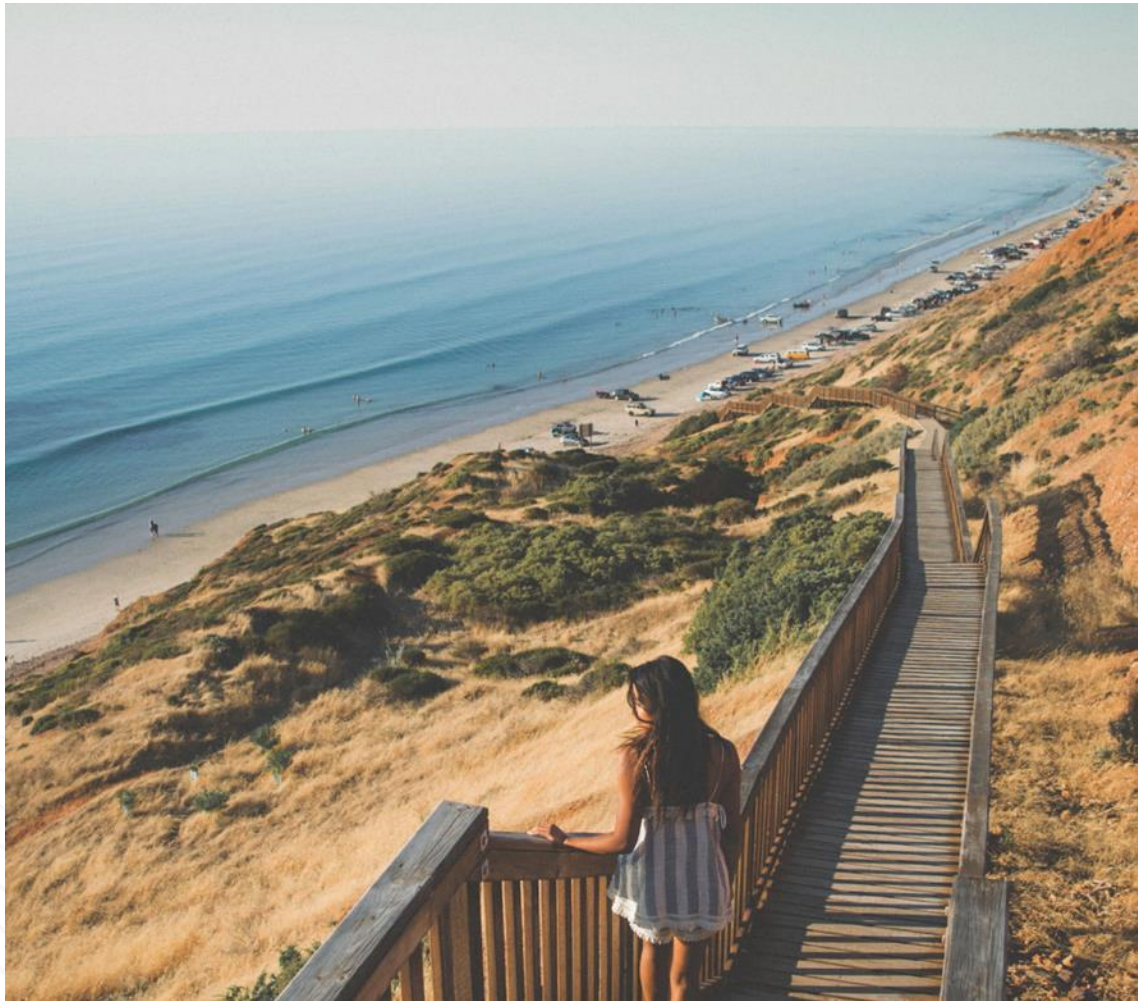


Sellicks Beach Retail Centre

Supportable Retail Capacity





Source: <https://fleurieupeninsula.com.au/places-to-go/sellicks-beach>

Table of Contents

Introduction	3
Section 1: Location and Context	5
Section 2: Trade Area Analysis	10
Section 3: Tourist Accommodation	15
Section 4: Retail Structure	16
Section 5: Retail Demand	18
Section 6: Retail Turnover and Market Potential	21
Conclusion	22
Appendix	23

Front cover source: <https://www.expedia.com/Adelaide-Sellicks-Beach>

Introduction

The 'Sellicks Beach Growth Area' has been identified for future urban growth in the 2010 and 2017 iterations of the 30-Year Plan for Greater Adelaide and Greater Adelaide Regional Plan, subject to a proposal to initiate an amendment to the Planning and Design Code pursuant to section 73(3)(b) of the Planning, Development and Infrastructure Act 2016.

Led by the Chief Executive of the Department for Housing and Urban Development, the Sellicks Beach Code Amendment seeks to rezone approximately 134 hectares of rural and deferred urban land to introduce an appropriate zone and policy framework to facilitate the proposed residential development.

As part of this code amendment, Hudson Howells has been engaged to undertake a retail capacity assessment to inform the level of retail floorspace that will be required to support the future population of both Sellicks Beach Growth Area, and the wider Sellicks Beach suburb.

Given that a retail capacity assessment was undertaken to inform the development of the City of Onkaparinga's Sellicks Beach Structure Plan (2021) over the subject area, a reference is made to enable high level comparison from the previous study.

Limitations within the Structure Plan

As noted in the 'Sellicks Beach Structure Plan', Sellicks Beach does not currently support more than a small level of retail expenditure. With a potential increased population, the Structure Plan identifies a preferred location for a new mixed-use centre within the Sellicks Beach Road/Justs Road quadrant. Two alternative locations are possible either on the northern or southern side of Sellicks Beach Road. A new centre should address the following criteria:

- Contain a complementary level of supermarket shopping and specialty outlets to support local needs (acknowledging that higher order centres are located nearby at Aldinga and Seaford).

Large format and bulky goods retailing are not considered necessary in this location.

The likely land area for a new centre is anticipated to be less than 1.5 hectares.

Report Outline

This demand and supply study contains the following sections:

Section 1 outlines the regional and local attributes for Sellicks Beach, an overview of the City of Onkaparinga's 'Sellicks Beach Structure Plan', and defines a potential catchment area for retail floorspace within the region.

Section 2 provides an analysis of the population and key socio-economic data of the catchment area, including an examination of demographic data including age, income, and education levels, and population forecast.

Section 3 provides a brief overview of the short-term rental market in Sellicks Beach, including listings and occupancy rate.

Section 4 reviews current retail supply in the region, including an overview of the regional retail hierarchy and an estimate of retail floorspace provision.

Section 5 includes an estimation of current retail spending within the trade area, a summary of current and forecast retail demand and supply, and insights into the retail market potential within the region.

Section 6 estimates forecast market potential for retail floorspace within the region.

Section 1: Location and Context

The suburb of Sellicks Beach is located within the City of Onkaparinga, approximately 52 km south of the Adelaide CBD.

It is the most southern suburb within the Greater Adelaide metropolitan region, and the point where the Mount Lofty Ranges reaches Gulf St Vincent.

- The suburb is characterised by a mix of residential and rural land uses, including parcels of land identified as deferred urban land.
- Immediately to its north is the suburb of Aldinga Beach, and growth areas in Moana and Seaford.
- To the east and south are rural and Hills Face zones, including the Sellicks Hill Quarry.
- To the immediate west is Gulf St Vincent.

