Korumburra Town Centre Framework Plan

Economic Assessment

For Hansen Partnership and South Gippsland Shire Council

Tim Nott

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Note

The assessment in this report has relied on consultant estimates and forecasts as well as on primary and secondary data from a variety of Government and commercial sources. In parts, the analysis has relied on reasonable assumptions. However the reader should bear in mind that there is no certainty in predicting the future.

Front cover pictures: Hansen Partnership

Economic Assessment

For Hansen Partnership and South Gippsland Shire Council

1 Introduction

Korumburra Town Centre serves as the main activity centre for the township of Korumburra and the surrounding district. It has previously been the subject of a substantial planning effort in order to ensure that development will create the strongest and most sustainable service to local residents. This has included debate about the most appropriate location for a new supermarket. South Gippsland Shire Council has now determined to prepare a Framework Plan to guide future development of the centre. Council has engaged a team led by planners Hansen Partnership to prepare the Framework Plan.

As part of the present planning process the project team is keen to understand the economic drivers of the centre and the future potential for retail and other development in the town centre. Accordingly, this economic assessment report has been commissioned as an input to the planning process.

The report has been prepared by economic geographer Tim Nott. The report concentrates on the retail function of the centre, since this is the largest and most dynamic of the economic activities present. However, the non-retail activities are not ignored and are described, albeit at a lower level of detail. The method of analysis is as follows:

- Identify the existing activities and the building floorspace devoted to each
- Estimate the retail sales using the floorspace and an estimate of sales per square metre derived from a variety of industry and statistical sources
- Identify the retail catchment of the centre, with reference to surrounding centres
- Estimate the demand for retail goods and services from this catchment using a variety of statistical sources
- Identify the balance between supply and demand for retail goods and services in the Korumburra catchment, taking into account sales to visitors, and review the “escape spending”
- Use the existing Council population forecasts to determine the likely future population of the retail catchment
- Identify any likely growth in retail demand from trends in the catchment and trends in retail provision more generally; and identify how this could be accommodated within the centre given existing policies
- Review the non-retail activities and how these may grow into the future

A summary of findings and recommended actions for the framework plan are provided at the end of the report.

The information and analysis in this report builds on previous work, including the Korumburra Retail Assessment undertaken in 2007 (Tim Nott, 2007). However, the passage of time and better information about spending and retail sales patterns means that the earlier assessment has now been superseded.

2 Korumburra Town Centre

2.1 Description

Korumburra is a rural service centre in South Gippsland with a growing commuter population. The town originally developed to provide workers for the nearby black coal mine and the local dairy industry. However, the coal mine closed in 1958 and the town's economy is now reliant on food processing, small-scale tourism, and servicing the urban and rural population.

The town centre study area is illustrated below.

Figure 1. **Korumburra Town Centre Study Area**

The description of the town centre provided in an earlier report is still fairly apt:

> *The business centre of the town has developed over time along the main South Gippsland Highway. The centre provides the main shopping facilities for the town and surrounding district and also accommodates a selection of professional and community services.*
>
> *The centre can be thought of as comprising several precincts:*
>
> - *Commercial Street/Bridge Street is the retail and commercial core of the town centre, comprising a strip-shopping and services centre (with car-yards and auto repair businesses on the western periphery)*
> - *South Railway Crescent is the supermarket precinct, comprising a purpose-built supermarket, associated shops and car-parking*
> - *Mine Road provides a less active business precinct comprising secondary retailing, services and small scale manufacturing*
>
> *Further industrial activity is located to the west of the town centre in a purpose-built business park. Several industrial enterprises are also located on the South Gippsland Highway to the east of the town centre.*
>
> *The extent and form of the centre reflects a level and style of economic activity that no longer exists, developed when the town was crowded with miners, farmers and railway workers, and the commercial centre ran parallel to the important rail connection. Mine Road, in particular, is only sparsely occupied with remaining economic activities as the mineworkers no longer walk to work along this route. In addition, the topography of the centre, built high on a ridge, has made it difficult to find space for the larger scale retail developments that have become generally more prevalent over the past 30 years. The search for flat land has led to the development of a supermarket that is slightly out-of-centre, effectively splitting the functions of the centre between a comparison retail and service precinct (Commercial Road/Bridge St) and a convenience retail precinct (the supermarket in South Railway Crescent).*
>
> *This split has reduced the capacity of the shopping centre to capture retail expenditure. The supermarket has a separate car-park to the remainder of the centre. Whilst there is some pedestrian traffic between the two parts of the centre, it is likely that if the comparison and convenience retail functions were co-located, more shoppers would undertake both kinds of shopping in a single trip, improving the viability of the smaller shops in particular.*
>
> Source: Tim Nott, 2007

2.2 Activity

A survey of activity was undertaken for this project in March 2013. The results of this are provided below.

Table 1: Estimated floorspace of activities at Korumburra Town Centre, March 2013

Use	Premises	Floorspace	
	No	sq m	%
Supermarkets and grocery stores	2	1,508	16%
Specialty food	2	172	2%
Clothing	5	867	9%
Homeware and hardware	7	1,559	16%
Recreational goods	5	662	7%
Other retail	9	1,332	14%
Cafés, restaurants and takeaway food	13	2,680	28%
Retail services	6	672	7%
Total retailing	49	9,451	100%
Retailing	49	9,451	45%
Manufacturing	0	0	0%
Trade supplies	4	1,840	9%
Communications	1	172	1%
Hotels and clubs	3	1,447	7%
Finance and insurance	6	1,244	6%
Business and professional services	14	1,919	9%
Education	2	420	2%
Health and community services	8	1,313	6%
Cultural and recreational services	2	1,110	5%
Automotive	6	2,164	10%
Other services	2	152	1%
vacant	7	928	4%
All activities	97	21,231	100%

Source: Tim Nott; Council records

Notes: The survey was a visual inspection of each premises to determine the activity, with floorspace figures from Council property records. The survey area includes the entire Business 1 Zone from the corner of King Street and Commercial Street to the corner of Mine Road and John Street as well as the Mixed Use Zone on Mine Road. The study area for this project only includes the Business 1 Zone but the survey area was extended in order to allow direct comparison with an earlier survey (see next sub-section). Approximately 15% of the activity space counted in the table above is therefore outside the study area. This was mainly non-retail activities.

The centre has approximately 21,200 sq m of activity space, of which 9,500 sq m (47%) is devoted to retailing. Other significant activity generators are automotive services (petrol stations, tyre sales and auto repairs), business services (including lawyers and accountants), trade supplies (wholesale activities) and hotels and clubs, health and community services, finance and insurance (including banks), and cultural and recreational services (including the library and masonic hall).

Based on the floorspace, the centre accommodates approximately 600 full and part-time jobs, making it a key employment node for the Shire.

2.3 Recent Change

A survey of the centre was conducted in 2007 as part of the Korumburra Retail Assessment. It is instructive to compare the activity profile in 2007 with the current profile, as shown below.

