

# MOSS VALE RD URBAN RELEASE AREA Retail Centres Impact Study



Prepared for Shoalhaven City Council

# Contents

<b>1.0</b>	<b>Introduction .....</b>	<b>5</b>
1.1	Study background .....	5
1.2	Study objectives .....	6
<b>2.0</b>	<b>Competitive retail environment .....</b>	<b>7</b>
2.1	Nowra town centre .....	7
2.2	Local centres .....	8
2.3	Villages .....	9
2.4	Out of centre retail.....	9
2.5	Other surrounding centres of influence.....	9
2.6	Surrounding competitive retail environment .....	10
<b>3.0</b>	<b>Trade area analysis .....</b>	<b>11</b>
3.1	Trade area identification .....	11
3.2	Trade area population projections.....	12
3.2.1	Moss Vale Road Urban release areas development options .....	12
3.2.2	Main trade area population projections .....	13
<b>4.0</b>	<b>Retail demand assessment.....</b>	<b>15</b>
4.1	Resident retail expenditure.....	15
4.2	Capture of household expenditure .....	16
4.3	Potential retail sales.....	18
4.3.1	Location option 1 .....	18
4.3.2	Location option 2 .....	18
4.4	Demand for retail floorspace .....	19
4.4.1	Location 1 (Abernethys Lane / Bells Lane) .....	20
4.4.2	Location 2 (Moss Vale Road).....	20
4.5	Demand for non-retail space .....	21
4.6	Land area requirements .....	22
<b>5.0</b>	<b>Proposed location of centre(s) .....</b>	<b>23</b>
5.1	Potential retail centre sites .....	23
5.2	Location suitability assessment criteria .....	24
5.2.1	Site 1 location suitability assessment .....	25
5.2.2	Site 2 location suitability assessment .....	28
5.2.3	Site 3 location suitability assessment .....	30
5.2.4	Site 4 location suitability assessment .....	32
5.2.5	Site 5 location suitability assessment .....	34
5.2.6	Site 6 location suitability assessment .....	36
<b>6.0</b>	<b>Recommendation .....</b>	<b>38</b>
6.1	Single centre recommendation.....	38
6.2	Option of two centres .....	39
<b>Appendix A : Total retail expenditure by sub-trade area and Scenario.....</b>		<b>40</b>
<b>Appendix B : Potential Retail centre Locations 1 and 2.....</b>		<b>43</b>

## Tables

Table 1: Moss Vale surrounding competitive retail environment .....	10
Table 2: Moss Vale Road Urban Release Areas dwelling yields by scenario.....	13
Table 3: MTA population projections by scenario.....	13
Table 4: MTA population projections by population scenario .....	14
Table 5: MTA total resident retail expenditure by population scenario .....	16
Table 6: Moss Vale retail centre capture rates.....	17
Table 7: Estimated retail sales – location option 1 (\$m) .....	18
Table 8: Estimated retail sales – location option 2 (\$m) .....	19
Table 9: Retail Turnover Densities (RTDs) .....	20
Table 10: Occupied retail floorspace demand (GFA) by population growth and centre location scenario (sqm) .....	20
Table 11: Total centre floorspace demand.....	21
Table 12: Location assessment criteria scoring weights.....	24
Table 13: Site 1 location suitability assessment .....	27
Table 14: Site 2 location suitability assessment .....	29
Table 15: Site 4 location suitability assessment .....	31
Table 16: Site 4 location suitability assessment .....	33
Table 17: Site 5 location suitability assessment .....	35
Table 18: Site 6 location suitability assessment .....	37
Table 19: Proposed centre composition by population scenario (sqm) .....	38
Table 20: Proposed centre(s) composition by population scenario and location (sqm) .....	39
Table 21: Population scenario 1 – total resident expenditure 2019-41 (\$m 2019).....	40
Table 22: Population scenario 2 – total resident expenditure 2019-41 .....	41
Table 23: Population scenario 3 – total resident expenditure 2019-41 .....	42

## Figures

Figure 1: Moss Vale Urban Release Areas .....	5
Figure 2: Surrounding retail context .....	7
Figure 3: Moss Vale .....	12
Figure 4: Retail centre location scenario 1 total floorspace demand by composition (sqm) .....	22
Figure 5: Retail centre location scenario 2 total floorspace demand by composition (sqm) .....	22
Figure 6: Potential retail centre(s) locations .....	23
Figure 7: Site 1 location suitability assessment .....	26
Figure 8: Site 2 location suitability assessment .....	28
Figure 9: Site 3 location suitability assessment .....	30
Figure 10: Site 4 location suitability assessment .....	32
Figure 11: Site 5 location suitability assessment.....	34
Figure 12: Site 5 location suitability assessment.....	36

# Quality Assurance

## Report Contacts

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**Nicholas Hill**

**Associate**

B. Science, M Human Geography, Macquarie University (2012) M.A Property Development, University of Technology Sydney (2015)

[Nick.Hill@hillpda.com](mailto:Nick.Hill@hillpda.com)

## Supervisor

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**Adrian Hack**

**Principal, Urban and Retail Economics**

M. Land Econ. B.Town Planning (Hons). MPIA

[Adrian.Hack@hillpda.com](mailto:Adrian.Hack@hillpda.com)


## Quality Control

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This document is for discussion purposes only unless signed and dated by a Principal of HillPDA.

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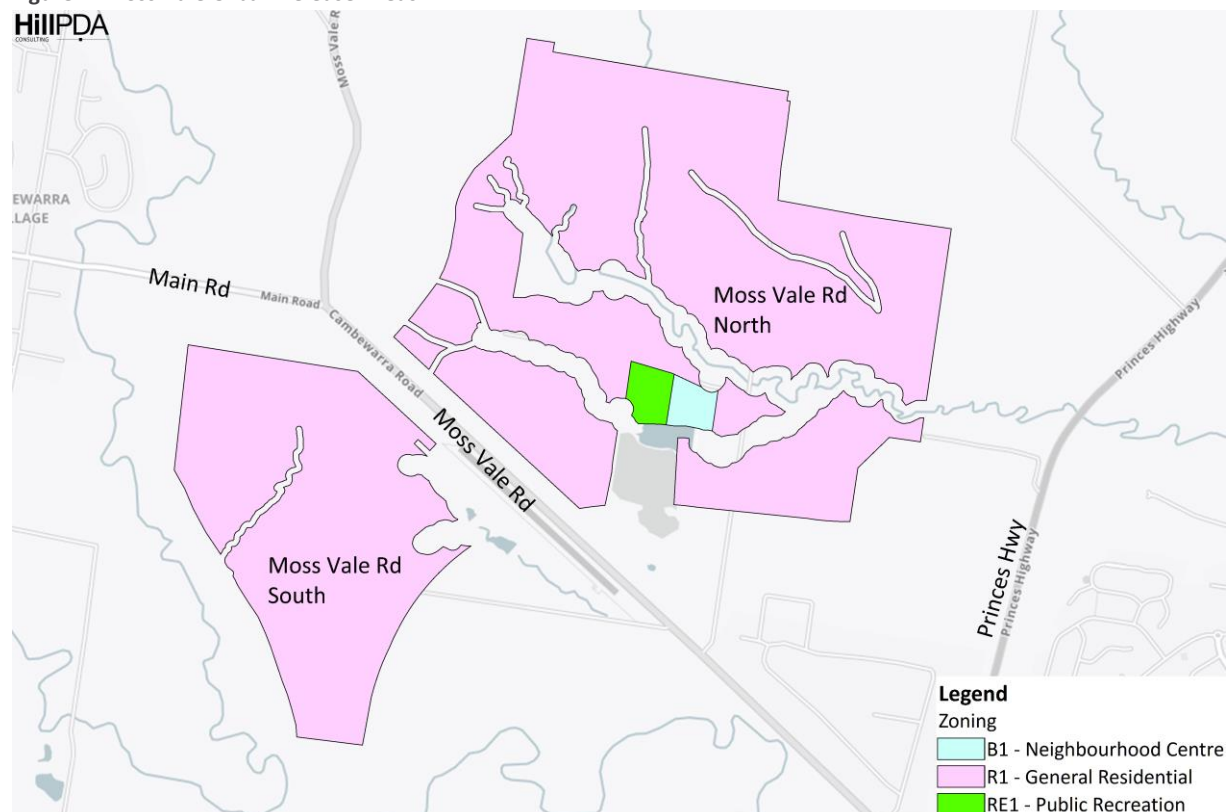
# 1.0 INTRODUCTION

HillPDA was commissioned by Shoalhaven Council (Council) to undertake a retail demand study (the study) to identify and provide advice on the amount, type and optimal location of retail floorspace required to service the future community of the Moss Vale Road Urban Release Areas (Figure 1).

## 1.1 Study background

The Nowra-Bomaderry Structure Plan 2006 identified several new urban areas across the Nowra-Bomaderry area with the capacity to contribute to the supply of new homes. The Structure Plan includes two areas known as Moss Vale Road North and Moss Vale Road South (Figure 1), which are Urban Release Areas in the Shoalhaven Local Environmental Plan 2014.

**Figure 1: Moss Vale Urban Release Areas**



Source: HillPDA

The southern area comprises around 80 hectares of R1 General Residential zoned land. No commercial areas are currently planned for the southern area. Planning of the southern area is substantially complete with subdivision currently underway. The south area is forecast to provide 950 dwellings.

The northern area is about 167.6 hectares in area and is mostly zoned R1 General Residential. As identified in the 2006 Structure Plan, the northern area is to facilitate the delivery of around 1,300 dwellings with the residential community being supported by:

- A local retail centre on 2.35 hectares of land zoned B1 Neighbourhood Centre.
- Around 2.7 hectares of zoned RE1 Public Open Space.
- A range of environmental zones to identify and manage development along riparian corridors and areas with biodiversity or scenic value.

Together the two release areas are forecast to provide homes for about 5,850 people (calculated at 2.6 persons per dwelling<sup>1</sup>).

A group of landowners in the northern release area have proposed an alternative outcome for this northern area. This revised proposal increases the dwelling yield up to 3,000 dwellings along with adjustments to the planned local retail centre.

The proposed increase in yield would potentially increase the size of the future community to about 10,270 people.

The proposed adjustments to the retail centre include:

- A rezoning to B2 Local Centre.
- A decrease in size from 2.3 to 1.6 hectares.
- Adjusted dimensions to provide a greater east-west orientation.

Council is currently reviewing the proposed alternative outcome to the northern release area. In undertaking, this review Council identified the need for a retail analysis to understand the amount, type and optimal location of retail floorspace required to service the future community of both release areas under the planned and proposed structure plans. This study provides such analysis and advice for Council's consideration.

## 1.2 Study objectives

There are three main objectives of the study, these are:

1. Identify the amount and type of retail floorspace required to service the future community of the Moss Vale Road Urban Release Areas.
2. Recommend options for the optimal location or location(s) for retail floorspace, including either as a combined or separate retail space(s).
3. Comment on the proposed amount and location of retail floorspace.

In undertaking Objective 1 (identifying the amount of retail floorspace required to service the future community) the following development outcomes were considered:

1. The current planned development: 950 homes in the southern area and 1,300 homes in the northern area
2. The proposed outcome: 950 homes in the southern area and 3,000 homes in the northern area
3. An alternative development outcome for the northern area to reflect the early nature of current planning work which may result in refinement of the ultimate number of dwellings.

While in undertaking Objective 2, identifying appropriate location(s) for retail services, the following were considered in the analysis:

- The intended primary role of the centre(s) is to service the new and immediately surrounding communities
- Providing efficient, walkable catchments (800m)
- Connecting with physical infrastructure such as roads, pathways and public open space
- Avoiding areas immediately adjacent to Moss Vale Road because of the desired visual buffer between the release areas.

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<sup>1</sup> Average persons per dwelling for detached dwellings in Nowra – Bomaderry UCL and North Nowra – Bomaderry SA2 in the 2016 Census

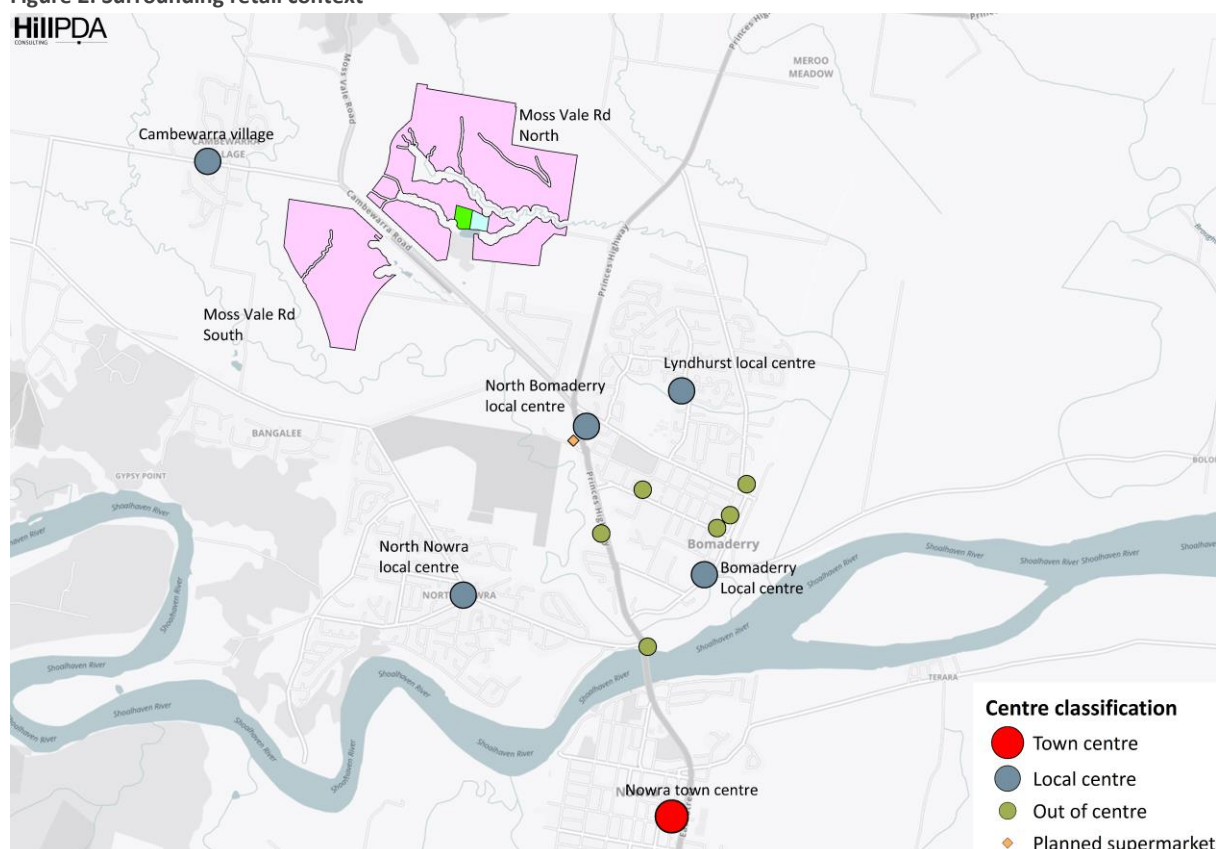


## 2.0 COMPETITIVE RETAIL ENVIRONMENT

The following undertakes a review of the surrounding retail hierarchy around the release areas. This includes a review of existing and planned centres of relevance that would influence a potential trade area and retail expenditure capture rates for various retail uses.

