



# A G E N D A

## **Unley Business and Economic Development Committee Agenda**

Notice is hereby given pursuant to the provisions of the Local Government Act, 1999, that a meeting of the Unley Business and Economic Development Committee will be held in the Council Chambers, 181 Unley Road Unley on

***Wednesday, 7 December 2016  
at 6.30pm***

for the purpose of considering the items included on the Agenda.



**Peter Tsokas  
Chief Executive Officer**

## **UNLEY BUSINESS AND ECONOMIC DEVELOPMENT COMMITTEE**

### **PRESENT:**

Councillor John Koumi – Presiding Member  
Mayor Lachlan Clyne – ex Officio  
Councillor Anthony Lapidge  
Councillor Don Palmer  
Councillor Luke Smolucha  
Doug Strain  
Orren Pruncken  
Alison Snel  
Jodie Gaffney  
Craig Phillips  
James Morris  
Susan Straschko  
Leonie Clyne

### **ACKNOWLEDGMENT:**

We acknowledge that the land we meet on today is the traditional land of the Aboriginal people and that we respect their spiritual relationship with their country.

We also acknowledge that the Aboriginal people are the custodians of the Adelaide region and that their cultural and heritage beliefs are still important to the living Aboriginal people today.

### **APOLOGIES:**

### **CONFIRMATION OF MINUTES:**

MOVED:

SECONDED:

That the minutes of the meeting of the Unley Business and Economic Development Committee held on Wednesday, 7 September 2016 as printed and circulated, be taken as read and signed as a correct record.

## **DEPUTATIONS**

## **PRESENTATION:**

## **OFFICER'S REPORTS**

30	Conflict of Interest	1-1
31	King William Road Implementation – Business Case	2
32	City Of Unley Mainstreet Association Review 2016	6-9
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35	Unley Business and Economic Development Committee Meeting Dates 2017	20-22

## **NEXT MEETING**

TBA

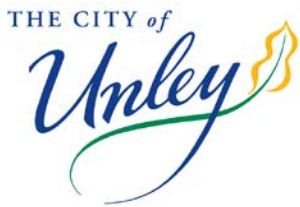
## **CONFLICT OF INTEREST**

<b>TITLE:</b>	CONFLICT OF INTEREST
<b>ITEM NUMBER:</b>	30
<b>DATE OF MEETING:</b>	7 DECEMBER 2016
<b>ATTACHMENT:</b>	1. CONFLICT OF INTEREST DISCLOSURE FORM

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Members to advise if they have any material, actual or perceived conflict of interest in any Items in this Agenda.

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## CONFLICT OF INTEREST DISCLOSURE FORM

I, \_\_\_\_\_ have received a  
*[insert name]*

copy of the agenda for the (Ordinary / Special) **Council / Committee / Board**  
*[delete that which is not applicable]*

meeting to be held on \_\_\_\_\_  
*[insert date]*

I consider that I have a **\*material** conflict of interest pursuant to section 73 / **\*actual** or **\*perceived** conflict of interest pursuant to section 74 *[\*delete that which is not applicable]* of the *Local Government Act 1999* ("the LG Act") in relation to the following agenda item:

\_\_\_\_\_  
*[insert details]*

which is to be discussed by the **\*Council / \*Committee / \*Board** at that meeting.  
*[delete that which is not applicable]*

The nature of my **material** conflict of interest is as follows *[ensure sufficient detail is recorded, including the reasons why you (or a person prescribed in section 73(1) of the LG Act) stands to obtain a benefit or suffer a loss depending on the outcome of the consideration of the matter at the meeting of the Council in relation to the agenda item described above].*

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**OR**

The nature of my **actual** conflict of interest is as follows *[ensure sufficient detail is recorded, including the reasons why the conflict between your interests and the public interest might lead to a decision that is contrary to the public interest in relation to the agenda item described above].*

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I intend to deal with my **actual** conflict of interest in the follow transparent and accountable way *[ensure sufficient detail is recorded as to the manner in which you intend to deal with the actual conflict of interest in a transparent and accountable way]*

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**OR**

The nature of my **perceived** conflict of interest is as follows *[ensure sufficient detail is recorded, including the reasons why you consider that an impartial fair-minded person could reasonably consider that you have a perceived conflict of interest in the matter]*

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I intend to deal with the **perceived** conflict of interest in the following transparent and accountable way *[ensure sufficient detail is recorded as to the manner in which you intend to deal with the perceived conflict of interest in a transparent and accountable way]*

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*Signature*

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*Date*

## DECISION REPORT

**REPORT TITLE:** KING WILLIAM ROAD IMPLEMENTATION – BUSINESS CASE  
**ITEM NUMBER:** 31  
**DATE OF MEETING:** 7 DECEMBER 2016  
**AUTHOR:** KEITH DAVIS  
**JOB TITLE:** MANAGER CITY DEVELOPMENT

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### 1. EXECUTIVE SUMMARY

Council has provided capital project funding of \$200K in this current financial year for the continuation of the implementation of the King William Road Project – Curated Street Concept. The *King William Road Master Plan – Kerb build outs* is a new capital project continuing the kerb build out to promote activated street frontages in the main street.

The project is presented for further consideration by the Council, as per the Annual Business Plan and Budget 2016-17. As part of the consideration, this report proposes to redirect the funding to develop the design for the purposes of implementing a larger 'step-change' project; the Curated Street Upgrade. The scope of this upgrade involves the transformation of the entire road reserve including footpaths and vehicle carriageway. The extent is defined as the High Street (from the Park/Mitchell intersection to Arthur/Union intersections). Council's Long Term Financial Plan proposes \$4M over the following two financial years (\$1.5M 2017/18 and \$2.5 2018/19) for the main street upgrade.

In addition, a Business Case has been commissioned to investigate the cost benefit and economic impact of the proposed \$4M large scale upgrade. The cost benefit of the project just outweighs the costs, under a pessimistic scenario. The cost benefit improves approximately threefold under an optimistic scenario. The economic impact under the pessimistic scenario is 16 fulltime equivalent jobs; \$1.47M per annum in value added. The economic impact under the optimistic scenario is 62 fulltime equivalent jobs; \$5.89M per annum in value added. This project may also qualify for grant funding from the State Government as part of its Infrastructure Improvement Program.

### 2. RECOMMENDATION

The Committee recommends to Council that:

1. The report be received.
2. That the expenditure of funds for the Implementation of *King William Road Master Plan – Kerb build outs*, be redirected to the design development of the *Curated Street Upgrade*; which includes the entire

road reserve inclusive of the footpath, on-street car parks, vehicle carriageway, and all of the fitments and associated infrastructure. The extent of the upgrade is defined as the High Street and extends from the intersection of Park/Mitchell to the intersections of Arthur and Union Street.

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### 3. **RELEVANT CORE STRATEGIES/POLICIES**

King William Road Project Report – HASSELL June 2014

### 4. **DISCUSSION**

Council in the Annual Business Plan and Budget 2016-17 (Plan) has endorsed a new capital budget of \$200K for the continuation of the *Implementation of King William Road Master Plan – Kerb build outs*. In the previous financial year Council committed the expenditure of \$165K for the construction of kerb build outs. The works were undertaken in the context of the *Curated Street Concept* of the King William Road Project (HASSELL 2014). In the initial year of the concept, the first step, the *Parklet Program*, introduced a temporary change within the road corridor, transforming two car park spaces into 'parklets' or spaces for people. The parklets were installed on the side street intersections at Opey Avenue and Bloomsbury Street, each site being the location of a supportive business. Subsequently in the following year, the next step, *Side Street Intersections* was implemented. Construction of a kerb build was undertaken at each side street location, Opey Avenue and Bloomsbury Street. The kerb build outs activate the street frontage; in each case, by providing the opportunity for outdoor dining. Concurrently, the second year of the *Parklet Program* has introduced the parklet into the main street road reserve.

The project *Implementation of King William Road Master Plan – Kerb build outs*, is identified in the Plan as a project requiring further consideration by Council prior to any commitment of expenditure. As part of the consideration, this report proposes an alternative direction for the expenditure of the funds. The alternative proposal is to spend the funds on the design development for a larger scale transformation of the King William Road precinct. The design work would fast track the implementation of the construction to the final step of the *Curated Street Concept*, the *Curated Street Upgrade*. The scope of the upgrade includes the entire road reserve inclusive of the footpath, on-street car parks, vehicle carriageway, and all of the fitments and associated infrastructure. The extent of the upgrade is defined as the High Street and extends from the intersection of Park/Mitchell to the intersections of Arthur and Union Street.

The Council has allowed for, in its Long Term Financial Plan, a construction budget of \$4M over the following two financial years (\$1.5M 2017/18 and \$2.5M 2018/19). The Council will be required to undertake the design development and further detail documentation to prepare the required tender and contract to control the construction of the works. The proposed re-direction of the current funds to this purpose would fast track the process and complete the design development; including the important process of community engagement. However the re-directed funds would most likely be insufficient to deliver detailed construction documentation. The required balance to produce the detailed documentation for tender and contract would be a component of the future \$4M capital. The total design fees to tender and contract are estimated at \$250K.

Under delegation the Council administration commissioned a Business Case to investigate the cost benefit and economic impact of the proposed \$4M large scale upgrade. The cost benefit analysis quantifies and monetises the benefits that accrue to the Unley community as a result of the project. The economic impact analysis estimates the expected employment and value added generated in the Unley local economy by the proposed project.

The Business Case considers two scenarios, a pessimistic and an optimistic, each differing in the degree to which they assume that the project; improves local amenity and therefore improves retail spending and retail vacancy rates; improves local resident public and active transport usage; and improves urban renewal rates in the surrounding precinct.

The analysis under the pessimistic scenario, demonstrates that the cost benefit of the project just outweighs the costs at a Benefit Cost Ratio (BCR) of 1.1. The greater the BCR the greater the cost benefit. The cost benefit improves approximately threefold under the optimistic scenario. The economic impact under the pessimistic scenario generates 16 additional fulltime equivalent (FTE) jobs. Once completed the project is expected to generate annually \$1.47M in value added (labour and business surpluses). The economic impact under the optimistic scenario generates 62 FTE jobs; and expected to generate annually \$5.89M in value added (Attachment 1 to Item 31/16).

*Attachment 1*

Recently the State Government announced the commencement of a local infrastructure program, whereby appropriate community infrastructure projects could receive funding from the State Government. While details have not yet been received, economic stimulus and employment opportunities are key factors of successful projects. The King William Road project may qualify for this program.

## **5. ANALYSIS OF OPTIONS**

Option 1 – That the expenditure of funds for the Implementation of *King William Road Master Plan – Kerb build outs*, be redirected to the design development of the *Curated Street Upgrade*; which includes the entire road reserve inclusive of the footpath, on-street car parks, vehicle carriageway, and all of the fitments and associated infrastructure. The extent of the upgrade is defined as the High Street and extends from the intersection of Park/Mitchell to the intersections of Arthur and Union Street.

The Council has provided \$4M to upgrade the High Street precinct, commencing in 2017-18 for a two year period. The *Curated Street Upgrade* requires significant design development to resolve infrastructure issues and material finishes throughout the design. Importantly a stakeholder engagement should be undertaken to ensure acceptance of the proposed changes. All of these processes require a major investment in time. To date changes in the precinct have been incremental and small

in scale, less likely to alarm traders and the community, although the loss of on street car parks is a significant issue for the traders, and will be a major issue to be resolved.