Table 2: Korumburra Town Centre - comparison of activity in 2007 and 2013

Use	2007		2013		Change 2007 to 2013	
	Premises	Floorspace	Premises	Floorspace	Premises	Floorspace
Supermarkets and grocery stores	2	1,225	2	1,508	0	282
Specialty food	8	1,041	2	172	-6	-869
Clothing	5	823	5	867	0	44
Homeware and hardware	9	1,833	7	1,559	-2	-273
Recreational goods	5	662	5	662	0	0
Other retail	7	1,246	9	1,332	2	86
Cafés, restaurants and takeaway food	7	1,239	13	2,680	6	1,441
Retail services	5	437	6	672	1	234
Total retailing	48	8,505	49	9,451	1	946
Manufacturing	1	150			-1	-150
Trade supplies	3	1,722	4	1,840	1	118
Communications	1	172	1	172	0	0
Hotels and clubs	3	1,447	3	1,447	0	0
Finance and insurance	8	1,413	6	1,244	-2	-169
Business and professional services	11	1,676	14	1,919	3	243
Education	2	420	2	420	0	0
Health and community services	6	1,223	8	1,313	2	90
Cultural and recreational services	2	1,110	2	1,110	0	0
Automotive	9	2,558	6	2,164	-3	-394
Other services	4	320	2	152	-2	-168
vacant	11	1,034	7	928	-4	-106
All activities	98	20,715	97	21,231	-1	516

Source: Tim Nott

Notable changes over the six year period include:

- Substantial growth in the floorspace devoted to cafés, restaurants and take-away food with a net addition of six premises
- Growth in the size of the supermarket, as it took over adjacent shop units in South Railway Crescent
- Decline in the space devoted to specialty food (although this was mostly a category change - bakeries became cafés, bottle shops became part of the supermarket, and so on)

- Growth in business and professional services (mainly real estate agents)
- Automotive activities declined as the two car-yards in the town centre closed down

Vacant space (overwhelmingly shop-front space) declined only slightly over the six years from around 12% of retail space in 2007 to 10% in 2013.

Overall, many of the shops in the centre remain the same, although there has been a notable growth in the provision of food service (catering to the needs of visitors as well as residents) and no real growth in the food and grocery provision of the centre (catering mainly to residents).

2.4 Views of Traders

As part of the consultation for this project, business operators in the Korumburra town centre (and surrounds) were asked their opinions about the town centre and its economic prospects via a survey. Fourteen respondents completed the survey. Their responses can be summarised as follows:

- Some growth in the centre was expected. Whilst most firms expected to stay the same, more firms were expecting to employ more people over the next two years compared with firms that were expecting to employ fewer people. Similarly, more firms were expecting to increase their floorspace over the next two years than were expecting to decrease it. Overall, respondents had a “moderate” expectation for business prospects in the town centre.
- Most businesses were not intending to move or close in the next two years. Of those that were expecting to move, most were likely to remain within Korumburra.
- Key barriers to business growth were seen as:
  - Poor market conditions (e.g. poor returns in the dairy industry)
  - Poor amenity of available business space in the centre
  - Not sufficient people in the town centre because of a lack of key attractors (e.g. supermarket)
- Finding a car-parking space was nominated as the most significant barrier in terms of accessing the centre. However, no respondents nominated additional car-parking as their key priority. There was recognition that car parking in Little Commercial Street was probably adequate but that access to it was poor. (This issue was nominated as the single most important improvement to access and circulation in the centre).
- When asked to nominate additional services or facilities in the town centre, respondents suggested:
  - Improved bicycle parking and access
  - A town bus and improved taxi services
  - New shops, especially a supermarket
  - Local craft and produce outlets
  - An outdoor fitness trail
  - Improved signage and seating
  - Easy access business support services (including training and meeting spaces)
- The visual appearance of Commercial Street and, to a lesser extent, Little Commercial Street were seen as very important to the business prospects of respondents and the success of the centre as a whole.

Clearly, business respondents were keen to see improvements in the appearance and function of the centre and in the quality of the business space available.

2.5 Retail Sales

By estimating the average sales per square metre of retail floorspace in different categories, and knowing the total floorspace in each category, it is possible to make an estimate of retail sales at the centre. These estimates are provided in the following table. The retail turnover density, that is, sales per square metre, has been estimated from a variety of statistical and industry sources. These figures take into account the location of the centre and the nature of the shops in each category.

[The sales estimates are based on *average* figures for their category and for the types of shops involved; it may be that some shops are trading well above the average for their category. If this were true of the supermarket, for example, the sales for the food and groceries category and for the centre as a whole would be under-estimated. Nevertheless, it is important for the subsequent analysis that average figures are used in order to understand the potential for growth. Using higher figures would under-estimate the development potential and could entrench a situation in which one retailer was able to derive higher than average returns at the expense of competition in the centre.]

Table 3: Estimate of retail sales, Korumburra town centre, 2012

Activity	Floorspace	Retail turnover density	Sales	
	sq m	$/sq m	$m	
Food and groceries	1,680	$7,800	$13.1	27%
Non-food goods	4,420	$4,800	$21.2	43%
Food service	2,680	$4,500	$12.1	25%
Retail services	672	$3,800	$2.6	5%
Total	9,451	$5,200	$48.9	100%

Source: Tim Nott

In total, the retail sales at the centre are estimated to be approximately $49 million in 2012. (This compares with an estimate of $41 million in 2007.)

Most of these sales are derived from Korumburra and surrounding district. This trade area is examined in the following section.

For the purposes of this report, retail activity comprises the following categories:

Food and groceries – supermarkets, general stores, liquor outlets, specialty food outlets (butchers, bakers, greengrocers etc)

Non-food goods, comprising

- **Clothing** – clothes, shoes, manchester
- **Household goods** – homeware, hardware, furniture, floor coverings, curtains and blinds, electronic goods etc
- **Recreational goods** - sporting goods, toys, bookshops, newsagents
- **Other goods** –, chemists, florists, jewellers, second hand goods etc

Food service – cafes, restaurants and take-away food outlets

Retail services – hairdressers, beauty parlours, video rental, clothing and household goods repairs

3 The Retail Trade Area

3.1 The Extent of the Trade Area

The trade area of an activity centre is the area from which it gets most of its sales; the area from which residents naturally visit the centre to obtain particular goods and services. At the boundary of the trade area, residents may choose from two or more centres that provide equivalent services. The extent of a trade area is influenced mainly by the location of competing centres and the travel patterns of residents. The precise boundaries are usually set by the analyst to coincide with convenient statistical areas.

In this case, the trade area has been set with reference to the location of surrounding centres, and following previous reports. The trade area is taken to be the Korumburra SA2 statistical area, illustrated at Figure 2.

Surrounding centres include:

- Leongatha town centre
- Wonthaggi town centre
- Cranbourne
- Warragul
- Moe

All of these centres have supermarkets and compete with Korumburra town centre for the spending of local residents on food and groceries and convenience items. These larger centres also compete strongly in non-food segments such as clothing, homewares and recreational goods (each of the main surrounding centres except Leongatha has a discount department store).

Figure 2. **Trade area of Korumburra town centre**

Source: www.abs.gov.au

3.2 Trade Area Population

The trade area population is estimated to be 8,900 in 2012.

This figure is based on figures from the ABS (2012) and .id consulting (2012).

The area has grown at approximately 0.9% per year over the period from 2001 to the 2012, largely through settlement by commuters on the outskirts of Korumburra and in the small town of Nyora to the west.

