

Appendix I

Retail and Commercial Potential



planning consultants

Incorporating
Hirst Consulting Services

South Dural Urban Investigation Area Retail and Commercial Potential



Prepared for: The South Dural Residents Group
Project No: 7015A
Date: December 2008



**South Dural Urban Investigation
Retail and Commercial Potential**

Printed: 23 December 2008
File Name: P:\PROJECTS\7015A South Dural Urban Investigation\Reports\7015A.1.doc
Project Manager: Ellen Robertshaw
Client: Pascoe Planning Solutions on behalf of the South Dural Residential Group
Project Number: 7015A

Document history and status

Version	Issued To	Qty	Date	Reviewed
Draft	Project Manager	1	03.06.2008	Ellen Robertshaw
Draft	Project Manager	1	12.06.2008	Michael Evesson
Draft	Project Manager	1	04.08.2008	Michael Evesson
Final	Client	1-e	27.11.2008	
Re-draft	Project Manager	1	18.12.2008	Ellen Robertshaw
Re-draft	Michael Evesson	1-e	19.12.2008	Michael Evesson
Final	Client	1-e 1-h	23.12	Ellen Robertshaw

Table of Contents

1	Introduction	1
2	Existing Retail Facilities in the Area	1
2.1	Introduction	1
2.2	Regional Centre	2
2.3	Local District Centres	3
2.4	Local Centres	4
3	Population	5
3.1	Introduction	5
3.2	Population Characteristics	5
3.3	Population Projections	7
3.4	Expenditure Potential	8
3.5	Expenditure Distribution	9
3.6	Turnover Estimates	9
3.7	Potential Retail and Non-Retail Provision	10
3.8	Retail Floorspace Provision	11
4	Support for Existing Retail Network	12
5	Community Facilities	13

Figures

- 1 Location of surrounding centres

Appendices

- A List of outlets within surrounding centres

1 Introduction

This assessment has been prepared by Don Fox Planning incorporating Hirst Consulting Services on behalf of the South Dural Residents Group in order to assist with a planning assessment of the urban potential of the South Dural Investigation Area.

The South Dural Investigation Area is that area bounded generally by Old Northern Road, Hastings Road and New Line Road. The bulk of this area is currently zoned Rural BA (Small Holdings – Agricultural Landscape) under the provisions of Hornsby Local Environmental Plan 1994.

The release of this land for urban purposes was previously considered as part of the Hornsby Shire Rural Lands Study conducted in August 1995, and independently in 2001.

This report aims to provide fresh advice regarding the feasibility, in terms of demand, for the provision of retail and non-retail commercial and community floorspace within the South Dural Investigation Area. In this regard the report will address the following:

- The likely scale of demand for convenience retailing on the site and the appropriate style and composition of uses;
- The relationship of any proposed centre with existing and proposed retail centres in the locality; and
- The position such a centre might occupy within the ultimate retail network in the area.

In order to address these issues, the following aspects will be discussed:

- Existing proposed and planned for retail facilities in the area;
- A potential trade area for any retail facilities provided as part of the South Dural investigation area;
- The likely characteristics of the future South Dural population;
- Population projections for the South Dural investigation area;
- Retail expenditure characteristics and trends of the potential South Dural population; and
- The likely demand for and potential composition of any retail centre including non-retail floorspace to be provided as part of the South Dural area.

2 Existing Retail Facilities in the Area

2.1 Introduction

Within the area surrounding South Dural there is a variety of centres of different size and function. The location of these centres in relation to South Dural is shown on the plan at **Figure 1**.