The Business Case is predicated on the larger scope of the *Curated Street Upgrade*. A reduction in the scope and timing reduces the benefits demonstrated by the analysis. Procurement costs, contractor preliminaries, project management fees, will be proportionally reduced as a larger consolidated capital project, when compared with separate incremental projects over a longer period of time. However the construction nuisance will be far greater and widespread over a large scale, when compared to continuing the incremental project delivery. The gradual, incremental change has to date been readily acceptable to the traders and community. Though this may be due to the focus upon the side street intersections, and any intervention in the main street may prove to be resisted, irrespective of the scale of work.

The timing of the works is another factor, whereby an accelerated project may create greater resistance, yet deliver an expected reduction in vacancy and the surpluses that are generated as a result, occur rapidly.

The asset of the road surface is reaching the end of its design life and a decision on the replacement of the asset should be made in the wider context of the overall amenity proposed by the *Curated Street Upgrade*. The opportunity to improve the amenity of the precinct has direct flow on benefits to the economic performance of the main street.

#### Option 2 – Proceed with the King William Road – Kerb build outs as originally proposed in the Annual Business Plan and Budget

To date the incremental delivery of small scale project delivery has been successful and well received by the traders and community. These changes have been delivered in the side streets only. Continuing an incremental approach may be beneficial to ongoing trader and community acceptance within the potentially more contentious main street frontage.

The greater long term benefits of a large scale investment as envisaged in the *Curated Street Upgrade* and demonstrated in the Business Case will not be realised. The road asset will continue to fail and a decision on replacement of the asset may be required prior to a thorough design development of the entire road reserve.

The required design development process and engagement will be delayed for the larger project, however a continued engagement will occur under the kerb build out proposal. The proposed \$4M capital investment can be utilised to provide the required design funding, when and if the Council decides to proceed with that level of investment.

## **6. RECOMMENDED OPTION**

Option 1 is the recommended option.

## **7. POLICY IMPLICATIONS**

### **7.1 *Financial/budget***

- In the 2016 – 2017 Budget an amount of \$200,000 has been included for the Implementation of King William Road Master Plan – Kerb build outs. This budget is sufficient to undertake the design development including consultation. The budget will most likely be insufficient to complete the detail documentation for tender and contract. Expenditure for the consultancy costs for the Business Case is \$25K.

### **7.2 *Legislative/Risk Management***

- The King William Road road reserve is under the control of the Council.
- The proposed changes are significant impacts to the current operation and 'look and feel' of the road environment. There is likely to be a high level of scrutiny from the traders and community and potential media interest. A thorough communication plan is required to mitigate the risk of adverse trader and community feedback.

### **7.3 *Staffing/Work Plans***

- The expenditure is for the procurement for an appropriately qualified design consultancy, an internal project manager resource will be required.  
Internal project team to be formed to oversee design development & delivery.

### **7.4 *Environmental/Social/Economic***

- The construction will integrate green infrastructure in the construction.
- The promotion of a public and active transport will have broad social benefits.
- A business case has been undertaken, which demonstrates a cost benefit and positive economic impact.

### **7.5 *Stakeholder Engagement***

- The proposal has been presented to the KWR Traders and supported in the minutes of that meeting.
- The design development will include an integrated stakeholder engagement plan.

**8. REPORT CONSULTATION**

Executive management team

**9. REPORT AUTHORISERS**

<b><u>Name</u></b>	<b><u>Title</u></b>
Peter Tsokas	Chief Executive Officer

# King William Road Project

## Cost benefit & economic impact analyses

FINAL REPORT

City of Unley  
October 2016



Independent insight.



This report has been prepared for the City of Unley. SGS Economics and Planning has taken all due care in the preparation of this report. However, SGS and its associated consultants are not liable to any person or entity for any damage or loss that has occurred, or may occur, in relation to that person or entity taking or not taking action in respect of any representation, statement, opinion or advice referred to herein.

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# EXECUTIVE SUMMARY

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## Project scope

The high street precinct along King William Road (KWR) currently faces a number of challenges, including high vacancy rates, a car dominated environment and a road asset at the end of its useful life.

To address these and other challenges, the City of Unley is aiming to slow traffic, remove carparks, improve amenity and facilitate a more flexible use of public space along the strip.

The City proposes to commit \$4 million to fund works to this end.

SGS was commissioned to prepare a cost benefit analysis and an economic impact analysis of the proposed project. Accordingly this report:

- Quantifies and monetises (where possible) the benefits that accrue to the Unley community as a result of the project, and
- Estimates the expected employment and value added generated in the Unley local economy by the proposed project.

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## Project scenarios

Experience elsewhere highlights that significant capital works programs in activity centres/ strips can generate significant economic and social benefits; particularly when they are step change in nature and therefore promote complementary private sector investment.

Nonetheless, because the KWR is not fully resolved in terms of its design, SGS has developed two scenarios for assessing its impacts. These 'optimistic' and 'pessimistic' scenarios differ in terms of the degree to which they assume the project improves:

- Local amenity and therefore improves retail spending and retail vacancy rates
- Local resident public and active transport usage, and
- Urban renewal rates in the surrounding precinct.

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## Cost benefit analysis

The cost benefit analysis compares the 'costs' of delivering the KWR project, and maintaining it over the coming decades, with the 'benefits' associated with:

- Avoided maintenance costs
- Economic surpluses (rents, profits) generated by retail property/ business owners
- More sustainable transport patterns, and
- Improved resident health.

The analysis indicates that the project's benefits just outweigh the costs under a pessimistic scenario (BCR of ~1.1). Nonetheless, a Net Present Value of at least \$4 million is generated.

Under the optimistic scenario, the benefits outweigh the costs by a factor of 3 and a Net Present Value of in excess of \$7.8 million is generated.

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## Economic impact analysis

The economic impact analysis highlights that the increased retail spending linked with the project is expected to support the following level of activity on an ongoing basis in the City of Unley:

- Pessimistic scenario                      16 full time equivalent jobs; \$1.47 million p.a. in value added
- Optimistic scenario                      62 full time equivalent jobs; \$5.89 million p.a. in value added

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## Conclusion

Based on the above results, it can be concluded that the KWR project will lift local community welfare and is therefore worth doing. Moreover, the project will generate significant local economic activity.

# 1 INTRODUCTION

## 1.1 Project description

The City of Unley has undertaken a design study of King William Road (KWR), one of the City's main street precincts, with the view of improving the public realm infrastructure, including the road, footpath and fitments.

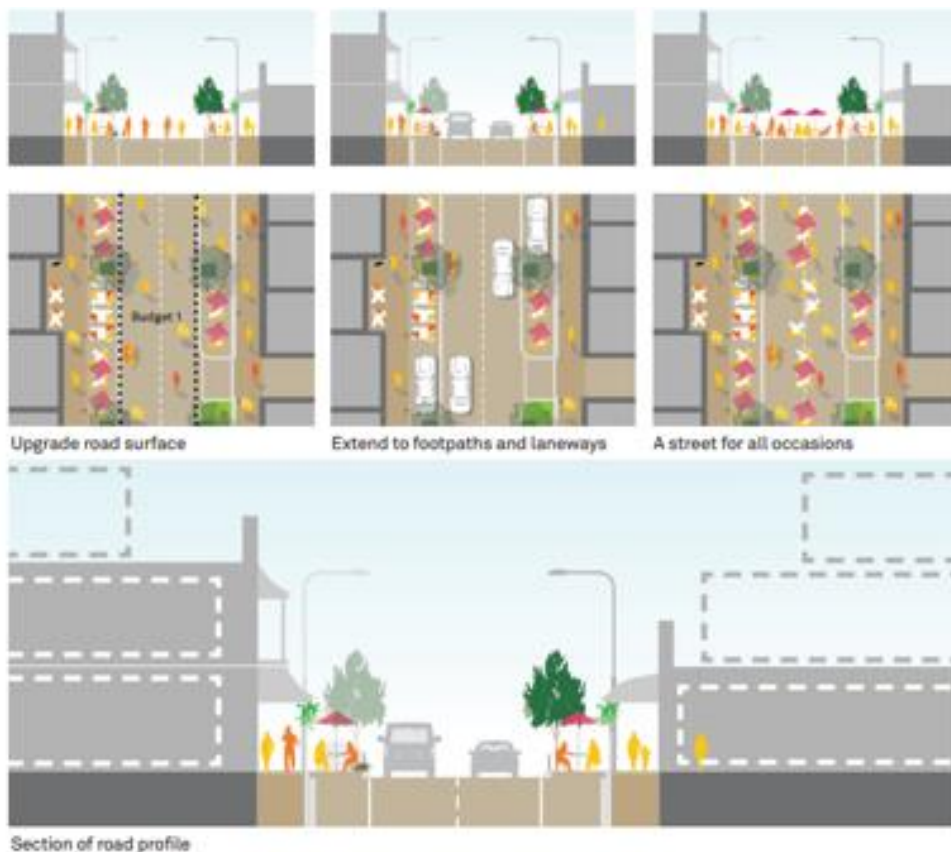
The Council is aiming to slow traffic, remove carparks and improve amenity along the central 'high street' strip, and proposes to commit funding for capital works to the value of ~\$4 million.

The project will primarily utilise the Council owned road reserve to introduce flexibility between car parking and parklet establishment, enabling business proprietors to make better use of public space and to serve the local community.

The project is informed by the vision for KWR (Hassell 2014) which was based on 12 principles, including:

- Move from the transactional to experiential
- Pursue adaptive flexible public spaces, and
- Facilitate a better journey for car, bike and people.

FIGURE 1. KWR CURATED STREET CONCEPT



Source: Hassell KWR Report, 2014.

To date the City has implemented a successful incremental program of small scale activations and events, followed by small infrastructure improvements at discrete locations.

While it is viable for the City to continue on making improvements in this incremental fashion, significant momentum now exists to deliver a more significant project in terms of magnitude and scope.

## 1.2 Project objectives

The major objectives and envisioned outcomes of the KWR project are:

- Using different treatments, distinguish the high street precinct as the village heart, making it a better place for visitors and workers
- Encourage the transition of tenancy mix to provide opportunities for new business
- Transition from a car dominated environment, improving pedestrian amenity and safety, and
- Encourage the uptake of public and active transport.

## 1.3 SGS brief

SGS Economics & Planning Pty Ltd (SGS) was commissioned by Council to prepare a cost benefit analysis (CBA) and economic impact assessment (EIA) of the KWR project.

Accordingly this report:

- Quantifies and monetises (where possible) the benefits that accrue to the Unley community as a result of the project, and
- Estimates the expected employment and value added generated by the proposed project.

### Cost benefit analysis

Cost benefit analysis (CBA) assesses the merit of investing in a project, i.e. it assesses if it is worth doing when a broad societal perspective is taken? CBA contrasts the project's economic, social and environmental benefits with its costs, to establish if the benefits outweigh the costs. If this is the case, the project is considered worth doing from a broad community welfare (or economic efficiency) perspective.

The CBA has been undertaken from an Unley community perspective given the nature of project.

### Economic impact analysis

An economic impact analysis (EIA) measures the degree to which the economic stimulus associated with a project accumulates in total economic activity levels (incomes, jobs), i.e. after measuring the cumulative impact of all the buyer/ supplier transactions that are triggered in the local region. That is, it does not assess if a project is worth doing, but measures how project implementation impacts on overall economic activity levels.

The EIA has also been assessed from a local Unley economic perspective.

Importantly, the results of the CBA and EIA are not additive. They answer separate questions and must be interpreted in this fashion.

### **Qualified, headline assessment**

It is important to note that SGS's analysis is at a headline level only. Moreover, SGS has relied on the estimates provided by Council and has not undertaken a detailed review of these assessments or checked their veracity.