Selected characteristics of the trade area population are provided in the table below.

Table 4: Selected population characteristics, Korumburra trade area, 2011

Area	Census population	Median Age	Average household size	Median household income	Comparison of household income with Victoria
	No.	Years	Persons per household	$ per week	%
Korumburra trade area	8,744	42	2.5	$969	80%
South Gippsland Shire	27,208	44	2.4	$920	76%
Country Victoria	1,345,715	41	2.4	$945	78%
Victoria	5,354,042	37	2.6	$1,216	100%

Source: ABS, 2012a

Whilst there are variations across the Korumburra trade area, on average, the area is older, with slightly fewer people per household and with significantly lower household incomes than for Victoria as a whole. However, compared with the South Gippsland Shire and Country Victoria, the area has slightly higher household incomes.

3.3 Retail Spending

Retail spending per person has been estimated here with reference to a variety of sources including:

- Market Info, a proprietary data-base that estimates retail spending by the population of small areas using a wide variety of socio-economic variables from the Census of Population and Housing (2006) applied to data from the Household Expenditure Survey and National Accounts figures (MDS Market Data Systems, 2006)
- Retail Trade Australia, produced by the ABS to track, amongst other things, retail turnover (ABS, 2012b)
- Household income data from the Census of Population and Housing, 2011 (ABS, 2012a)

The estimate of spending per person is shown in the table below, along with the total spending by trade area residents (using the trade area population figure estimated earlier – 8,900).

Table 5: Estimate of annual retail spending, Korumburra Trade area, 2012

Retail activity	Retail spending per person		Total retail spending by trade area residents	Retail spending in shops	
	Country Victoria	Korumburra trade area			
	$	$	$m	% of total spending	$m
Food and groceries	$5,500	$5,500	$48.9	99%	$48.4
Non-food goods	$5,300	$5,500	$48.9	94%	$46.0
Food service	$1,300	$1,300	$11.6	99%	$11.5
Retail services	$400	$400	$3.6	80%	$2.8
Total retail spending	$12,500	$12,700	$113.0	96%	$108.7

Source: Tim Nott

Note: "Retail spending in shops" takes account of online sales (see later in this report for a discussion of online sales)

Total retail spending by trade area residents is estimated at $113 million in 2012, with around $109 million being spent in shops.

4 Balance of Retail Supply and Demand

The following table provides an estimate of the balance between supply and demand in the Korumburra trade area. In making the calculation, the share of retail sales at Korumburra made to visitors (that is, people who live outside the trade area) is estimated with reference to similar centres elsewhere.

Table 6: Retail Escape Spending, Korumburra town centre, 2012

Retail activity	Retail sales	Share of sales to visitors	Spending by visitors	Sales to residents	Total spending by residents	Escape spending	
	$m	%	$m	$m	$m	$m	%
Food and groceries	$13.1	10%	$1.3	$11.8	$48.4	$36.7	76%
Non-food goods	$21.2	20%	$4.2	$17.0	$46.0	$29.0	63%
Food service	$12.1	40%	$4.8	$7.2	$11.5	$4.2	37%
Retail services	$2.6	10%	$0.3	$2.3	$2.8	$0.6	19%
Total	$48.93	22%	$10.6	$38.3	$108.7	$70.45	65%

Source: Tim Nott

This table provides an estimate of escape spending of 65%; that is, the shops in Korumburra town centre capture 35% of the spending of their trade area. This figure is rather low for a country town centre with a catchment of nearly 9,000 people. In particular, the capture of spending on food and groceries is low because of the rather small supermarket in the centre and the lack of specialist food shops. A more normal capture rate in food and groceries for centres of this size would be 60% to 70%. On the other hand, the centre does capture a relatively high proportion of spending on food service (cafés, restaurants and take-away food outlets). The high provision of these outlets services the needs of residents as well as visitors.

A little of the “escape spending” flows to the small local centres within the trade area, including Loch, Poowong and Nyora. However, the majority flows to larger centres which have full line supermarkets and a broader range of non-food goods. Leongatha is likely to be the preferred destination for food shopping because of its relative proximity and the presence of several larger supermarkets.

5 Factors Affecting Future Retail Development

The future demand for retailing at Korumburra town centre will be driven by a wide range of factors including:

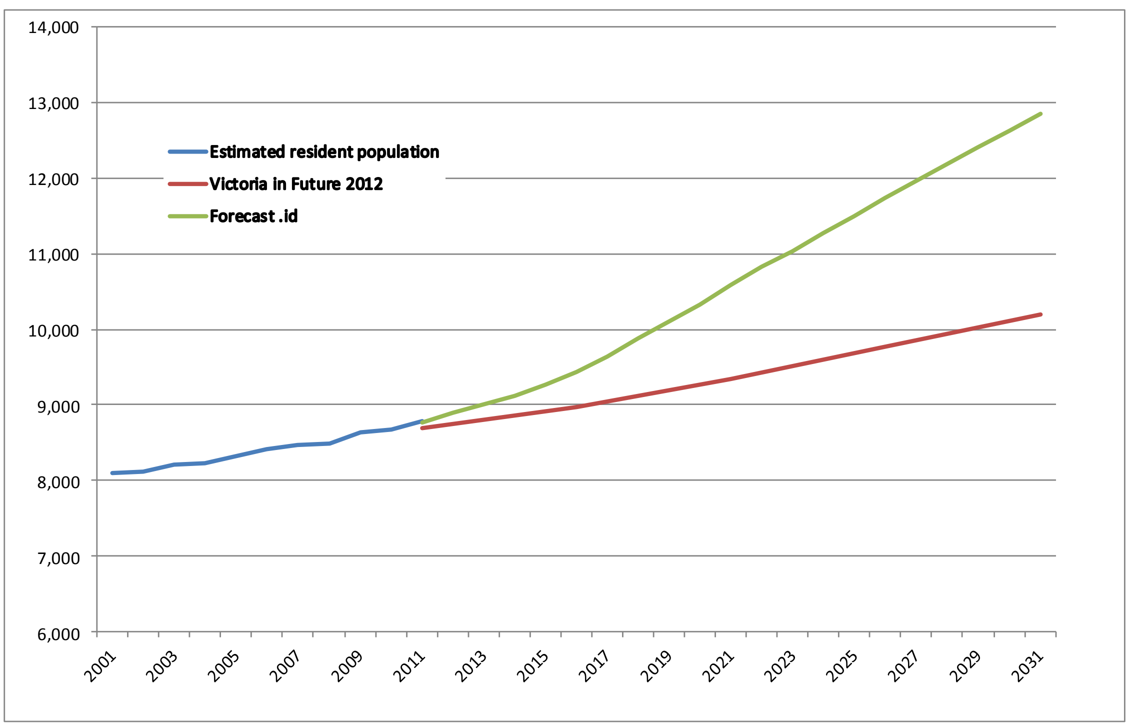
- General economic conditions (that is, retail demand will vary according to the business cycle)
- Changes in the number of people in the trade area and the level and type of their retail spending
- Changes in retail industry organisation such as the growth of internet shopping
- Competition from other centres in the surrounding activity centre network
- Policy requirements of Council and State Government
- Capacity of the town centre to accommodate growth and change

Several of these factors are examined here.