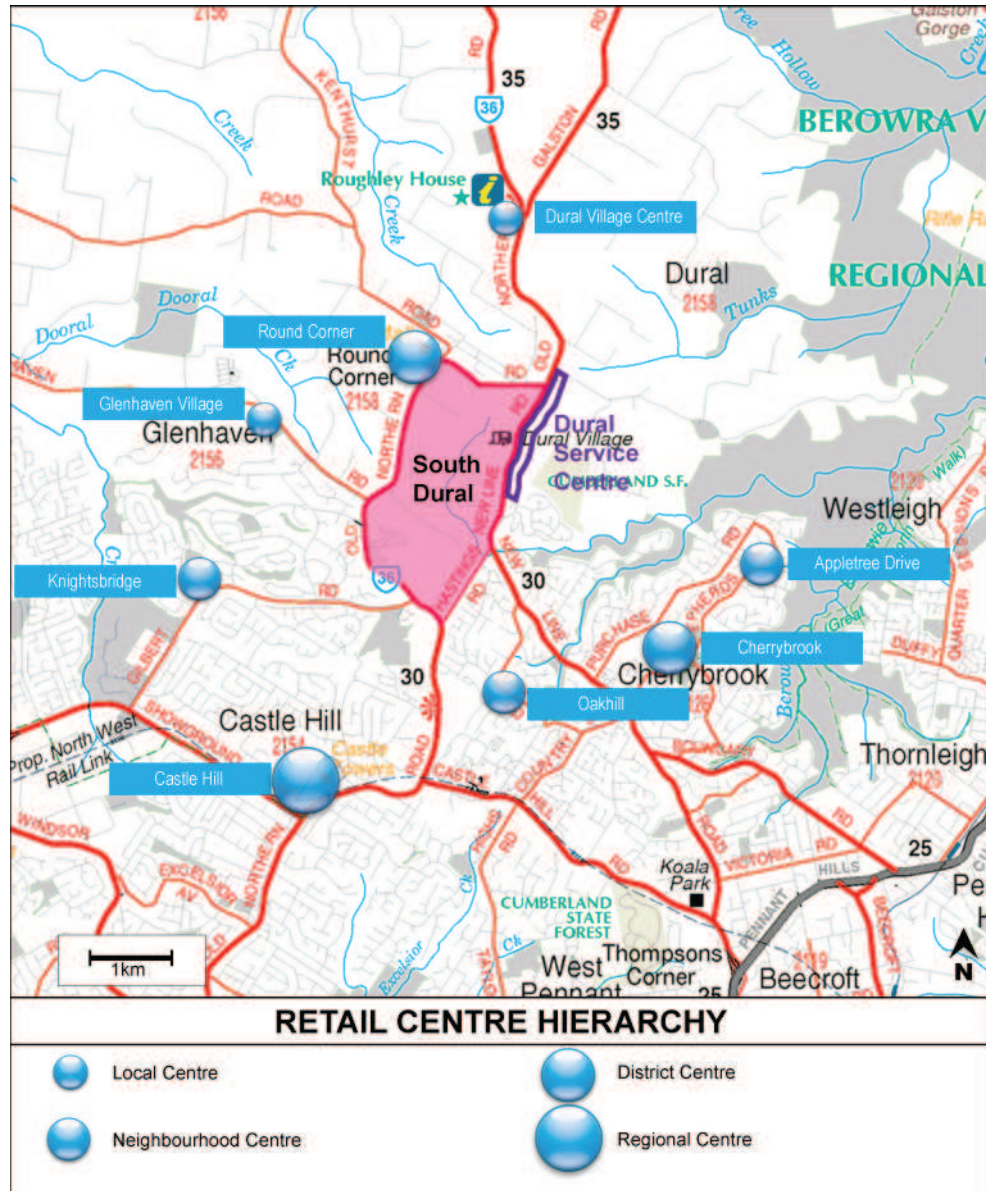


Figure 1 – Location of surrounding centres

2.2 Regional Centre

South Dural is within the catchment of the Castle Hill Regional Centre. Retailing in this centre is dominated by the Castle Towers Shopping Centre which comprises over 108,000m² of floorspace. The Shopping Centres Directory 2007, produced by the Property Council, identifies Castle Towers as a Super Regional Centre. This Centre is anchored by major tenants including David Jones, Myer, K Mart, Target, Coles, and Bi Lo and has in excess of 300 specialty shops. There is also a cinema complex and restaurant precinct within the Centre.

Baulkham Hills Council is currently considering an application to expand the Castle Towers Shopping Centre by more than 60,000m². Should this expansion proceed, the total floorspace of the Centre will be almost 173,000m². As part of this expansion, it is proposed to provide almost 20,000m² in department store and discount department store floorspace, 8,400m² of additional supermarket floorspace, 17,000m² of other retail floorspace, an additional 6,300m² of restaurant and café floorspace, and 5,000m² of cinemas and other entertainment facilities.

Castle Mall is another major retail centre within the Castle Hill Regional Centre. This centre is located on Old Northern road and comprises over 9,750m² of floorspace, 1,915m² is occupied by a discount variety outlet and 1,820m² of which is occupied by a Franklins supermarket. There are also 57 speciality stores in this centre.

There are a variety of retail and non-retail outlets along Old Northern Road, together with some community facilities such as a branch library.

Potential residents of the South Dural Investigation Area could also patronise facilities at the new Rouse Hill Regional Centre on Windsor Road at Rouse Hill. The centre currently comprises some 55,000m² of retail floorspace incorporating over 200 speciality shops with focus on fresh food, restaurants and cafes, homewares, fashion and entertainment. (Extract from Shopping Centre News, volume 26, No. 2 2008).

2.3 Local District Centres

Retail facilities at Round Corner Dural represent the closest convenience retail facilities to the South Dural area. The retail centre at Round Corner Dural comprises three main shopping centres, together with a smaller centre and street-front outlets along Kenthurst Road and New Line Road. We estimate the total retail and non-retail floorspace in Round Corner Dural to be approximately 14,700m².

The Village Green shopping centre comprises 19 speciality outlets with no major anchor tenant. Details of tenants within this centre are provided in **Appendix A**, which is the result of a recent field survey undertaken by DFP.

The **Round Corner Plaza** shopping centre accommodates a variety of retail and non-retail tenants including banks, solicitor and real estate agents. Outlets within Round Corner Plaza are also detailed in **Appendix A**. There are some 17 tenancies in the centre accommodating a variety of retail and non-retail services.:

Dural Mall is anchored by an ALDI store. A Woolworths supermarket is adjacent to Dural Mall. There are also 22 speciality outlets within the Dural Mall shopping centre including Post Office, banks, food stores and personal service providers.