### **Marginal, real value, lifecycle assessment**

As per the conventions of economic appraisal, both the CBA and the EIA have been conducted on an marginal basis. That is, the project outcomes are tested in comparison to the outcomes that would be generated under a business as usual (BAU) scenario, that is, without the project.

Moreover, real values have been utilised throughout. This means that dollar prices have not been escalated for inflation over time during the analysis period.

Finally, the analysis has been conducted over a 25 year period, aligning with the long term life of the capital works developed by the project.

## 2 PROJECT OUTCOMES

### 2.1 Business as usual scenario

KWR is one of the key corridors from the Adelaide CBD to the southern suburbs, and provides a direct traffic, cyclist and bus route out to the south to Greenhill Road and subsequently Cross Road<sup>1</sup>. The 2.2 km arterial road passes through a number of inner city suburbs including Unley, Wayville, Goodwood, Hyde Park and Unley Park.

The streetscape of KWR is unique, having been reconstructed using concrete segmental pavers in 1985. KWR is nearing the end of its 25 year design life and will require upgrading in the near future. The road is comprised of one 40 km/h moving lane and one parking lane in either direction; the northern end of the corridor is served by the Glenelg Tram line.<sup>2</sup>

The car is currently the most popular mode of transport for workers and residents using KWR. While the street experiences high levels of pedestrian activity, the footpaths are considered narrow for the level of use. The City is looking to improve pedestrian amenity throughout the precinct and prioritise active transport.

Key attributes in terms of movement include:

- High volumes of traffic with 10,000 vehicles per day south of Park Street to 18,000 vehicles per day south of Greenhill Road
- High frequency bus route with a 15 minute 'Go-Zone' frequency during the day
- Popular route for commuter and recreational cyclists
- High levels of pedestrian traffic, with pedestrians utilising the street to visit businesses and as a movement corridor to access public transport, residential properties and employment.

Figure 2 shows how six precincts of distinct function (land use) and built form (height and design) are desired along KWR. The Central 'high street' precinct from Arthur/Union to Mitchell Park Street forms the targeted stretch of road for upgrade under the project scenario. The Central 'high street' is the village heart of the KWR strip and is a mixed use area comprised primarily of retail, café, takeaway and personal services with active frontages, and office and residential above.

It is important to note that since 2013, vacancy along KWR has been consistently recorded above 6.0 per cent. The precinct currently holds the highest vacancy rate (7.9 per cent) and churn rate (6.8 per cent) for comparative strips across the City.

To the immediate north of the Central high street precinct is the northern residential zone, followed by the northern mixed use 'boulevard' and northern 'gateway'. All three precincts have been earmarked for higher intensity residential development by local and state government policy.

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<sup>1</sup> KWR Draft Transport Report, 2016

<sup>2</sup> See above



FIGURE 2. DESIRED CHARACTER OF KWR BY PRECINCT

Precincts of distinct function (land use) and built form (height & design)

#### northern 'gateway'

- landmark buildings with setbacks to street boundary
- 7 storey in height, with high quality and well articulated design
- office with residential above
- gateway public realm development along western side of road adjacent to tram and stop

#### northern mixed use 'boulevard'

- 3 to 5 storeys in height transitioning to adjacent precincts, with dominant lower podium level and lighter more articulated upper levels
- street and side boundary setbacks with building envelope sloping to rear to avoid undue impacts
- office with residential above, and ancillary service small retail (e.g. café, deli)
- public realm along western side of road with café/community facilities at southern end linking with bike trail, tram and bus stop

#### northern residential

- large apartment/supported accommodation with significant road and side boundary setbacks in spacious landscaped setting
- 2 storey to the streetscape and adjacent residential zone with opportunity to reach 3 storeys centrally on-site. Respectful of heritage context, Park Lands Creek and Glen Osmond Creek environs
- primarily medium density residential with residential style small scale or ancillary non-residential uses
- public realm key site along Glen Osmond linear trail

#### business/residential 'transition'

- mixed uses including moderately scaled non-residential (e.g. consulting rooms, personal service establishments, offices and restaurants) and medium density housing located above non-residential or as a stand-alone use
- 1 to 2 storey façade to the street and 3 storey off-set, with post supported vine covered verandahs over the footpath
- variable setbacks allowing for outdoor dining/ activity spaces and landscaping in front of buildings to the streetscape
- opportunity for medium density housing in adjacent underutilised sites to east

#### central 'high street'

- mixed use primarily retail, café, takeaway and personal services forming active frontages with office and residential above
- intimate pattern of individual narrow (6m) traditional shop fronts, 1 to 2 storey parapet facades and post supported vine covered verandahs at street level
- 3 storeys overall but upper levels setback from street parapet facade, with due respect for heritage context and rear height, and integrated rear parking areas
- public realm key sites close to Arthur Street (in front of Toop and Toop) and/or a road closure at Thomas Street and adjacent road verge areas

#### southern 'living'

- residential character housing with pattern of consistent road (up to 5 metres) and side (2 to 3 metres) boundary setbacks
- 1 storey presentation to street, with 2 storey upper levels in-roof and/or well setback and towards the rear
- residential only (including 'home activity' and 'home office')
- public realm key site at Heywood Park

3 Maximum building heights

Public realm focus – key road junction, precinct entry, tram

Existing Local Heritage Place

Proposed Local Heritage Place

Existing Contributory Item

Potential Contributory Item



Source: City of Unley, 2016.



## Population and employment levels

KWR and other strip based precincts do not align well with the geographic areas used by the Australian Bureau of Statistics and State Government for statistical collection and forecasting purposes. Consequently, SGS has assembled estimates of population and employment levels for KWR and select comparator precincts in Unley, based on the spatial definitions documented in Appendix A.

Table 1 and 2 summarise these results, highlighting that over the next 20 years population within the KWR precinct is expected to grow from 930 to 1020 (i.e. ~90 residents). A similarly modest rate of employment growth is expected, increasing from 840 to 1,000 (i.e. ~120 jobs) over the 2016 to 2036 period.

TABLE 1. POPULATION KWR, ADJACENT PRECINCTS, CITY OF UNLEY

Population	2016	2021	2026	2031	2036
<b>KWR</b>	<b>931</b>	<b>954</b>	<b>975</b>	<b>996</b>	<b>1,016</b>
Unley Rd	1,323	1,350	1,377	1,404	1,429
Goodwood Rd	1,094	1,168	1,246	1,322	1,396
<b>City of Unley</b>	<b>39,182</b>	<b>40,329</b>	<b>41,518</b>	<b>42,674</b>	<b>43,802</b>

Source: MASTEM (2016) & SGS (2016).

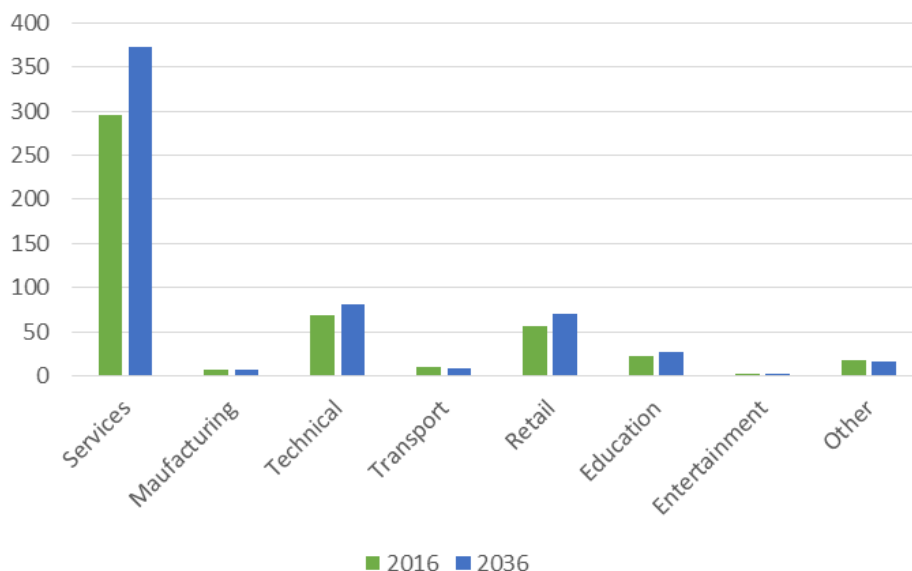
TABLE 2. EMPLOYMENT KWR, ADJACENT PRECINCTS, CITY OF UNLEY

Employment	2016	2021	2026	2031	2036
<b>KWR</b>	<b>840</b>	<b>887</b>	<b>924</b>	<b>962</b>	<b>998</b>
Unley Rd	948	1,002	1,044	1,087	1,128
Goodwood Rd	609	653	693	733	773
<b>City of Unley</b>	<b>22,538</b>	<b>23,996</b>	<b>25,198</b>	<b>26,402</b>	<b>27,608</b>

Source: MASTEM (2016) & SGS (2016).

Figure 3 highlights that the bulk of this employment growth is expected in the services industry.

FIGURE 3. INDUSTRY EMPLOYMENT GROWTH, KWR 2016 – 2036



Source: MASTEM (2016) & SGS (2016).

## Asset renewal

As already mentioned, the current streetscape of KWR is unique, having been reconstructed using concrete segmental pavers in 1985. However, this asset is nearing the end of its 25 year design life and will require upgrading in the near future.

The *KWR Draft Transport Report* identified existing locations within the street that evidence the early stages of the road sub-structure starting to fail.

The 2010 City of Unley *KWR Pavement Report* states that:

- KWR has continued to deteriorate since the last inspection in 2006, with the section in the shopping precinct between Mary and Mitchell Streets having undergone significant deterioration despite patching work.
- Sections of KWR will require replacement/renewal within the next 5 years for Mary Street to Mitchell Street, and 5-10 years and 6-12 years in other sections.
- As the road continues to deteriorate the maintenance cost will increase to the point where there is no economic long term benefit in Council maintaining the surface and it will need to be replaced.

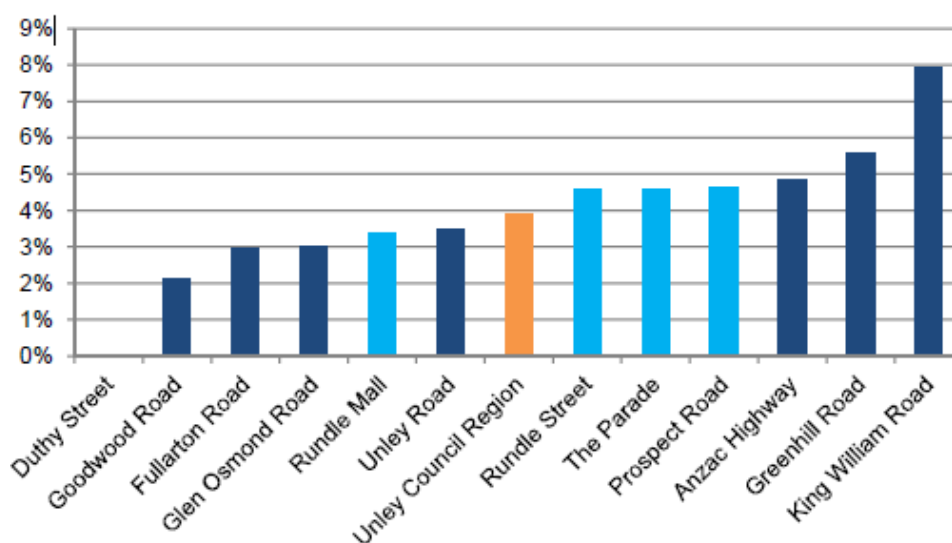
## Retail and commercial vacancy & changing tenancy mix

A recent report by Colliers International (2015) found that:

- The KWR precinct currently holds the highest vacancy rate (7.9 per cent) and churn rate (6.8 per cent) for comparative strips in the City.
- Vacancy along King William Road has been consistently above 6.0 per cent since 2013.