This review was informed by a site visit in January of 2020 coupled with other sources such as previous HillPDA and other consultancy reports and Property Council of Australia Shopping Centre Directory.

**Figure 2: Surrounding retail context**



Source: HillPDA

### 2.1 Nowra town centre

Nowra town centre provides an estimated 47,000sqm of retail floorspace, making it the largest provider of retail space in Shoalhaven Local Government Area (LGA). Of this floorspace, around 14,960sqm is comprised of supermarket floorspace while the remaining 31,820sqm is other retail space.

In the town centre, Stockland Nowra provides the largest amount of floorspace in single ownership at around 15,900sqm. Of this, 4,230sqm is a Woolworths supermarket while the remaining 11,675sqm is other retail. In 2019, the centre had a turnover of around \$86.7 million equating to a retail turnover density (RTD measure as \$/sqm) of \$16,703.<sup>2</sup> This ranked it the third highest trading centre in terms of RTD out of 144 similar sized centres across Australia in 2019<sup>3</sup>.

The second largest single provision of floorspace is provided in Nowra Mall at around 5,875sqm. This space is predominantly comprised of a 3,889sqm Coles supermarket with the remaining 1,985sqm being supportive

<sup>2</sup> Shopping Centre News Mini Guns 2019

<sup>3</sup> Centres sized between 6,000sqm to 20,000sqm

specialty shops. In 2019, the Mall had a turnover of around \$10,070 per square metre, ranking it 60 out of 144 similarly sized retail centres<sup>4</sup>.

The profitability of these centres implies that Nowra town centre is trading strongly and may indicate a shortage of retail provision within the Nowra – Bomaderry location. Furthermore, the large amount and diversity of retail provision in the town centre would restrict any retail trade area(s) for Moss Vale Urban Release Areas to the north of the river.

## 2.2 Local centres

### Bomaderry local centre

Bomaderry local centre is located along Bolong Road and Merro Street. The centre is comprised of two land zonings these being a neighbourhood zoning and a mixed-use zoning. The two parts are separated by a small strip of open space.

The neighbourhood zoning component contains a Caltex service station with around 100sqm of convenience space and a 130sqm BWS shop.

The mixed-use component largely front Merro Street opposite the train station. At the southern end is the two-level Bomaderry Plaza, which provides a total of 2,900sqm of retail space and is anchored by a 700sqm IGA supermarket. The plaza includes 17 specialty stores of which 12 were vacant as at January 2020.

Occupied shops included a games workshop, pet grooming salon, takeaway food and liquor store. The centre appears to be trading poorly with a high level of vacancies evident in around 70% of the speciality shop space being vacant. However, the supermarket appears to be trading sustainably if not satisfactorily.

Elsewhere in the mixed-use zone there is a hotel/pub, seafood shop, five hair and nail salons, haberdashery, newsagency, four restaurants, bakery, real estate agent, two take-away/fast food stores, a massage salon, medical centre, theatre hall, ten commercial office suites, two vacant shopfront spaces and two vacant commercial office suites.

The balance of the mixed-use zone comprises predominantly industrial buildings and residential cottages.

### North Nowra local centre

North Nowra local centre is located at the intersection of Illaroo Road and McMahan's Road. The centre includes the North Nowra shopping centre, a standalone service station and a tavern.

North Nowra shopping centre includes 15 shop front businesses including a Friendly Grocer store of around 300sqm. Specialty stores include a post office, four restaurants, two takeaways / fast foods, butcher, bakery, two hair salons, pharmacy, scrapbooking shop and finance service. Total shopfront floorspace is around 1,600sqm. The shopping centre also includes a 700sqm gymnasium (former squash courts).

The service station contains a small retail convince component of around 80sqm while the tavern contains a restaurant and bottle shop.

In total, it is estimated that North Nowra provides around 1,900sqm of occupied retail space. the presence of no vacancies indicates that the centre is performing relatively well.

### North Bomaderry local centre

North Bomaderry local centre comprises approximately 3.5 hectares of largely undeveloped land zoned B5 Business Development on the eastern side of the intersection of the Princes Highway, Moss Vale Road and

<sup>4</sup> Shopping Centre News Mini Guns 2019



Cambewarra Road, Bomaderry. The centre includes a car dealership and two fast food family restaurants (KFC and McDonalds) with a combined floorspace estimated at 600sqm.

Construction of a Woolworths supermarket shopping centre had just commenced which has approval for a supermarket of around 3,860sqm, a mini-major retail tenancy of around 1,440sqm and two speciality stores totalling 200sqm.

On the opposite side of the Princess Highway along Narang Road, there is development approval for a 1,800sqm ALDI supermarket. This would further strengthen this centres attraction and retail offer and place in the hierarchy.

A recent article in the South Coast Register, however, has indicated that ALDI has no plans to develop the site with an ALDI spokesperson sating “*unfortunately we have no further updates ... as the store is not on our radar at this time*”.<sup>5</sup> Currently, development consent lapses in 2021.

## Lyndhurst local centre

Lyndhurst local centre is almost 2km north of Bomaderry and comprises a 500sqm IGA with liquor, a hairdresser and child care centre.

## 2.3 Villages

### Cambewarra village

Cambewarra village is located along Main Road in Cambewarra. The village contains a small 100sqm general store/post office.

## 2.4 Out of centre retail

As indicated in Figure 2, there are several out of centre retail outlets in the Bomaderry and North locality. These are primarily stand-alone restaurant, take-away or bottle shops. Bomaderry Bowling Club and RSL are included in this category however only the retail space is estimated. This includes a bar, bistro and Chinese restaurant.

In total it is estimated that around 1,880sqm of out of centre retail exists in the Bomaderry and North Nowra locality.

## 2.5 Other surrounding centres of influence

### Berry local centre

Berry is located along Queen Street and provides around 60 to 65 shop front businesses with an estimated 7,000 to 8,000sqm of shop front floorspace. The centre contains a small 400sqm IGA with the remaining retail space predominately being focused on providing for the surrounding residential and visitor communities. Berry has a large number of cafes and restaurants and homewares, arts and crafts and souvenir shops catering for day tourism.

### Shoalhaven Heads

Shoalhaven Heads contains around 1,000sqm of retail shopfront space which is predominantly comprised of take away stores, speciality food, a bottle shop, post office, personal services and some commercial shop front uses.

<sup>5</sup> Aldi has no immediate plans for Bomaderry site, Zoe Cartwright, South Coast Register June 26 2019

## 2.6 Surrounding competitive retail environment

A review of the surrounding competitive retail environment reveals that Nowra Town Centre provides a large range and quantum of floorspace which likely draws trade from a wide area. This is evident in its indoor shopping centres having some of the highest turnover per square metre in Australia for their size.

Nowra would be drawing significant trade from residents from the north side of the Shoalhaven River (North suburbs of North Nowra, Bomaderry and Cambewarra). This is evident in Bomaderry Plaza having a vacancy rate of around 70% in its speciality retail shops.

Historically this area had an undersupply of retail floorspace despite it having strong population growth over the coming decades. This is being addressed with the development of a 5,500sqm Woolworths anchored centre on North Bomaderry and the possible development of a 1,800 ALDI supermarket in this location.

However, with the potential addition of almost 9,800 residents, under the high scenario, to be accommodated in the Moss Vale release areas additional retail services in this location to support the community should be explored.

**Table 1: Moss Vale surrounding competitive retail environment**

Centre name	Supermarket	Speciality food	Other retail	Commercial	Vacant	Total
Nowra Town Centre	14,959	2,600	29,200	15,000		61,800
Bomaderry local centre	700	820	1,550	1,100	1,950	6,120
Cambewarra Village		100				100
Lyndhurst local centre	500					500
Nth Bomaderry local centre*	3,860	600	1,640			6,100
Planned Nth Bomaderry supermarket**	1,800					1,800
North Nowra local centre	300	1,100	380	200	100	2,080
Out of centre retail		1,880				1,880
Berry	400		2,100			2,500
Shoalhaven heads			1,000			1,000
<b>Total</b>	<b>22,520</b>	<b>7,100</b>	<b>38,867</b>	<b>16,300</b>	<b>2,050</b>	<b>83,880</b>

\* Currently under construction

\*\* Proposed ALDI supermarket with development approval

## 3.0 TRADE AREA ANALYSIS

This Chapter derives a trade area(s) for the Moss Vale Urban Release Areas. This area is then subsequently used to estimate the amount of expenditure generated from residents to forecast demand for retail space.

### 3.1 Trade area identification

In defining a trade area served by a retail centre within the Moss Vale Urban Release Area, we have considered the below:

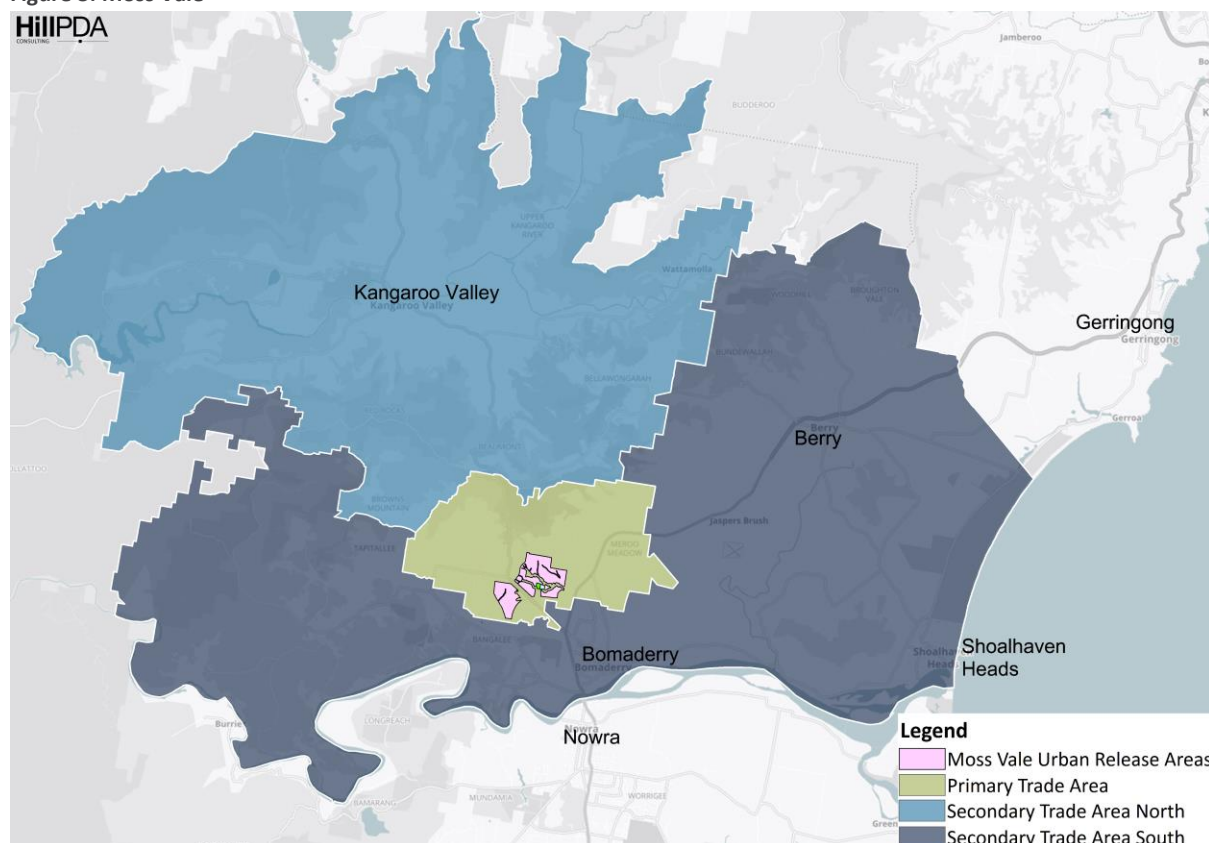
- The strength and attraction of a possible centre in the Moss Vale Urban Release Areas could provide, as determined by factors such as possible composition, layout, ambience/atmosphere and car parking
- Competitive retail centres, particularly their proximity to the Moss Vale Urban Release Areas and respective sizes, retail offer and attraction
- The location and accessibility of the Moss Vale Urban Release Areas, including the available road and public transport network and travel times
- The presence or absence of physical barriers, such as rivers, railways, national parks and freeways.

Based on the surrounding retail environment, transport connections and presence of artificial/natural barriers, we have derived a main trade area for the site comprising the following sub-trade areas:

- A **primary trade area (PTA)** – this is the area in which the proposed centre would derive most of its trade. This PTA predominantly comprises the suburbs of Cambewarra, Cambewarra Village and Meroo Meadow.
- A **secondary trade area-north (STAN)** – secondary trade areas are areas on the peripheral of a PTA where residents are likely to use the centre/retailers but less frequently than residents in the PTA. The STAN predominantly comprises the suburbs of Barrengarry, Beaumont, Bellawongarah, Browns Mountain, Kangaroo Valley, Red Rocks, Upper Kangaroo River and Wattamolla.
- A **secondary trade area-south (STAS)** – The STAS predominantly comprises the suburbs of Back Forest, Bangalee, Berry, Berry Mountain, Bolong, Bomaderry, Broughton, Broughton Vale, Budgong, Bundewallah, Coolangatta, Far Meadow, Illaroo, Jaspers Brush, North Nowra, Shoalhaven Heads, Tapitallee, Watersleigh and Woodhill.

The main trade by its sub-trade area components is provided in the map below.

Figure 3: Moss Vale



Source: HillPDA

### 3.2 Trade area population projections

The following population projections were sourced from:

- The ABS 2016 Census
- AnySite 2017 population projections
- Population.id 2018 population projections -including assumptions regarding future development.

#### 3.2.1 Moss Vale Road Urban release areas development options

To reflect the early nature of the current planning work for the release areas three development yield scenarios have been developed. These being:

- **Scenario 1** | is the current planning framework development yields for the release areas as identified in the 2006 Structure Plan. That is a total development yield of 2,250 dwellings with 1,300 dwellings in the northern area and 950 dwellings in the southern area.
- **Scenario 2** | is a midpoint scenario where the dwelling yield for the northern area is increased to 2,150 dwellings. This increases the total dwelling yield across the two release areas to 3,100 dwellings.
- **Scenario 3** | increases the dwelling yield in the northern area to a total of 3,000 dwellings. This reflects the revised proposal from a group of landowners in this northern area. This increases the total dwelling yield across the two release areas to 3,950 dwellings.

