

## Key Services

- Demographic Research
- Population Trends
- Retail Spending Analysis
- Turnover Projections
- Floorspace Demand
- Centres Hierarchies
- Centre, Retail, Commercial & Mixed Use Policy Formulation
- Trade Impact Analysis
- Catchment Area Analysis (Primary & Secondary Research)
- Concept Formulation for Centres & Main Streets
- Structure Planning for Centres
- Development/Design Briefs
- Development Applications & Approvals Negotiation
- Management of the Delivery Process



## Centres and Retailing

Holmes Dyer has extensive expertise and experience in retailing, encompassing the following major areas of activity:

- Retail & Demographic Research
- Retail Modelling
- Concept Formulation
- Development Approval and Delivery Processes
- Activity Centres/Retail Policy Planning

A number of these facets may be combined to support, for example, a new policy initiative of the planning authority or to underpin the development proposal of a retailer / developer. Alternatively, clients may seek only a single service. These services are discussed in the following paragraphs.

# Centres and Retailing

## Retail and Demographic Research

Understanding of the catchment population underpinning a centre or region is fundamental to the planning and delivery of centres and shops. Different income levels, age profiles and household structures generate different spending patterns.

Emerging retail delivery forms are also significant, for example;

- the continuing preference by key owners / investors for enclosed malls
- the emergence of big box killers
- the rediscovery of the high street and the emergence of centres as community meeting places and areas of recreation and entertainment
- the demise of department stores
- the emphasis on mixed use and apartments above retailing
- the refocusing of centres around improved public transport infrastructure
- the rise of internet retailing and off shore shopping
- the entry of key retailers into shopping centre development and ownership in periods of funding shortages.

## Retail Modelling

Retail modelling might be undertaken to validate support for additional retail floorspace of an individual shop, a centre, hierarchy of centres within a wider region or category of retail expenditure (eg. bulky goods). It can also be used to establish the impact of the addition of new floorspace on existing centres over time (a trade impact analysis) and, is ideally undertaken in support of any substantive policy changes to the size and/or distribution of centres in an area.

Retail modelling is typically based upon secondary data sources (eg. ABS data, Household Expenditure Survey, Retail

Data Base etc.) for reasons of financial expediency, however, the opportunity exists to undertake primary research in the form of telephone surveys, in-home surveys and in-centre surveys in order to increase the robustness of results. Holmes Dyer has regularly applied these techniques to improve statistical reliability in areas of poor secondary data coverage.

Our typical retail analysis comprises:

- Policy Review
- Competing Centres Review
- Catchment Area Identification
- Current Catchment Area Household and Population Estimates
- Projected Catchment Area Households and Population Estimates
- Current Catchment Area Income and Expenditure Levels
- Projected Catchment Area Income and Expenditure Levels
- Catchment Area Penetration Levels
- Supportable Floorspace / Turnover Levels
- Impact on Other Centres

Understanding likely future catchment conditions is particularly relevant for new or expanding retail facilities in both infill and growth areas. We provide projections based on likely residential development scenarios and demographic characteristics.

The product of such investigations could include:

- Establishment of Centres' hierarchies
- Determination of floorspace thresholds for individual centres
- Location of new centres or expanded centres
- Establishment of turnover levels and projected centre performance
- Determination of turnover impacts on competing centres
- Support for new centres or floorspace expansion



# Centres and Retailing

## Concept Formulation

Holmes Dyer has been responsible for the master planning, structure planning and site concept formulation for a range of centres including local, neighbourhood, district and regional centres, mixed use precincts, bulky goods centres, arterial road precincts, markets, main streets and tourist centres.

Our role might typically involve site analysis, locality analysis, infrastructure assessment, planning policy review, assessment of scale bulk and height relationships, evaluation of community objectives and public realm expectations, establishment of retailer, developer and land owner criteria and targets, car parking and access requirements and land use and tenancy mix assessments. These assessments may be undertaken in our own right, as part of a larger team and/or in consultation with relevant communities or agencies, with the product being an area-wide master plan or a site specific concept plan that might then form the basis of a structure plan in a planning instrument or as a brief for architectural design and development.

## Development Approval & Delivery Processes

Holmes Dyer is responsible for the formulation of development applications for shopping centres and for the negotiation of approvals. We are also responsible for the development management / project management of projects from inception to delivery. These skills are detailed in our planning and development management / project management brochures.

## Activity Centres/Retail Policy Planning

Centres' policy is a fundamental plank of our Development Plans and, historically, has been one of the most controlled areas of development activity. With the advent of bulky goods precincts, transit corridors and TODs, the traditional centres hierarchy is under challenge. New policies are required to deal with these emerging mixed use environments.

Holmes Dyer connects the retail research and modeling with an understanding of the built form and development outcome requirements of the retail industry to deliver pragmatic policies for planning authorities.



# Centres and Retailing

## Project Examples



### Retail Modelling & Centres Hierarchy

- Blakeview
- Playford North
- Munno Para Expansion
- Penfield
- Mt Barker Township Expansion
- Port Augusta
- Buckland Park
- Virginia
- Roseworthy
- Seaford Meadows
- Seaford Heights
- Gawler East
- Gawler Racecourse
- Golden Grove

### Site Concepts/Master Plans

- Angle Vale Road Centre
- Curtis Road Main Street
- Fulham Gardens District Centre
- Seaford District Centre
- Aldinga District Centre
- AAMI Stadium Precinct Main Street
- The Parks Neighbourhood Centre
- Port Road Mixed Use Concepts
- Highway Hotel Major Development
- Coles Mitcham Site Concepts
- Buckland Park District Centre Site Concept
- Clipsal Site Development Options
- Caroma Site Redevelopment
- Fulham Gardens Shopping Centre and Library Relocation

### Strategic Design Advice/Design Briefs

- Coles Norwood Mixed Retail / Apartment Complex
- Noarlunga Centre Development Guidelines
- Payneham Library
- Rundle Mall Master Plan
- Seaford Meadows Main Street and Integrated Shop Top Housing

### Development Applications

- Henley Shopping Centre Retail and Apartment Redevelopment
- Murray Bridge Woolworths Market
- Seaford Meadows Neighbourhood Centre
- Walkerville Town Centre

### Activity Centres

- Brickworks Market DPA
- AAMI Stadium Precinct DPA
- 30 Year Plan Centres Hierarchy Definitions
- TOD Study (DPLG)
- Mile End South – Keswick DPA
- Munno Para Expansion DPA

### Community & Entertainment Studies

- Marion Shopping Centre Cinema Demand Analysis
- West Lakes Shopping Centre Cinema Demand Analysis
- Firle Site Cinema Demand Analysis
- Payneham Library Location Analysis
- Norwood Library Relocation
- St Peters Library Upgrade
- Fulham Gardens Shopping Centre / Library Integration