Figure 4 illustrates KWR's comparatively high vacancy when compared with retail precincts in and outside of the City.

FIGURE 4. COMPARATIVE VACANCY RATES 2015

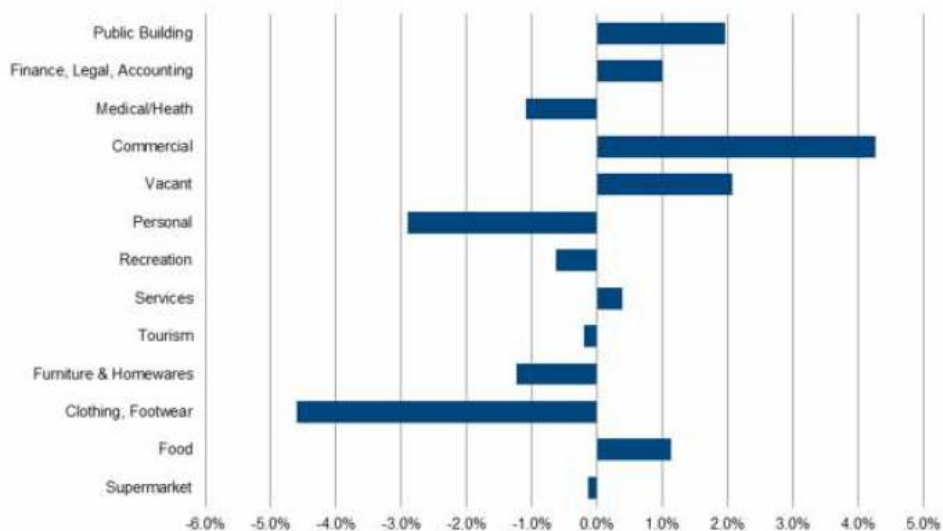


Source: Colliers International, 2015.

The KWR vacancy rate presents a challenge to realising Theme 1 of the City of Unley's *Business and Economic Development Strategy 2010/13* which outlines a plan to strengthen the retail and professional services sector. The strategy recognises that the nature of retail in the area is changing with 'fewer antique and curiosity shops, and more health and beauty shops and cafes and restaurants'.

This is consistent with the tenancy mix changes in KWR which have seen an increased share in the number of food and commercial tenants offset by a decline in the personal, clothing and footwear categories (Colliers International, 2015).

FIGURE 5. TENANCY MIX CHANGES 2012 – 2015



Source: Colliers International, 2015.

### Urban renewal/ densification

To the immediate north to the central precinct is the northern residential zone, followed by the northern mixed use 'boulevard' and northern 'gateway'. All three precincts have been earmarked for higher intensity residential development by local and state government planning policy. However, as shown in Table 1 and 2 only limited population and employment growth is forecast.

### A car dominated environment/ poor pedestrian amenity

The 2002 *Unley Integrated Transport Strategy* (2002) described the KWR route as significant and multifunctional and 'without a single land use footprint', and identified the potential for travel demand measures to reduce traffic. There was recognition that there should be greater prioritisation of people over traffic.

The City have since expressed a vision for the movement within the KWR precinct to provide safe and equitable allocation of space between all users. The underlying principle of the movement strategy is to improve the environment for the various transport modes used to access and move around the KWR precinct, prioritising those modes of greatest importance to the precinct. In order of importance, these are:

- Pedestrians
- Cyclists
- Customers
- Vehicle access/parking
- Private car or through traffic.

Table 3 provides a summary of key points for each mode of transport based upon the KWR Transport Draft Report.

TABLE 3. OVERVIEW OF VEHICLE, PEDESTRIAN AND BICYCLE MOVEMENTS

Mode	Summary
<b>Vehicles</b>	<ul style="list-style-type: none"> <li>– KWR experiences high volumes of traffic with 10,000 vehicles per day south of Park Street to 18,000 vehicles per day south of Greenhill Road.</li> <li>– Park Street and Mitchell Street both carry around 4,500 vehicles per day.</li> <li>– Vehicle speeds are not therefore considered to be an issue. There are no significant crash locations.</li> </ul>
<b>Public Transport</b>	<ul style="list-style-type: none"> <li>– High Frequency bus route with 15 min Go-Zone Frequency throughout the day, every 10 mins in peak periods.</li> <li>– Northern End of KWR served by the Glenelg tram, with stops 1 (Greenhill Rd) and 2 (Wayville) within walking distance.</li> </ul>
<b>Cycling</b>	<ul style="list-style-type: none"> <li>– Popular route for commuter and recreational cyclists.</li> <li>– Mike Turtur bikeway alongside the tram, connects to the northern end of KWR.</li> <li>– No formal bike facilities available along KWR. Despite this, route appears well used.</li> <li>– 9 cyclists injured in road crashes between 2009 and 2013.</li> </ul>
<b>Pedestrians</b>	<ul style="list-style-type: none"> <li>– High level of pedestrian activity.</li> <li>– Most visit multiple shops/businesses as well as use the street as a movement corridor to access PT/residential properties and employment.</li> <li>– Pedestrian footpaths in the core area are considered narrow for level of use.</li> <li>– Pedestrians are largely reliant on mid-block crossings, between parked cars and gaps in traffic. There have been 4 pedestrian injuries from road crashes between 2009 and 2013.</li> </ul>

Source: KWR Draft Transport Report

## Road safety

The *KWR Draft Transport Report* states for the period 2009 – 13 a total of 51 crashes, resulting in 20 injury casualties, recorded along KWR between Park Street and Union Street.

Of the total number of crashes, 9 involved cyclists and 4 involved pedestrians. In only one of the pedestrian crashes was the cause of the crash attributed to the pedestrian or cyclist.

TABLE 4. SUMMARY OF CRASHES 2009 - 2013

	Injury	Damage Only	Total
<b>Vehicles</b>	10	28	38
<b>Cyclists</b>	6	3	9
<b>Pedestrians</b>	4	0	4
<b>Total</b>	<b>20</b>	<b>31</b>	<b>51</b>

The Hassel report site and context analysis identified that pedestrian and vehicle sight lines are blocked by traffic and that it is difficult for people to cross the street at times.

## Modal share

A limited survey undertaken by the City identified the car as the most popular mode at 57 per cent with walking as the only other significant mode at 31 per cent.

Table 5 shows a breakdown of the modes utilised for journey to work (JTW) purposes for both workers in and residents of the KWR precinct. For both residents and workers the car is the most popular form of transport at >70 per cent for residents and almost 90 per cent of workers.

TABLE 5. CURRENT MODAL SHARE, JTW RESIDENTS &amp; WORKERS

	Residents		Workers	
	No.	%	No.	%
<b>Public transport<sup>A</sup></b>	54	12.6%	29	5.6%
<b>Private motor vehicle<sup>B</sup></b>	306	71.8%	460	88.0%
<b>Active travel<sup>C</sup></b>	54	12.7%	24	4.6%
<b>Other</b>	12	2.9%	10	1.8%
<b>Total<sup>D</sup></b>	<b>426</b>	<b>100%</b>	<b>523</b>	<b>100%</b>

Notes:

A Train, bus, tram or taxi

B Car as driver or passenger plus motorbike

C Bicycle or walked

D Those that did not work are excluded.

Source: ABS, 2011.

Limited data is available about the non-work trips for residents of KWR. To provide some guidance, SGS has extracted data relevant to localities in Melbourne that reflect Unley's spatial positioning within Adelaide. This data tells us that on average the ratio of non-work to work trips per day is 3.5: 1. On a per-resident basis, the average time and distance of daily trips by mode of is summarised in Table 6.

TABLE 6. ESTIMATED TRIP CHARACTERISTICS

	Distance (km)	Time (mins)	Percentage
<b>Work trips</b>	<b>11.2</b>	<b>31.3</b>	<b>100%</b>
– Active travel <sup>A</sup>	2.6	17.9	14.8%
– Other	9.8	26.0	2.0%
– Private motor vehicle <sup>B</sup>	12.6	28.8	65.0%
– Public Transport <sup>C</sup>	13.6	52.7	18.2%
<b>Non-work trips</b>	<b>6.4</b>	<b>18.9</b>	<b>100%</b>
– Active travel <sup>A</sup>	1.0	11.7	26.2%
– Other	7.8	22.6	1.2%
– Private motor vehicle <sup>B</sup>	8.0	18.5	65.1%
– Public Transport <sup>C</sup>	11.1	49.7	7.5%
<b>All trips</b>	<b>7.5</b>	<b>21.7</b>	

Notes:

A Bicycle or walked

B Car as driver or passenger plus motorbike

C Train, bus, tram or taxi

Source: VISTA, 2016.

## 2.2 Project scenario

A description of the project has been provided in Section 1.1.

The project as described is likely to impact on some of the key issues facing KWR, which are articulated above in Section 2.1. More specifically, the project is likely to:

- Commence the process of KWR asset replacement and renewal
- Improve the amenity along KWR and enable operating flexibility for business operators in relation to the use of footpath/ outdoor space, thereby helping to normalise vacancy rates
- Generate a safer environment for pedestrians, cyclists and motorists, and potentially, and
- Accelerate urban renewal/ densification within the KWR precinct and its surrounding areas.

Given that the project design is still at a relatively conceptual level, it is difficult for SGS to determine the degree to which the above contributions will be promoted by the project. Having said this, experience elsewhere tells us that projects similar to the proposed KWR project have consistently generated an array of benefits for the community.

## Experience elsewhere

### Creating Better Places Program

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In 2008, SGS was engaged by the Victorian Government to evaluate the effectiveness of the Creating Better Places grants program that funds council led projects for urban improvement planning, capital works and coordination activities (i.e. place management) in priority activity centres across Melbourne.

When evaluating the performance of the Creating Better Places program SGS found that the program was a key implementation tool for Melbourne's 2030's activity centre policy, which, in essence, was to intensify, improve and diversify activity centre development. Overall, the program was found to help:

- Build some foundations for activity centre investment by delivering structure plans that meet Government guidelines and investor requirements, and
- Catalyse structure plan implementation by coordinating and seeding capital works projects in public spaces in these priority activity centres.

Furthermore, the program was found to underpin significant net benefits to the Victorian community which accrue over the medium and long term and which span across the following:

- Heightened amenity
- Liveability enhancements including improved accessibility to jobs and services, and reduced congestion costs
- Economic productivity improvements and infrastructure cost savings, as urban redevelopment in the surrounding areas is promoted, and
- Housing affordability improvements, as a diversity of housing types is provided by the redevelopment process.

The analysis highlighted that the financial impacts of the programs of Government are limited to program funding. However, the socio-economic implications are much more widely distributed and likely to engender triple bottom line benefits that outweigh the costs by a factor of 3.

### Impacts of reduced car parking

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Part of the KWR proposal involves the removal or reallocation of car parking spaces from the precinct. Over recent years SGS has undertaken a number of studies exploring the impact of parking on activity centres.

In 2010, SGS prepared a report for the City of Yarra, an inner Melbourne municipality, investigating the impact and contribution of the provision of car parking in activity centres, particularly with regard to business activity.

The analysis showed that there appeared to be no systematic relationship between the provision of conveniently located on-street parking and the economic performance of the four shopping strips covered by the study.