**Table 2: Moss Vale Road Urban Release Areas dwelling yields by scenario**

Scenario	Northern area dwelling yield	Southern area dwelling yield	Total dwelling yield	Persons per dwelling*	Estimated population
- 2006 Structure Plan yield	1,300	950	2,250	2.6	5,850
- Midpoint yield	2,150	950	3,100	2.6	8,060
- Landowner proposal	3,000	950	3,950	2.6	10,270

Source: HillPDA \* Average persons per dwelling for detached dwellings in Nowra – Bomaderry UCL and North Nowra – Bomaderry SA2 in the 2016 Census and density identified in Population id for Bangalee - Cambewarra Village - Tapitallee & Surrounds small area

Please note, that we have assumed that development starts in 2021 with full development and occupation by 2041. Although this may not occur, this has been assumed to fully test the impact and demand rising from the final population within the Moss Vale Urban Release Areas to properly plan for the resulting community under each scenario.

### 3.2.2 Main trade area population projections

Using Population id small area population forecasts as a base in conjunction with the above population estimates for each development yield scenario it is estimated that the resident population within the MTA will increase from around 24,055 residents in 2019 to between 32,864 to 37,284 residents by 2041. This represents an increase of between 8,809 to 13,229 residents over the period.

**Table 3: MTA population projections by scenario**

Scenario	2019	2021	2026	2031	2036	2041	Total change	% change
1	24,055	24,220	26,171	28,263	30,468	32,864	8,809	37%
2	24,055	24,220	26,724	29,368	32,125	35,074	11,019	46%
3	24,055	24,220	27,276	30,473	33,783	37,284	13,229	55%

Source: HillPDA, Population id

The PTA is where any future retail centre located within or in the Moss Vale Road Urban Release Areas would draw most of its trade from. As such, an understanding of its current and future population is important.

Forecast population growth under each scenario for the PTA is as follows:

- Under population scenario 1 it is estimated that the PTA's resident population will increase from 1,996 residents in 2019 to around 9,370 residents by 2041. This represents an increase of 6,406 residents or 326% over the period.
- Under population scenario 2 it is estimated that the PTA's resident population will increase from 1,996 residents in 2019 to around 10,580 residents by 2041. This represents an increase of 8,616 residents or 438% over the period.
- Under population scenario 3 it is estimated that the PTA's resident population will increase from 1,996 residents in 2019 to around 12,790 residents by 2041. This represents an increase of 10,825 residents or 551% over the period.

Total resident population by 2041 under scenario 2 and 3 would be sufficient to warrant a centre anchored by a full-line supermarket.

**Table 4: MTA population projections by population scenario**

Scenario	2019	2021	2026	2031	2036	2041	Total change	% change
1	1,966	2,077	3,650	5,224	6,798	8,371	6,406	326%
2	1,966	2,077	4,203	6,329	8,455	10,581	8,616	438%
3	1,966	2,077	4,755	7,434	10,113	12,791	10,826	551%

Source: HillPDA, Population id



## 4.0 RETAIL DEMAND ASSESSMENT

There are three main sources of expenditure which influence demand for retail floorspace these being expenditure from residents, tourists and workers. The purpose of this Chapter is to quantify expenditure generated from residents in the MTA. The next step is to estimate the amount of household expenditure likely to be captured by a future centre in Moss Vale Urban Release Area North.

Please note, we consider any expenditure to be captured from workers or tourists in a future Moss Vale retail centre to be minimal given the low levels of non-retail employment space in the release area; the possible location of the centre away from a main road; proximity to Nowra town centre; proximity to Woolworths and ALDI supermarkets which are located in a highly visible location on a main road; and the low levels of short-term accommodation in the PTA.

This being said, to account for any expenditure from beyond the MTA, i.e. non-residents, it is reasonable to assume that an additional 5% of total retail sales could be achieved from expenditure by residents and visitors beyond the MTA.

Having forecasted total potential retail sales generated from household expenditure in the MTA, this Chapter quantifies the amount and type of retail floorspace that could be accommodated on the site.

### 4.1 Resident retail expenditure

This Section examines the projected growth in household retail expenditure within the main trade area between 2019 and 2041. Household expenditure was sourced from:

- ABS Household Expenditure Survey 2015-16 which provides household expenditure by broad commodity type by household income quintile.
- MDS Marketinfo 2017 data which utilises national accounts, ABS Census and ABS Household Expenditure Survey data to derive estimated household expenditure down to SA1 level for 625 different categories of expenditure.

As of 2019 residents within the MTA spent \$362.4 million on retail goods and services. Of total retail spend approximately in 2019, \$29.3 million, or about 32%, was in supermarkets and grocery stores.

Over the period to 2041 total retail expenditure generated by the MTA is forecast to increase to \$591.2 million as a result of population and expenditure growth under population scenario 1, \$632.8 million under population scenario 2 and \$674.4 million under population scenario 3.

Total MTA retail expenditure generated by residents is shown in the table below. Please refer to Appendix A for a breakdown of expenditure generated in each scenario by its sub-trade area components.

**Table 5: MTA total resident retail expenditure by population scenario**

Population scenario 1	2019	2026	2036	2041
Supermarkets & Grocery Stores	116.8	119.8	154.6	198.9
Specialty Food Stores	25.9	26.6	34.4	44.3
Fast-Food Stores	22.4	23.0	29.9	38.6
Restaurants, Hotels and Clubs*	28.2	29.0	37.1	47.4
Department Stores	21.4	21.8	27.0	33.2
Apparel Stores	28.3	28.8	36.2	44.9
Bulky Goods Stores**	60.7	61.7	76.5	94.1
Other Personal & Household Goods Retailing	48.2	49.0	60.0	73.2
Selected Personal Services***	10.6	10.8	13.4	16.5
<b>Total Retailing</b>	<b>362.4</b>	<b>370.4</b>	<b>469.1</b>	<b>591.2</b>
Population scenario 2	2019	2026	2036	2041
Supermarkets & Grocery Stores	116.8	119.8	160.8	212.5
Specialty Food Stores	25.9	26.6	35.8	47.4
Fast-Food Stores	22.4	23.0	31.1	41.3
Restaurants, Hotels and Clubs*	28.2	29.0	38.7	50.7
Department Stores	21.4	21.8	28.1	35.6
Apparel Stores	28.3	28.8	37.9	48.5
Bulky Goods Stores**	60.7	61.7	79.7	100.9
Other Personal & Household Goods Retailing	48.2	49.0	62.3	78.1
Selected Personal Services***	10.6	10.8	14.0	17.8
<b>Total Retailing</b>	<b>362.4</b>	<b>370.4</b>	<b>488.4</b>	<b>632.8</b>
Population scenario 3	2019	2026	2036	2041
Supermarkets & Grocery Stores	116.8	119.8	166.9	226.1
Specialty Food Stores	25.9	26.6	37.2	50.4
Fast-Food Stores	22.4	23.0	32.4	44.1
Restaurants, Hotels and Clubs*	28.2	29.0	40.2	54.1
Department Stores	21.4	21.8	29.2	38.0
Apparel Stores	28.3	28.8	39.5	52.0
Bulky Goods Stores**	60.7	61.7	83.0	107.8
Other Personal & Household Goods Retailing	48.2	49.0	64.6	82.9
Selected Personal Services***	10.6	10.8	14.6	19.0
<b>Total Retailing</b>	<b>362.4</b>	<b>370.4</b>	<b>507.7</b>	<b>674.4</b>

Source: HillPDA \* Turnover relating only to the consumption of food and liquor (excludes all other types of revenue such as accommodation, gaming and gambling) \*\* Bulky Goods includes fabrics, soft goods, furniture, floor coverings, hardware, houseware, electrical appliances, sports and camping stores.\*\*\* Selected Personal Services includes hair and beauty, laundry, clothing hire and alterations, shoe repair, optical dispensing, photo processing and hiring of videos

## 4.2 Capture of household expenditure

The above analysis identified the total volume of retail expenditure generated by residents in the MTA under each population growth scenario, however not all of this expenditure would be captured by retail services within a future centre located in the Moss Vale Road Urban Release Area (referred to as the Moss Vale centre). Reasons for this include:

- Proximity of a North Bomaderry local centre with the provision of a Woolworths supermarket, mini-major and possible ALDI supermarket.
- Proximity of other competing facilities especially those in Nowra town centre which provides a greater range and quantum of retail floorspace and which are trading very strongly.
- Residents leaving the locality to, predominantly, undertake discretionary shopping (in department stores, apparel stores and bulky goods stores elsewhere).
- Working residents spending a portion of annual retail expenditure close to their place of work (approximately 15-25% or more).
- Expenditure from residents who are on holidays/business trips or are away for other reasons for any extended period. This is counterbalanced to some extent by residents from outside the Study Area visiting the new retail centre as they visit the area.

Capture rates (i.e., the proportion of expenditure captured by the new retail centre) have been adopted, considering the above factors and have been assumed to remain consistent across the population growth scenarios.

### Future location of centre and capture rates

Capture rates will also be affected by the choice of location of any new centre. In the case of the Moss Vale release area two locations have been identified:

#### Location Option 1

This location is inside the release area north of Moss Vale Road. This location is identifiable from the current B1 – Neighbourhood Centre zoning fronting Abernethys Lane near Bells Lane. Whilst this is a convenient location for residents in the northern part of the release area, it is removed from Moss Vale Road which reduces its visibility and opportunity to capture passing trade.

#### Location Option 2

The other option is to locate the centre along Moss Vale Road which would give the centre much higher visibility to passing trade while also improving accessibility and convenience for residents in other parts of the PTA and MTA including the existing residents in Cambewarra and the new residents in the southern part of the release area (south of Moss Vale Road).

There are three possible locations of a centre under this scenario. These being

- (1) the B1 – Neighbourhood Centre zoned land at the junction of Taylors Lane and Moss Vale Road
- (2) the B4 – Mixed Use zoned land on the western side of the intersection of the Princes Highway, Moss Vale Road and West Cambewarra Road or
- (3) the B5 - Business Development zoned land on the eastern side of the intersection of the Princes Highway, Moss Vale Road and Cambewarra Road.

These capture rates or market share assumptions under each location option are provided in the following table.

**Table 6: Moss Vale retail centre capture rates**

Location option 1 (Abernethys Lane / Bells Lane)	PTA	STAN	STAS
Supermarkets & Grocery Stores	20%	10%	0%
Specialty Food Stores	16%	8%	0%
Fast-Food Stores	9%	5%	0%
Restaurants, Hotels and Clubs	8%	4%	0%
Department Stores	0%	0%	0%
Apparel Stores	1%	0%	0%
Bulky Goods Stores	0%	0%	0%
Other Personal & Household Goods Retailing	5%	3%	0%
Selected Personal Services	8%	4%	0%
<b>Total Retail</b>	<b>10%</b>	<b>5%</b>	<b>0%</b>
Location option 2 (Moss Vale Road)	PTA	STAN	STAS
Supermarkets & Grocery Stores	35%	20%	10%
Specialty Food Stores	28%	16%	8%
Fast-Food Stores	16%	9%	5%
Restaurants, Hotels and Clubs	14%	8%	4%
Department Stores	0%	0%	0%
Apparel Stores	2%	1%	1%
Bulky Goods Stores	0%	0%	0%
Other Personal & Household Goods Retailing	9%	5%	3%
Selected Personal Services	14%	8%	4%
<b>Total Retail</b>	<b>17%</b>	<b>10%</b>	<b>5%</b>

Source: HillPDA

### 4.3 Potential retail sales

Applying the above capture rates for each location scenario (Table 6 immediately above) to total household expenditure (identified in Table 5 above) derives total potential retail sales in the hypothetical centre.

#### 4.3.1 Location option 1

When fully developed total potential retail sales (measured in 2019 dollars) in the centre is expected to reach

- \$17.2 million in 2041 under population scenario 1.
- \$21.3 million under population scenario 2.
- \$25.4 million under population scenario 3.

Potential retail sales by retail store type in location option 1 between 2019 and 2041, is shown in the table below.

**Table 7: Estimated retail sales – location option 1 (\$m)**

Population scenario 1	2019	2026	2036	2041
Supermarkets & Grocery Stores	2.8	3.0	6.8	11.4
Specialty Food Stores	0.5	0.5	1.2	2.0
Fast-Food Stores	0.2	0.3	0.6	1.0
Restaurants, Hotels and Clubs	0.3	0.3	0.7	1.1
Department Stores	0.0	0.0	0.0	0.0
Apparel Stores	0.0	0.0	0.1	0.1
Bulky Goods Stores	0.0	0.0	0.0	0.0
Other Personal & Household Goods Retailing	0.3	0.3	0.6	1.0
Selected Personal Services	0.1	0.1	0.3	0.4
<b>Total Retailing</b>	<b>4.3</b>	<b>4.5</b>	<b>10.3</b>	<b>17.2</b>
Population scenario 2	2019	2026	2036	2041
Supermarkets & Grocery Stores	2.8	3.0	8.0	14.1
Specialty Food Stores	0.5	0.5	1.4	2.5
Fast-Food Stores	0.2	0.3	0.7	1.3
Restaurants, Hotels and Clubs	0.3	0.3	0.8	1.4
Department Stores	0.0	0.0	0.0	0.0
Apparel Stores	0.0	0.0	0.1	0.2
Bulky Goods Stores	0.0	0.0	0.0	0.0
Other Personal & Household Goods Retailing	0.3	0.3	0.8	1.3
Selected Personal Services	0.1	0.1	0.3	0.5
<b>Total Retailing</b>	<b>4.3</b>	<b>4.5</b>	<b>12.1</b>	<b>21.3</b>
Population scenario 3	2019	2026	2036	2041
Supermarkets & Grocery Stores	2.8	3.0	9.2	16.8
Specialty Food Stores	0.5	0.5	1.7	3.0
Fast-Food Stores	0.2	0.3	0.8	1.5
Restaurants, Hotels and Clubs	0.3	0.3	0.9	1.7
Department Stores	0.0	0.0	0.0	0.0
Apparel Stores	0.0	0.0	0.1	0.2
Bulky Goods Stores	0.0	0.0	0.0	0.0
Other Personal & Household Goods Retailing	0.3	0.3	0.9	1.5
Selected Personal Services	0.1	0.1	0.4	0.6
<b>Total Retailing</b>	<b>4.3</b>	<b>4.5</b>	<b>14.0</b>	<b>25.4</b>

Source: Marketinfo 2017 and HillPDA

#### 4.3.2 Location option 2

A centre in this location is expected to achieve higher retail sales due to its wider area of capture. Under this option potential retail sales are expected to reach:

- \$51.9 million in 2041 under population scenario 1.
- \$58.1 million under population scenario 2.
- \$65.3 million under population scenario 3.

Potential retail sales by retail store type in location option 2 between 2019 and 2041, is shown in the table immediately below.