5.1 Forecast Population Growth in the Trade area

Municipal population forecasts have been undertaken for Council by .id consulting, including forecasts by sections of the Shire. In addition, State Government has recently undertaken small area population projections (DPCD, Victoria in Future, 2012). These are compared in the chart below.

Figure 3. **Population change in the Korumburra trade area, 2001 to 2031**



Source: ABS, 2012; forecast .id, 2012; DPCD, 2012; Tim Nott

Note: The areas used in Forecast .id do not correspond precisely to the Korumburra trade area. Population figures have therefore been estimated from component areas.

The chart demonstrates a significant difference between the latest projections by DPCD and the forecasts by .id consulting. By 2031, the population predicted by .id consulting is around 26% higher than that projected by DPCD. Council has preferred the predictions of .id consulting because these forecasts take into account the significant residential development areas that are about to be released:

- In south west Korumburra as a result of implementation of the township structure plan
- In Loch, Poowong and, especially, Nyora as these small townships are sewered with expected growth to accommodate an influx of commuters and retirees (and this will be after 2018, when the sewer schemes are destined to come on line)

Whilst the .id consulting forecasts are used here, the reader should bear in mind the potential for significantly different population outcomes. Continual monitoring of this factor is required to ensure that Council strategies remain current.

For the purposes of this assessment then, the population of the Korumburra trade area is forecast to be:

- **10, 590 in 2021**
- **12,860 in 2031, growing by 3,960 over the period from 2012.**

5.2 Future Retail Spending

Future retail demand can be calculated using the forecast population and average retail spending per person. The calculation in the following table assumes that retail spending per person will grow by 1% per year on average in real terms over the period to 2031. This reflects past growth trends in retail spending over several economic cycles as real wages have grown and new products have been introduced. The estimates in the following table are based on the trade area population forecast outlined above.

Table 7: Estimate of annual retail spending by trade area residents, 2021 and 2031

Retail activity	2021 Retail spending per person	2021 Total retail spending	2031 Retail spending per person	2031 Total retail spending
	$/per person	$m	$/per person	$m
Food and groceries	$6,000	$63.5	$6,600	$84.9
Non-food goods	$5,800	$61.4	$6,600	$84.9
Food service	$1,400	$14.8	$1,600	$20.6
Retail services	$400	$4.2	$500	$6.4
Total	$13,600	$144.0	$15,300	$196.7

Source: Tim Nott
Note: figures in 2012 dollars (that is, no allowance has been made for inflation)

This calculation provides an estimate of retail spending by trade area residents of $144 million by 2021 and $197 million by 2031, which is around $88 million more than at present.

[This estimate of future retail spending assumes that the share of spending on each category will remain the same over the period to 2031. Whether this assumption holds true should be monitored from time to time.]

How much of this spending will be undertaken at Korumburra Town Centre will depend on a wide range of factors, with the key influences explored below.

5.3 Activity Centre Hierarchy

Residents of the Korumburra trade area, in common with residents throughout Victoria, have a choice of activity centres depending on their retail requirements and their willingness (or ability) to travel. Each activity centre in the network performs a different role and provides a different, albeit overlapping, set of goods and services. By and large, residents make rational choices about where they shop, choosing the closest available centre in which they can satisfy their needs. This leads to a hierarchy of centres; fewer, larger centres deliver regional level services and offer a more complete range of retail goods; smaller, more numerous centres offer localised services and a smaller range of retail goods usually providing day-to-day groceries and convenience items.

Extensive research has been undertaken by many analysts about the nature of centres in the hierarchy and the types of service they provide. The benefits of a hierarchy of centres include:

- Clustering of services at the closest economical location to the customer, resulting in shorter trips (and lower travel costs) for residents and agglomeration benefits for retailers (that is, cross-flow of customers, specialisation etc)
- Reduction in infrastructure costs for the community through provision of shared car parks, public transport nodes etc

The following table sets out the activity centre hierarchy used in this report. It is largely similar to that used in the previous town centre retail assessment (Nott, 2007).

Table 1: Hierarchy of retail activity centres

Level in the hierarchy	Retail role	Relevant example	Typical catchment population
Capital City Central Activities District	Extensive comparison goods and services; culture, entertainment; dining. Includes department stores and many specialty stores	Melbourne Central Activities District	1 million plus
Regional centre	Extensive comparison goods and entertainment. Includes department store, discount department store, supermarkets and many specialty stores. Also applies to some large specialty centres that cater to an extensive catchment	Fountain Gate Dandenong Frankston	150,000 plus
Sub-regional centre	Routine comparison goods as well as food and groceries. Includes discount department store, supermarkets and specialty stores. Also applies to some specialty centres that cater to a significant catchment	Cranbourne Wonthaggi Moe	30,000 plus
Community centre	Routine comparison goods and food and groceries. Contains a number of supermarkets and many specialty stores. Often town centres with strong civic and entertainment functions	Leongatha Warragul	20,000 plus
Neighbourhood centre	Mainly food and groceries and other convenience goods and services. Includes supermarket(s) and specialty stores. Sometimes town centre with civic and other community functions	Korumburra Koo-wee-rup Foster	3,000 to 25,000
Local centre	Convenience goods. Usually comprises a corner grocery store and may include take-away food and local services	Loch, Nyora,	Up to 1,500
Specialist centre	Usually a narrow but deep range of goods aimed at a specialist market	Cranbourne Homemaker Centre	Varies

Source: Tim Nott

[*The reader should note that the hierarchy used here is based on the retail function of centres. It is different from the hierarchy of centres defined in Melbourne 2030 and subsequent metropolitan strategic planning documents, in which centres are categorised on a more broadly-based set of criteria. Nevertheless, there is some concordance between the two hierarchies. In general, and with some exceptions:*

- *Capital Activities Districts and Principal Activity Centres (Melbourne 2030 and Melbourne @ 5 Million) are usually Regional or Sub-Regional Centres in the retail hierarchy used here*
- *Major Activity Centres can be Regional, Sub-Regional or Neighbourhood Centres*
- *Neighbourhood Activity Centres in M2030 are Neighbourhood or Local Centres*
- *Local Centres are Local Centres*]

Centres such as Korumburra can often capture 50% of the retail spending of their catchment. However, this kind of market share would normally be achieved by a centre with two or more supermarkets. In the following table, Victorian towns around the same size as Korumburra have been ranked according to their population and the presence of supermarkets has been indicated, with some explanatory commentary.