Key findings also included the following:

- Car borne shoppers are more likely to change destination or cancel their trip in the face of a decrease in car parking when compared to workers or other non-workers
- Car borne shoppers were found to have a marginally lower average spend than those shoppers arriving by public transport
- Results of the statistical analysis suggested that a parking restraint policy may be efficient in encouraging workers to shift their commuting mode with minimal effect on their destination.

In 2009, SGS undertook a similar study investigating the implications of introducing parking metres to activity centre strips. The following positives resulting from the introduction of parking metres were observed, and may also be applicable to the KWR project's removal/ reuse of car parking spaces:

- Encouragement of sustainable transport travel modes such as public transport, cycling, walking and carpooling (particularly for those in the local catchment)
- Shopping 'browsing' expenditure may be increased by those waiting for public transport arrivals
- Potential shifts in mode of travel reduces traffic congestion improving accessibility for new customers and those who must drive to a centre.

Based on case study analysis, SGS hypothesised that while the introduction of new parking fees may result in some indignation at first and the tendency to 'make a statement', over time it can be expected that some customers will reverse their decision to shop elsewhere as the inconvenience becomes apparent.

### KWR project outcome targets

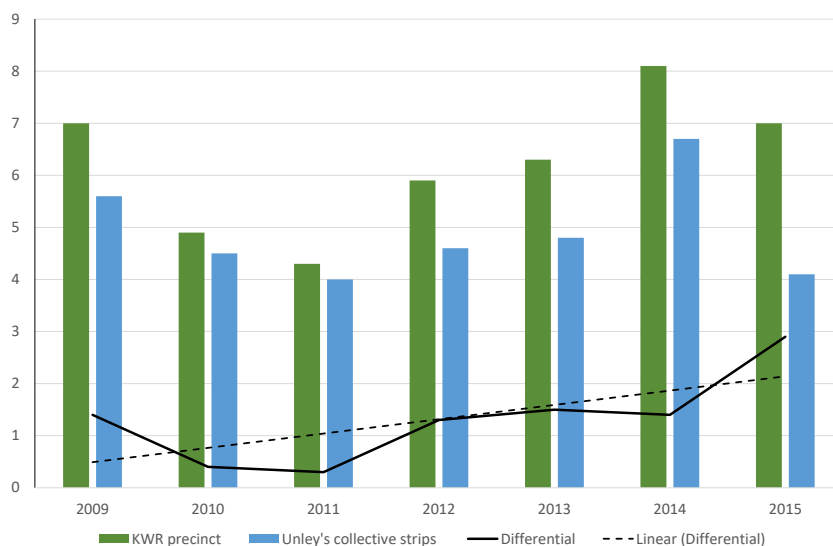
Given that the outcomes promoted by the KWR project are difficult to quantify precisely at this stage, SGS has developed a range of targets that might be plausibly enabled by the project. These include high and low estimates for the following outcomes, which essentially stem from having a more amenable, vibrant and safer street environment.

- Normalising the vacancy rate of the KWR precinct in the short term, i.e. reducing vacancies to the average vacancy rates experienced across shopping strips in the City
- Commensurately increasing the local retention rates of resident spending on retail and food & beverage/ hospitality services
- Shifting local resident trips to more public and active transport modes, and in doing so, reducing transport costs, reducing transport accident costs and improving health outcomes
- Accelerating urban renewal/ redevelopment within the precinct and, in doing so, lifting population and employment levels accommodated along KWR.

#### Normalising vacancy rates

The long term performance of KWR in comparison to the City of Unley's other shopping strips in terms of tenancy vacancies is shown in Figure 6.

FIGURE 6. HISTORIC VACANCY RATES



Source: Colliers International (2015).

The linear trend line shows that KWR's differential in vacancy has increased steadily over recent years and now sits at above 2% higher than that experienced in surrounding strips. Plausible project targets could be to address this ongoing differential as follows:

- Pessimistic a permanent 1% reduction in vacancy rate
- Optimistic a permanent 2% reduction in vacancy rate.

#### Local resident spending rates

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Data provided by Council indicates that the average size of retail tenancies along the KWR strip is approximately 120 sqm. Assuming that this floorspace achieves a standard turnover rate of between \$5,000 and \$10,000 per square metre p.a., a single tenancy will attract between:

- Pessimistic \$600,000 per annum
- Optimistic \$900,000 per annum.

Colliers International (2015) estimate that KWR has 262 retail/ commercial tenancies. If the optimistic and pessimistic targets for tenant vacancy reductions are assumed to flow through to tenant revenues, this equates to the following retail/ commercial spending rates along KWR:

- Pessimistic \$1.57 million per annum
- Optimistic \$6.23 million per annum.

#### Local resident trip patterns

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Section 2.1 highlights that KWR is a car dominated environment. Given the described scope of the project, it is plausible that the mix of trips made by local residents will change slightly in favour of public and active travel modes. This might be bounded by the following assumptions:

- Pessimistic 5% increase in public and active travel trips for work and non-work trips
- Optimistic 10% increase in public and active travel trips for work and non-work trips.

Moreover, with the improved safety afforded by the project it is plausible that accident risks will also reduce. Given the profile of accidents along KWR described earlier, i.e. about 10 crashes per year in total, plausible project assumptions might be as follows:

- Pessimistic 10% reduction in accidents
- Optimistic 20% reduction in accidents.

#### Local area development levels

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In terms of the long term expectations for urban development, SGS has utilised data built into the strategic transport model for metropolitan Adelaide (MASTEM).

This data shows that under the business as usual scenario, population, dwellings and employment within the KWR precinct are expected to grow very modestly over the period to 2036 (Table 7). It is our view that the project might improve these forecasts modestly, with overall development growth to 2036 increasing by the following rates:

- Pessimistic 10%
- Optimistic 20%.



TABLE 7. BAU &amp; PROJECT SCENARIO DEVELOPMENT RATES: KWR PRECINCT

	2016	2021	2026	2031	2036
<b>Population</b>					
– BAU	931	954	975	996	1,016
– Pessimistic	931	957	981	1,004	1,026
– Optimistic	931	959	986	1,011	1,036
<b>Dwellings</b>					
– BAU	474	490	506	522	474
– Pessimistic	475	493	511	529	475
– Optimistic	477	497	516	536	477
<b>Employment</b>					
– BAU	840	887	924	962	998
– Pessimistic	840	892	933	974	1,014
– Optimistic	840	897	941	986	1,029

Source: MASTEM (2016) & SGS (2016).

Note: These improvements in development rates are only included in the CBA, i.e. to the extent that they lift the amount of local residents who shift towards public and active transport modes. While this is a highly conservative approach, it certainly reinforces the degree to which improved local retail spending will reduce vacancy rates.

# 3 COST BENEFIT ANALYSIS

## 3.1 Marginal costs and benefits

The array of marginal costs and benefits generated by the project are outlined in Table 8.

TABLE 8. COST BENEFIT FRAMEWORK

Marginal Costs		Marginal Benefits	
<b>Capital costs</b> for delivering the project and, in doing so, improving the KWR asset		<b>Improved amenity</b> and functionality in the KWR precinct	
<b>Recurrent costs</b> for maintaining and operating the improved KWR asset		<b>Avoided maintenance costs</b> as KWR asset exponentially deteriorates	
<b>Environmental costs</b> linked with non-renewable resource depletion		<b>Economic surpluses</b> (rents) generated by KWR property owners	
<b>Construction nuisance</b> caused during the project's delivery		<b>Economic surpluses</b> (profits) generated by KWR business proprietors	
		<b>Reduced transport costs</b> (decongestion, pollution) linked with more public and active travel patterns by KWR residents	
		<b>Improved resident health</b> linked with more active travel patterns by KWR residents and reduced accident with the precinct	

Source: SGS Economics & Planning, 2016.

## 3.2 Marginal costs

### Capital costs

The total capital costs of the project are assumed to be \$4 million.

This allowance covers procurement costs, contractor preliminaries, project management fees, and coordination of the construction program.

These costs are assumed to be expended in Year 1 of the project, acknowledging that this will be split over two financial years.

### Recurrent costs

Annual maintenance costs for the improved asset are assumed to be 1% of capital cost per annum for the first 10 years (Years 2 to 11), escalating to 1.5% thereafter (Year 12 plus).

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## Environmental costs

Environmental costs include those costs linked with developing the precinct/s that are not captured in the market price of envisaged works (e.g. non-renewable resource depletion costs).

Environmental risk will be managed during the project management process, and largely if not wholly mitigated.

Environmental costs have not been quantified due to their inherent intangibility.

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## Construction nuisance

A cost to the ongoing users of the KWR, albeit only temporary, will be the nuisance caused by the project's construction works. This cost is not expected to be large when compared to the ongoing disruption of the KWR incremental change program under the BAU scenario.

Best practice construction management and processes will minimise this cost

SGS has not attempted to quantify this cost given the inherent difficulty in doing so, recognising that it is a short term cost only.

### 3.3 Marginal benefits

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#### Improved precinct amenity and functionality

It is assumed that the project will improve amenity and outdoor seating capacity in the precinct. This is likely to generate significant social benefits for precinct users and will most likely be reflected in local resident visitation rates to, length of stays in, and expressed satisfaction with the precinct.

Notwithstanding this, SGS has not attempted to value improved amenity because of the potential overlaps with improved amenity and economic surpluses (see below).

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#### Avoided maintenance costs

Council has advised that maintenance spending at KWR has tracked as follows over recent years:

- 2014/15      \$25,000
- 2015/16      \$20,000
- 2016/17      \$30,000.

Section 2.1 indicates that renewal is required imminently and maintenance spending will soon become inefficient.

SGS has assumed that the spending required to maintain the existing KWR asset is broadly equivalent to the costs of maintaining the proposed project, i.e. \$40,000 p.a. for Years 2 to 11, escalating to \$60,000 p.a. in Year 12 (and thereafter).

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#### Economic surpluses generated by property owners

By reducing the vacancy rates along KWR as described in Section 2.2, property assets that are currently underutilised will be better positioned, and will become more valuable in terms of accommodating economic activity.

The value of this repositioning is reflected in the rents earned. As discussed above, these rents are likely to plausibly range between the following:

- Pessimistic scenario \$102,000 per annum
- Optimistic scenario \$204,000 per annum.<sup>3</sup>

Given the step change approach proposed by the project, this reduction in vacancy and the surpluses that are generated as a result, are expected to occur rapidly, i.e. commencing in Year 2.

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### **Economic surpluses generated by business operators**

By reducing the vacancy rates along KWR as described in Section 2.2, property assets that are currently underutilised will be better positioned, and will become more valuable in terms of accommodating economic activity, i.e. in the short term given.

The value of this repositioning is also reflected in the profits generated by the businesses that occupy these reposition property assets. As discussed above, these operators are likely to enjoy turnovers of between the following:

- Pessimistic \$1.57 million per annum
- Optimistic \$6.23 million per annum<sup>4</sup>.

ABS<sup>5</sup> indicates that the average profitability rate on business sales in the retail services is ~5%, whereas food & accommodation services is ~10%. If we apply a conservative 5% profitability rate on the above turnover, KWR business profits are as follows:

- Pessimistic \$79,000 per annum
- Optimistic \$314,000 per annum.

Again these benefits are expected to flow in the short term, i.e. commencing in Year 2.

---

### **Reduced transport costs**

It is assumed that the project will reduce local resident private vehicle use, as more trips become self-contained to the local area (i.e. for dining, shopping, working), and public transport modes become more attractive alternatives.