Another centre known as the **Mirabelle Centre** is located behind the street frontage outlets along Old Northern Road and Kenthurst Road. This centre accommodates 13 tenants including restaurant, personal service providers, and some non-retail local serving businesses including construction companies and medical practitioners.

Along Kenthurst Road and Old Northern Road are street frontage outlets, many of which house non-retail facilities.

A complete list of both retail and non-retail facilities within Round Corner appears at **Appendix A** to this report. The variety and range of retail and non-retail facilities at Round Corner Dural make this centre a comprehensive local district centre, capable of providing services to the surrounding urban and rural areas.

The **Cherrybrook Village Shopping Centre** on Shepherds Drive is approximately three kilometres south-east of the South Dural Investigation area. This centre comprises 9,500m² of floorspace, 3,830m² of which is occupied by a Woolworths Supermarket. The centre also accommodates over 50 speciality outlets including food stores, clothing stores, cafes and a range of local serving non-retail outlets including banks, optometrists and other medical practitioners. A list of occupants currently in this centre is included in **Appendix A**.

2.4 Local Centres

The **Appletree Drive** neighbourhood centre on the corner of Shepherds Drive and Appletree Drive, Cherrybrook is a local convenience centre providing for the day-to-day needs of the surrounding neighbourhood. This centre comprises eleven outlets including a general store, bakery, newsagency, pharmacy, medical centre, physiotherapist, take-away food outlet, dentist, pathologist, beauty salon and a pizza restaurant. This centre has an estimated floorspace of 1,100m².

The **Oakhill Village Shopping Centre** on David Road, Castle Hill provides a similar range of services to the Appletree Centre. This centre is anchored by a 500m² IGA supermarket and has 16 speciality outlets including newsagent, Chinese restaurant, butcher, pizza restaurant, patisserie, chicken shop, liquor shop, beautician, medical practice and dentist. This centre provides 1,560m² of retail and non-retail floorspace.

The **Knightsbridge Shopping Centre** on the corner of Ridgicroft Drive and Gilbert Road, Castle Hill is approximately 2.5 kilometres west of the South Dural area. We estimate this centre comprises some 2,200m² of floorspace. Tenants within this centre include an IGA supermarket, delicatessen, bakery, newsagent, chemist, liquor outlet, real estate agent, butcher, video hire and beautician. There is a total of 15 retail and non-retail outlets in this local centre which provides services to its local neighbourhood.

This collection of centres is supported by two smaller village centres at Glenhaven and Dural. The **Dural Village Shopping Centre** on Old Northern Road near Galston Road comprises eight tenancies. Outlets in this centre include an IGA Supermarket, Liquorland, newsagent, take away food outlet, chemist and Chinese restaurant. At the time of the recent survey there was one vacant outlet in this centre. The **Glenhaven Shopping Centre** on Glenhaven Road near Hyde Avenue is a small local centre accommodating six outlets including a small supermarket/general store which incorporates video hire, newspapers and fruit and vegetable sales, a medical clinic, pharmacy, pizza restaurant, beautician and Chinese takeaway food outlet.

This network of centres is complemented by the Dural Service Centre which is located on the eastern side of New Line Road between Sebastian Drive and Quarry Road. The Dural Service Centre supports a variety of light industrial uses and bulky goods retail outlets, including fast food restaurants and major hardware chains. A complete list of uses within the Dural Service Centre also appears in **Appendix A** to this report.

The development of the South Dural area for residential purposes could well increase the level of support for these surrounding centres and there may also be the opportunity for complementary convenience retail facilities to be provided as part of the redevelopment of the South Dural area.

In addition, the preliminary concept plan for South Dural recognises the existence of a number of non-residential commercial uses fronting major roads around the site by proposing to incorporate such uses in appropriate zones in order to encourage future residential use in addition to the current uses.

3 Population

3.1 Introduction

The current (rural) population of the South Dural area is unlikely to be representative of the future community should the area be developed for residential purposes.

We would expect the ultimate population of the South Dural area to display similar characteristics to the surrounding residential areas of Dural and Glenhaven, although there is likely to be a much higher proportion of medium density housing within South Dural. In this regard, a collection of Census Collectors Districts based on the residential areas north of Pyes Creek and east of New Line Road, between Hastings Road and David Road, and the residential areas bounded generally by Gilbert Road, Old Northern Road, Glenhaven Road and Evans Road, have been used to generate an indication of the broad characteristics of the future population of the South Dural Area. These characteristics have been based on data available from the 2006 Census.

3.2 Population Characteristics

A summary profile of the population characteristics of the potential South Dural population compared to the Sydney metropolitan area as a whole is presented in Table 1.