Table 8: Presence of supermarkets in selected Victorian towns, 2011

Town	Population (Census count 2011)	Key stores present	Comment
Numurkah	3,843	Foodway, Dysons	Competition from Shepparton, Cobram and Nathalia
Romsey	3,679	Foodway	New supermarket required for growing town
Tatura	3,674	Supa IGA	Small catchment, close to regional centre of Shepparton-Mooroopna
Kerang	3,567	Safeway	Isolated town, around 60 km to nearest supermarket
Bannockburn	3,512	Woolworths	Exurban growth area near Geelong
Woodend	3,417	Coles, Target Country	Catchment of around 11,000
Broadford	3,385	IGA	Small catchment - proximity to supermarkets in Kilmore, Seymour and Wallan
Korumburra	**3,352**	**IGA**	Catchment of around 8,900 – proximity to supermarkets in Leongatha
Daylesford - Hepburn Springs	3,264	Coles, IGA	Catchment of around 8,500
Paynesville	3,237	Foodworks, Richies Supa IGA	Catchment of around 5,000 plus visitors
Portarlington	3,148	IGA, Williamsons Supermarket	Catchment of around 6,000 plus visitors
Mansfield	3,068	Foodworks, Marks IGA	Catchment of around 7,000 plus visitors
Trafalgar	3,045	Foodworks	Proximity to larger centres of Moe, Warragul
Riddells Creek	2,973	Foodworks	Proximity to larger centre of Gisborne
Camperdown	2,938	Woolworths, IGA	Extensive catchment area

Source: ABS, 2012; Tim Nott

This table shows that many of the towns of a similar size to Korumburra do have two supermarkets and some have one of the major operators (Coles or Woolworths/Safeway) indicating a supermarket of significant size (usually more than 2,000 sq m). Daylesford-Hepburn Springs, for example, has a resident population catchment of a similar size to that of Korumburra and has both a Coles and an IGA supermarket.

This assessment assumes that Korumburra town centre can achieve a market share of 50% of the resident spending in its own trade area, mainly through the provision of larger supermarket facilities.

5.4 The Internet

In the twelve months to November 2012, Australians spent around $12.6 billion on online retail. This is equivalent to 5.7% of the scale of traditional bricks and mortar retail (excluding cafés, restaurants and take-away food) for the year to October 2012.

Gerald Burg, NAV Business Research and Insights, 9th January 2013.

Remote shopping via the internet and mobile phone network currently accounts for approximately 6% of retail sales in Australia (see box). This compares with 7.5% in the USA and 9% in the UK (in 2011, according to Frost & Sullivan, 2011).

Various commentators, including the founder of Amazon.com, have suggested that online retailing in mature economies will gradually achieve 15% of all retail sales. However, other commentators have suggested that, with mass customisation in fashion, improvements in online food ordering, and more widespread adoption of online technology, online retailing could approach 50% of total sales. For the moment this seems unlikely; nevertheless, online retail sales appear set to grow substantially. This report assumes that online retailing will account for 15% of total retail spending by residents.

In addition to this direct impact on retail trade in shops, it is likely to be more and more the case that retailers will have an online presence so that the distinction between real and virtual shops will become blurred. This may mean that chain stores take up less shop space and more space in industrial areas for packing and distribution. Independent stores with an online presence may use more of their store space for fulfilling orders and less for display purposes. Neighbourhood centres in established suburbs, often have a relatively high proportion of independent stores. As long as these independent retailers develop an online presence, on-site order fulfilment may ensure that shops remain occupied. However, centres where retailers neglect the online side of their business may well begin to experience long-term vacancies.

5.5 Other Industry Trends Affecting Neighbourhood Centres

- Supermarket operators are continually seeking growth in market share and expanding the range of goods that they provide, using their extensive and efficient supply chains and market power to deliver low prices for customers. In addition, new supermarket chains have entered the market from overseas with a very low cost offering, including Aldi and, latterly, Costco. Small and independent retail operators often find it hard to compete with the supermarkets on price. Often, the only ways that small and independent operators can compete effectively is on service and quality. It is not clear that all the retailers in Korumburra have embraced their resident base with the aim of securing repeat business. The largest retail segment (cafés and restaurants) is aiming to some degree at the passing (visitor) trade. In addition, the large number of second-hand goods shops provides an ambience that is discouraging for some shoppers and other retail investors.

- Traditional department stores have had a declining market share for a number of years and this has led the major retail operators to begin experimenting with new store formats. The decline has also created room for new large format clothing and other store operators, mainly from overseas chains looking for outlets in the relatively buoyant Australian market (Zara, Top Shop etc). These changes mainly affect the larger regional and sub-regional centres. However, there will be increasing competition throughout the clothes and homewares sector, making it more difficult for neighbourhood centres to offer goods in these categories. Stores in neighbourhood centres are likely to succeed best where they have a strongly defended niche market. Such shops have not yet emerged in Korumburra.

- The growth of out-of-centre big box retailing in many categories has temporarily abated as the large chains have struggled with competition from the internet and apparently reduced spending by Australian consumers. However, increasing competition may see growth in pressure for low-cost retail locations outside of existing designated centres, particularly in industrial areas that are able to accommodate larger format stores.
- Compared with larger centres, the strength of neighbourhood centres is their accessibility; people can get in and out quickly if they need to. Because of growing concerns about personal and environmental health, an increasing number of people are walking, cycling and catching public transport to centres. Neighbourhood centres must therefore balance the need for easy car parking and access with improved accessibility for buses, cycles and pedestrians. (Mobility scooters are also a transport form that needs to be taken into account in many centres.) This often points to the need for wider, well-maintained pavements, accessible bike parking and attractive seating and outdoor areas protected from the wind where these do not already exist. Korumburra town centre does have extensive car-parking areas at the rear of the shops on Commercial Street but its pedestrian environment could be a little more friendly. There is no gathering place or extensive public seating area, for example. Walking and cycling trails in from the surrounding township could also assist.

5.6 Competition from Other Centres

The potential for Korumburra town centre to grow will depend in part on competition from surrounding centres.

Competition in the food and grocery sector may come from:

- Leongatha, which is already the chief grocery shopping destination of many local residents and which will expand its supermarket provision over the timeframe of this study (with, for example, the recent approval of a new Aldi store)
- The sub-regional centre of Wonthaggi, which many residents visit to access higher order goods (clothes, household goods etc) but would also do their supermarket shopping while there
- Local centres within the Korumburra trade area, including Loch, Nyora and Poowong, where retail provision may expand to improve the convenience services to the growing number of local residents

Competition in the other retail sectors is unlikely to affect Korumburra town centre more than it already has unless another of the towns on the South Gippsland Highway substantially expands its provision of cafés and restaurants to service visitors.

5.7 Change in Policy

Council policy on the development of Korumburra town centre is captured in the planning scheme:

Objectives

- *To maintain and promote Korumburra as a significant industrial, retail, service residential and tourism centre in the Shire.*
- ***To maintain the primacy of the Town Centre as the retail and service hub of the town.***
- ***To actively support the establishment of new retail opportunities in the Town Centre Retail Core.***

- *To ensure that sufficient residential land, at a range of densities, is available to accommodate future township growth.*
- *To achieve sequential and staged residential development that integrates with existing infrastructure networks.*
- *To improve highway traffic movement through the town.*
- ***To provide strong pedestrian and cycling connectivity to the Town Centre, key community assets and the schools.***

Strategies

- ***Promote the use and development of land in accordance with the strategic directions in the Korumburra Framework Plan and the Korumburra Town Centre Framework Plan maps.***
- ***Maintain a compact, convenient and well-connected Town Centre that is the primary activity hub of the town.***
- ***Actively encourage major retail, office and community developments to concentrate in the Town Centre Retail Core, comprising the blocks bounded by Commercial Street, King Street, Victoria Street and Bridge Street.***
- ***Encourage the consolidation of sites in the Town Centre Retail Core to accommodate new large floor space developments.***
- ***Promote development in the Town Centre that improves pedestrian connectivity and the layout and operation of car parking, and enhances the amenity of the streetscape.***
- ***Strongly discourage the development of new retail uses outside of the Town Centre Retail Core where such uses may weaken the principal role of the Town Centre.***
- *Monitor the availability and development of residential land and encourage the rezoning of appropriate areas identified in the Korumburra Framework Plan map to maintain an estimated 15-year residential land supply.*

South Gippsland Planning Scheme, Clause 21.04-5 (emphasis added)

Council has clearly supported the development of Korumburra town centre as one of the key activity centres for the municipality.