For each kilometre of shift away from private vehicle use, the local community will benefit from decongested roads and reduced air and noise pollution, and greenhouse gas emissions savings. Table 9 identifies how each kilometre of avoided private motorised vehicle generates community benefits.

<sup>3</sup> = (% reduction in vacancy rate) \* (number of tenancies) \* (average floorspace sqm per tenancy) \* (average rents per sqm per annum).

<sup>4</sup> = (% reduction in vacancy rate) \* (number of tenancies) \* (average floorspace sqm per tenancy) \* (average turnover density per sqm per annum).

<sup>5</sup> ABS Cat No. 5676.0 - Business Indicators, Australia, Jun 2016.

TABLE 9. TRAVEL BENEFITS: REDUCED PRIVATE VEHICLE KILOMETRES

Benefit categories	Range of estimates (\$/km)
Decongestion benefit	\$0.207 - \$0.258
Air pollution reduction	\$0.017 - \$0.028
Noise reduction	\$0.005 - \$0.009
Greenhouse gas reduction	\$0.006 - \$0.022

Source: Australian Transport Assessment and Planning Guidelines (2016).

### Improved resident health

It is assumed that the project will reduce local resident private vehicle use, as more trips become self-contained to the local area (i.e. for dining, shopping, working), and public transport modes become more attractive alternatives.

For each kilometre of shift towards active travel modes, the local community will benefit from improved health and reduced vehicle accident costs. Table 10 identifies how each kilometre of induced active travel generates community benefits.

These benefit rates have been applied to the pessimistic and optimistic targets described earlier for mode shift and increased in overall development rates (population) in the KWR precinct.

TABLE 10. HEALTH BENEFITS: INCREASED ACTIVE TRAVEL KILOMETRES

Benefit categories	Range of estimates (\$/km)
Bicycle injury cost savings	-\$0.020 to -\$0.370
Walking injury cost savings	-\$0.031 to -\$0.240
Health benefits cycling	\$0.014 - \$1.660
Health benefits walking	\$1.018 - \$1.680

Source: Australian Transport Assessment and Planning Guidelines (2016).

These negative benefits in relation to injury costs savings, as people are more likely to injure themselves walking or riding than driving, must be counterbalanced by the improved safety profile of KWR assumed in Section 2.2.

ATAP Guidelines (2016) indicate that the total combined cost of a 'serious injury crash' is ~\$500,000 whereas an 'other injury crash' is ~\$20,000. The lesser cost has been applied in the analysis.

## 3.4 Project performance

In line with convention, the cost benefit analysis has been undertaken on a 'marginal' basis.

A discounted cashflow analysis has been conducted over 25 years, using a real discount rate of 4% to convert future costs and benefits into present day dollars.

Two performance measures are generated by the analysis:

- Net Present Value (NPV), and
- Benefit Cost Ratio (BCR).

Details on how these measures are calculated and how they should be interpreted are summarised in Table.

TABLE 11. INTERPRETATION OF PERFORMANCE MEASURES

Performance measure	Estimation method	Decision rule
Net Present Value (NPV)	A number generated by deducting the present value of the stream of costs from the present value of the stream of benefits (with the present value of costs and benefits determined by using an appropriate discount rate).	<ul style="list-style-type: none"> <li>Accept options with a positive NPV</li> <li>Reject options with a negative NPV</li> <li>The greater the NPV the better.</li> </ul>
Benefit Cost Ratio (BCR)	Ratio of discounted present day benefits to discounted present day costs.	<ul style="list-style-type: none"> <li>Accept options with a BCR that exceeds 1</li> <li>Reject options with a BCR less than 1</li> <li>The greater the BCR the better.</li> </ul>

The discounted cashflow results are provided in Tables 12 and 13. Tables also include results using 2% and 4% real discount rates, so that any sensitivity to these rates is automatically tested.

TABLE 12. DISCOUNTED CASH FLOW RESULTS: PESSIMISTIC SCENARIO

	Present Value (2% real discount rate)	Present Value (4% real discount rate)	Present Value (6% real discount rate)
Capital costs	\$3,921,600	\$3,846,200	\$3,773,600
Recurrent costs	\$936,500	\$723,700	\$571,500
Environmental costs	Not quantified	Not quantified	Not quantified
Construction nuisance costs	Not quantified	Not quantified	Not quantified
<b>Total costs</b>	<b>\$4,858,100</b>	<b>\$4,569,900</b>	<b>\$4,345,100</b>
Improved amenity	Not quantified	Not quantified	Not quantified
Avoided maintenance	\$936,500	\$723,700	\$571,500
Economic surpluses (rents)	\$1,894,700	\$1,498,000	\$1,209,800
Economic surpluses (profits)	\$1,457,500	\$1,152,300	\$930,600
Reduced transport costs	\$2,066,800	\$1,637,900	\$1,325,800
Improved resident health	\$458,100	\$361,000	\$290,600
<b>Total benefits</b>	<b>\$6,813,600</b>	<b>\$5,372,900</b>	<b>\$4,328,300</b>
<b>Net benefits (NPV)</b>	<b>1.40</b>	<b>1.18</b>	<b>1.00</b>
<b>Benefit Cost Ratio (BCR)</b>	<b>\$1,955,500</b>	<b>\$803,000</b>	<b>-\$16,800</b>

Notes: PV means present values.

Source: SGS Economics & Planning, 2016.

TABLE 13. DISCOUNTED CASH FLOW RESULTS: OPTIMISTIC SCENARIO

	Present Value (2% real discount rate)	Present Value (4% real discount rate)	Present Value (6% real discount rate)
Capital costs	\$3,921,600	\$3,846,200	\$3,773,600
Recurrent costs	\$936,500	\$723,700	\$571,500
Environmental costs	Not quantified	Not quantified	Not quantified
Construction nuisance costs	Not quantified	Not quantified	Not quantified
<b>Total costs</b>	<b>\$4,858,100</b>	<b>\$4,569,900</b>	<b>\$4,345,100</b>
Improved amenity	Not quantified	Not quantified	Not quantified
Avoided maintenance	\$936,500	\$723,700	\$571,500
Economic surpluses (rents)	\$3,789,500	\$2,996,000	\$2,419,600
Economic surpluses (profits)	\$5,829,900	\$4,609,300	\$3,722,500
Reduced transport costs	\$5,639,800	\$4,469,100	\$3,617,000
Improved resident health	\$3,025,000	\$2,377,600	\$1,909,600
<b>Total benefits</b>	<b>\$19,220,700</b>	<b>\$15,175,700</b>	<b>\$12,240,200</b>
<b>Net benefits (NPV)</b>	<b>3.96</b>	<b>3.32</b>	<b>2.82</b>
<b>Benefit Cost Ratio (BCR)</b>	<b>\$14,362,600</b>	<b>\$10,605,800</b>	<b>\$7,895,100</b>

Notes: PV means present values.

Source: SGS Economics &amp; Planning, 2016.

# 4 ECONOMIC IMPACT ANALYSIS

## 4.1 Introduction

An economic impact assessment (EIA) measures the degree to which the economic stimulus associated with a project accumulates in total economic activity levels of a defined region, i.e. after measuring the cumulative impact of all the buyer/ supplier transactions that are induced in the region.

The basic steps in undertaking an EIA include:

1. Isolating how the project stimulates the regional economy (direct impacts).
2. Generating region specific econometric models and subsequently deriving economic multipliers for major regional industry groups.
3. Applying these multipliers (by relevant industry group) to the direct impacts to estimate total regional impacts in terms of regional (output) value added and employment.

## 4.2 Regional definition

For this purpose of this project, the local area was defined as the City of Unley.

## 4.3 Economic stimuli (direct impacts)

The economic stimuli include:

- Improved retail spending (which reduces vacancies, pays rents, and generates profits) which directly impacts the Retail sectors.

## 4.4 Regional economic multipliers

To calculate the indirect impacts associated with the direct impacts outlined above, SGS has used regional economic multipliers generated by its internal econometric modelling techniques.

In essence, SGS takes the inter-industry relationships (buyer–supplier transaction) that are measured by the Australian Bureau of Statistics in the National Accounts,<sup>6</sup> and scales these relationships down to a state level initially and then subsequently a regional level using available datasets and accepted mathematical techniques.

The results of this scaling process are a set of regional industry specific multipliers which estimate how spending in a specific regional industry, via the assessed direct impacts (stimuli), flows through to total regional value added (or contribution to GRP net of taxes), and full time equivalent employment levels.

<sup>6</sup> Particularly the Australian Input-Output Tables (ABS Cat. No. 5209.0).



## 4.5 Assessed economic impacts

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### Pessimistic scenario

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#### Job creation

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Once completed, i.e. from Year 2 onwards, the project is expected to generate on an average annual basis:

- Direct            12 additional FTE jobs
- Indirect        4 additional FTE job
- Total            16 additional FTE jobs.

#### Value added (contributions to GRP)

---

Once completed, i.e. from Year 2 onwards, the project is expected to generate on an average annual basis:

- Direct            \$0.91 million
- Indirect        \$0.56 million
- Total            \$1.47 million.

Value added includes the sum of wages paid out to employees and Gross Operating Surpluses retained by firms, net of input or material costs. In other words, value added measures labour and business surpluses retained within a region. It does not include taxes paid to government.

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### Optimistic scenario

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#### Job creation

---

Once completed, i.e. from Year 2 onwards, the project is expected to generate on an average annual basis:

- Direct            49 additional FTE jobs
- Indirect        15 additional FTE job
- Total            64 additional FTE jobs.

#### Value added (contributions to GRP)

---

Once completed, i.e. from Year 2 onwards, the project is expected to generate on an average annual basis:

- Direct            \$3.63 million
- Indirect        \$2.26 million
- Total            \$5.89 million.

---

### Impact trajectory

Figure 7 illustrates how this job creation is expected to track over the life of the project for both scenarios. The directly impacted industries include retail with indirectly impacted industries including retail and local service provision.

FIGURE 7. MARGINAL JOB CREATION (BOTH SCENARIOS)

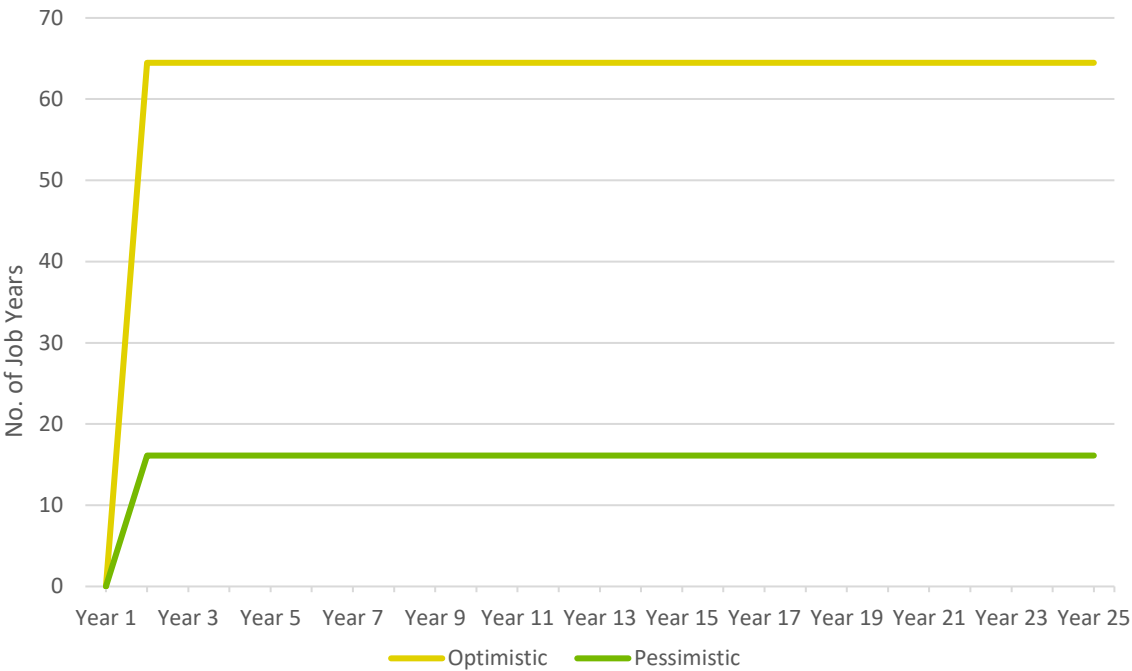


Figure 8 illustrates how this value added generation is expected to track over the life of the project for both scenarios.