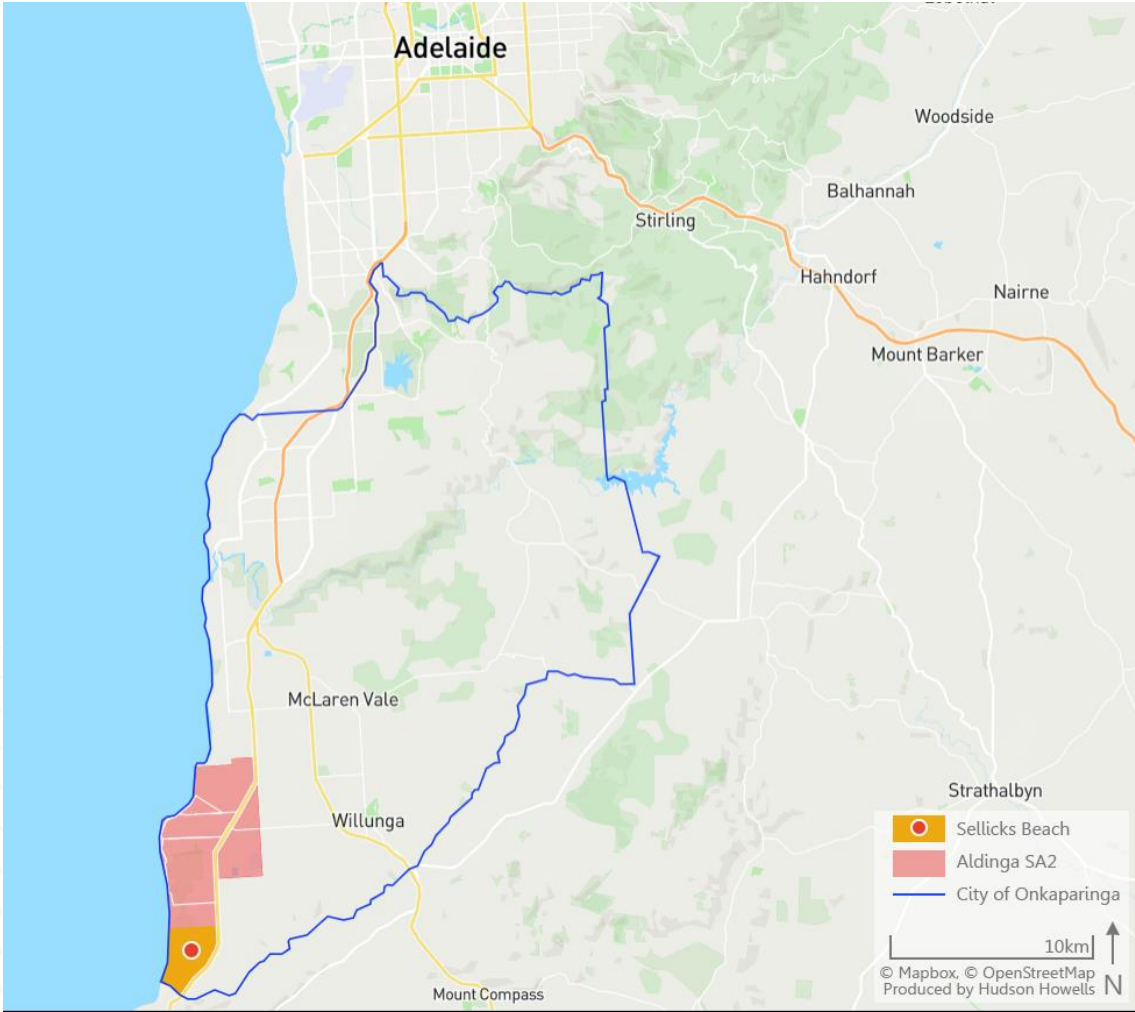
Main South Road, as the boundary to the east, provides regional access north to Aldinga and the metropolitan area, and south to the Fleurieu.

The maps on the following page show the regional location of the suburb in context with key arterial routes, and in a local context showing surrounding land uses.



Source: <https://www.expedia.com/Adelaide-Sellicks-Beach>

Map 1: Regional Context



Map 2: Local Context



'Sellicks Beach Growth Area' Overview

The Sellicks Beach Growth Area extends from Main South Road to Justs Road, southwards to Gulf View Road. County Road intersects the site in a north south direction.

The approximate total area for the Sellicks Beach Growth Area is 134 ha (refer Map 3), comprising of:

- Deferred Urban Zone (approx. 87 ha)
- Rural Zone (approx. 47 ha)

Both the Deferred Urban Zone and Rural zoned land within the Study Area are identified in the Greater Adelaide Regional Plan as Greenfield Growth Area.

The Sellicks Beach Growth Area (SBGA) has the capacity to accommodate up to approximately 1,700 dwellings. This yield resulted from the State Government announcement which led to initiation of the Code Amendment, which this study is intended to inform, including the Affected Area contained in that document. A number of factors may impact on this overall yield, including market conditions given the location, and open space or buffer requirements as identified in Councils Structure Plan. Due to these factors the number of dwellings could range between 1,200 and 1,700 in the SBGA¹.

"The 'Sellicks Beach Structure Plan' is a strategic land use plan that establishes a set of objectives and a future spatial arrangement for Sellicks Beach, and was endorsed by the City of Onkaparinga on 18 May 2021, having undertaken and concluded the community and agency consultation process. The 'Sellicks Beach Structure Plan' identifies a preferred location for a new mixed-use centre within the Sellicks Beach Road/Justs Road quadrant. The Structure Plan continues to indicate that a new centre should contain a complementary level of supermarket shopping and specialty outlets to support local needs (acknowledging that higher order centres are located nearby at Aldinga and Seaford), and that large format and bulky goods retailing are not considered necessary in this location.

1. PlanSA, 'Sellicks Beach Code Amendment - Proposal to Initiate an Amendment to the Planning and Design Code', June 2023

Map 3: Sellicks Beach Growth Area



Trade Area Definition

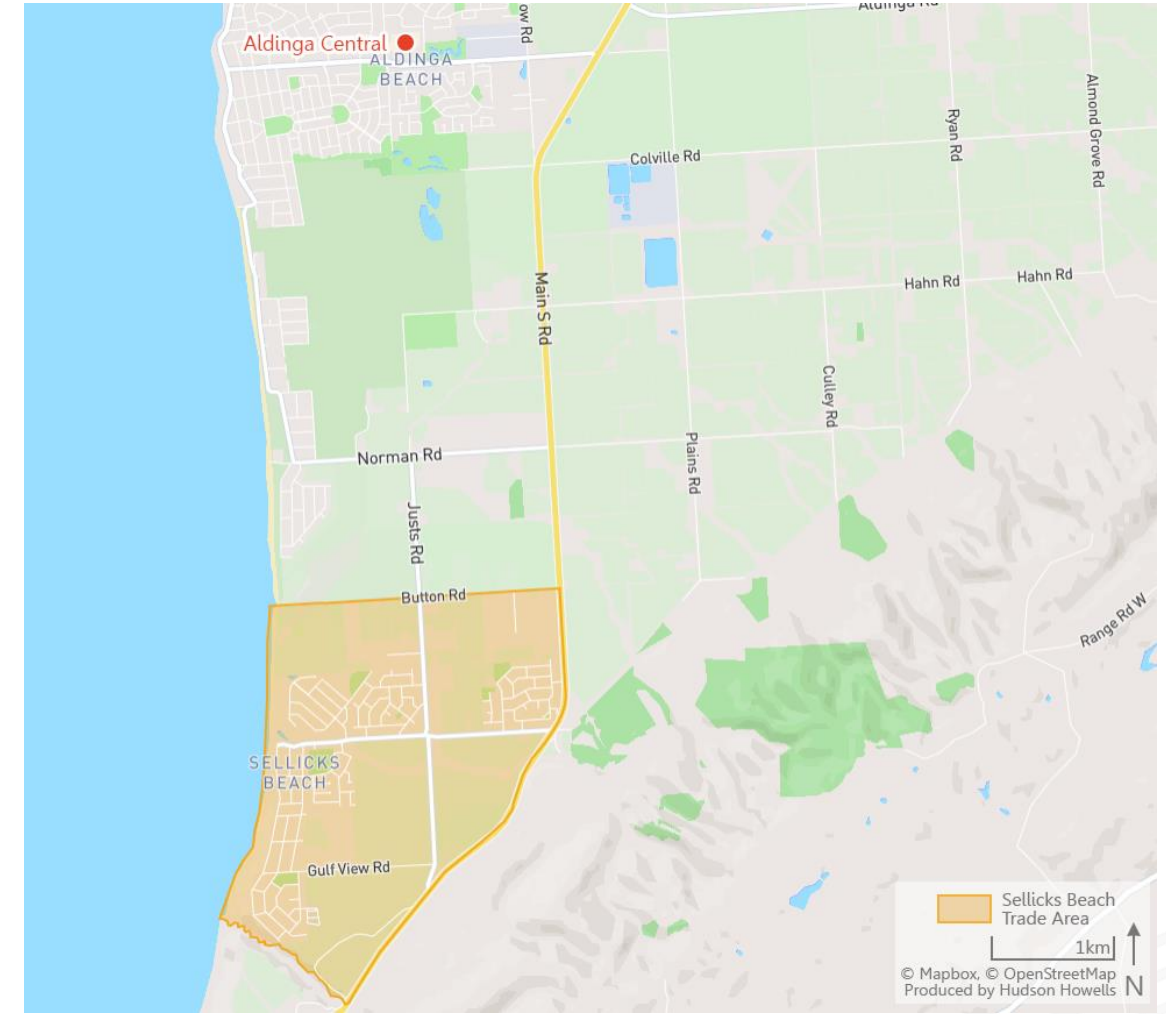
A number of key factors are taken into consideration when defining a potential catchment area for a neighbourhood retail centre, including:

- Type of development, in this case retail provision.
- Location of the development within a regional and local context, including ease of access and exposure.
- Proximity and attractiveness of existing and potential competitors.

Important considerations for defining a trade area for Sellicks Beach include the lack of urban development potential to the east and south due to current land uses and the natural topography of the area.

The catchment area for the following analysis has been defined based on a local catchment of the suburb itself, constrained by major retail competition in Aldinga to the north, and a topography to the east and south.

Map 4: Trade Area



Section 2: Trade Area Analysis

The following section details key characteristics of the Fleurieu Peninsula and potential catchment area, including:

- Historical and forecast population growth;
- Socio-economic profile; and
- Household goods retail spend.

We note that:

- Current population estimates are based on Estimated Resident Population (ERP) numbers.
- Demographic data are based on the usual resident population data from 2016 and 2021 ABS Census of Population and Housing.

The primary source of population forecasts in South Australia are population projections prepared by Planning SA. The most recent publically available forecasts, published in January 2024, are based on population estimates from the 2021 Census of Population and Housing. For this analysis, *medium series forecast growth rates have been applied to current 2021 ERP at the Statistical Area 2 (SA2) level.*

Trade Area Population - historical

Historically, the catchment area has experienced a limited increase in population, reflecting previous limitations for residential developments due to land zoning. More recently, there have been smaller residential developments and infill constructions.

Historically, population growth in the catchment area was comparable to growth within the Aldinga SA2 region in the five years to 2021 (+0.5% compared to 0.6% respectively). In comparison, population in the two years to 2023 was significantly stronger, with an average of 1.5% per annum, stronger than the Aldinga SA2 region over the same two years.

Current population data estimates a catchment area population of 2,800 people in 2023, or 17% of the Aldinga SA2 region.

Table 1: Historical Estimated Resident Population, 2016 - 2023

Region	Actual			Growth	
	2016	2021	2023	2016-21	2021-23
Sellicks Beach	2,658	2,723	2,807	0.5%	1.5%
Aldinga SA2	15,627	16,066	16,431	0.6%	1.1%
Onkaparinga LGA	169,372	176,595	180,865	0.8%	1.2%
Greater Adelaide	1,324,057	1,402,393	1,446,380	1.2%	1.6%

Source: .id (2023), Sellicks Beach ERP, 2017 to 2023; Australian Bureau of Statistics (2023), ERP by SA2 and above (ASGS Edition 3), 2001 onwards; Australian Bureau of Statistics (2023), ERP by LGA (2023), 2001 to 2023

Trade Area Population - forecast

Currently on the market, land within the ‘Sellicks’ development, a masterplanned land release of 42 allotments, is assumed to contribute an additional 100 people to the suburb by 2026.

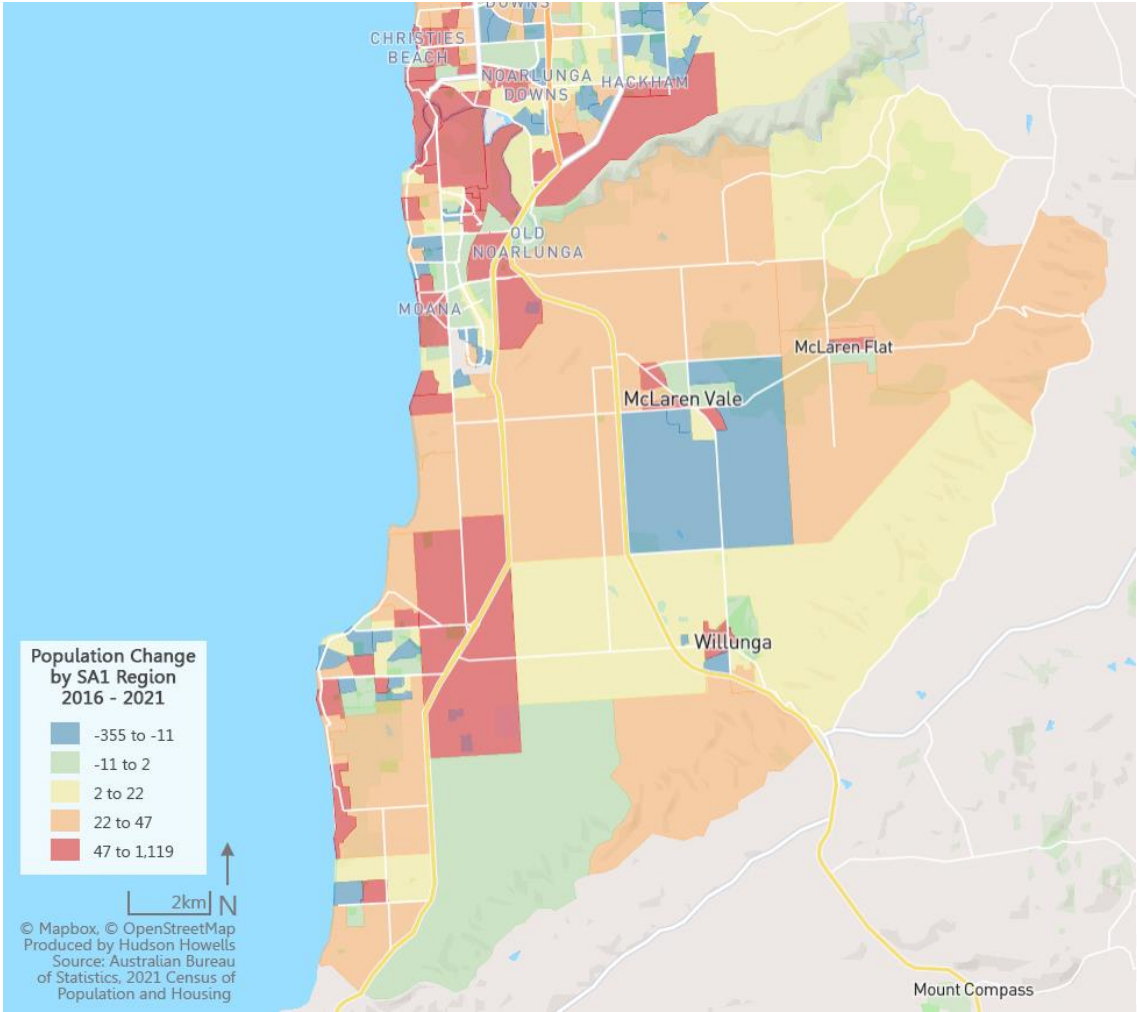
In 2023 the South Australian government introduced the ‘Better Housing Future plan’, which includes 1,700 new homes at Sellicks Beach. The process to rezone the land to residential has commenced allowing for the next stages of the release to accelerate, with on ground delivery commencing December 2029. Based on a total yield of 1,750 dwellings, and assuming construction of an average 120 dwellings per year from 2026 to 2041 and 2.4 people per household within the new dwellings, the catchment area is expected to experience significant growth over the 15 years to 2041 (av. +6.2% p.a.).