**Table 8: Estimated retail sales – location option 2 (\$m)**

<b>Population scenario 1</b>	<b>2019</b>	<b>2026</b>	<b>2036</b>	<b>2041</b>
Supermarkets & Grocery Stores	15.0	15.5	23.7	33.9
Specialty Food Stores	2.7	2.8	4.2	6.1
Fast-Food Stores	1.3	1.3	2.1	3.0
Restaurants, Hotels and Clubs	1.5	1.5	2.3	3.3
Department Stores	0.0	0.0	0.0	0.0
Apparel Stores	0.2	0.2	0.3	0.4
Bulky Goods Stores	0.0	0.0	0.0	0.0
Other Personal & Household Goods Retailing	1.5	1.6	2.3	3.1
Selected Personal Services	0.6	0.6	0.9	1.2
<b>Total Retailing</b>	<b>22.7</b>	<b>23.4</b>	<b>35.8</b>	<b>50.9</b>
<b>Population scenario 2</b>	<b>2019</b>	<b>2026</b>	<b>2036</b>	<b>2041</b>
Supermarkets & Grocery Stores	15.0	15.5	25.9	38.6
Specialty Food Stores	2.7	2.8	4.6	6.9
Fast-Food Stores	1.3	1.3	2.3	3.4
Restaurants, Hotels and Clubs	1.5	1.5	2.5	3.8
Department Stores	0.0	0.0	0.0	0.0
Apparel Stores	0.2	0.2	0.3	0.5
Bulky Goods Stores	0.0	0.0	0.0	0.0
Other Personal & Household Goods Retailing	1.5	1.6	2.5	3.5
Selected Personal Services	0.6	0.6	0.9	1.3
<b>Total Retailing</b>	<b>22.7</b>	<b>23.4</b>	<b>39.0</b>	<b>58.1</b>
<b>Population scenario 3</b>	<b>2019</b>	<b>2026</b>	<b>2036</b>	<b>2041</b>
Supermarkets & Grocery Stores	15.0	15.5	28.0	43.4
Specialty Food Stores	2.7	2.8	5.0	7.8
Fast-Food Stores	1.3	1.3	2.5	3.9
Restaurants, Hotels and Clubs	1.5	1.5	2.7	4.2
Department Stores	0.0	0.0	0.0	0.0
Apparel Stores	0.2	0.2	0.4	0.6
Bulky Goods Stores	0.0	0.0	0.0	0.0
Other Personal & Household Goods Retailing	1.5	1.6	2.7	3.9
Selected Personal Services	0.6	0.6	1.0	1.5
<b>Total Retailing</b>	<b>22.7</b>	<b>23.4</b>	<b>42.3</b>	<b>65.3</b>

Source: HillPDA

## 4.4 Demand for retail floorspace

In order to determine the demand for retail floorspace that could be supported in a new centre, target turnover rates (\$/sqm) of retail floorspace, and otherwise known as Retail Turnover Densities (RTDs) have been applied to projected retail sales under each population scenario and location option. These RTD rates broadly represent industry averages in non-metropolitan NSW and are identified in the table below.

**Table 9: Retail Turnover Densities (RTDs)**

Retail category	Target RTD (\$/sqm)
Supermarkets & Grocery Stores	\$10,000
Specialty Food Stores	\$9,000
Fast-Food Stores	\$8,000
Restaurants, Hotels and Clubs	\$5,800
Department Stores	\$3,200
Clothing Stores	\$5,200
Bulky Goods Stores	\$2,800
Other Personal & Household Goods Retailing	\$5,200
Selected Personal Services	\$4,000
<b>Total Retailing (weighted average)</b>	<b>\$8,468</b>

#### 4.4.1 Location 1 (Abernethys Lane / Bells Lane)

When the release area is fully developed there will be sufficient demand for a centre the size of:

- 1,800sqm under population growth scenario 1.
- 2,240sqm under population growth scenario 2.
- 2,700sqm under population growth scenario 3.

#### 4.4.2 Location 2 (Moss Vale Road)

There is sufficient demand to support a 2,600sqm centre on Moss Vale Road immediately. With forecast population growth by 2041 the size of the centre that could be supported increases to:

- 5,350sqm under population growth scenario 1.
- 6,100sqm under population growth scenario 2.
- 6,850sqm under population growth scenario 3.

**Table 10: Occupied retail floorspace demand (GFA) by population growth and centre location scenario (sqm)**

Population scenario 1	Target RTD*	Centre location 1		Centre location 2	
		2019	2041	2019	2041
Supermarkets & Grocery Stores	\$10,000	283	1,022	1,499	3,035
Specialty Food Stores	\$9,000	56	204	297	603
Fast-Food Stores	\$8,000	31	115	163	336
Restaurants, Hotels and Clubs	\$5,800	50	175	253	507
Department Stores	\$3,200	0	0	0	0
Apparel Stores	\$5,200	5	23	35	73
Bulky Goods Stores	\$2,800	0	0	0	0
Other Personal & Household Goods	\$5,200	55	177	296	532
Selected Personal Services	\$4,000	28	93	139	262
<b>Total occupied space</b>	<b>\$8,468</b>	<b>509</b>	<b>1,809</b>	<b>2,682</b>	<b>5,349</b>
Population scenario 2	RTD*	2019	2041	2019	2041
Supermarkets & Grocery Stores	\$10,000	283	1,266	1,499	3,461
Specialty Food Stores	\$9,000	56	253	297	688
Fast-Food Stores	\$8,000	31	143	163	384
Restaurants, Hotels and Clubs	\$5,800	50	217	253	580
Department Stores	\$3,200	0	0	0	0
Apparel Stores	\$5,200	5	29	35	86
Bulky Goods Stores	\$2,800	0	0	0	0
Other Personal & Household Goods	\$5,200	55	218	296	605
Selected Personal Services	\$4,000	28	115	139	301
<b>Total occupied space</b>	<b>\$8,468</b>	<b>509</b>	<b>2,241</b>	<b>2,682</b>	<b>6,105</b>



Population scenario 3	RTD*	2019	2041	2019	2041
Supermarkets & Grocery Stores	\$10,000	283	1,509	1,499	3,887
Specialty Food Stores	\$9,000	56	301	297	773
Fast-Food Stores	\$8,000	31	171	163	433
Restaurants, Hotels and Clubs	\$5,800	50	258	253	653
Department Stores	\$3,200	0	0	0	0
Apparel Stores	\$5,200	5	35	35	98
Bulky Goods Stores	\$2,800	0	0	0	0
Other Personal & Household Goods	\$5,200	55	260	296	678
Selected Personal Services	\$4,000	28	137	139	340
<b>Total occupied space</b>	<b>\$8,468</b>	<b>509</b>	<b>2,672</b>	<b>2,682</b>	<b>6,862</b>

\* Sources: ABS Retail Survey 1998-99, JHD Retail Averages, Shopping Centre News, HillPDA and various consultancy studies - An Allowance for Real Growth in Retail Store Turnover per annum of 0.5% has been factored in.

## 4.5 Demand for non-retail space

Some commercial spaces would be required for non-retail uses such as travel agents, banks, financial or legal services. Typically, smaller retail centres have up to 20% to 30% of their space being occupied by non-retail uses. Given the low amount of non-retail uses present in surrounding centres and the focus on providing retail items for the surrounding community, an additional 10% demand for non-retail services has been applied to each demand scenario.

It is prudent to also plan for some level of vacancy within any retail centre. Typically, a healthy vacancy rate for smaller retail centres ranges between 5-10% of specialty stores. We have applied for a 5% vacancy rate allowance to each scenario.

Accounting for non-retail uses and some level of vacancy a centre a location scenario 1 could support around 2,000sqm under population growth scenario 1, around 2,500sqm under population scenario 2 and around 3,000sqm growth scenario 3.

While a centre at location scenario 2 could support around 6,000sqm under population growth scenario 1, around 7,000sqm under population scenario 2 and around 8,000sqm growth scenario 3.

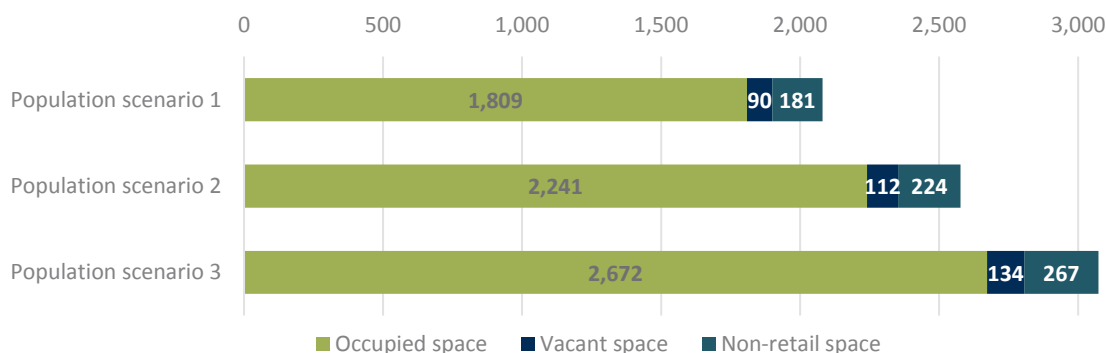
**Table 11: Total centre floorspace demand**

Growth scenario	Location scenario 1				Location scenario 2			
	Occupied retail space	Vacant space*	Non-retail space**	Total	Occupied retail space	Vacant space*	Non-retail space**	Total
Population scenario 1	1,809	90	181	<b>2,081</b>	5,349	267	535	<b>6,151</b>
Population scenario 2	2,241	112	224	<b>2,577</b>	6,105	305	611	<b>7,021</b>
Population scenario 3	2,672	134	267	<b>3,073</b>	6,862	343	686	<b>7,891</b>

Source: HillPDA, \*5% vacancy rate allowance, 10% allowance for space to be occupied by non-retail uses

The forecast breakdown of land uses for a retail centre at location scenario 1 for each population growth scenario is visually provided in the figure below.

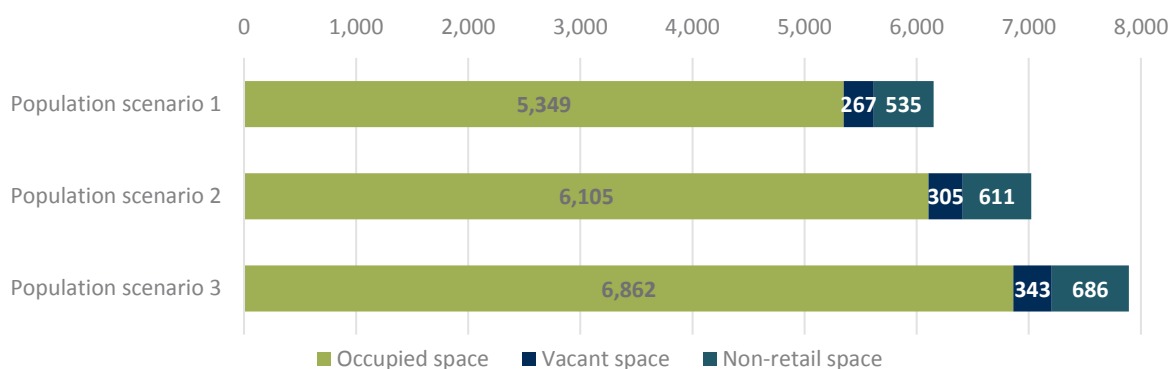
**Figure 4: Retail centre location scenario 1 total floorspace demand by composition (sqm)**



Source: HillPDA

The forecast breakdown of land uses for a retail centre at location scenario 2 for each population growth scenario is visually provided in the figure below.

**Figure 5: Retail centre location scenario 2 total floorspace demand by composition (sqm)**



Source: HillPDA

## 4.6 Land area requirements

In this locality, it's likely that new centres will be single storey with at grade parking spaces on site. At grade parking takes up more area than the building – around 28sqm per car space for every (say) 22sqm of GFA<sup>6</sup>. GFA is typically 10% to 20% larger than leasable space and some area is required for loading. Typically, development results in an FSR of around 0.25 to 0.3:1.

The land area requirement for a new centre in Location 1 option is, therefore:

- Around 1.0 hectares under population growth scenario 1.
- Around 1.2 hectares under population growth scenario 2.
- Around 1.4 hectares under population growth scenario 3.

The land area requirement for a new centre in Location 2 option is:

- Around 2.7 hectares under population growth scenario 1.
- Around 3.0 hectares under population growth scenario 2.
- Around 3.5 hectares under population growth scenario 3.

<sup>6</sup> Shoalhaven DCP requires 1 space per 19sqm of supermarket space and 24sqm of other commercial.

## 5.0 PROPOSED LOCATION OF CENTRE(S)

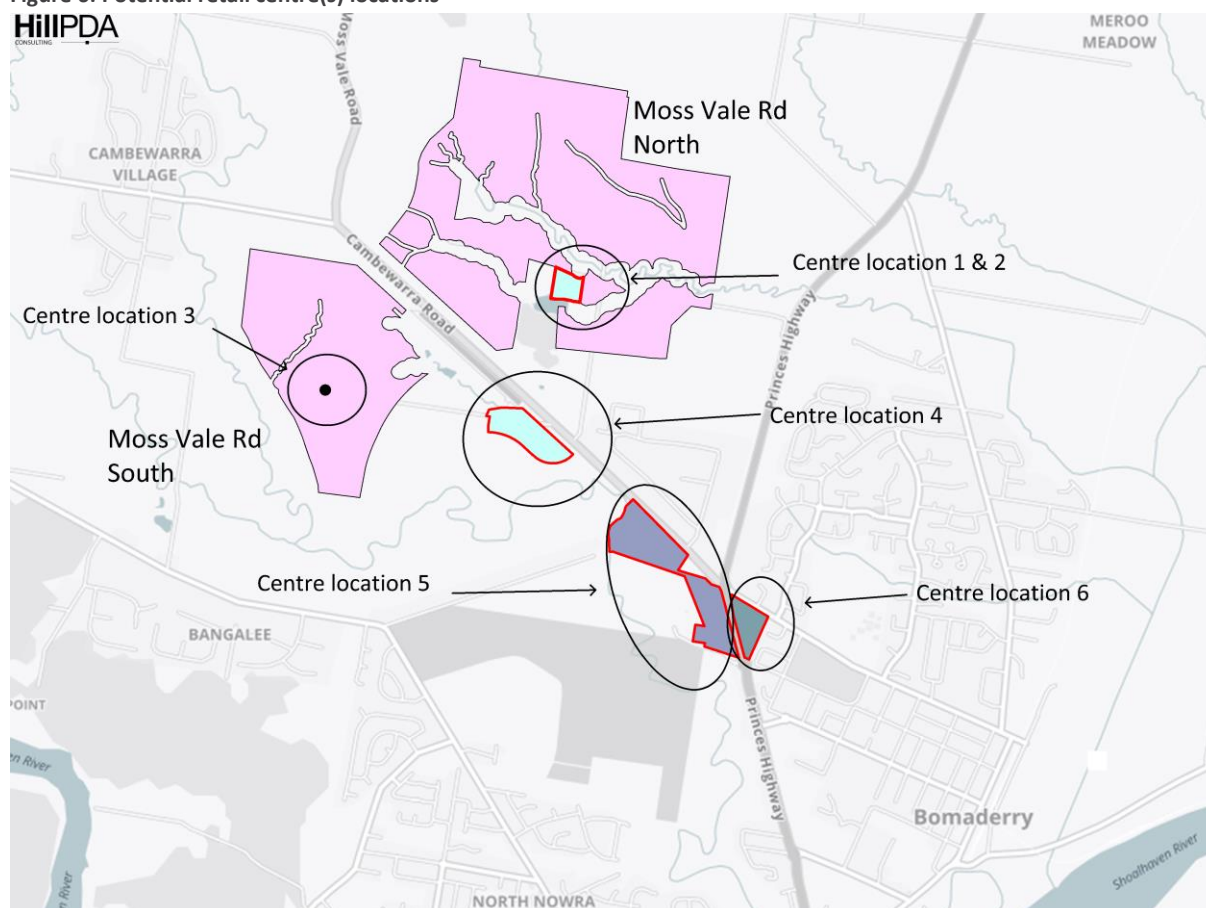
The following Chapter provides a preliminary assessment of the suitability of five potential site locations that could accommodate the development of a new retail centre(s) within the Moss Vale Urban Release locality.