FIGURE 8. MARGINAL VALUE ADDED GENERATION



## 4.6 Limitations to analysis

Input-output modelling has some limitations, as follows, but is a cost effective technique, recognising that the only feasible alternative is utilise partial or general equilibrium econometric models. Having said this, general equilibrium models require an annual stimulus of >\$100 million before the impacts start to be measurable across the economy.

- The input output (econometric) model assumes relationships between industries are static over the forecast period. That is, productivity improvements are not factored in and historic relationships are assumed to hold.
- The input output (econometric) model derives relationships between industries using total production estimates. Consequently, the relationships are 'average', whereas the stimulus used as an input is 'marginal'. Such an approach does not account for any 'underutilised capacity' at the industry level or additional economies of scale that might ensue, as production expands from its existing base.
- All of the stimuli (direct impacts) are assumed to be 'new' economic activities for each regional economy. That is, crowding out or industry substitution effects are assumed to be negligible, meaning that key economic inputs such as labour and capital are assumed to be unconstrained, i.e. there is sufficient slack in the economy to service these stimuli without transferring significant resources from other productive uses. It also means that the activities that are promoted by the subject project do not adversely affect operations elsewhere.

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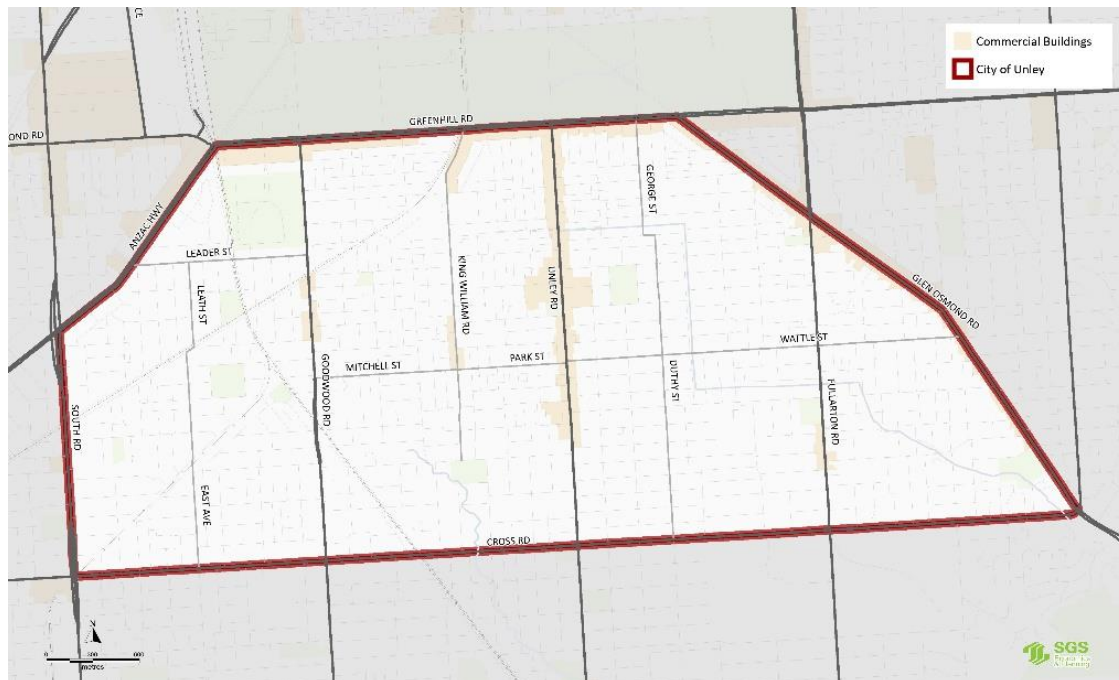
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# APPENDIX A

FIGURE 9. BASE MAP OF PRECINCTS (COMMERCIAL BUILDINGS)



Source: SGS Economics and Planning, 2016

FIGURE 10. PRECINCTS BY TRAVEL ZONE



Source: SGS Economics and Planning, 2016

**Precincts by SA1**

- Anzac Hwy/South Rd
- Duthy St
- Fullarton Rd
- Glen Osmond Rd
- Goodwood Rd
- Greenhill Rd
- King William Rd
- Unley Rd

SA1s  
City of Unley

King William Road Project 33

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## DECISION REPORT

**REPORT TITLE:** CITY OF UNLEY MAINSTREET ASSOCIATION  
REVIEW 2016

**ITEM NUMBER:** 32

**DATE OF MEETING:** 7 DECEMBER 2016

**AUTHOR:** AKARRA KLINGBERG

**JOB TITLE:** COORDINATOR BUSINESS AND ECONOMIC  
DEVELOPMENT

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### 1. EXECUTIVE SUMMARY

This report is to provide the Unley Business and Economic Development (UBED) Committee with options to consider regarding the City of Unley Mainstreet Association Review 2016 and Mainstreet Associations.

At the 2 December 2015 meeting, the UBED Committee resolved that:

*An independent consultant be engaged to undertake a review of the role and operation of the Trader Associations, in conjunction with the Associations, to ensure they are still the most appropriate method for promotion of the precincts, and are supported by the businesses of those precincts. The review is to include face to face interviews with a broad cross section of those who pay the separate rate.*

In April 2016, an economic development consultant (Retail IQ) was engaged to undertake a review of the existing association framework model in order to assess its relevance in the current economic climate. An analysis of the precinct areas was conducted to identify each association's strengths, weaknesses, opportunities and threats. This analysis identified common threads which Retail IQ presented to a UBED Committee workshop on 2 November 2016.

One of the main findings of the review is the importance of good governance arrangements when dealing with public money. As independent incorporated associations, the Mainstreet Associations are responsible for their own governance. While Council is not able to provide these services directly, there is opportunity for the Administration to assist with the coordination of good governance practices.



## **2. RECOMMENDATION**

The Committee recommends to Council that:

1. The report be received.
  2. Recommend to Council that the Association Separate Rate Agreements be reviewed to include a mandatory requirement for the Mainstreet Associations to undertake approved governance training. Council may offer assistance with the coordination of group training. To assist with this, Council may provide a 50% subsidy for the initial group training to be undertaken by 30 June 2017. After this, training is to be undertaken at a cost borne by each Mainstreet Association.
  3. This requirement becomes a condition of the Agreement.
-

### **3. RELEVANT CORE STRATEGIES/POLICIES**

3.1 The City of Unley 4 year Plan 2013-2016, Goal1 Emerging Our Path to a Future City.

- 1.1 A thriving and prosperous business community

The City of Unley Mainstreet Association model has been the cornerstone of the Council's economic development strategy since the 1990's.

### **4. DISCUSSION**

Mainstreet Precincts are a key economic asset of the City of Unley. Currently four Mainstreet Associations represent the business communities of the following Precincts: Goodwood Road, King William Road, Unley Road and Fullarton Road (South).

The voluntary members who make up the associations are an important representative group of the business community who identify, implement and operate various marketing activities to promote the collective group of businesses in their respective precincts.

In December 2015, UBED recommended to Council that "An independent consultant be engaged to undertake a review of the role and operation of the Trader Associations, in conjunction with the Associations, to ensure they are still the most appropriate method for promotion of the precincts, and are supported by the businesses of those precincts. The review is to include face to face interviews with a broad cross section of those who pay the separate rate".

In April 2016, an economic development consultant (Retail IQ) was engaged to undertake a review of the existing association framework model in order to assess its relevance in the current economic climate. Stakeholder engagement was critical with one on one interviews with individual retailers, property owners, committee members, marketing coordinators and the Chairs of the associations. An analysis of the precinct areas was conducted to identify each association's strengths, weaknesses, opportunities and threats. This analysis identified common threads which informed the guiding principles and recommendations.

The City of Unley Mainstreet Association review contains five guiding principles;

- **Professionalism**
- **Accountability**
- **Leadership**
- **Inclusiveness**
- **Visibility**

On 2 November 2016 a UBED workshop was held where Retail IQ presented their findings. The general outcome of the workshop was that all the recommendations seemed fair and adequate and that the governance of the associations needed further consideration.

As Incorporated Associations, the Mainstreet Associations are responsible for their own governance and Council cannot undertake this on their behalf. Good governance drives the effective leadership of an organisation and ensures the organisation meets its legal and compliance responsibilities.

Despite being volunteer organisations, the governance expectations of not for profit, incorporated associations are the same as the expectations of a profit making company and the standards, obligations and liabilities of a committee member are no different than those of a company director, under Australian Law. Additionally, as publically funded associations, the associations must show a high level of transparency.

In considering this, Council understands governance training will have a financial impact on the Mainstreet Associations; however Council has an obligation to ensure that the revenue raised from the Separate Rate is expended for the purpose for which the rate was imposed. Governance training will help the associations understand their responsibilities and implement good governance practices. Introducing a clause to the Separate Rate Agreements to make governance training a mandatory requirement to receive future funds will assure the associations understand their roles and responsibilities. There is the opportunity for Council to assist in coordinating combined training for the associations to keep the investment from the associations down and to provide details of possible approved training providers.

## **5. ANALYSIS OF OPTIONS**

Option 1 - Recommend to Council that the Association Separate Rate Agreements be reviewed to include a mandatory requirement for the Mainstreet Associations to undertake approved governance training. Council may offer assistance with the coordination of group training. To assist with this, Council may provide a 50% subsidy for the initial group training to be undertaken by 30 June 2017. After this, training is to be undertaken at a cost borne by each Mainstreet Association.

This option will maintain the existing Mainstreet Association structure with Council providing support while the associations maintain their independence. While it is a responsibility of the associations to manage their governance, there is the opportunity for Council to assist by coordinating combined training sessions and suggesting approved training providers. This option will ensure consistency in the training received, that a qualified training provider is used and keep the investment from the Mainstreet Associations down.

To assist with the transition and lessen the financial burden, Council may provide a 50% subsidy for the initial governance training session to be attended by the associations prior to the commencement of the 2017-2018 Agreement. Future training will be at the cost of the associations.

This option allows Council to ensure governance training is undertaken, on a coordinated basis, providing the Mainstreet Associations with the knowledge and skills to manage their own governance.

Option 2 - Recommend that the Association Separate Rate Agreements be reviewed to include the mandatory requirement for the Mainstreet Associations to undertake approved governance training. Governance Training is to be organised by, and at a cost to, the Mainstreet Associations.

This option will allow Council to review the Association Separate Rate Agreements and ensure governance training is undertaken as a mandatory requirement of the agreements. As the Mainstreet Associations are responsible for their own governance, the associations are to organise their own governance training.