TABLE 1: Extract from 2006 Basic Community Profile		
	South Dural Surrogate Area	Sydney Metro
Born in Australia	65.6%	60.4%
Born Overseas	30.6%	31.7%
AGE of PERSONS		
0-14	22.9%	19.5%
15-24	17.4%	13.8%
25-44	23.7%	30.6%
45-64	30.2%	23.8%
65 or more	5.8%	12.3%
On Census Night, persons counted:		
At home	97.4%	96.7%
Elsewhere in Australia	2.6%	3.3%
Household Composition		
Couple with Children	65.7%	49.3%
Couple without Children	24.2%	33.2%
Single Parent	9.5%	15.6%
Other Families	0.7%	1.9%
Lone Person Households	6.4%	23.1%
Group Households	1%	4%
Dwelling Structure		
Separate House	91.4%	63.6%
Apartments	0.0%	23.9%
Other Medium Density	8.6%	11.8%
Other (including not stated)	0.0%	0.7%
Persons per Dwelling	3.3	2.7
Tenure		
Owned	36.7%	31.9%
Being Purchased	53.8%	33.1%
Rented	8.3%	31.3%
Other	1.2%	3.7%
Medians		
Weekly Rent	\$418	\$250
Monthly Mortgage	\$2,270	\$1,833
Annual Household Income	\$111,800	\$60,010
Weekly Household Income		
\$0 - \$649	9.8%	25.1%
\$650 - \$1999	31.0%	40.6%
\$2000 +	46.1%	23.0%
Other, including not stated	13.2%	11.3%
Average Vehicles per Household	2.2	1.5
Households with no vehicle	1%	13%

Based on the analysis of the surrogate area, the population of South Dural could display the following characteristics:

- A younger population compared to that of the Sydney metropolitan area. The proportion of 0 to 14 and 15 to 24 year olds is likely to be higher than that of the Sydney metropolitan area.
- The dominant household is likely to comprise a couple with children. The next most represented household is likely to be a couple without children. Lone person households are expected to make up only a small proportion of households within the South Dural area.
- The dominant dwellings are likely to comprise a separate dwelling on its own allotment of land, although a significant proportion of integrated housing and other forms of medium density housing is also likely.
- The average occupancy is likely to be higher than that of the average Sydney household. In 2006, the average occupancy rate of households of the surrogate area was 3.3 persons per dwelling.
- It is likely that most residents will be owner/occupiers, although the majority of these will be paying off a mortgage. Only a small proportion of dwellings are likely to be rented.
- Those households paying a mortgage will have significant financial commitments in terms of meeting monthly payments. However, given the median annual income of households is likely to be significantly greater than that of the average Sydney household, this commitment is unlikely to result in these households having restricted spending capacity.
- Members of these households are likely to be relatively mobile, with an average of more than two vehicles per household, and very few households having no vehicle.
- The majority of households are likely to be on a high weekly income, particularly when compared to the Sydney metropolitan population.

3.3 Population Projections

For the purposes of assessing the development potential of the area, a development timeline has been considered based on a preliminary development concept prepared by others. Under this scenario 2,900 dwellings may be possible. Table 2 is an estimate of the maximum development potential of the South Dural area.

Table 2: Assumed Development Potential						
	2011	2016	2021	2025	2031	2036
Assumed development scenario	200	600	1300	1900	2400	2900
Source: DFP estimates						
Notes: Development relates to number of households						

Based on the staging as indicated in Table 2, maximum population projections for the South Dural area as shown in Table 3 could result.

Area	2008		2011		2016		2021	
	Persons	H'holds	Persons	H'holds	Persons	H'holds	Persons	H'holds
Assumed development scenario	0	0	670	200	1,920	600	4,095	1,300

Source: DFP estimates based on yield estimates in Table 2 and occupancy rates of 3.35 persons per household in 2011, 3.2 persons per household in 2016 and 3.15 persons per household in 2021

This notional development scenario could see 600 households in South Dural by 2016 and 1,300 households by 2021. We assume that full development of the area may not occur before 2036 under this scenario.

3.4 Expenditure Potential

Accepting these broad characteristics of the possible future resident population of the South Dural area, it is possible to estimate the likely theoretical household expenditure across the range of retail commodity groups by evaluating the results for such a community from the 2006 Census, if the community had existed then, with information from the 2003/2004 Household Expenditure Survey, updated by applying the most recent Consumer Price Index. The results for the notional South Dural population, based on the above scenario are presented in Table 4 below. These results have been compared to the Sydney metropolitan area for comparison purposes.

Retail Commodity Group	\$per Household	Total all households 2011 (\$mil)	Total all households 2016 (\$mil)	Total all households 2021 (\$mil)	Sydney Av. \$ per Household
Food for Home	\$10,256.7	\$2.1	\$6.7	\$14.0	\$8,691.5
Clothing	\$3,058.7	\$0.6	\$2.0	\$4.2	\$2,327.3
Small Household Goods	\$5,468.1	\$1.1	\$3.5	\$7.5	\$4,501.8
Large Household Goods	\$8,579.6	\$1.8	\$5.6	\$11.7	\$6,885.7
Personal Services	\$3,364.4	\$0.7	\$2.2	\$4.6	\$2,647.2
Food Restaurants	\$2,610.7	\$0.5	\$1.7	\$3.6	\$1,932.4
Take Away Food	\$2,039.9	\$0.4	\$1.3	\$2.8	\$1,560.1
TOTAL (\$)	\$35,378.1	\$7.3	\$23.0	\$48.2	\$28,546.0
Supermarket Expenditure	\$10,720.7	\$2.2	\$7.0	\$14.6	\$9,128.0

Source: ABS: Basic Community Profile, Household Income Data.
ABS: Household Expenditure Survey, 2003/04
Detailed Expenditure Items, Cat. No. 6535.0.55.001

Base Data: ABS Consumer Price Index, March 2008

Totals: Annual Growth Rate of 1.0% factored in

The available expenditure from the average South Dural household is likely to be significantly higher per year than the average Sydney household. If South Dural had existed in 2008, we estimate each household could expend \$35,400 across the range of retail commodity groups. This is almost \$7,000 per year more than the average Sydney household.