In line with the project brief, in analysing options for the best location(s) for the following is considered:

- The intended primary role of the centre(s) to service the new and immediately surrounding communities
- Providing efficient, walkable catchments (800m)
- Connecting with physical infrastructure such as roads, pathways and public open space
- Avoiding areas immediately adjacent to Moss Vale Road because of the desired visual buffer between the release areas.

The five locations are identified in the map below.

**Figure 6: Potential retail centre(s) locations**



Source: HillPDA

### 5.1 Potential retail centre sites

- **Site 1** | site 1 comprises around 2.4 hectares of B1 – Neighbourhood Centre zoned land in the northern Moss Vale Urban Release Area. Its central location within the northern release area would increase its walkability to future residents in the northern release area.
- **Site 2** | site 2 comprises around 1.6 hectares of proposed B2 – Local Centre zoned land also within the northern Moss Vale Urban Release Area. This site is the alternative outcome proposed by the group of landowners for the northern Moss Vale Urban Release Area. Its location is similar to site 1, however, its

northern boundary has been moved slightly southward away from Abernethys Lane and extended eastward towards Bells Lane. As item site 1 its central location within the northern release area would increase its walkability to future residents in the northern release area.

Please refer to Appendix C for a detailed map of Site 1 and 2's location and proposed zoning.

- **Site 3** | site 3 is a small retail centre located in the southern release area likely along Taylors Lane.
- **Site 4** | site 4 comprises around 7 hectares of B1 – Neighbourhood Centre zoned land at the junction of Taylors Lane and Moss Vale Road. The site has good exposure to passing traffic along Moss Vale Road which also increases with connectivity, via car, to surrounding residential communities – particularly Cambewarra and Cambewarra Village.
- **Site 5** | site 5 comprises around 16 hectares of B4 – Mixed Use zoned land on the western side of the intersection of the Princes Highway, Moss Vale Road and West Cambewarra Road, Bomaderry. Approximately 50% of the site is undeveloped. An ALDI supermarket of around 1,800sqm has development approval in the southern section of the site. Development has not yet occurred with approval lapsing in 2021.
- **Site 6** | site 6 comprises approximately 3.6 hectares of zoned B5 - Business Development zoned land on the eastern side of the intersection of the Princes Highway, Moss Vale Road and Cambewarra Road, Bomaderry. Development of a 3,860sqm Woolworths supermarket with a supportive minor major tenancy of around 1,440sqm and two speciality shops of 100sqm each have begun site preparation for development.

## 5.2 Location suitability assessment criteria

This section considers the suitability of these five potential retail centre sites in more detail. More specifically, each of the identified sites is assessed against a set of criteria and assigned a score ranging from 1 being very poor to 5 being very strong (as shown in Table 12 below).

**Table 12: Location assessment criteria scoring weights**

Description	Score
Very Poor	1
Poor	2
Neutral	3
Strong	4
Very Strong	5

The assessment criteria the sites have been assessed against include:

- **Development Area:** An adequate provision of developable land is required to accommodate the centre. The amount of developable land required under each population growth scenario is provided in Section 4.6 The centre could be provided over multiple levels with basement car parking to reduce the centre's building footprint however this will increase costs and may have implications on the feasibility of the development. A supermarket-based centre within the Nowra-Bomaderry location would likely have onsite at grade parking to reduce costs.
- **Location:** A supermarket-based centre is largely a local population serving centre, meeting the day to day shopping needs of local residents. Thus, the location of a centre, in terms of its convenience for the vast majority of residents of which it serves is key to the success of a retail facility and meeting the local communities need.

- **Exposure:** The success of a retail centre is largely influenced by its visibility and ability to attract business from passing traffic. Thus, retail greatly benefits from being located on a high-profile location (i.e. a main arterial road or precinct with strong pedestrian traffic).
- **Accessibility:** With people becoming increasingly 'time poor' convenience and accessibility increase the attractiveness and visitation of a centre.
- **Walkable Catchment:** There has been a government-led movement towards creating walkable communities as this brings significant economic and social benefits (reduced vehicle emissions, reduced petrol costs, improved traffic safety, health benefits etc). Walkable communities are also increasingly becoming more accepted by the community. This coupled with changing shopping behaviours (i.e. increase of top up shopping) has resulted in an increase of people travelling to retail facilities by foot. A retail centre with a substantial walkable catchment would be a favourable outcome for the community. Typically, a walkability target of around 800 metres is most often cited as being a good benchmark to measure a centres walkable catchment. However, outside the Sydney metropolitan area, it is difficult to achieve a high percentage of trade via walking mode. Usually, the density of the surrounding residential area is too weak to support this scenario.

In addition to the above criteria, we have also considered a series of environmental factors such as whether the land is flood prone as the development of a retail centre on such land has potential risks to the business, resident or visitor community. Whether development on the site will endanger any ecological communities is also considered.

#### 5.2.1 Site 1 location suitability assessment

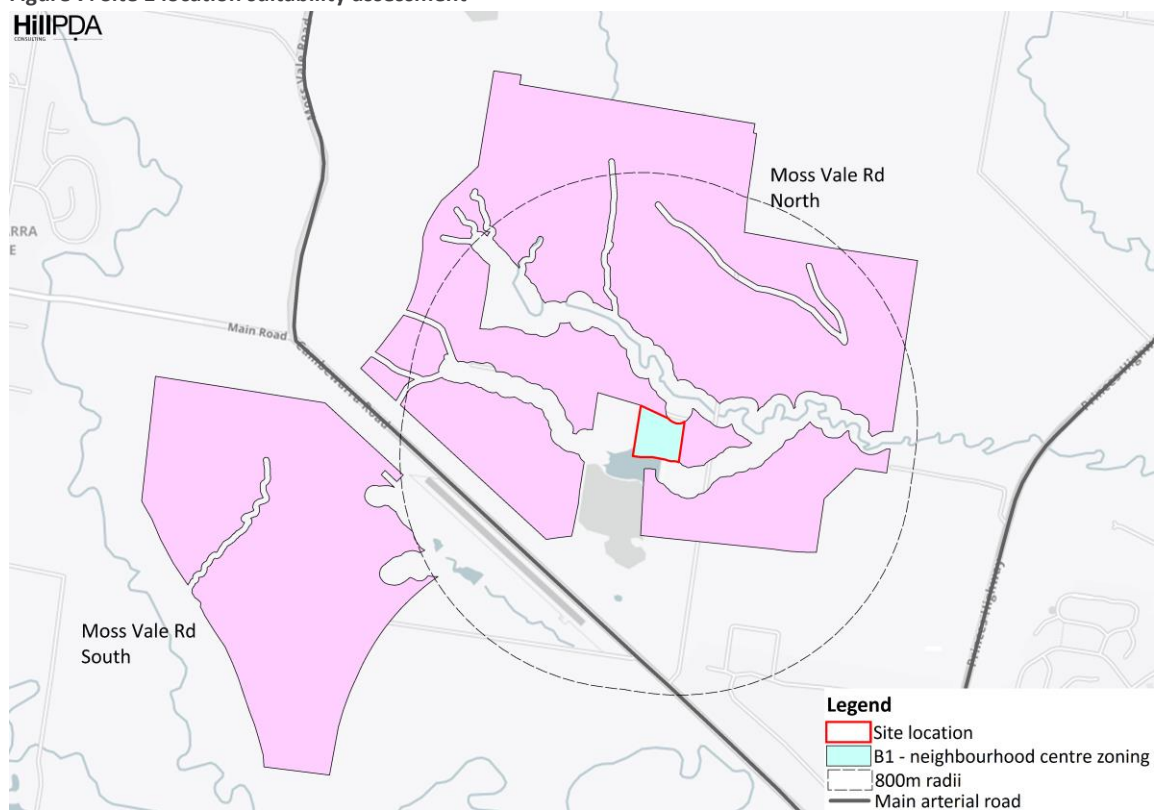
In our modelling, site 1 was the foundation for the location 1 scenario demand modelling. The modelling for this location scenario found that under:

- Population growth scenario 1 a centre of around 2,000sqm could be supported
- Population growth scenario 2 a centre of around 2,500sqm could be supported
- Population growth scenario 3 a centre of around 3,000sqm could be supported.

The amount of land required to accommodate centres of the above sizes is:

- Around 1.0 hectare for population growth scenario 1.
- Around 1.2 hectares for population growth scenario 2.
- Around 1.4 hectares for population growth scenario 3.

Figure 7: Site 1 location suitability assessment



Source: HillPDA



**Table 13: Site 1 location suitability assessment**

Criteria	Commentary	Score
Developable area	The site has 2.4 hectares land is available for development. This is sufficient to accommodate each proposed centre under the three population growth scenarios.	5
Location	<p>A retail centre on this site is more conveniently located for residents in the northern release area. This would result in lower levels of expenditure captured from other resident locations in the PTA such as Cambewarra and the southern release area.</p> <p>Due to its central location in the northern release area and smaller size, residents in the STAN and STAS would likely have a greater propensity to continue travelling along Moss Vale Road/Pacific Highway to shop at North Bomaderry local centre with its Woolworths and possible ALDI just to the south given their greater accessibility and exposure.</p>	2
Exposure	A centre in this location would have a low level of exposure to passing trade outside of the northern release area.	1
Accessibility	<p>Access to the centre is off Abernethys Lane which is accessed off the main arterial road of Moss Vale Road. This location gives good access to residents in the northern release area. Road infrastructure upgrades are planned for the two release areas, including an appropriately sized roundabout on Moss Vale Road – located 700 to 800 metres east of the Moss Vale Road-Main Road intersection. Residents in the southern release area would have direct access, along planned collector roads into the northern area allowing them to access the centre. However, given the proximity to the larger North Bomaderry local centre with its Woolworths and potential ALDI supermarket residents in this release area would likely have a lower propensity to shop at this centre.</p> <p>Residents in the STAS would have a low propensity or incentive to travel past North Bomaderry local centre with its Woolworths, potential ALDI supermarket and supportive retail to shop at the proposed centre. While residents in the STAN would have greater propensity to continue travelling down Moss Vale Road and shop at North Bomaderry local centre.</p>	3
Walkable catchment	<p>The site has a high walkable catchment in the northern release area (Figure 7) providing top up shopping needs to its potential 3,380 to 7,800 future residents. However, walkability for residents within the southern release area or other parts of the MTA is limited to non-existent.</p>	3.5
Flood prone	The site is not located in a flood prone area.	5
Biodiversity	The site is not in an identified biodiversity protection area	5
Scenic protection	The site is not in an identified scenic protection area	5
Total Score Out of 100	The sites location lends to its excellent walkability catchment for residents in the northern release area and low environmental constraints. However, its location makes it less convenient for other residents in the MTA while also impacting its accessibility and exposure. This affects the amount of retail space that could be accommodated on the site which is reflected in the lower demand modelling under the centre location 1 scenario.	<b>74/100</b>

### 5.2.2 Site 2 location suitability assessment

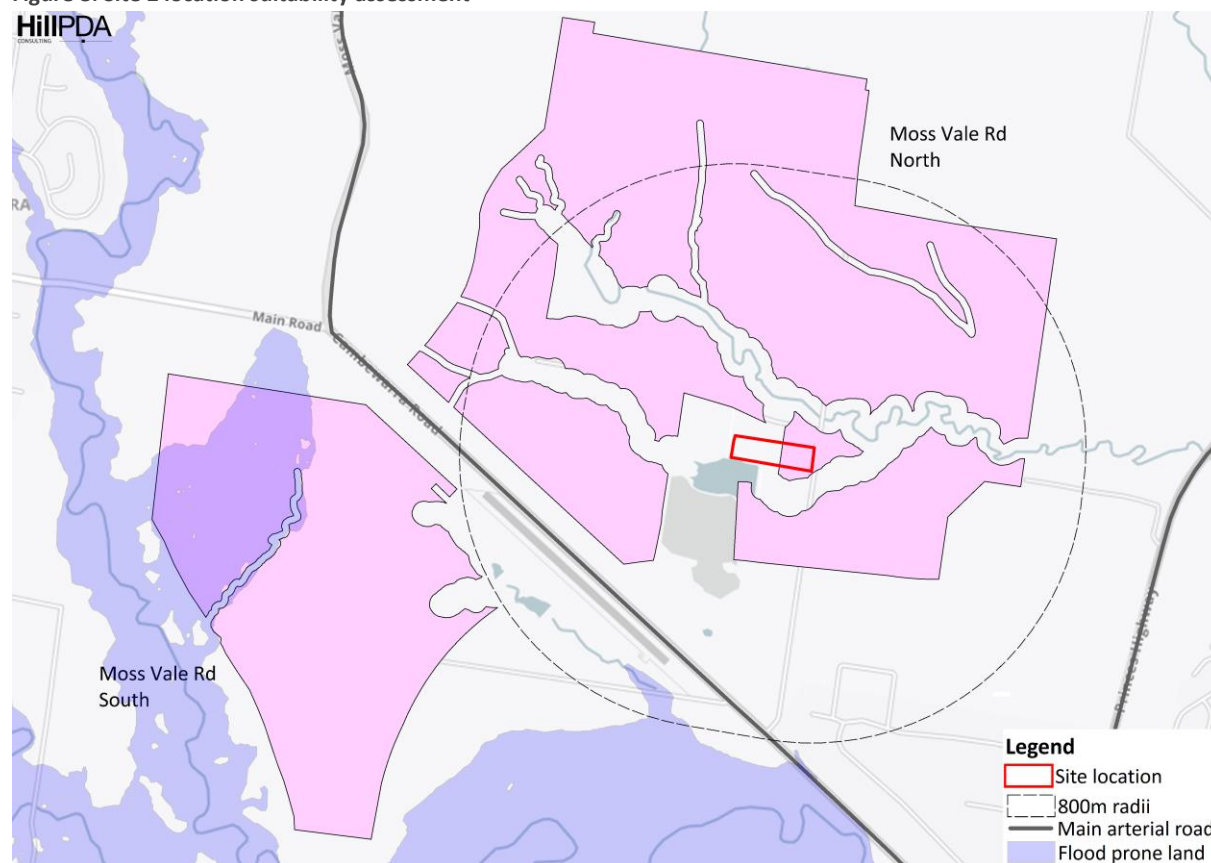
In our modelling, demand for site 2 is reflected in the centre location 1 scenario. The modelling for this location scenario found that under:

- Population growth scenario 1 a centre of around 2,000sqm could be supported
- Population growth scenario 2 a centre of around 2,500sqm could be supported
- Population growth scenario 3 a centre of around 3,000sqm could be supported.