Table 2: Forecast Population, 2026 - 2041

Region	Forecast				Av. Annual Growth			
	2026	2031	2036	2041	2021-26	2026-31	2031-36	2036-41
Sellicks Beach	2,969	4,409	5,849	7,289	1.7%	8.2%	5.8%	4.5%
Aldinga SA2	17,377	18,286	19,377	20,303	1.6%	1.0%	1.2%	0.9%
Onkaparinga LGA	184,977	192,126	198,530	203,681	0.9%	0.8%	0.7%	0.5%
Greater Adelaide	1,492,169	1,568,291	1,639,396	1,705,864	1.2%	1.0%	0.9%	0.8%

Source: South Australian Department for Trade and Investment (2024), Population Projections for South Australian Local Government Areas, 2021-41, January 2024 release [Medium Series]; South Australian Department for Trade and Investment (2024), Population Projections for South Australian Statistical Areas (SA2), 2021-41, January 2024 release [Medium Series].

Map 5: Historical Population Growth by SA1 Region, 2016 - 2021



Sellicks Beach – Population & Households

The following points provide an overview of key population and dwelling characteristics of Sellicks Beach and Aldinga SA2 compared to the Greater Adelaide region (refer Table 3) :

- A comparable average age and dependency ratio in Sellicks Beach when compared to the Greater Adelaide region.
- Higher proportion of population aged 45-64 years when compared to both Aldinga SA2 and the Greater Adelaide region.
- Average weekly personal and household incomes reflect a greater proportion of lower-to-middle income earners within the regions. Although below the Greater Adelaide region average, average weekly incomes in Sellicks Beach increased between 2016 and 2021 (from -8.3% and -14.0% respectively in 2016).
- Family households and couple family without children reflect older established families and empty nester households.
- House ownership within the total catchment is above average in comparison to the Greater Adelaide average, with lower than average median mortgage repayments indicating a more affordable area.

Table 3: Socio-Economic Characteristics, 2021 (Population & Households)

Characteristic	Sellicks Beach	Aldinga SA2	Greater Adelaide
Population			
Average Age	41	40	39
Dependency Ratio ¹	35.1%	38.5%	35.8%
% Australian Born	72.3%	74.9%	68.7%
% aged 25-44 years	25.2%	24.1%	27.3%
% aged 45-64 years	29.3%	26.1%	24.8%
Median Weekly Income			
Personal income ²	\$745	\$674	\$762
Variation from Greater Adelaide	-2.2%	-11.5%	
Household income ³	\$1,424	\$1,317	\$1,548
Variation from Greater Adelaide	-8.0%	-14.9%	
Household Characteristics			
Number of Households	1,032	6,099	536,048
Average Household size	2.4	2.5	2.5
Family Households	73.2%	70.8%	68.6%
Couple family without children	42.1%	38.5%	38.7%
Owner/Purchaser	79.4%	72.1%	68.0%
Median mortgage repayments	\$1,391	\$1,400	\$1,562
Variation from Greater Adelaide	-10.9%	-10.4%	

1. Dependency Ratio refers to the proportion of the population aged 0-14 years and 65+ years.

2. Median total personal income is applicable to persons aged 15 years and over.

3. Median total household income is applicable to occupied private dwellings.

Source: Australian Bureau of Statistics, 2021 Census of Population and Housing - General Community Profile.

Sellicks Beach Demographics - Employment

The following points provide an overview of key employment characteristics of the regions' population within the Onkaparinga LGA compared to the Greater Adelaide region (refer Table 4) :

- Comparable proportion of residents employed and labour force participation in Sellicks Beach when compared to the Greater Adelaide region.
- Nearly one-third of Sellicks Beach residents are employed in blue collar occupations, with proximity to both the McLaren Vale wine region and key residential growth areas in the southern metropolitan area.
- A higher than average proportion of workers employed in the construction industry when compared to the Greater Adelaide region, with nearly 16.6% of the population aged 15 years or older working in construction compared to 8.7% respectively.

Table 4: Socio-Economic Characteristics, 2021 (Employment)

Characteristic	Sellicks Beach	Aldinga SA2	Greater Adelaide
Labour force			
% Employment to population ¹	58.5%	55.6%	58.4%
% Unemployment	5.8%	6.2%	5.8%
% Labour force participation ²	61.8%	59.1%	61.7%
Occupation			
Managers	9.4%	10.2%	12.3%
Professionals	16.2%	15.9%	24.0%
Technicians and trades workers	19.9%	17.6%	13.1%
Community and personal service workers	14.7%	15.5%	13.4%
Clerical and administrative workers	12.3%	12.0%	13.4%
Sales workers	7.9%	9.7%	8.6%
Machinery operators and drivers	7.1%	5.9%	5.6%
Labourers	12.5%	13.3%	9.5%
Industry - Top 5			
Health care and social assistance	16.9%	17.7%	17.7%
Construction	16.6%	13.0%	8.7%
Retail trade	9.2%	10.9%	10.0%
Education & training	7.6%	8.1%	9.3%
Manufacturing	6.8%	7.9%	7.0%

1. The number of employed persons expressed as a percentage of persons aged 15 years and over.

2. The number of persons in the labour force expressed as a percentage of persons aged 15 years and over.

Source: Australian Bureau of Statistics, 2021 Census of Population and Housing - General Community Profile.

Sellicks Beach - Dwellings

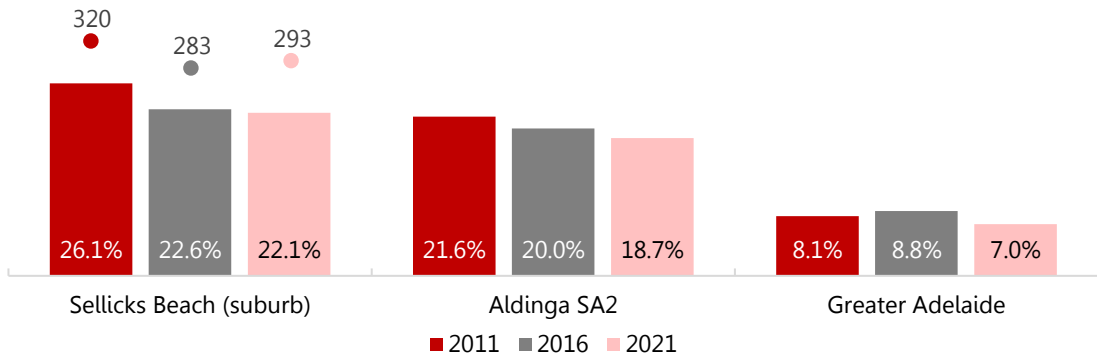
The following points provide an overview of key dwelling characteristics of Sellicks Beach and Aldinga SA2 compared to the Greater Adelaide region (refer Table 5 and Chart 1) :

- Nearly all dwellings within Sellicks Beach are separate housing types, with a higher proportion of medium density dwellings in Aldinga SA2.
- Reflecting the high proportion of separate housing types, over a third of dwellings were comprised of 4 or more bedrooms (34.5%) compared to 25.3% of dwellings in Greater Adelaide.
- Around 22% of private dwellings in Sellicks Beach were unoccupied on Census night, almost all separate houses, reflecting dwellings used as secondary residences or short-term holiday accommodation.
- Proportion of unoccupied private dwellings in Sellicks Beach has decreased over the ten years to 2021, dropping 4% from the high of 26.1% in 2011.
- The number of unoccupied private dwellings has decreased in the ten years to 2021, to 293 dwellings. An overview of the use of private dwellings for tourism accommodation in Sellicks Beach is provided in the next section.