Based on this development scenario, we estimate the following expenditure may be available from South Dural households:

- In 2011 there could be \$7.3 million available;
- By 2016 we estimate there could be \$23 million available; and
- \$48.2 million in 2021.

3.5 Expenditure Distribution

The way in which retail expenditure is distributed throughout the retail network can vary significantly depending upon accessibility to different centres and the level of services provided by a centre.

As described in Section 2 of this report, the South Dural area is surrounded by a comprehensive network of local, large local/district and major regional centres. We would anticipate however that the potential population of the South Dural area could not only support some of the retail and non-retail facilities in these centres, there may also be the potential for facilities to be provided within the South Dural area to directly service these households.

Previous experience in urban areas would suggest that as much as 25% of household expenditure could be captured by local facilities and be spent within locally available convenience retail outlets. Even if we conservatively estimate that only 20% of such expenditure is retained, the following expenditure could be available to support outlets within a local retail centre:

Under the adopted scenario there could be:

- \$1.46 million dollars available in 2011;
- \$4.6 million available in 2016; and
- \$9.64 million available in 2021.

Beyond 2021 there is likely to be additional support for any local retail facilities as the population of the area increases. Without factoring in a growth in spending (ie – based on population growth only), and using 2008 dollar values, we estimate the total available ultimate expenditure from all South Dural households could be \$102.6 million .

If 20% of this available expenditure continues to be directed to locally provided retail outlets within South Dural, \$20.5 million expenditure could ultimately be available.

These estimates are considered particularly conservative as they are based on a 2008 dollar value and do not allow for any increase in spending capacity. Historically, the growth in spending has averaged around 1% per annum (although it has been as high as 3% per annum). If such a trend continued, the total amount of expenditure available to support local retail facilities within South Dural could be \$26.8 million.

3.6 Turnover Estimates

In order to establish how much retail floorspace may be able to be supported by a population, it is necessary to calculate the sales requirements of different retail facilities.

Depending on their size, location and the range of products available, supermarkets and speciality stores can experience significantly different turnovers. For example, from our experience a full range supermarket such as the Woolworths located within the Round Corner Dural Centre might attract a turnover of up to \$9,000 per square metre per annum in 2008, but speciality stores are likely to have a much lower average turnover. Estimates of the turnovers of various retail facilities for the years 2008-2021 are provided in Table 5 below:

Retail Facility	Estimated Turnover \$/m ² /year			
	2008	2011	2016	2021
Full-line supermarket (Average size 3,600sqm)	\$9,000	\$9,270	\$9,734	\$10,220
Smaller supermarket (less than 2,000sqm)	\$8,000	\$8,240	\$8,652	\$9,085
Specialty shops (includes food and non-food and personal service providers)	\$5,200	\$5,356	\$5,624	\$5,905

Source: DFP estimates. 1% growth rate/annum factored in.

3.7 Potential Retail and Non-Retail Provision

It is generally not economically viable to construct retail projects in a piecemeal fashion as additional expenditure becomes available. The market will dictate when such facilities might be supportable, however it is likely that some or all of the outlets may experience slightly reduced turnovers until such time as the support population has increased to a point where turnovers equivalent to those estimates provided in Table 5 may be able to be achieved.

Given that development within the South Dural area is likely to occur over an extended period of time, a staged development where additional retail floorspace is added in increments may be warranted.

Using 2016 as a benchmark for the initial development, we estimate that based on the adopted scenario, over 800m² of retail floor space may be supportable within South Dural in 2016. These estimates assume only speciality outlets will be provided by that time.

These estimates do not include any non-retail floorspace that may be provided. As can be seen from the lists included at **Appendix A** to this report, in order to ensure a neighbourhood centre provides a complete range of services and facilities, provision of some local servicing non-retail floorspace within a centre is essential. Such floorspace could be occupied by professionals such as doctors, dentists, physiotherapists, engineers, travel agents, accountants, solicitors and the like.

In our experience, such floorspace is generally provided at a rate of 0.75m² per household. On this basis, in 2016 there could be a demand for 450m² of such floorspace. If such floorspace was provided, total floorspace of 1,250m² might be supportable by 2016.

Ultimately, we estimate the following retail floorspace could be supportable in South Dural:

Available expenditure = \$20.5 million

- 1,000m² of small supermarket (@ \$10,547/m² in 2036)
= \$10.55 million +
- 1,400m² of speciality retail floorspace (@ \$6,855/m² in 2036) +
- 600m² of non-retail/local serving office floorspace (20% of floorspace)

Total floorspace = 3,000m²

Table 6 below is a summary of the potential floorspace that may be supportable in 2016 and upon ultimate development of the South Dural area.