The most recent indications from State Government have been a de-emphasising of activity centres - see the recent Discussion Paper on the new Metropolitan Strategy (DPCD, 2012) and some intent to “remove the shackles” on investment by, for example, allowing significant retail development in industrial zones without the need for a permit for the use.

A series of relevant zoning changes have been approved by the Planning Minister, as follows:

- **Business zones**

Five Business zones are to be condensed into two Commercial zones.

The **Commercial 1 Zone** will be the appropriate zone for retail and commercial activity centres. It is essentially the same as the Business 1 Zone.

The stated purpose of the **Commercial 2 Zone** suggests that the zone is for a mix of offices and light industry. However, bulky goods retailing and trade supplies are the main purpose of the B4 Zone which is to be rolled into the Commercial 2 Zone. The purpose of the C2 Zone will therefore include the provision of land for bulky goods and trade supplies.

The new C2 Zone will also be able to accommodate, with a permit, a small supermarket of up to 1,800 sq m and supporting shops up to 500 sq m. (Small shops will only be allowed as of right when they accompany a supermarket – either on adjacent land or on the same lot.) This is a significant change from the existing B3 and B4 Zones. It is being introduced in order to provide flexibility and to encourage competition.

This change will allow a small neighbourhood activity centre to be developed in a C2 Zone as of right.

- **Residential Zones**

The existing residential zones are to be adjusted. The proposed General Residential and Residential Growth Zones will allow shops and food and drink premises up to 100 sq m and offices up to 250 sq m to be developed with a permit if they are within 100 m of a commercial zone and on the same street as the properties in a commercial zone.

This will allow the extension of activity centres beyond their present boundaries.

The consequences of these proposed zoning changes for Korumburra town centre are relatively minor, with no land that would be covered by the C2 Zone and relatively few opportunities for retail development in residential streets. (Radovick Street is the most likely candidate for retail expansion in residential areas but with extensive vacancies in the main street it is unlikely that such development would occur in the short to medium term).

6 Retail Development Potential

6.1 Summary of Factors Affecting Retail Development

Following the notes in the previous section, the analysis here makes the following assumptions:

- General economic conditions will remain moderately positive over the study period. That is, while there may be some periods of recession, economic growth will average 2-3% per year in Australia.
- Korumburra town centre will continue to perform the role of a neighbourhood centre throughout the study period for the trade area defined in this report.
- By 2021, the population of the trade area will be 10,590 with total retail spending of $144 million per year
- By 2031, the population of the catchment will be 12,860, with a total retail spending of $197 million per year.
- Approximately 15% of this spending will be undertaken via the internet.
- No substantial new competitor to the town centre will emerge and the centre will provide additional retail facilities so that it can capture 54% of the retail spending of trade area residents by 2021. This is assumed to drop back to 50% by 2031 as activity centres in other towns in the trade area begin to grow.
- Sales to visitors from outside the catchment area will constitute the same percentage of total sales as at present (that is, around 22% in total).
- Retailers will become more competitive and efficient over the period, with sales per sq m of floorspace increasing by 0.5% per year.

These assumptions are conservative; that is, they anticipate little change from the existing situation or established trends. The real unfolding picture will undoubtedly be different in subtle and, possibly, substantial ways. Monitoring and review of these assumptions is required to keep the analysis up to date.

6.2 Future Retail Sales and Floorspace

6.2.1 Development by 2021

The following table uses the assumptions above to predict the retail sales at Korumburra town centre in 2021.

Table 9: Forecast retail sales, Korumburra Town Centre, 2021

Retail activity	Total spending in shops by Trade Area population	Spending captured by Korumburra TC		Spending by visitors		Total sales at Korumburra TC
	$m	%	$m	%	$m	$m
Food and groceries	$57.2	65%	$37.2	10%	$4.1	$41.3
Non-food goods	$49.1	37%	$18.2	20%	$4.5	$22.7
Food service	$14.1	60%	$8.4	40%	$5.6	$14.1
Retail services	$2.1	83%	$1.8	10%	$0.2	$2.0
Total	$122.5	54%	$65.5	22%	$14.5	$80.0

Source: Tim Nott
Note: figures in 2012 dollars (that is, no allowance has been made for inflation)

Total retail sales at Korumburra town centre are forecast to be $80 million per year in 2021. The table below forecasts how this will be translated into the amount of retail floorspace that can be supported by that volume of sales.

Table 10: Forecast retail floorspace supported, Korumburra town centre, 2021

Retail activity	Total sales at Korumburra TC	Retail turnover density	Retail floorspace supported	Current retail floorspace	Additional floorspace supported compared with 2012
	$m	$/sq m	sq m	sq m	sq m
Food and groceries	$41.3	$10,000	4,100	1,700	2,400
Non-food goods	$22.7	$5,000	4,500	4,400	100
Food service	$14.1	$4,700	3,000	2,700	300
Retail services	$2.0	$4,000	500	700	-200
Total	$80.0		12,100	9,500	2,600

Source: Tim Nott
Note: figures in 2012 dollars (that is, no allowance has been made for inflation)

The level of retail floorspace supported in 2021 is 12,100 sq m – 2,600 sq m more than at present. Most of this floorspace is assumed to be in food and grocery provision and could be provided as a result of a new supermarket. An additional supermarket of 2,400 sq m would represent a medium-sized facility. A major chain would most likely be keen to develop a full-line supermarket of 3,000 sq m or more. Such a supermarket would likely trade at lower than average retail turnover density until such time as the supporting population was large enough. Alternatively, a new supermarket could stimulate some reorganisation of existing retail activity.

6.2.2 Development by 2031

The following table uses the assumptions above to predict the retail sales at Korumburra town centre in 2031.

Table 11: Forecast retail sales, Korumburra Town Centre, 2031

Retail activity	Total spending in shops by Trade Area population	Spending captured by Korumburra TC		Spending by visitors		Total sales at Korumburra TC
	$m	%	$m	%	$m	$m
Food and groceries	$76.4	60%	$45.8	10%	$5.1	$50.9
Non-food goods	$67.9	35%	$23.8	20%	$5.9	$29.7
Food service	$19.5	60%	$11.7	40%	$7.8	$19.5
Retail services	$3.2	80%	$2.6	10%	$0.3	$2.9
Total	$167.0	50%	$83.9	23%	$19.1	$103.0

Source: Tim Nott
Note: figures in 2012 dollars (that is, no allowance has been made for inflation)

Total retail sales at Korumburra town centre are forecast to be $103 million per year in 2031. The table below forecasts how this will be translated into the amount of retail floorspace that can be supported by that volume of sales.