Table 5: Socio-Economic Characteristics, 2021 (Dwellings)

Characteristic	Sellicks Beach	Aldinga SA2	Greater Adelaide
Dwelling Characteristics			
Dwelling Type ¹ :			
- Separate house	97.2%	91.2%	75.0%
- Semi-detached	1.6%	6.8%	16.3%
- Flat, unit or apartment	0.9%	0.6%	8.2%
4 or more bedrooms	34.5%	32.7%	25.3%
% Unoccupied Private Dwellings ²	22.1%	18.7%	7.0%

Chart 1: Changes in Unoccupied Private Dwellings, 2016 to 2021



1. Based on count of occupied private dwellings. Based on count of occupied private dwellings and does not include 'Dwelling structure not stated' category.

2. Based on count of unoccupied private dwellings on Census Night, including holiday homes/short-term accommodation.

Source: Australian Bureau of Statistics, 2021 Census of Population and Housing - General Community Profile.

Section 3: Tourist Accommodation

Sellicks Beach is situated in close proximity to popular tourist daytrip destinations, including Victor Harbor and the McLaren Vale wine region. Potential retail provision in Sellicks Beach can capitalize on the local tourist spend, though this has not been considered in the following analysis.

Tourist accommodation data has been sourced from AirDNA. AirDNA collects short-term vacation rental data from a variety of sources, creating a comprehensive view of the short-term rental market.

The following points provide an overview of short-term rentals in Sellicks Beach:

- As at July 2024, there were 93 short-term rentals within the suburb of Sellicks Beach.
- At the time of the 2021 Census there were 36 short-term rental listings in the suburb, 13% of the unoccupied dwellings counted in the Census (293 dwellings).
- The number of listings in Sellicks Beach is increasing and availability varies through the year, with available listings higher during the summer holiday period.
- Occupancy rates of short-term rentals is high during the summer holiday period, but the overall occupancy rate is trending down, indicating less demand for short-term accommodation within Sellicks Beach.

Chart 2: Sellicks Beach Number of Listings

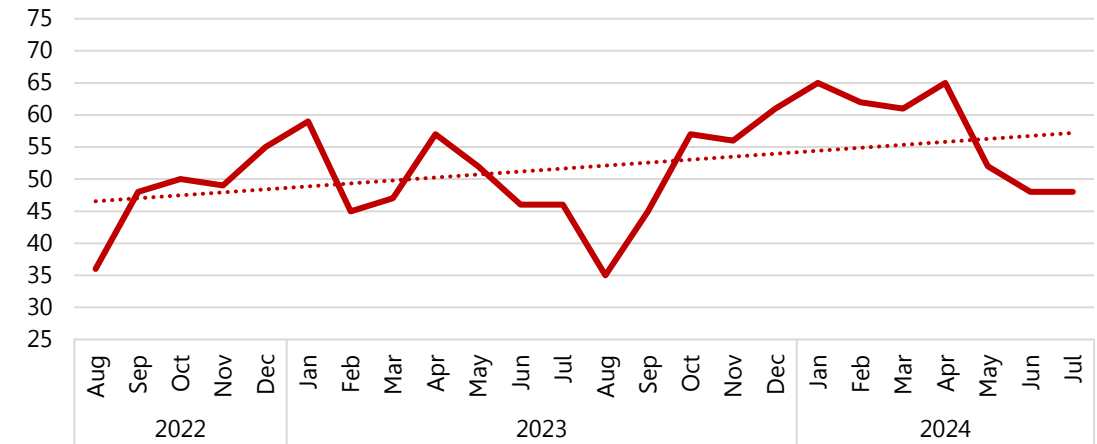
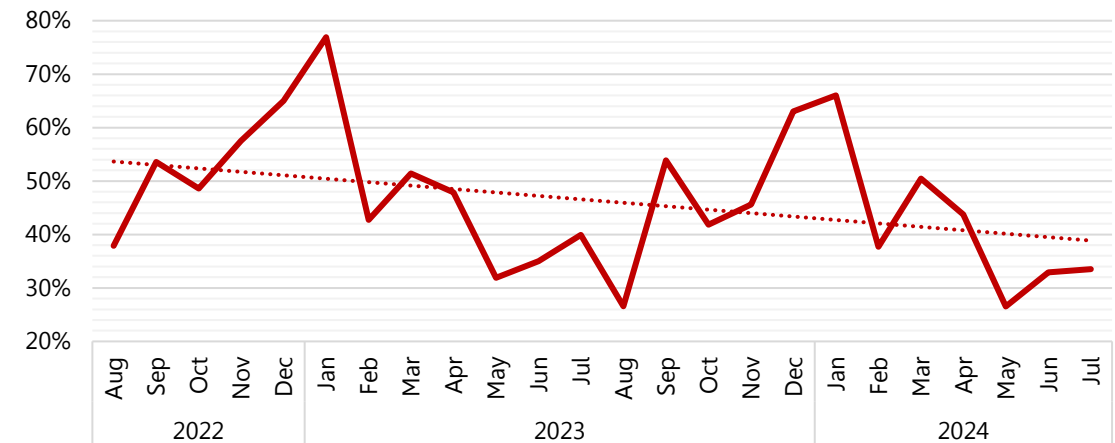


Chart 3: Sellicks Beach Occupancy Rate



Source: AirDNA

Section 4: Retail Structure

The hierarchy of centres within the southern metropolitan Adelaide region is identified on Map 6, and is as follows:

- Sub-Regional Centre – at least one full line discount department store, major supermarket/s, and specialty shops; Gross lettable area retail (GLAR) between 10,000 and 30,000 sq.m.
- Neighbourhood Centre – a supermarket and specialty shops; GLAR less than 10,000 sq.m.
- Local Centre – stand-alone supermarket with no additional retail provision.