The amount of land required to accommodate centres of the above sizes is:

- Around 1.0 hectare for population growth scenario 1.
- Around 1.2 hectares for population growth scenario 2.
- Around 1.4 hectares for population growth scenario 3.

**Figure 8: Site 2 location suitability assessment**



Source: HillPDA

**Table 14: Site 2 location suitability assessment**

Criteria	Commentary	Score
Developable area	The site has around 1.6 hectares of land is available for development. This is sufficient to accommodate each proposed centre under the three population growth scenarios.	5
Location	<p>A retail centre on this site is more conveniently located for residents in the northern release area. This would result in lower levels of expenditure captured from other resident locations in the PTA such as Cambewarra and the southern release area.</p> <p>Due to its central location in the northern release area and smaller size, residents in the STAN and STAS would likely have a greater propensity to continue travelling along Moss Vale Road/Pacific Highway to shop at North Bomaderry local centre with its Woolworths and possible ALDI just to the south given their greater accessibility and exposure.</p> <p>The possible centre would benefit if it was right on the corner of Abernethys Lane and Bells Lane where it would enjoy increased exposure and provide added convenience.</p>	2
Exposure	A centre in this location would have a low level of exposure to passing trade outside of the northern release area.	1
Accessibility	<p>Access to the centre is off Abernethys Lane which is accessed off the main arterial road of Moss Vale Road. This location gives good access to residents in the northern release area. Road infrastructure upgrades are planned for the two release areas, including an appropriately sized roundabout on Moss Vale Road – located 700 to 800 metres east of the Moss Vale Road-Main Road intersection. Residents in the southern release area would have direct access, along planned collector roads into the northern area allowing them to access the centre. However, given the proximity to the larger North Bomaderry local centre with its Woolworths and potential ALDI supermarket residents in this release area would likely have a lower propensity to shop at this centre.</p> <p>Residents in the STAS would have a low propensity or incentive to travel past North Bomaderry local centre with its Woolworths, potential ALDI supermarket and supportive retail to shop at the proposed centre. While residents in the STAN would have greater propensity to continue travelling down Moss Vale Road and shop at North Bomaderry local centre.</p>	3
Walkable catchment	<p>The site has a high walkable catchment in the northern release area (Figure 8) providing top up shopping needs to its potential 3,380 to 7,800 future residents. However, walkability for residents within the southern release area or other parts of the MTA is limited to non-existent.</p> <p>Relocation of the centre northward to Abernethys Lane would increase its walkability for residents in the northern section of the northern release area.</p>	3.5
Flood prone	The site is not located in a flood prone area.	5
Biodiversity	The site is not in an identified biodiversity protection area	5
Scenic protection	The site is not in an identified scenic protection area	5
Total Score Out of 100	The sites location lends to its excellent walkability catchment for residents in the northern release area and low environmental constraints. However, its location makes it less convenient for other residents in the MTA while also impacting its accessibility and exposure. This affects the amount of retail space that could be accommodated on the site which is reflected in the lower demand modelling under the centre location 1 scenario.	<b>74/100</b>

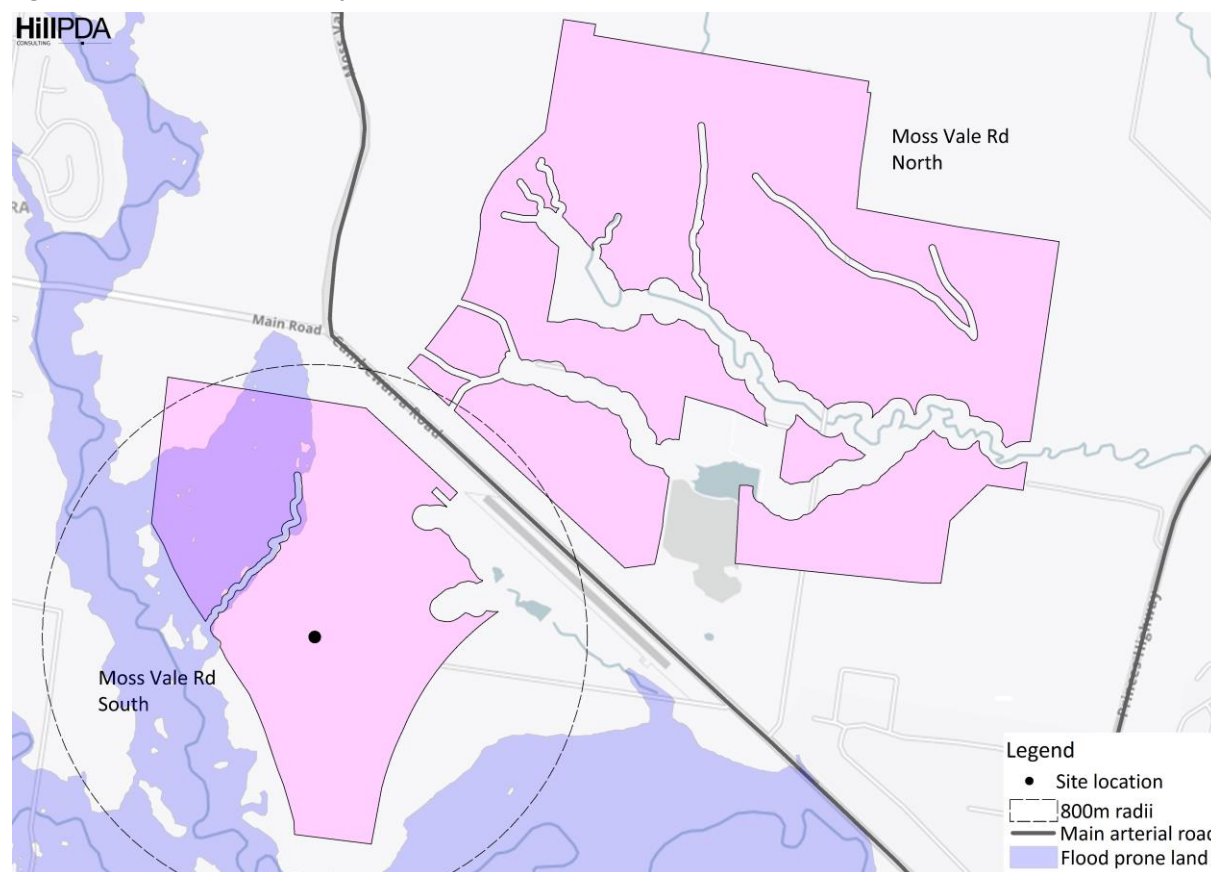
### 5.2.3 Site 3 location suitability assessment

A centre developed on site 3 was not modelled however it would likely serve the needs of the future resident in the southern release area. Given, that the potential population of this area is around 2,470 residents upon full completion and occupation, the centre would be comparably smaller than that recommended for site's 1 and 2. For example, it would likely consist of a small IGA of around 300-500sqm with a couple of supportive speciality retail shops of around 100sqm.

As stated, demand for a centre in this location was not modelled. However, to properly assess the locational benefits of possible centre locations upon the residents within the Moss Vale release areas this scenario was developed.

It must be noted that development of a centre in this location would also mean the loss of some residential land (say 10 to 20 homes). Also, the population of just under 2,500 residents is probably insufficient to viably support a local centre unless it can achieve some reasonable capture of expenditure outside.

Figure 9: Site 3 location suitability assessment



Source: HillPDA

**Table 15: Site 4 location suitability assessment**

Criteria	Commentary	Score
Developable area	Currently, there is no identified site for a centre at this location. Planning of the southern release area is substantially complete and delivery (subdivision) is underway. Any rezoning of land to allow for a centre would impact the potential returns and overall dwelling/population yields. As such, this outcome is deemed unlikely.	2
Location	<p>A retail centre on this site is more conveniently located for residents in the southern release area. This would result in lower levels of expenditure captured from other resident locations in the PTA such as Cambewarra and the northern release area.</p> <p>Due to its central location in the southern release area and smaller size, residents in the STAN and STAS would likely have a greater propensity to continue travelling along Moss Vale Road/Pacific Highway to shop at North Bomaderry local centre with its Woolworths and possible ALDI just to the south given their greater accessibility and exposure.</p>	2
Exposure	A centre in this location would have a low level of exposure to passing trade outside of the southern release area.	1
Accessibility	<p>Accessibility would largely be off Taylors Lane giving it limited access to passing trade outside of the southern release area.</p> <p>Road infrastructure upgrades are planned for the two release areas, including an appropriately sized roundabout on Moss Vale Road – located 700 to 800 metres east of the Moss Vale Road-Main Road intersection. Residents in the northern release area would have direct access, along planned collector roads into the northern area allowing them to access the centre. However, given the proximity to the larger North Bomaderry local centre with its Woolworths and potential ALDI supermarket residents in this release area would likely have a lower propensity to shop at this centre.</p>	2
Walkable catchment	<p>The site has a high walkable catchment in the southern release area (Figure 9) providing top up shopping needs to its potential 2,470 future residents. However, the likely population is unable to be sufficient to sustain a viable local centre without some capture of spend from other areas.</p> <p>Walkability for residents within the northern release area or other parts of the MTA is limited to non-existent.</p>	2
Flood prone	The site is not located in a flood prone area.	5
Biodiversity	The site is not in an identified biodiversity protection area	5
Scenic protection	The site is not in an identified scenic protection area	5
Total Score Out of 100	The site's location lends to its excellent walkability catchment for residents in the southern release area and low environmental constraints. However, its location makes it less convenient for other residents in the MTA while also impacting its accessibility and exposure. Given, that planning of the southern release area is substantially complete and delivery (subdivision) is underway rezoning of land to allow a centre in this location is unlikely. Its fruition would also reduce the overall dwelling and population yields of the southern release area having implications on the size and demand for a centre in the locality.	<b>60/100</b>

### 5.2.4 Site 4 location suitability assessment

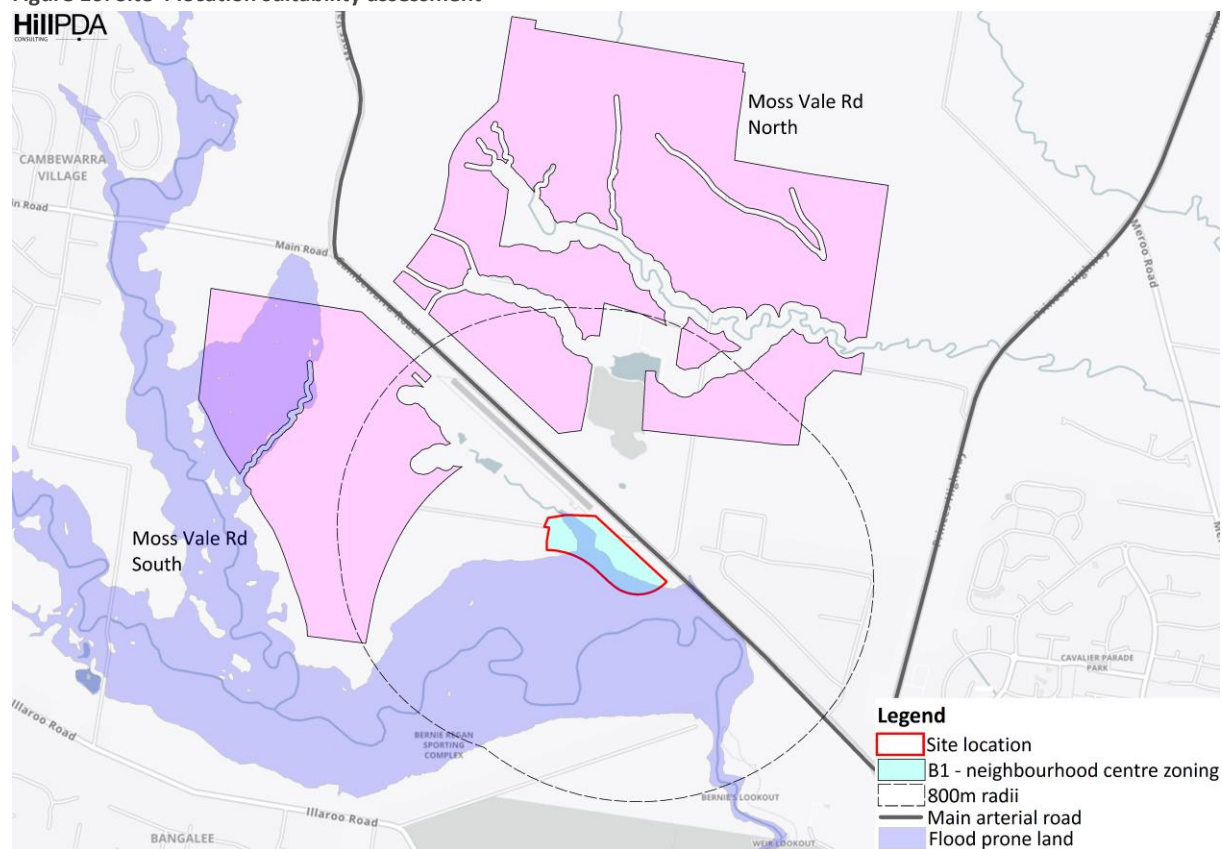
In our modelling, demand for site 4 is reflected in the centre location 2 scenario. The modelling for this location scenario found that under:

- Population growth scenario 1 a centre of around 6,000sqm could be supported
- Population growth scenario 2 a centre of around 7,500sqm could be supported
- Population growth scenario 3 a centre of around 8,000sqm could be supported.

The amount of land required to accommodate centres of the above sizes is:

- Around 2.7 hectares for population growth scenario 1.
- Around 3.0 hectares for population growth scenario 2.
- Around 3.5 hectares for population growth scenario 3.