Table 6: Potential Floorspace Provision		
	2016	Ultimate
Potential supportable floorspace	Assumed Yield Scenario	Assumed Yield Scenario
Supermarket (assuming small supermarket)	0	1000
Specialty Retail	800	1400
Non-retail	500	600
Total floorspace	1300	3000
Notes:		
All floorspace estimates in m ²		
Estimated turnover of small supermarket in 2036 = \$10,547/m ²		
Estimated turnover of specialty shop floorspace in 2036 = \$6,855/m ²		

Based on the accessibility of larger centres such as Round Corner Dural, Cherrybrook and Castle Hill, it is unlikely that a large, full-line supermarket would be supportable in any retail provision in South Dural. However, it is considered that a small supermarket/grocery store, similar to the IGA outlets at Knightsbridge and Oakhill, would serve as an appropriate 'anchor' for any small local centre in South Dural. However, such floorspace may not be supportable until the area is almost fully developed.

The quantum of non-retail floorspace has been increased only slightly above the 2016 floorspace provision which was calculated on the basis of 0.75m²/2016 household. Given the range of non-retail services available within both the Cherrybrook and Round Corner Dural centres, the demand for such floorspace within South Dural is likely to be limited to uses such as a real estate agent, medical practitioners and possibly an accountant (or similar) office. Ultimately this floorspace could comprise approximately 20% of the total floorspace, which is considered appropriate.

3.8 Retail Floorspace Provision

Notwithstanding the availability of retail services in other nearby centres, we suggest that there could be demand for local servicing retail floorspace within the South Dural area.

The method in which any retail facilities are delivered will be dictated to a certain extent by market forces.

In order for a centre to attract operators, that centre needs to be a reasonable size in terms of its capacity to accommodate a satisfactory number of outlets within a supportable floorspace provision.

There are pros and cons for providing any retail floorspace within South Dural in one centre or whether that is 'split' between two centres.

There are obvious benefits to surrounding residents by having a local centre in their immediate neighbourhood and this could have flow on effects in terms of increasing the value of land within these neighbourhoods.

The identification of sites for such centres could allow for more efficient strategic planning and infrastructure provision and consideration in regard to linking neighbourhoods could be dispensed with.

However, it must be remembered that the expenditure estimates provided in this assessment are based on the total development of South Dural.

Depending on the level of expenditure available, it may be that the surrounding population could only support a very small centre. In our experience, developers are generally loath to

commit to a development with less than 1,500m², unless the development is a 'one-man band' operation, such as a corner store/general store.

On the basis of the suggested floorspace breakdown in Table 6, in our opinion any retail provision within South Dural should preferably be provided in one location. We would also suggest that such a centre be provided as part of a community hub, adjacent to other uses such as playing fields, a primary school/child care facility, or other community facilities.

There could be the potential for a small (up to 150m²) general store/convenience store to be provided to service a secondary 'hub', but in our opinion the potential for two local centres to be supported (particularly given the existing network of centres surrounding the area) might only be confirmed as significant residential development proceeds.

It is appreciated that there are internal constraints that may separate some precincts within the South Dural area. Depending on the ultimate location of any retail provision within South Dural, some households may find facilities in Round Corner for example, more accessible than a retail centre in South Dural.

The expenditure estimates assume that 20% of expenditure from all South Dural households will be directed to locally provided retail facilities. If such a centre is more conveniently located to some households, it could potentially attract more than 20% of retail expenditure from these households. Similarly, some households may find it more convenient to patronise retail facilities 'outside' South Dural as their 'local' centre in which less than 20% of their expenditure may be expended at a local South Dural Centre.

In any event, in our opinion the ability for any locally provided retail facilities to attract an average of 20% of retail expenditure from South Dural households represents a reasonable estimate of the expenditure likely to be attracted to a small local centre to be provided as part of the development of South Dural.

In our opinion, the composition of such a centre could possibly ultimately replicate that of the Knightsbridge shopping centre on Gilbert Road, Castle Hill. This centre comprises approximately 2,200m² of floorspace and includes an IGA supermarket and 15 other retail and non-retail tenancies. In addition to the variety of outlets provided in the Knightsbridge centre, we might expect a local centre in South Dural to include at least one restaurant.

4 Support for Existing Retail Network

The addition of up to 2,900 households within South Dural will also support retail facilities in other centres, particularly those higher order centres identified in Section 2 of this report.

If we assume an average 20% of expenditure from South Dural households is retained locally, the remaining 80% of that available expenditure could be distributed throughout the retail network in the following manner:

- 40% to regional centres such as Castle Hill and Rouse Hill;
- 25% to local district centres such as Round Corner Dural and Cherrybrook; and
- 15% to out-of-centre retail outlets such as the facilities located in the Dural Service Centre and other facilities located along New Line Road and Old Northern Road.

Based on the expenditure estimates in Table 4, and applying the rationale in terms of forecasting potential available expenditure as described in Section 3.5 of this report, development in South Dural could also ultimately contribute the following expenditure to support retail outlets outside South Dural:

- \$41 million to regional centres;
- \$25.6 million to district centres; and
- \$15.4 million to out-of-centre locations.