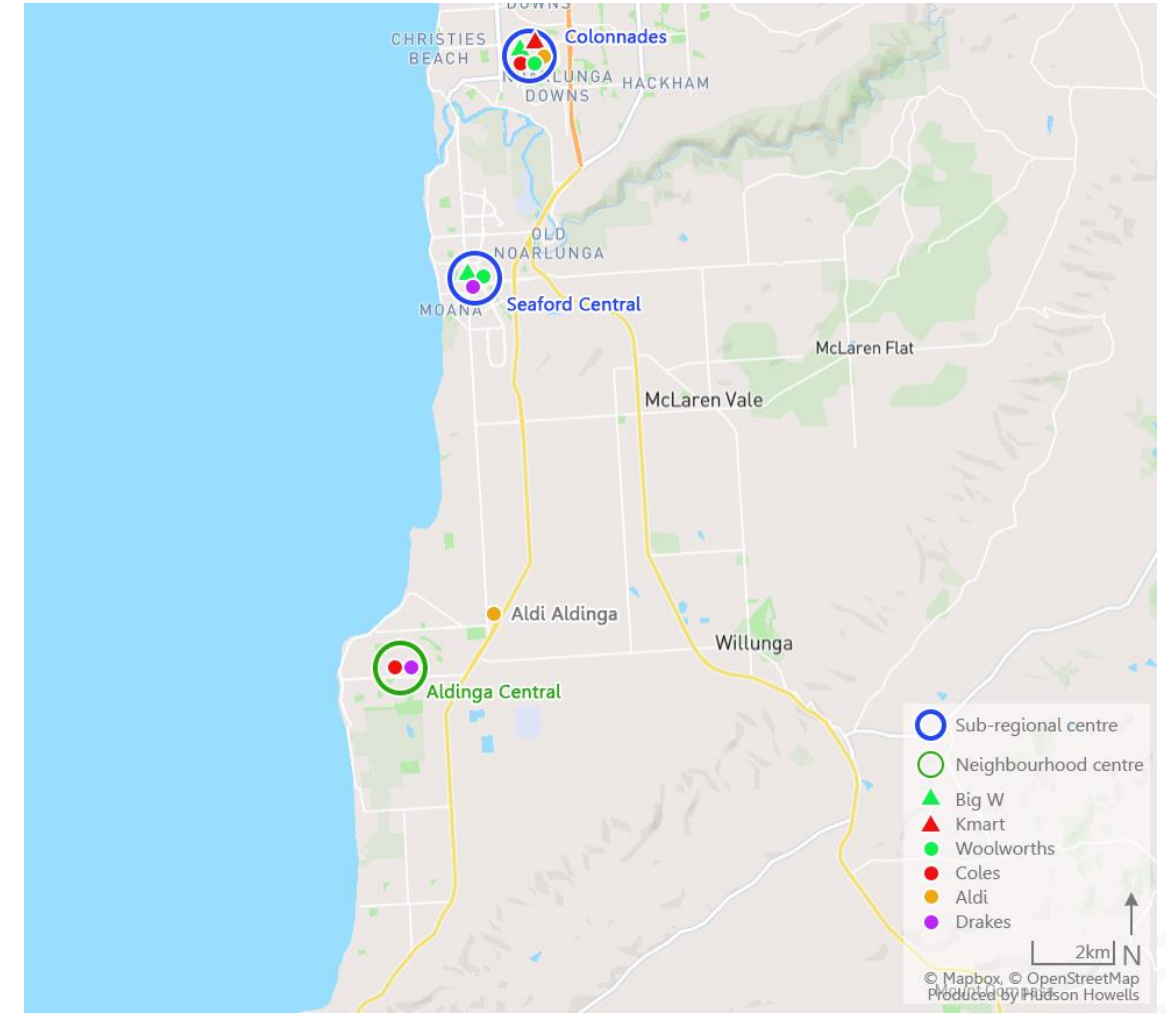
Retail centres of relevance to a neighbourhood centre in Sellicks Beach are outlined on the next page.

Each centre services a unique retail need in the community (e.g., top-up shopping at local centres; discount department store shopping at sub-regional centres).

Catchment area residents will also travel to undertake higher order shopping at Westfield Marion (super regional) or the Adelaide CBD.

Currently, the only retail floorspace within the suburb is 'The General at Sellicks', a small convenience offer located on Esplanade.

Map 6: Regional Hierarchy



Aldinga Central



Centre Type:	Neighbourhood
Major:	Coles, Drakes
Specialties:	40
GLA:	11,300 sq.m
Distance*:	8.5 km
Notes:	Current application to Council to extend existing Coles (staff areas and plantroom). Plans lodged for expansion in 2020 for potential Kmart.

Aldinga Aldi



Centre Type:	Local
Major:	Aldi
Specialties:	-
GLA:	1,517 sq.m
Distance*:	8.3 km
Notes:	

Seaford Central



Centre Type:	Sub-regional
Major:	Big W, Woolworths, Drakes
Specialties:	63
GLA:	21,659 sq.m
Distance*:	16.8 km
Notes:	

Colonnades



Centre Type:	Sub-regional
Major:	Big W, Kmart, Harris Scarfe, ALDI, Coles, Woolworths
Specialties:	115+
GLA:	86,241 sq.m
Distance*:	24.3 km
Notes:	Previously a regional centre, including Myer department store which closed end 2020.

* Distance by road from the centroid of Sellicks Beach. Source: Hudson Howells

Section 5: Retail Demand

In order to estimate the future market potential for retail floorspace within the catchment area, the total retail expenditure generated by residents within the catchment area needs to be assessed.

Current retail expenditure growth has been based on industry subsections of total retail turnover, with per capita retail spending growth calculations provided in Figure A.1 in the Appendix.

As shown in Table 6, real growth in per capita retail spending in South Australia was highest in non-food retail between 2016 and 2023 (+2.0%). Over the same period, there was an average annual increase in per capita expenditure on total retail of approximately 0.5% per annum, dampened by the decrease in food retail expenditure (-0.2%), caused in part by a decrease in supermarket/grocery store spending (-0.5%).

Taking both calculated average annual growth in per capita expenditure and 2016 average household expenditure into consideration, calculated total expenditure on food/non-food retailing within the catchment area in \$2023 is \$28.3m.

The methodology for calculating total expenditure market is provided in Figure A.2 in the Appendix.

Table 6: Per Capita Retail Expenditure (\$2023 as at June)

	Food	Non-food	Total F + NF Retail
South Australia Retail Trade, 2016-23			
\$2016 million			
- total	10,805.5	5,655.5	16,461.0
- per capita	6,309	3,302	9,610
2016 (\$2023) - per capita	8,107	3,653	11,759
\$2023			
- total	14,763.3	7,778.3	22,541.6
- per capita	7,970	4,199	12,170
Av. Annual Growth Rate (2016-23)	-0.2%	2.0%	0.5%
South Australia Av. Weekly Household Expenditure (\$), 2016-23			
\$2016 per household			
- per week	258.27	97.0	355.2
- per annum	13,476	5,060	18,536
2016 (\$2023) - per household per annum	17,492	5,458	22,950
Av. Annual Growth Rate (2016-23)	-0.2%	2.0%	0.5%
\$2023			
- per household per annum	17,317	6,530	23,847
Catchment Retail Expenditure			
- total catchment per household per annum	17,562	6,622	24,184
- total catchment area expenditure (\$m)	20.5	7.7	28.3
- per capita	7,318	2,759	10,077

Source: Australian Bureau of Statistics, Retail Trade, Australia, Cat. No. 8501.0 - Retail Turnover, State by Industry Subgroup, Original; Australian Bureau of Statistics, Consumer Price Index, Australia, Cat. No. 6401.0 - CPI: Groups, Index Numbers by Capital City; Australian Bureau of Statistics, Household Expenditure Survey, Australia, Cat. No. 6535.0 - Detailed Expenditure Items, 2015-16

Food/Non-Food Demand Forecast

Based on historical retail expenditure growth, future estimated retail expenditure on food/non-food generated by the defined catchment area to 2041 has been calculated based on the following assumed growth rates:

- Increasing average annual real expenditure growth:
 - > 1.0% food (though historical growth was low at -0.2%, annual growth averaged +1.3% between 2014 and 2023, with food spending variable between 2020 and 2023)
 - > 3.0% non-food (annual growth averaged +3.8% between 2014 and 2023, with annual growth in non-food spend reaching +8.0% in 2021 and 2023)
- Average annual population growth, based on official population forecasts, as shown in Table 2.

We note that the following forecast provided in Table 7 is in \$2023 – that is, it does not include inflation or account for potential fluctuations in economic cycles over this period (e.g., expected future slowing growth in CPI).

As shown in Table 6, total expenditure on total retail by catchment area residents is calculated at \$98.0 million in 2041, or around \$13,450 per capita.