Table 12: Forecast retail floorspace supported, Korumburra town centre, 2031

Retail activity	Total sales at Korumburra TC	Retail turnover density	Retail floorspace supported	Current retail floorspace	Additional floorspace supported compared with 2012
	$m	$/sq m	sq m	sq m	sq m
Food and groceries	$50.9	$10,500	4,800	1,700	3,100
Non-food goods	$29.7	$5,300	5,600	4,400	1,200
Food service	$19.5	$4,900	4,000	2,700	1,300
Retail services	$2.9	$4,200	700	700	0
Total	$103.0		15,100	9,500	5,600

Source: Tim Nott
Note: figures in 2012 dollars (that is, no allowance has been made for inflation)

The level of retail floorspace supported in 2031 is 15,100 sq m – 5,600 sq m more than at present. Whilst a majority of this additional floorspace would be support food and grocery provision, non-food goods and food services would also have potential to expand by over 1,000 sq m each.

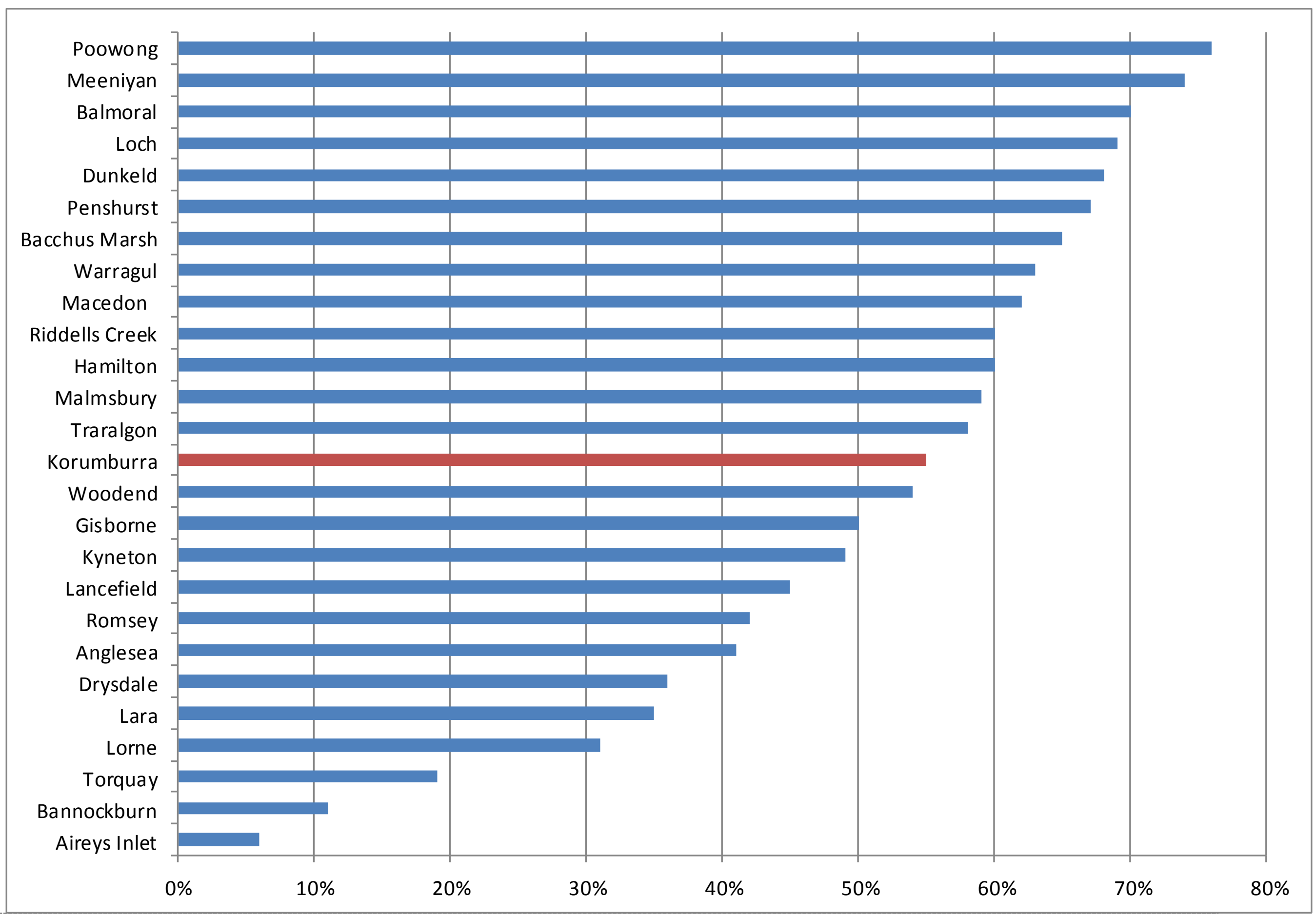
7 Non-Retail Development

Whilst retailing in the town centre may be the most dynamic activity, more than half the activity space (12,700 sq m) is taken up by non-retail activities. This space provides health and community services, professional services, banks and trade supplies, hotels and clubs, which are all important to the level of service for residents and businesses in the trade area.

The demand for these services does not depend solely on the size of the local population but on a variety of factors including local skill and occupational levels, the business mix in the wider area, proximity to clients, transport access, availability of space, and the ability of local property developers. As a result the chance of accurately predicting the demand for these types of activities over a long period is low. However, in order to provide a useful guide for the planning process, it is possible to provide some indication about the potential for non-retail space using information from similar centres elsewhere.

Currently, around 55% of the activity space in Korumburra Town Centre accommodates non-retail activities. The following chart shows the range of non-retail space in a selection of other town centres in country Victoria.

Figure 4. **Proportion of non-retail space in selected town centres, Victoria (2006 to 2012)**



Source: Tim Nott

The average proportion of non-retail space in these 28 country town centres is 53%, although the range is wide. For the town centres most like Korumburra in size and function, the proportion is generally between 40% and 60%.

In the future, it is likely that the proportion of non-retail space will decline since:

- retail activity will take up vacant space to cater for population growth
- many existing civic and community facilities are largely already present and will not need to be expanded or duplicated

If the existing library site is redeveloped for a supermarket or large retail use (as has been proposed), a new library will be built. However the size and location of a new library in Korumburra has not yet been determined but the net change in space overall is unlikely to be large. A new *library* is proposed as a result of redevelopment of the existing library site for a supermarket (as has been proposed). However, this will simply be a replacement facility and consolidation of various community services into a single site, with little net additional space required.

On the other hand there is potential for growth in some services as the population and business community grows. This could include accountants and lawyers, designers, health providers, gyms, bars, financial planners, small scale accommodation, child care and banks (not all four main banks have a presence in the town). Some of these activities could take space above shops rather than shop fronts.

This report anticipates that 30% of additional space requirements will be for non-retail activities.

8 Potential Measures for Improving Competitiveness

The following measures are suggested by the preceding analysis and by the views of businesses expressed through surveys and in workshop discussions.

