td>
<td>13%</td>
<td>51%</td>
<td>7%</td>
<td>11%</td>
<td>24%</td>
<td>3.75</td>
<td>3.00</td>
<td>3.38</td>
</tr>
<tr>
<td>Access to labour within 30 minutes</td>
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<td>2</td>
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<td>5</td>
<td>5.00</td>
<td>5.00</td>
</tr>
<tr>
<td>4G mobile coverage</td>
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<td>0%</td>
<td>0%</td>
<td>29%</td>
<td>0%</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
<td>54%</td>
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<td>5.00</td>
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<tr>
<td><strong>Performance levels</strong></td>
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<td>40,100</td>
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## Liveability

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<th>Indicators</th>
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<th>Noarlunga</th>
<th>Mawson Lakes</th>
<th>Marion</th>
<th>Elizabeth</th>
<th>Subiaco</th>
<th>Highpoint</th>
<th>Doncaster</th>
<th>Benchmark average</th>
<th>SA2 Rating</th>
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<td>High quality place</td>
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<td>Share of dwelling units by structure type</td>
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<tr>
<td>Share of public and active transport trips to precinct</td>
<td>7.5%</td>
<td>6.9%</td>
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<tr>
<td>Share of public and active transport trips from precinct</td>
<td>16%</td>
<td>12%</td>
<td>14%</td>
<td>19%</td>
<td>13%</td>
<td>38%</td>
<td>25%</td>
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<td>Car ownership</td>
<td>35%</td>
<td>31%</td>
<td>49%</td>
<td>35%</td>
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<td>24%</td>
<td>39%</td>
<td>49%</td>
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<td>Access to jobs</td>
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</tbody>
</table>
10. Appendix E – Areas for improvement

A number of data gaps and potential improvements have been identified as part of this study. These could be developed as part of the next stage of the evaluation framework.

They are:

- Collect floorspace and vacancy data across the entire precinct – this data was available for the Westfield Shopping Centre only.
- Improvements to the walkability analysis is suggested as only a high level analysis was undertaken. More detailed GIS and field analysis would improve this indicator.
- Increase the number of benchmarks selected - the performance of the Precinct is largely dependent on how it performs against the benchmarks selected. The identification of other precincts would affect how it’s relative performance. This is a subject for further refinement.
- This report presents equal weightings across the indicators. Weightings could be introduced to determine the most important indicators under each of the dimensions.
- Collect sales data for all precincts, including commercial values.
- Present public realm investments
- Check local crime data availability