Table 7: Catchment Area Expenditure, 2023-2041¹

	Food	Non-food	Total F + NF Retail
Per Capita Expenditure:			
2023 (\$)	7,318	2,759	10,077
2026 (\$)	7,539	3,015	10,554
2031 (\$)	7,924	3,495	11,419
2036 (\$)	8,328	4,052	12,380
2041 (\$)	8,753	4,697	13,450
Total Catchment Area Expenditure:			
2023 (\$m)	20.5	7.7	28.3
2026 (\$m)	22.4	9.0	31.3
2031 (\$m)	34.9	15.4	50.3
2036 (\$m)	48.7	23.7	72.4
2041 (\$m)	63.8	34.2	98.0

1. As at June.

Source: Australian Bureau of Statistics, Household Expenditure Survey, Australia, Cat. No. 6535.0 - Detailed Expenditure Items, 2015-16; Australian Bureau of Statistics, Consumer Price Index, Australia, Cat. No. 6401.0 - CPI: Groups, Index Numbers by Capital City; Australian Bureau of Statistics (2022), Population estimates by age and sex, by Statistical Area Level 2 (ASGS2021), 2001 to 2021, ABS Cat. No. 3235.0.

Supportable Retail Floorspace Per Capita

The following estimation assumes a retail floorspace per capita provision of 0.75 sq.m per capita for a neighbourhood centre in Sellicks Beach. This provision is appropriate for a retail centre located in Sellicks Beach due to the limited catchment population and competition to the north. As such, supportable retail floorspace within Sellicks Beach is estimated at 2,110 sq.m in 2023 (refer Table 8).

Based on population growth within the trade area (Table 2) and floorspace provision of 0.75 sq.m per capita, Table 9 and Chart 4 presents a ‘status quo’ scenario of forecast retail floorspace provision from 2023 to 2041.

Table 8: Trade Area Supportable Retail Floorspace (2023)

	Factor	Unit	Value
(1)	Catchment Area Population	No.	2,807
(2)	Floorspace Provision per capita	Sq.m	0.75
(3) = (1) * (2)	Sustainable Floorspace	Sq.m	2,110

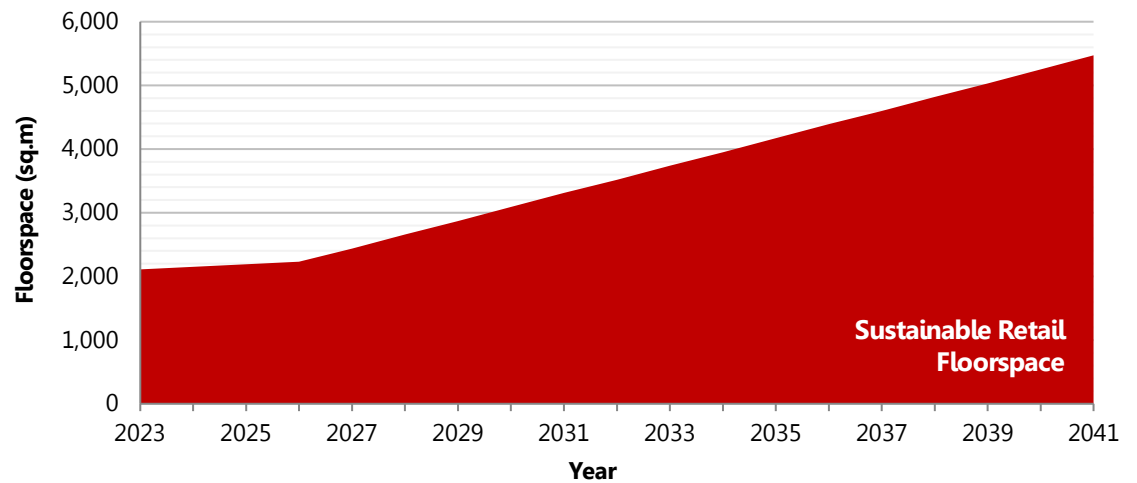
Source: Hudson Howells

Table 9: Forecast Trade Area Supportable Retail Floorspace (2023 - 2041)

	2023	2026	2031	2036	2041
Trade Area Population	2,807	2,969	4,409	5,849	7,289
Retail Floorspace provision per capita (sq.m)	0.75	0.75	0.75	0.75	0.75
Sustainable Retail Floorspace	2,110	2,230	3,310	4,390	5,470

Source: Hudson Howells

Chart 4: Forecast Trade Area Supportable Retail Floorspace (2023 - 2041)



Source: Hudson Howells

Section 6: Retail Turnover and Market Potential

Table 10 presents a ‘status quo’ scenario of forecast retail market potential from 2023 to 2041, based on the following inputs:

- Sustainable retail floorspace, as outlined in Table 9 (directed 60% to food and 40% to non-food)
- Trading performance assumption of \$7,200/sq.m for food and \$3,400/sq.m for non-food in 2023. Food retail performance has been calculated to increase by 0.5% per annum by 2041, and non-food retail trading levels calculated to increase by 1.0% per annum to 2041.

Table 10: Trade Area Retail Market Potential (2023 - 2041)

	2023	2026	2031	2036	2041
Sustainable retail floorspace (sq.m) - food	1,266	1,338	1,986	2,634	3,282
- non-food	844	892	1,324	1,756	2,188
Trading level (\$ per sq.m) - food	7,200	7,309	7,493	7,682	7,876
- non-food	3,400	3,503	3,682	3,870	4,067
- total retail	5,680	5,786	5,969	6,157	6,353
Forecast retail market potential (\$m)	12.0	12.9	19.8	27.0	34.7

Source: Hudson Howells

Limitations within the Structure Plan

As noted in the ‘Sellicks Beach Structure Plan’ :

Sellicks Beach does not currently support more than a small level of retail expenditure. With a potential increased population, the Structure Plan identifies a preferred location for a new mixed-use centre within the Sellicks Beach Road/Justs Road quadrant. Two alternative locations are possible either on the northern or southern side of Sellicks Beach Road.

A new centre should address the following criteria:

- Contain a complementary level of supermarket shopping and specialty outlets to support local needs (acknowledging that higher order centres are located nearby at Aldinga and Seaford).

Large format and bulky goods retailing are not considered necessary in this location

The likely land area for a new centre is anticipated to be less than 1.5 hectares.

Conclusion

A neighbourhood centre located within the Sellicks Beach Road/Justs Road quadrant in Sellicks Beach could include the following:

- A medium sized supermarket, most likely an independent operation, of approximately 1,500 sq.m.
- A small provision of supporting specialty retail operators, including uses such as café/bakery, fresh produce, and takeaway.
- Potentially a small number of other convenience retail uses (e.g., hairdresser, optometry, small newsagency).
- Supportable non-retail uses could be considered, likely a medical centre, childcare, gym and community centre.

The total land requirement for the centre would therefore be around 1.5 hectares.