Retail mix

- Introduce a major chain supermarket
- Improve the provision of speciality food retailing, including greengrocer, another butcher, ice-creamery etc
- Potential to change second-hand goods shops for more desirable non-food goods; alternatively, celebrate the extensive collection of op shops by, for example, highlighting the facades; developing promotional brochure; specialising; concentrating these shops in a precinct

Urban design

- Ensure that any new buildings and signage achieve a high quality design, adding to the physical attractiveness of the centre
- Improve presentation of existing buildings and signage
- Develop some attractive and sheltered on-street seating for cafés and restaurants
- Create a piazza in an appropriate central location to encourage pedestrians to linger and develop a more pedestrian-friendly atmosphere
- Commission art for public spaces and encourage provision of public art as part of new developments of sufficient scale
- In appropriate locations within the centre, encourage quality residential development and offices that will improve the local demand for goods and services and extend the hours of activity in the centre
- Improve pedestrian and cycle links into the surrounding residential districts through signage, improved crossings, bicycle lanes and bicycle parking
- Improve car-parking areas to generate more usable space
- While additional shop space (apart from a supermarket) is not presently required, over time, trade and automotive activities could be relocated from the town centre to fringing industrial areas

Trader Activities

- Consider the collection of a special rate to engage in marketing and promotional activities for the centre
- Develop a more attractive and comprehensive online presence for the centre with links to traders and timely promotion of events
- Encourage the use of any vacant shop space for community activities or pop-up shops
- Encourage extension of services to visitors throughout the weekend and evening by developing a roster of opening times
- Encourage the provision and take-up of customer service improvement programs

9 New Space Requirements

The following table identifies the net building area requirements to accommodate the forecast growth in activities in the Korumburra Town Centre over the period to 2031. In calculating the net space requirement, the existing vacant building space has been taken into account.

Table 13: Net space potential, Korumburra Town Centre, 2021 and 2031 (sq m)

	2021	2031
Retail space requirement	2,600	5,600
Non-retail space (30% of total)	1,100	2,400
Total additional space	3,700	8,000
Existing vacant space	900	900
Net space requirement	2,800	7,100

Source: Tim Nott

By 2031, then, the net additional space requirement is forecast to be 7,100 sq m bringing the total activity space in the centre to 28,300 sq m, although this does not include any residential development within the town centre, which may be considered desirable to add vitality to the area. (Note: This forecast is <u>not</u> a target. There is the potential for more or less space. More space may be required, for example, if retail operators accept lower returns per square metre than have been allowed for here. This would allow, for example, a larger supermarket to be provided.)

These space potentials could be accommodated largely within the existing boundary of the town centre through:

- Redevelopment of the library and adjacent sites to accommodate a supermarket as has been previously been proposed by Council and other land-holders, with potential reconstruction of the library and other community services either in a community hub at a central town centre location (possibly in Radovick Street) or else co-location of a new library with the supermarket
- Development of other vacant sites including:
    - Sites at the rear of 125-139 Commercial Street – around 800 sq m
    - 6 Radovick Street – around 700 sq m
    - 31 Bridge Street (former car yard) – around 400 sq m
- Redevelopment to improve efficiency of under-performing sites
- Development of shop-top offices

Hansen Partnership has identified many of these sites and more in the following plan for the town centre structure planning project.

Figure 5. **Draft Framework Plan, Korumburra Town Centre**

Source: Hansen Partnership, unpublished draft project outputs

These areas for expansion are likely to be quite adequate to accommodate growth over the next 10 years. Beyond that time, and in the longer term, extensions to the town centre may be required. Such extensions could easily encompass:

- Mine Road to the junction with the South Gippsland Highway, which is already zoned Mixed Use and contains a number of commercial and community activities

- The residential properties in the block bounded by Victoria Street, King Street, Little Commercial Street and Mechanics Lane

In addition to these areas, the station precinct may be suitable for some commercial activity (tourism uses etc), although any such use may need to protect the future potential for re-opening of the railway line.

10 Summary

1. Korumburra town centre serves as the main activity centre for the township of Korumburra and the surrounding district. Located on the South Gippsland Highway in the middle of the township, it has a total floorspace of 21,200 sq m, of which around 9,500 sq m is providing retail goods and services. The centre has a wide variety of activities and is truly multi-functional.

2. The retail function of the centre is as a local neighbourhood service with extensive services for those who do not have the resources to travel (a high proportion of op-shops, for example) and for those who are travelling through (with floorspace devoted to cafés and restaurants being larger than that devoted to food and groceries). The centre does not cater strongly for the weekly retail needs of its trade area, which is traditionally the role of centres of this type and size.

3. Total employment at the centre is estimated at 600 people, most of whom are likely to live in the local area.

4. The retail catchment area for the centre is defined by the surrounding network of centres. In this report the population of the catchment has been estimated at 8,900 in 2012. Retail sales at the centre are estimated at $49 million in 2012, 78% of which comes from people living in the catchment and 22% from visitors living outside the catchment. The annual retail spending of catchment residents in shops is estimated at $109 million, with 35% of this being spent at Korumburra town centre. Most of the remaining 65%, or $70 million, “escapes” from the catchment to larger centres such as Leongatha, Wonthaggi and Warragul.

5. This report makes a forecast of retail development at the centre by 2031. The forecast is based on a series of assumptions the most significant of which are that:

   - population in the trade area will grow by around 4,000 people over the period to 2031, with growth in newly developing residential areas of Korumburra township and in the newly sewered small towns of Loch, Poowong and, especially, Nyora
   - retail sales via the internet will grow to 15% of all retail sales by 2031 (up from around 4% presently).

   Monitoring of the various assumptions will be required in order to keep the forecast up-to-date. The forecast is for growth of 2,600 sq m of retail space by 2021 and growth of 5,600 sq m by 2031 compared with 2012. This growth depends mainly on the provision of a new medium-sized supermarket.

6. Demand for non-retail space is likely to be more fluid. There is potential to attract investment in offices catering to health and professional service providers, bars, gyms and boutique accommodation. Some of these activities could be developed above existing shops.

7. In all, perhaps 8,000 sq m of additional space will be required in the town centre by 2031. Taking into account the existing vacant space, vacant sites and under-utilised buildings, there is ample room for expansion in the existing town centre for the next decade. In the longer term, extension of the town centre along Mine Road and into residential properties on the north side of Victoria Street can provide for growth.

8. Several recommendations can be made for improving the future performance of the centre:

    - Provide support for the proposal to redevelop the current library and adjacent sites for a significant supermarket in order to deliver improved food and grocery services that will attract trade area residents back to the centre with the opportunity to provide a design that generates a distinctive and attractive town gateway
    - Provide support for the proposal to develop a community hub in a central location in the town centre to house (potentially) the library and other community services, with the opportunity to provide a design that generates an attractive open space/piazza
    - Consider the establishment of a special rate to generate funds for promotion and marketing of the centre
    - Encourage the use of empty retail spaces for community uses or pop-up shops
    - Encourage the development of shop-top residences and office uses in order to improve the vibrancy of the centre
    - Highlight the large collection of op-shops with signage and a walking trail brochure (which could be a mobile phone application) in order to attract visitors
    - Ensure that services to visitors are provided throughout the weekend and evening by developing a roster of opening times
    - Encourage the use of customer service improvement programs
    - Improve pedestrian and cycle links into the surrounding residential districts through signage, improved crossings and bicycle lanes

The analysis presented here shows that these various suggestions would assist the centre to grow from retail sales of $49 million in 2012 to $80 million in 2021, with significant growth in employment (around 100 full-time equivalent jobs) and a greatly improved service to residents.

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