**Figure 10: Site 4 location suitability assessment**



Source: HillPDA



**Table 16: Site 4 location suitability assessment**

Criteria	Commentary	Score
Developable area	The site has around 7 hectares of land is available for development. This is sufficient to accommodate each proposed centre under the three population growth scenarios.	5
Location	The site fronts Moss Vale Road providing good accessibility and convenience for residents across the MTA. Bells Road and Taylors Lane also lead into the site, increasing its convenience to residents in both the northern and southern release area.	5
Exposure	As stated, the site fronts one major arterial road, this being Moss Vale Road giving it high exposure to passing trade.	4
Accessibility	The sites location along Moss Vale Road increases its accessibility to residents in the STAN while also to residents in the STAS, although to a lower degree as they would pass through Bombaderry north local centre.  The sites location also benefits from Bells Road and Taylors Lane leading to it, increasing its accessibility and convenience to residents in both the northern and southern release area.	4.5
Walkable catchment	The site has low walkable catchment for the release areas, limited to the southern sections of each release area (Figure 10). Its walkable catchment also includes the current residents located to the west of Princes Highway and north of Moss Vale Road.  However, walkability for residents within the southern release area or other parts of the MTA is limited to non-existent.	1
Flood prone	The site is significantly impacted by flood prone land which extends down the middle of the site. Around 2.9 or almost 60% of the site is flood prone. This may reduce its developable area and increase the costs of development.  Land closest to Moss Vale Road which is also non-flood prone comprises around 2.9 hectares of land which enough to accommodate the recommended centre sizes. However, given the undulating nature of its shape an appropriate developable area for a centre may not be attainable.	3
Biodiversity	The site is not in an identified biodiversity protection area	5
Scenic protection	The site is not in an identified scenic protection area	5
Total Score Out of 100	The site has excellent accessibility and exposure to passing motorist along Moss Vale Road. The site has a limited walkable catchment for future residents in the northern and southern release areas in addition to existing residents in Bomaderry suburb west of the Pacific Highway.  Despite these good locational attributes, the site has flood prone land affecting a significant proportion of the sites developable area. This may affect the developable envelope and feasibility of development in this location reducing its appropriateness as a potential site.	<b>81/100</b>

### 5.2.5 Site 5 location suitability assessment

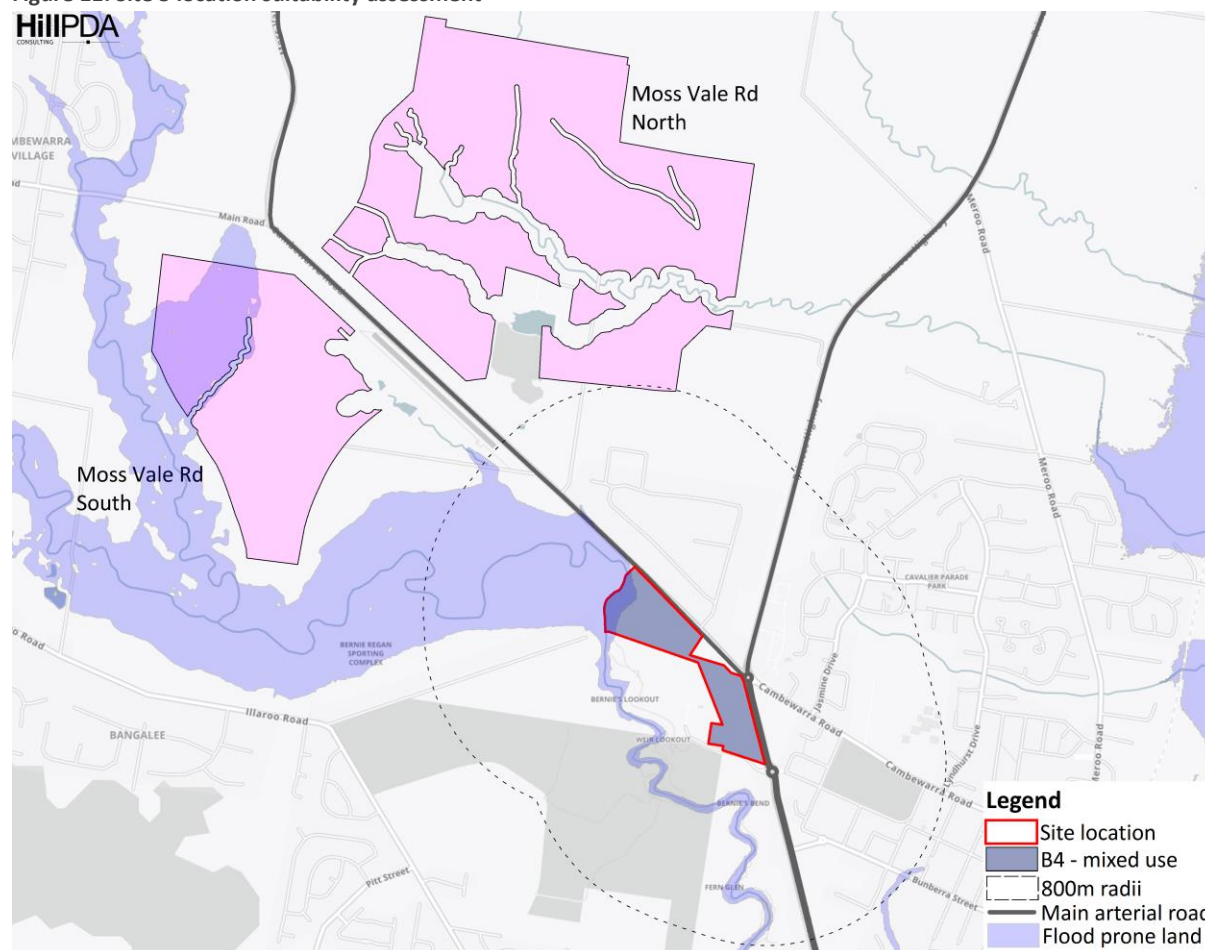
In our modelling, demand for site 5 is reflected in the centre location 2 scenario. The modelling for this location scenario found that under:

- Population growth scenario 1 a centre of around 6,000sqm could be supported
- Population growth scenario 2 a centre of around 7,500sqm could be supported
- Population growth scenario 3 a centre of around 8,000sqm could be supported.

The amount of land required to accommodate centres of the above sizes is:

- Around 2.7 hectares for population growth scenario 1.
- Around 3.0 hectares for population growth scenario 2.
- Around 3.5 hectares for population growth scenario 3.

**Figure 11: Site 5 location suitability assessment**



Source: HillPDA

**Table 17: Site 5 location suitability assessment**

Criteria	Commentary	Score
Developable area	The site has around an estimated 7 to 8 hectares of land available for development. This is sufficient to accommodate each proposed centre under the three population growth scenarios.	5
Location	The site fronts the two arterial roads of Moss Vale Road and the Princess Highway. This provides excellent accessibility and convenience for residents across the MTA. The site is within a five-minute drive for future residents in the northern and southern release areas.	5
Exposure	As stated, the site fronts two major arterial roads, this being Moss Vale Road and Pacific Highway giving it excellent exposure to passing trade. The site is also near the Woolworths supermarket currently under construction and the proposed ALDI supermarket. This proximity further increases its exposure to potential customers using these services.	5
Accessibility	The sites located at the junction of two arterial roads provides excellent accessibility to residents across the MTA. Future residents in the northern and southern release area are within a five-minute drive of the site providing good and equal accessibility between the two release areas.	5
Walkable catchment	The site has no walkable catchment for the release areas. However, it does have a small walkable catchment limited to residents within the western proportion of Bomaderry suburb (Figure 11).	2
Flood prone	The site is slightly affected by some flood prone land in the northern proportion of the site. However, there is enough developable land to accommodate a future centre within the remaining area.	4
Biodiversity	The site is not in an identified biodiversity protection area	5
Scenic protection	The site is not in an identified scenic protection area	5
Total Score Out of 100	The site has excellent accessibility and exposure to passing motorist along Moss Vale Road. The site has a limited walkable catchment for future residents in the northern and southern release areas in addition to existing residents in Bomaderry suburb west of the Pacific Highway. Despite these good locational attributes, the site has flood prone land affecting a significant proportion of the sites developable area. This may affect the developable envelope and feasibility of development in this location reducing its appropriateness as a potential site.	<b>90/100</b>



**Table 18: Site 6 location suitability assessment**

Criteria	Commentary	Score
Developable area	<p>The site is around 3.6 hectares in size. However, over half of the site is currently under development and will contain a Woolworths supermarket with supportive retail.</p> <p>The other half of the site is developed and contains a McDonald's, KFC and car yard. It is likely that these three developed sites would need to be acquired to allow any further development. Combined these three sites have an area of around a hectare which is deemed insufficient for any of the centres forecasted under each scenario.</p>	1
Location	<p>The site fronts the Princess Highway a major arterial road. It also has Moss Vale road another major arterial road leading to the site. These two roads provide excellent convenience and accessibility to residents across the MTA.</p> <p>In addition, the site front Cambewarra Road which increases its convenience and connectivity for residents in Bomaderry.</p> <p>The site is within a five-minute drive for future residents in the northern and southern release areas.</p>	5
Exposure	<p>As stated, the site is at the junction of two major arterial roads, this being Moss Vale Road and Pacific Highway while also fronting Cambewarra Road. This location gives it excellent exposure to passing trade.</p> <p>The site also contains the Woolworths supermarket currently under construction and adjacent the proposed ALDI site. This proximity further increases its exposure to potential customers using these future services.</p>	5
Accessibility	<p>The sites location at the junction of two arterial roads provides excellent accessibility to residents across the MTA. Future residents in the northern and southern release area are within a five-minute drive of the site providing good and equal accessibility between the two release areas.</p>	5
Walkable catchment	<p>The site has no walkable catchment for the release areas. However, it does have a small walkable catchment limited to residents within the western proportion of Bomaderry suburb (Figure 12).</p>	2
Flood prone	The site is not flood prone.	5
Biodiversity	The site is not in an identified biodiversity protection area	5
Scenic protection	The site is not in an identified scenic protection area	5
Total Score Out of 100	<p>The site has excellent accessibility and exposure to passing motorist along Moss Vale Road, Pacific Highway and Cambewarra Road. The site has a limited walkable catchment for residents within the western proportion of Bomaderry suburb. The site has not environmental constraints</p> <p>Despite these good locational attributes and low environmental constraints, after taking into consideration existing uses on the site it is unlikely that sufficient land would be available for a centre of the recommended size.</p>	<b>83/100</b>

## 6.0 RECOMMENDATION

The following Chapter reviews the findings of the previous chapters to determine an appropriate location and size for a future retail centre to service the resident population of the Moss Vale release areas and surrounding area.

### 6.1 Single centre recommendation

For the development of a single retail centre it is recommended that site 5 is the most appropriate location.

#### Reasoning

1. Its location at the junction of two major arterial roads gives it excellent exposure, access and connectivity to passing trade and residents within the MTA.
2. The site is also within a five-minute commute of further residents within the northern and southern residents.
3. The sites proximity to the Woolworths development and possible ALDI increases its exposure to potential passing trade/customers which increases its attractiveness and viability to future tenants.
4. The site has minimal environmental constraints.
5. The site has more than enough land available for the development of a centre.

#### Proposed centre size

Under the three population scenarios for a centre located at site 5 could range between 6,000sqm and 8,000sqm. Depending on the allowable FSR it is likely that between 2.7 and 3.5 hectares of land would be required.

#### Centre composition

Depending on the resultant population the composition of the centre could comprise the following.

**Table 19: Proposed centre composition by population scenario (sqm)**

Floorspace type	Population scenario		
	Scenario 1	Scenario 2	Scenario 3
Supermarket	3,000	3,400	3,800
Specialty retail	2,300	2,500	3,000
Vacant space	250	300	350
Non-retail commercial space	500	600	650
<b>Total</b>	<b>6,050</b>	<b>6,800</b>	<b>7,800</b>

## 6.2 Option of two centres

For the development of two retail centres it is recommended that either site 1 or 2 be chosen in conjunction with site 5.

### Reasoning

The benefits/reasoning of providing a centre at site 5 is detailed above. While the benefits of providing an additional centre at site 1 or 2 is as follows:

1. The centre would have high connectivity and walkability for residents within the northern release area
2. There is sufficient and appropriately zoned land within the northern release area
3. The centre would provide convenience shopping for up to 7,800 future residents – many of whom would be within walking distance.

### Proposed centre size

The two centres would need to share the above space shown in the above table based on the population scenario. While the development of two centres was not modelled in detail it is assumed that the overall combined capture rates would be in line with the location 2 scenarios findings. As such, depending on the population scenario, development of a centre at site 1 or 2 could range between 1,000sqm and 2,000sqm. Land area requirements would likely range between 0.5 and 1 hectare.

The development of a smaller centre in the northern release area would reduce the size of a second centre at site 5 to between 5,000sqm and 6,000sqm. Land area requirements to accommodate this would likely range between 2.2 and 3 hectares.

### Centre composition

Depending on the resultant population the composition of the centres could comprise the following elements.

**Table 20: Proposed centre(s) composition by population scenario and location (sqm)**

Floorspace type	Site location 1 or 2			Site location 5		
	Scenario 1	Scenario 2	Scenario 3	Scenario 1	Scenario 2	Scenario 3
Supermarket	400	600	800	2,600	2,800	3,000
Specialty retail	400	600	800	1,900	1,900	2,200
Vacant space	40	60	80	210	240	270
Non-retail Commercial space				500	600	650
<b>Total</b>	<b>840</b>	<b>1,260</b>	<b>1,680</b>	<b>5,210</b>	<b>5,540</b>	<b>6,120</b>

Please note that there is some risk of failure of a centre of around 1,000sqm to 2,000sqm in this location and this risk increases with a lower population in the immediate area (northern part of the release area). Increasing the number of residents in the northern part of the release area reduces the risk of failure and so we would recommend a smaller second centre only with population Scenario 2 or 3 rather than with Scenario 1.

To ensure success of the smaller centre it will be important to provide quality amenity. The centres amenity is somewhat advantaged by not having a main or arterial road and being positioned in a quieter setting. Some synergy with other land uses such as child minding, open space and visual amenity (water views), etc would also contribute to its success as shoppers prefer a more personal and pleasant experience when shopping rather than 'chore' shopping.



# APPENDIX A: TOTAL RETAIL EXPENDITURE BY SUB-TRADE AREA AND SCENARIO

The following provides, for each scenario, details on resident retail expenditure generated in each sub-trade area over the period between 2019-41.