Appendix

Appendix

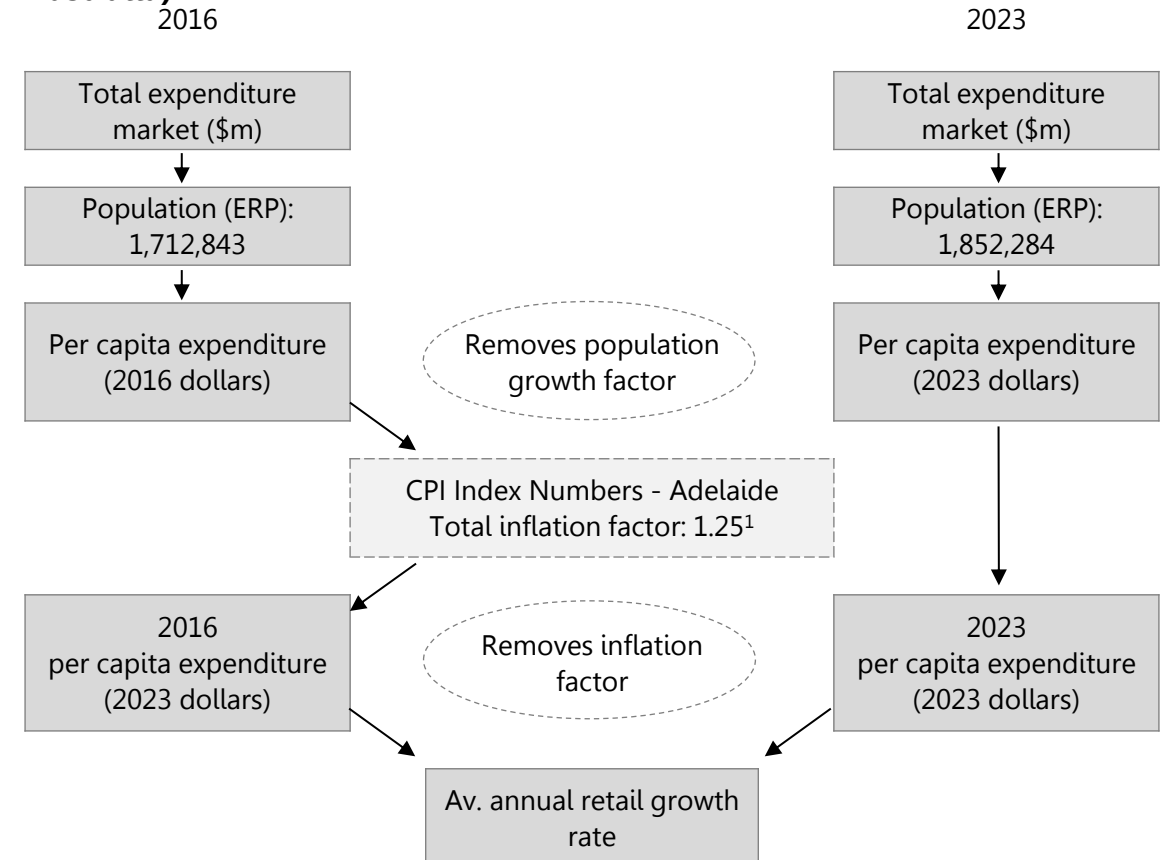
Table A.1: HES Expenditure Group Categories – Food/Non-Food Retailing

Expenditure Group	Subcategory	\$2016
Food Retail	Food and non-alcoholic beverages ¹	
	Tobacco products	166.14
	Household Durables	
Food Catering	Meals out and fast foods	65.26
Liquor	Alcoholic beverages	<u>\$26.87</u>
Total Av. Weekly Food Expenditure		\$258.27
Clothing & Accessories	Clothing	
	Footwear	\$36.30
Department Store	Books, newspapers, magazines and other printed material	
	Other recreational and educational equipment	\$18.84
Other Retailing	Clothing and footwear services	
	Personal care	
	Stationery equipment	<u>\$41.83</u>
	Other miscellaneous goods	
Total Av. Weekly Non-food Expenditure		\$99.97
Total Av. Weekly Food/Non-Food Retail Expenditure		\$355.24

1. Excluding 'Meals out and fast foods'.

Source: Australian Bureau of Statistics, Household Expenditure Survey, Australia, Cat. No. 6535.0 - Detailed Expenditure Items, 2015-16.

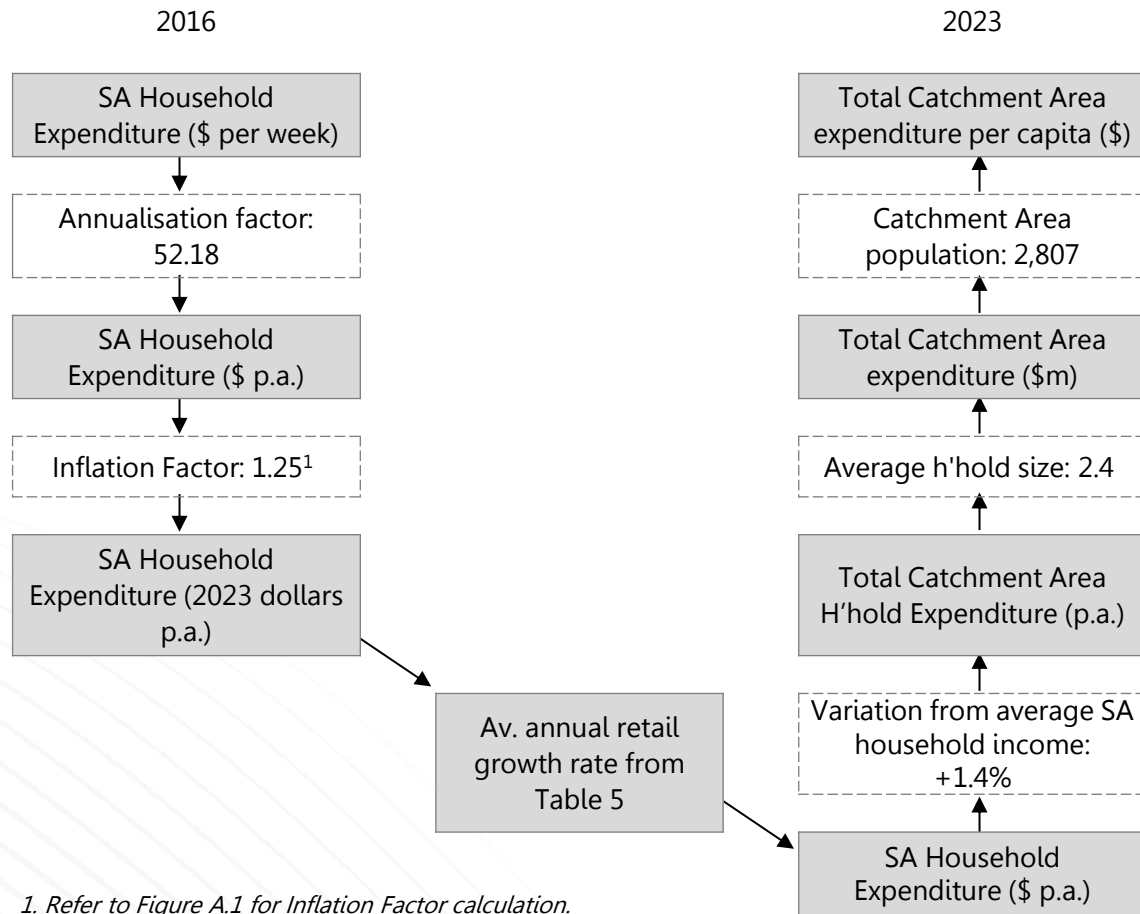
Figure A.1 - Average per capita expenditure growth calculation (South Australia)



1. Inflation factors based on inflation index numbers for 'Food and non-alcoholic beverages' (1.27), 'Alcohol and tobacco' (1.54), 'Clothing and footwear' (0.95), and 'All groups' (1.25)

Appendix

Figure A.2 – Estimated Total Expenditure Market for Catchment Area



1. Refer to Figure A.1 for Inflation Factor calculation.

Calculation of Catchment Area Retail Expenditure (Figure A.2)

- Annual retail expenditure in South Australia in 2015/16 of approximately \$16,460 million;
- An increase in CPI between June 2016 and June 2023 of 24.6%, or an average 3.2% per annum;
- Real growth in turnover in the industry subgroups between +5.3% and -0.5% in South Australia (total retail = 0.5%) over the period June 2016 to June 2023;
- Difference in estimated average household income of approximately +1.4% between the catchment area and South Australian average in 2023; and
- An average household size of 2.4 people and ERP population of 2,807 people (as at June 2023) within the catchment area.