These estimates are based on 2008 \$ values and therefore only allow for an increase in population. As described in Section 3.5 of this report, if retail spending continues to absolutely increase at a rate of 1% per annum, there could be significantly more expenditure available to support retail facilities within South Dural and in the surrounding centres.

5 Community Facilities

In addition to retail and commercial floorspace as above, maximum of 2,900 new households could also generate the following demands for community facilities based on a preliminary review of available data:

Health

Whilst major health needs are catered for by the existing hospital and private medical facilities in the region, provision of floorspace for private medical (and other associated) services could be considered as part of any centre development, as could the possible need for a small consulting space for visiting public health providers, subject to future consultation.

Education

There are several existing public primary and secondary schools in suburbs close to the South Dural area, and there are a number of private schools in the general locality. Because of this availability, it's possible that only one new public primary school might be required within the South Dural area, but this possibility needs to be confirmed by detailed consultation in the plan making phase.

Childcare

Given the proximity of the area to existing suburbs, and the maximum 2,900 new households, it would probably be prudent to imagine a future need for one multi-purpose childcare facility at (or near) any new retail/commercial centre within South Dural. The absolute need for such a facility can be confirmed by reference to prevailing circumstances at the time of final plan making for the area.



planning consultants

APPENDIX A

Survey of Shopping Centres South Dural:

1. Dural Village Shopping Centre

Old Northern Road Dural, opposite Galston Road

- Liquorland
- IGA Supermarket
- Newsagent
- Take-away food outlet
- Chemist
- Vacant (Formerly Butcher)
- Dentist (First Floor)
- Chinese Restaurant on the upper floor

2. Glenhaven Shopping Centre

Off Glenhaven Road, Corner Hyde Avenue, Glenhaven

- Chinese take-away food outlet
- Beautician/hairdresser
- Pizza Restaurant
- Supermarket/general store including video hire, newspapers, and fruit & vegetables
- Medical clinic
- Pharmacy

3. Knightsbridge Shopping Centre

Corner Ridegecroft Drive and Gilbert Road

In the Knightsbridge Estate of Castle Hill

- Liquor shop
- Chemist/ medical centre
- Newsagent
- Bakery

- Real Estate agent
- Take-away food outlet
- Delicatessen
- IGA supermarket
- Butcher
- Video Hire
- Doctor's surgery (1st floor)
- Beautician (1st floor)
- Music School (1st floor)
- Dentist (1st floor)
- Pizza takeaway

4. **Oakhill Village Shopping Centre**

David Road, Castle Hill

- IGA supermarket
- Newsagent
- Chinese Restaurant
- Butcher
- Pizza Restaurant
- Patisserie
- Chicken shop
- Liquor shop
- Lolly store
- Pharmacy
- Pool shop
- Medical Practice
- Dentist (1st floor)
- Physiotherapist (1st floor)

- Beautician/ Hair dresser (1st floor)

5. **Cherrybrook Village Shopping Centre**

Located off Shepherds Drive, Cherrybrook

Building 1:

- A long-day care centre

Outside Promenade:

- Commonwealth bank
- Post office
- Vacant (Real Estate Agent coming)
- Video Store
- Subway (Fast Food Outlet)
- Take away food restaurant
- Coffee shop
- Travel Agency
- Asian restaurant
- Tab
- Real Estate Agent
- Florist
- Women's clothing store
- ANZ bank
- Liquor store
- Dry Cleaners
- Travel Agent

Stores outside promenade separated from the main building:

- Patisserie
- Italian Restaurant
- Restaurant

- Gelato Bar
- Nuts and Chocolate store

Internal Mall:

- Pharmacy
- Hair dresser
- Newsagency
- Alfresco emporium
- Photo camera store
- Fruit market grocery
- Fish market
- Butcher
- Vitamin store
- Deli
- Bakery
- Diner
- Hair dresser
- Deli
- Beauty salon
- Optometrist
- Noodle bar
- Toy store
- Vacant store (previously clothing women's)
- Clothing store
- Book shop
- Women's clothing store
- St. George bank
- Women's clothing store

- Optometrist
- Ella Bache (beauty salon)
- Shoe store
- Jewellers
- Women's clothing store
- Child's clothing store
- Patisserie
- Supermarket
- Phone repairs store

6. Appletree Centre

Located on the Corner of Shepherds Drive and Appletree Drive, Cherrybrook

- General store
- Bakery
- Newsagency
- Pharmacy
- Medical centre
- Physiotherapist
- Take-away food outlet
- Dentist
- Pathologist
- Beauty salon
- Pizza restaurant

7. Round Corner, Dural

Located on the corner of Old Northern Road and Kenthurst Road, Round Corner

Village Green Shopping Centre:

- Hairdresser
- Chemist

- Travel agency
- Bakery
- Electrical repairs
- Clothing store
- Video store
- Giftware (Antiques gift)
- Take-away food (cheesecake shop)
- Home loans (mortgage broker)
- Physiotherapist
- Travel agency
- Clothing
- Child clothing store
- Computer store
- Pool shop
- Jewellery
- Liquor shop
- Thai Restaurant

Round Corner Plaza:

- Indian Restaurant
- Giftware
- Hairdresser
- Beautician
- Children's clothing
- National Australia bank
- Take-away food
- Real estate agent
- Real estate agent

- Solicitor
- Commonwealth bank
- Chicken shop
- Cake shop
- Natural Medicine Practice
- Development/Construction Company
- Osteopaths practice
- Women's clothing store

Dural Mall:

- Woolworths supermarket
- Patisserie
- Patisserie
- Delicatessen
- Drycleaner
- Medical centre
- Bank
- Optometrist
- Newsagent
- Health food shop
- Cafe
- Clothing shop
- Jewellery store
- Hairdresser
- Bakery
- Florist
- Gift shop
- Fruit shop

- Locksmith
- Gourmet meats
- Hairdresser
- Post office
- Optometrist

Strip shopping centre located on the western side of Kenthurst Road:

- Costume hire
- Jewellery store
- TAB
- Take-away food outlet
- Restaurant
- Saddler
- Beauty salon
- Clothes shop
- Hairdresser
- Westpac bank
- Real estate agent
- Real estate agent
- Accountant (upstairs)
- Hairdresser (upstairs)

(This was not on the Original checklist) Mirabelle Centre located behind the strip shopping centre:

- Malaysian restaurant
- Beauty therapies
- Hairdresser
- Clothing alterations
- Draftsmen

- Development/ construction company
- Clothing store
- Chiropractor
- Hairdresser
- Gift shop
- Cafe
- Beauty salon/ spa
- Gift store

Retail Area of Round Corner extends around the north-eastern corner of Old Northern Road and Kenthurst Road. Retailers in this section of Round Corner (beginning at the eastern end of the 3(a) area on Old Northern Road) include:

- Take-away food outlet
- Delicatessen
- Electrical store
- Real estate agent

Commercial building with tenants including:

- Dentist
- Real estate agent
- Office service
- Financial planner
- Service station
- Black smith
- Rural suppliers (horse)
- Auto spares/ smash repairs

Commercial development with tenants including:

- Solicitor
- Accountant

- Hairdresser
- Building consultant
- Hardware store

8. The Dural Employment Zone

The Dural Employment Zone is located on the eastern side of New Line Road between Quarry Road and Sebastian Drive

- Restaurant
- 827 Old Northern Road (uses listed separately)
- Dural Business Park (business listed separately)
- Rural supply/ farm equipment
- Bus Company
- Landscape supplies/ cafe
- Automotive repairs
- Pool Shop Irrigation supplies
- Golf driving range
- Australian Post Delivery sorting centre
- Building supplies
- Bunning Hardware Warehouse
- Southern Cross Laboratories
- Jarrett Implements
- Farm machinery/ mowers
- Welding
- Hardware
- Tiles
- Mitre 10 Hardware Warehouse
- Gazebo/ spa store

On the south-eastern corner of the intersection of Sebastian Drive and New Line

- Hungry Jack Fast food outlet
- Car wash centre

827 Old Northern Road:

- Equipment Hire
- Building suppliers
- Ultra tune (automotive repairs)
- Motorbike showroom
- Ceramic tile
- Exhaust repairs
- Taxi repairs
- Gun/hunting store

Dural Business Park:

- Horseland (Horse supplies store)
- Restaurant
- Take-away food (McDonalds)
- Take-away food (Kentucky Fried Chicken)
- Medical Centre
- Video Hire
- Cafe/restaurant
- Country furniture
- Footwear sales
- Carpets
- Offices
- Wetsuits
- Party hire
- Pet accessories

- Pumps
- Swim school
- Plumbing suppliers
- Auto electrician
- Auto mechanic
- Plumbing supplies
- Mechanic
- Art suppliers
- Stationery suppliers
- Chef supplies
- Carpets
- Music teaching studio
- King Gee clothing store
- Women's only gym
- Child care centre
- Water tank shop/ pool supplies
- Cabinet making

New Line Business Centre 256:

- Gym
- Cafe
- Interior Outlet store
- Fishing supplies store

Business Park South of New Line Business Centre:

- Carpet store
- Auto store
- (3 vacant suites)
- Lighting store

- Carpet store
- Builders/ draftsmen office
- Auto store
- Dental supplies wholesaler
- Church centre
- Dance factory studio
- Outdoor furniture
- Taekwondo studio
- Diving supplies

List of Uses:

1. Medical Centre
2. Chiropractic/ alternative medicine centre
3. Art Gallery
4. Service Station- Auto, marine sales and repairs to the rear, tyre centre
5. Squash courts
6. Physiotherapy
7. Australia Post
8. Vacant
9. Medical Centre
10. Nursery
11. Real Estate Office
12. Restaurant/ Function Centre
13. Restaurant/ Function Centre
14. Nursery/ Cafe at rear
15. Service Station
16. Timber Supplies
17. Surgery
18. Real Estate
19. Chartered Account & Tax agent
20. Service Station/ Mechanic
21. Smash Repairs
22. Farm Equipment
23. Bed & Breakfast Accommodation
24. Family Councillor Services
25. Veterinary Clinic
26. Solicitor & Attorneys
27. Nursery- Herbs
28. Podiatry Centre
29. Paving and Concrete services