**Table 21: Population scenario 1 – total resident expenditure 2019-41 (\$m 2019)**

PTA	2019	2026	2036	2041
Supermarkets & Grocery Stores	9.7	10.5	29.1	51.4
Specialty Food Stores	2.2	2.3	6.5	11.5
Fast-Food Stores	2.0	2.1	5.9	10.4
Restaurants, Hotels and Clubs*	2.5	2.6	7.3	12.8
Department Stores	1.9	2.0	5.4	9.1
Apparel Stores	2.8	3.0	8.0	13.4
Bulky Goods Stores**	5.4	5.8	15.3	25.8
Other Personal & Household Goods Retailing	3.9	4.1	10.9	18.4
Selected Personal Services***	1.0	1.1	2.8	4.7
<b>Total Retailing</b>	<b>31.3</b>	<b>33.6</b>	<b>91.1</b>	<b>157.6</b>
STAN	2019	2026	2036	2041
Supermarkets & Grocery Stores	8.9	9.0	9.7	11.2
Specialty Food Stores	2.0	2.0	2.2	2.5
Fast-Food Stores	1.6	1.6	1.8	2.0
Restaurants, Hotels and Clubs*	2.3	2.3	2.5	2.8
Department Stores	1.7	1.7	1.8	1.9
Apparel Stores	2.3	2.3	2.4	2.6
Bulky Goods Stores**	4.6	4.7	4.8	5.3
Other Personal & Household Goods Retailing	3.7	3.7	3.9	4.2
Selected Personal Services***	0.9	0.9	0.9	0.9
<b>Total Retailing</b>	<b>27.9</b>	<b>28.2</b>	<b>29.9</b>	<b>33.6</b>
STAS	2019	2026	2036	2041
Supermarkets & Grocery Stores	98.2	100.3	115.8	136.2
Specialty Food Stores	21.8	22.3	25.7	30.3
Fast-Food Stores	18.8	19.2	22.2	26.1
Restaurants, Hotels and Clubs*	23.5	24.0	27.4	31.8
Department Stores	17.8	18.0	19.8	22.2
Apparel Stores	23.2	23.5	25.8	28.9
Bulky Goods Stores**	50.6	51.3	56.3	63.0
Other Personal & Household Goods Retailing	40.6	41.2	45.2	50.6
Selected Personal Services***	8.7	8.9	9.7	10.9
<b>Total Retailing</b>	<b>303.1</b>	<b>308.6</b>	<b>348.1</b>	<b>400.0</b>
Total MTA	2019	2026	2036	2041
Supermarkets & Grocery Stores	116.8	119.8	154.6	198.9
Specialty Food Stores	25.9	26.6	34.4	44.3
Fast-Food Stores	22.4	23.0	29.9	38.6
Restaurants, Hotels and Clubs*	28.2	29.0	37.1	47.4
Department Stores	21.4	21.8	27.0	33.2
Apparel Stores	28.3	28.8	36.2	44.9
Bulky Goods Stores	60.7	61.7	76.5	94.1
Other Personal & Household Goods Retailing	48.2	49.0	60.0	73.2
Selected Personal Services***	10.6	10.8	13.4	16.5
<b>Total Retailing</b>	<b>362.4</b>	<b>370.4</b>	<b>469.1</b>	<b>591.2</b>

Source: HillPDA \* Turnover relating only to consumption of food and liquor (excludes all other types of revenue such as accommodation, gaming and gambling) \*\* Bulky Goods includes fabrics, soft goods, furniture, floor coverings, hardware, houseware, electrical appliances, sports and camping stores.\*\*\* Selected Personal Services includes hair and beauty, laundry, clothing hire and alterations, shoe repair, optical dispensing, photo processing and hire of videos

**Table 22: Population scenario 2 – total resident expenditure 2019-41**

PTA	2019	2026	2036	2041
Supermarkets & Grocery Stores	9.7	10.5	35.2	65.0
Specialty Food Stores	2.2	2.3	7.9	14.6
Fast-Food Stores	2.0	2.1	7.1	13.2
Restaurants, Hotels and Clubs*	2.5	2.6	8.8	16.1
Department Stores	1.9	2.0	6.5	11.4
Apparel Stores	2.8	3.0	9.7	17.0
Bulky Goods Stores**	5.4	5.8	18.6	32.6
Other Personal & Household Goods Retailing	3.9	4.1	13.2	23.2
Selected Personal Services***	1.0	1.1	3.4	6.0
<b>Total Retailing</b>	<b>31.3</b>	<b>33.6</b>	<b>110.4</b>	<b>199.2</b>
STAN	2019	2026	2036	2041
Supermarkets & Grocery Stores	8.9	9.0	9.7	11.2
Specialty Food Stores	2.0	2.0	2.2	2.5
Fast-Food Stores	1.6	1.6	1.8	2.0
Restaurants, Hotels and Clubs*	2.3	2.3	2.5	2.8
Department Stores	1.7	1.7	1.8	1.9
Apparel Stores	2.3	2.3	2.4	2.6
Bulky Goods Stores**	4.6	4.7	4.8	5.3
Other Personal & Household Goods Retailing	3.7	3.7	3.9	4.2
Selected Personal Services***	0.9	0.9	0.9	0.9
<b>Total Retailing</b>	<b>27.9</b>	<b>28.2</b>	<b>29.9</b>	<b>33.6</b>
STAS	2019	2026	2036	2041
Supermarkets & Grocery Stores	98.2	100.3	115.8	136.2
Specialty Food Stores	21.8	22.3	25.7	30.3
Fast-Food Stores	18.8	19.2	22.2	26.1
Restaurants, Hotels and Clubs*	23.5	24.0	27.4	31.8
Department Stores	17.8	18.0	19.8	22.2
Apparel Stores	23.2	23.5	25.8	28.9
Bulky Goods Stores**	50.6	51.3	56.3	63.0
Other Personal & Household Goods Retailing	40.6	41.2	45.2	50.6
Selected Personal Services***	8.7	8.9	9.7	10.9
<b>Total Retailing</b>	<b>303.1</b>	<b>308.6</b>	<b>348.1</b>	<b>400.0</b>
Total MTA	2019	2026	2036	2041
Supermarkets & Grocery Stores	116.8	119.8	160.8	212.5
Specialty Food Stores	25.9	26.6	35.8	47.4
Fast-Food Stores	22.4	23.0	31.1	41.3
Restaurants, Hotels and Clubs*	28.2	29.0	38.7	50.7
Department Stores	21.4	21.8	28.1	35.6
Apparel Stores	28.3	28.8	37.9	48.5
Bulky Goods Stores	60.7	61.7	79.7	100.9
Other Personal & Household Goods Retailing	48.2	49.0	62.3	78.1
Selected Personal Services***	10.6	10.8	14.0	17.8
<b>Total Retailing</b>	<b>362.4</b>	<b>370.4</b>	<b>488.4</b>	<b>632.8</b>

Source: HillPDA \* Turnover relating only to consumption of food and liquor (excludes all other types of revenue such as accommodation, gaming and gambling) \*\* Bulky Goods includes fabrics, soft goods, furniture, floor coverings, hardware, houseware, electrical appliances, sports and camping stores.\*\*\* Selected Personal Services includes hair and beauty, laundry, clothing hire and alterations, shoe repair, optical dispensing, photo processing and hire of videos

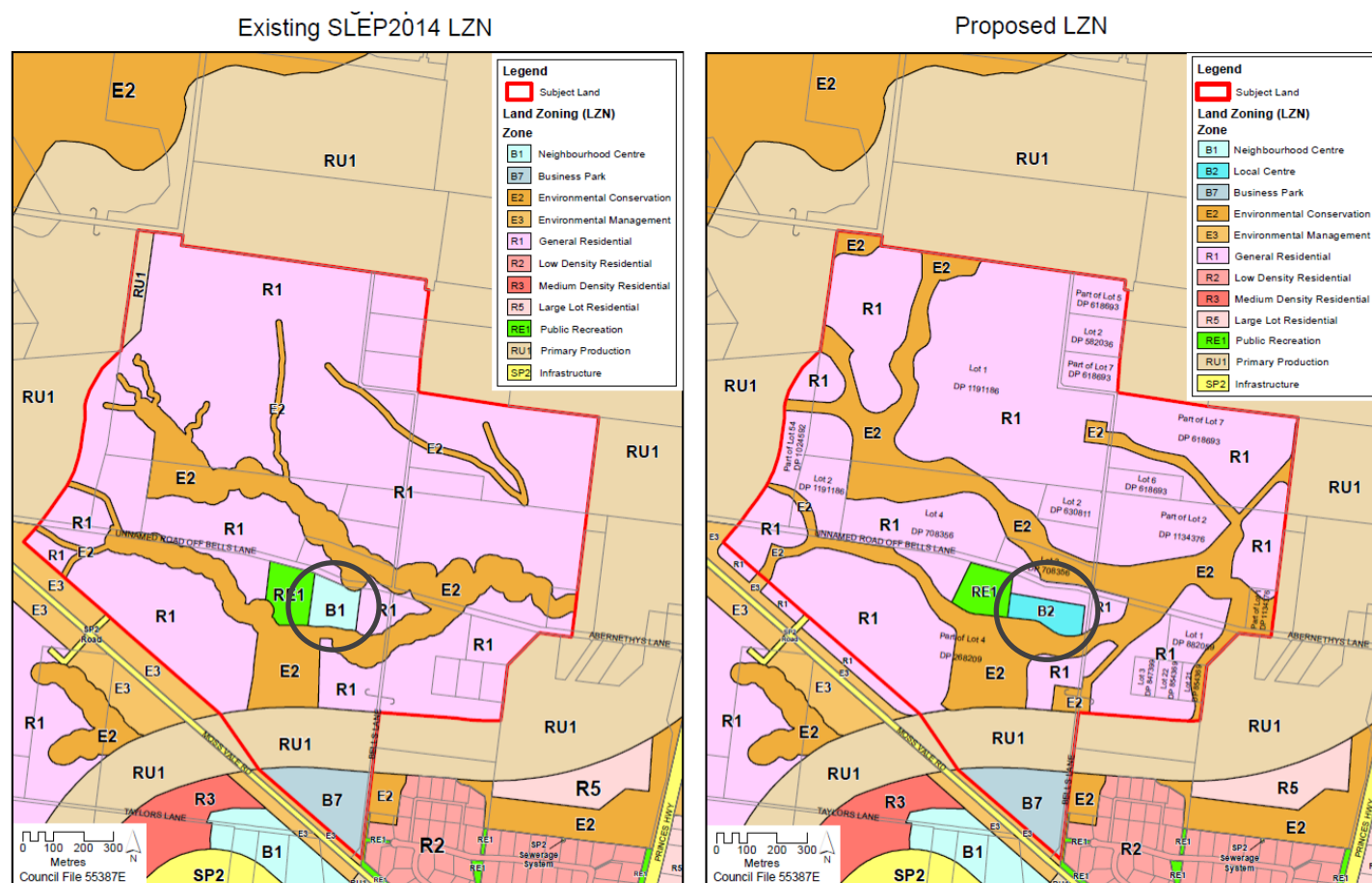
**Table 23: Population scenario 3 – total resident expenditure 2019-41**

PTA	2019	2026	2036	2041
Supermarkets & Grocery Stores	9.7	10.5	41.3	78.6
Specialty Food Stores	2.2	2.3	9.3	17.6
Fast-Food Stores	2.0	2.1	8.4	15.9
Restaurants, Hotels and Clubs*	2.5	2.6	10.4	19.5
Department Stores	1.9	2.0	7.7	13.8
Apparel Stores	2.8	3.0	11.4	20.5
Bulky Goods Stores**	5.4	5.8	21.8	39.5
Other Personal & Household Goods Retailing	3.9	4.1	15.5	28.1
Selected Personal Services***	1.0	1.1	4.0	7.2
<b>Total Retailing</b>	<b>31.3</b>	<b>33.6</b>	<b>129.7</b>	<b>240.8</b>
STAN	2019	2026	2036	2041
Supermarkets & Grocery Stores	8.9	9.0	9.7	11.2
Specialty Food Stores	2.0	2.0	2.2	2.5
Fast-Food Stores	1.6	1.6	1.8	2.0
Restaurants, Hotels and Clubs*	2.3	2.3	2.5	2.8
Department Stores	1.7	1.7	1.8	1.9
Apparel Stores	2.3	2.3	2.4	2.6
Bulky Goods Stores**	4.6	4.7	4.8	5.3
Other Personal & Household Goods Retailing	3.7	3.7	3.9	4.2
Selected Personal Services***	0.9	0.9	0.9	0.9
<b>Total Retailing</b>	<b>27.9</b>	<b>28.2</b>	<b>29.9</b>	<b>33.6</b>
STAS	2019	2026	2036	2041
Supermarkets & Grocery Stores	98.2	100.3	115.8	136.2
Specialty Food Stores	21.8	22.3	25.7	30.3
Fast-Food Stores	18.8	19.2	22.2	26.1
Restaurants, Hotels and Clubs*	23.5	24.0	27.4	31.8
Department Stores	17.8	18.0	19.8	22.2
Apparel Stores	23.2	23.5	25.8	28.9
Bulky Goods Stores**	50.6	51.3	56.3	63.0
Other Personal & Household Goods Retailing	40.6	41.2	45.2	50.6
Selected Personal Services***	8.7	8.9	9.7	10.9
<b>Total Retailing</b>	<b>303.1</b>	<b>308.6</b>	<b>348.1</b>	<b>400.0</b>
Total MTA	2019	2026	2036	2041
Supermarkets & Grocery Stores	116.8	119.8	166.9	226.1
Specialty Food Stores	25.9	26.6	37.2	50.4
Fast-Food Stores	22.4	23.0	32.4	44.1
Restaurants, Hotels and Clubs*	28.2	29.0	40.2	54.1
Department Stores	21.4	21.8	29.2	38.0
Apparel Stores	28.3	28.8	39.5	52.0
Bulky Goods Stores	60.7	61.7	83.0	107.8
Other Personal & Household Goods Retailing	48.2	49.0	64.6	82.9
Selected Personal Services***	10.6	10.8	14.6	19.0
<b>Total Retailing</b>	<b>362.4</b>	<b>370.4</b>	<b>507.7</b>	<b>674.4</b>

Source: HillPDA \* Turnover relating only to consumption of food and liquor (excludes all other types of revenue such as accommodation, gaming and gambling) \*\* Bulky Goods includes fabrics, soft goods, furniture, floor coverings, hardware, houseware, electrical appliances, sports and camping stores.\*\*\* Selected Personal Services includes hair and beauty, laundry, clothing hire and alterations, shoe repair, optical dispensing, photo processing and hire of videos

## APPENDIX B: POTENTIAL RETAIL CENTRE LOCATIONS 1 AND 2

The figure below shows the potential retail centre locations within the northern Moss Vale Urban Release Area. The first location (left image) is currently within the existing LEP while the second (right image) is the proposed location by the group of landowners. The locations are similar however zoning changes from B1 – Neighbourhood Centre to B2 – Local Centre.



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## **SYDNEY**

Level 3, 234 George Street  
Sydney NSW 2000  
GPO Box 2748 Sydney NSW 2001  
t: +61 2 9252 8777  
f: +61 2 9252 6077  
e: [sydney@hillpda.com](mailto:sydney@hillpda.com)

## **MELBOURNE**

Suite 114, 838 Collins Street  
Docklands VIC 3008  
t: +61 3 9629 1842  
f: +61 3 9629 6315  
e: [melbourne@hillpda.com](mailto:melbourne@hillpda.com)

**WWW.HILLPDA.COM**

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