The disadvantage of this option is that each Mainstreet Association may engage a different training provider and the information gained may vary. This option also has the potential to require a greater financial investment from each association.

Option 3 – Recommend that governance is the responsibility of the Mainstreet Associations with no further action to be taken.

One of the main findings of the Mainstreet Association review is the importance of good governance practices. The disadvantage of this option is that Council may be perceived to be supporting associations without adequate governance understanding and structures.

## **6. RECOMMENDED OPTION**

Option 1 is the recommended option.

## **7. POLICY IMPLICATIONS**

### **7.1 *Financial/budget***

- Option 1 suggests that Council subsidise training for the associations. The funding for this would come from the current economic development operational budget.

### **7.2 *Legislative/Risk Management***

- Council has an obligation to ensure that the revenue raised from the Separate Rate is expended for the purpose for which the rate was imposed. Therefore ensuring good governance practices are in place to ensure that funds are spent accordingly and measured in line with the associations' strategic marketing plans.

### **7.3 Staffing/Work Plans**

- The requirements of economic development staff in assisting the associations undertaking the training will be incorporated into existing work plans but will take significant staff hours.

### **7.4 Environmental/Social/Economic**

- Delivery of the Mainstreet Association Review recommendations in regards to good governance will ensure that the associations realise their obligations as Incorporated Associations. As well as building the resilience of local businesses and the attractiveness of the City of Unley as a business destination.

### **7.5 Stakeholder Engagement**

- The Mainstreet Association Review included one on one interviews and a small amount of phone interviews were conducted with 70 individual stakeholders across the trader associations, including: retailers, property owners, committee members, marketing coordinators and the Chairs of each association to undertake the review.

## **8. REPORT CONSULTATION**

Internal consultation has been undertaken with the Manger Governance and Risk in relation to the Mainstreet Associations' governance requirements.

## **9. REPORT AUTHORISERS**

<b><u>Name</u></b>	<b><u>Title</u></b>
Peter Tsokas	Chief Executive Officer

## **DECISION REPORT**

**REPORT TITLE:** VACANCY RATE REVIEW  
**ITEM NUMBER:** 33  
**DATE OF MEETING:** 7 DECEMBER 2016  
**AUTHOR:** AKARRA KLINGBERG  
**JOB TITLE:** COORDINATOR BUSINESS & ECONOMIC DEVELOPMENT

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### **1. EXECUTIVE SUMMARY**

The commercial vacancy report for the 12 months to September 2016 has been received. Commercial vacancy rates have been recorded by Council since 1998 as an indicative guide of economic activity within the City of Unley with the 2015-2016 annual report compiled by Colliers International.

Overall, vacancies across the City have increased from 3.9% in September 2015 to 4.9% in September 2016. This increase has been witnessed along Unley Road, Goodwood Road, Fullarton Road, Anzac Highway/South Road and Glen Osmond Road. King William Road recorded a fall in vacancies to 5.5% which is the lowest vacancy rate for the precinct since 2012. Duthy Street has recorded zero vacancy which is consistent with the past 4 years.

Other than Greenhill Road, all vacancy rates are measured on a tenancy basis, not a floor area basis.

### **2. RECOMMENDATION**

The Committee recommends to council that:

1. The report be received.
-

## **2. RELEVANT CORE STRATEGIES/POLICIES**

- 2.1 City of Unley Business and Economic Development Strategy 2012-2015.
- 2.2 A thriving and prosperous business community, City of Unley 4 Year Plan 2013 – 2016.

## **3. DISCUSSION**

A key performance measure of the 'health' of the local economy is commercial vacancy rates. Commercial vacancy rates within the City of Unley have been monitored by Council since 1999, as an indicative guide of economic activity within Unley.

The report attached outlines vacancy rates measured for all main streets within Unley, as recorded in September 2016, and compares the information to previous periods.

The report was previously compiled six monthly but has moved to be conducted on an annual basis.

The results may be interpreted as a key performance indicator for commercial property and precinct 'vibrancy' along King William Road, Unley Road, Goodwood Road Fullarton Road and Glen Osmond Road.

Vacancy rates are also seen by the community as a barometer of business performance. Additionally, the tenancy mix has been recorded as an indication of changes in business activity within the City. Other than Greenhill Road, vacancy rates are measured on a tenancy basis, not a floor area basis.

The September 2016 report shows a rise in vacancy rates across the City of Unley by 1%, however King William Road recorded a 2.4% improvement bringing its vacancy rate to the lowest level since 2012.

Greenhill Road saw an increased vacancy from 5.6% in September 2015 to 8.3%. There has been an increase in square meter space due to the completion of two buildings now available for lease. The majority of tenants are commercial tenants.

Vacancy on Unley Road increased over the last 12 months with a vacancy rate of 5.3% in September 2016 compared to 3.5% in September 2015. Food, commercial and service based tenants account for the majority of tenants along Unley Road. Over the last 4 years there has been more food and automotive retailers with fewer services, Clothing/footwear and personal retailers.

King William Road has seen vacancy fall from 7.9 per cent in September 2015 compared to 5.5% in September 2016. This is the lowest vacancy recorded for King William Road since 2012. Changes in tenancy mix include an increase in food and commercial tenants. This is offset with falls in the personal, clothing and footwear tenants.

Goodwood Road also saw a small increase in vacancy up to 2.7 per cent compared to 2.1 per cent in September 2015. After Duthy Street, Goodwood Road has the second lowest vacancy rate across the City of Unley. Commercial, Food and Service tenants make up the majority of the tenants.

The Fullarton Road precinct includes the tenancies of the Arkaba Shopping Centre located on the corner of Glen Osmond Road and Fullarton Road. Vacancy on Fullarton Road has increased from 2.9 per cent in September 2015 compared to 3.9 per cent in September 2016. Medical/health related tenants and food services account for the majority of the tenants in the Fullarton Road precinct.

The western (City of Unley) side of Glen Osmond Road only has been reported on. Vacancy in this precinct has increased to 3.8 per cent from 3.0 per cent in September 2015. The majority of the tenants are commercial with several large office buildings along Glen Osmond Road.

The following table and chart are extracted from the report.

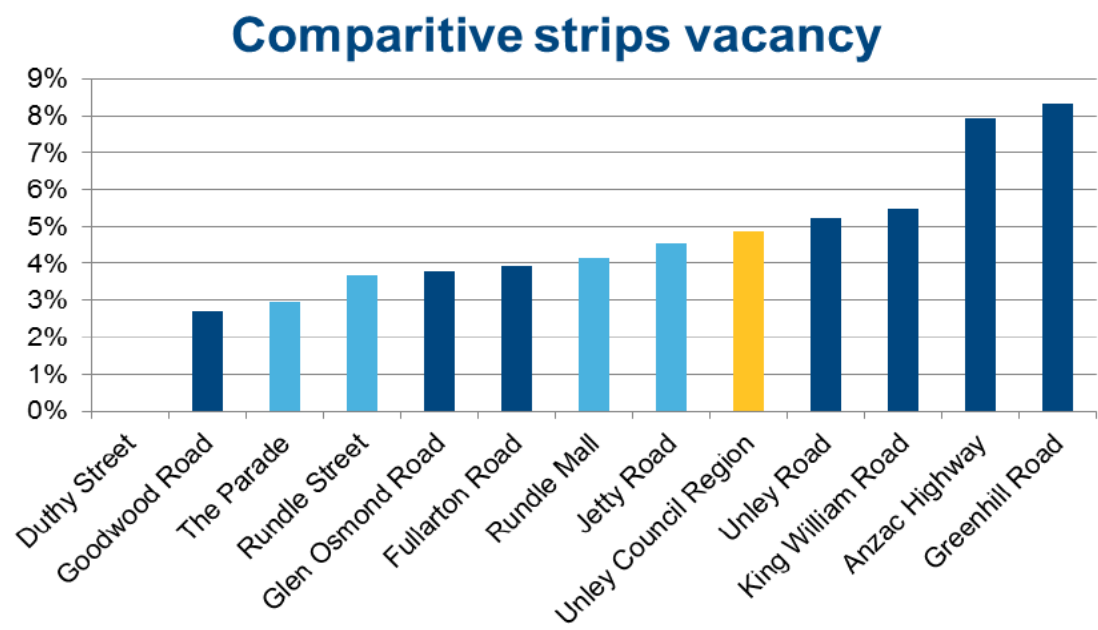
**Table 1. City of Unley Vacancy results by strip September 2016**

PRECINCT	Jan-13	Jul-13	Jan-14	Aug-14	Jan-15	Sep-15	Sep-16	No of tenants	No of vacancies
Unley Road	3.3%	4.2%	7.7%	6.6%	2.9%	3.5%	5.3%	385	17
King William Road	6.3%	8.9%	8.1%	8.9%	7.0%	7.9%	5.5%	205	19
Goodwood Road	5.9%	4.5%	5.0%	3.2%	3.0%	2.1%	2.7%	153	5
Fullarton Road	1.7%	13.3%	3.8%	6.2%	3.7%	2.9%	3.9%	80	0
Anzac Highway	8.5%	10.0%	8.1%	8.80%	8.9%	4.8%	7.9%	53	3
Glen Osmond Road	6.5%	6.6%	6.3%	5.2%	3.2%	3.0%	3.8%	142	0
Duthy Street	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	32	0
Greenhill Road	5.6%	7.5%	7.1%	7.5%	6.8%	5.6%	8.3%	NA	NA
<b>Unley Council Region</b>	<b>4.8%</b>	<b>5.3%</b>	<b>6.7%</b>	<b>6.2%</b>	<b>4.1%</b>	<b>3.9%</b>	<b>4.9%</b>	<b>1050</b>	<b>44</b>

Source: Colliers International/City of Unley (September 2016)



Chart 3: Comparative Vacancy with other retail precincts



Source: Colliers International (September 2016)

## 4.7. Vacant stores

Precinct	Sub-precinct	Street No.	Street Name
King William Road	King William Road	4	King William Road
King William Road	King William Road	32	King William Road
King William Road	King William Road	s2-92	King William Road
King William Road	King William Road	S1-92	King William Road
King William Road	King William Road	11/96	King William Road
King William Road	King William Road	102	King William Road
King William Road	King William Road	116	King William Road
King William Road	King William Road	116	King William Road
King William Road	King William Road	132	King William Road
King William Road	King William Road	154	King William Road
King William Road	King William Road	5/155	King William Road
King William Road	King William Road	4-155	King William Road
King William Road	King William Road	s5-7	King William Road
Anzac/South	Anzac Highway	*2-80	Anzac Highway
Anzac/South	Anzac Highway	80	Anzac Highway
Anzac/South	South Rd	655	South Rd
Anzac/South	South Rd	659	South Rd
Anzac/South	South Rd	711	South Rd
Fullarton Road	Fullarton Rd	439	Fullarton Rd
Fullarton Road	Fullarton Rd	3-389	Fullarton Rd
Fullarton Road	Fullarton Rd	1-389	Fullarton Rd
Glen Osmond Road	Glen Osmond Road	u5 202	Glen Osmond Road
Glen Osmond Road	Glen Osmond Road	238	Glen Osmond Road
Glen Osmond Road	Glen Osmond Road	290	Glen Osmond Road
Glen Osmond Road	Glen Osmond Road	290	Glen Osmond Road
Glen Osmond Road	Glen Osmond Road	332	Glen Osmond Road
Goodwood Road	Goodwood Road	37	Goodwood Road
Goodwood Road	Goodwood Road	41	Goodwood Road
Goodwood Road	Goodwood Road	93	Goodwood Road
Goodwood Road	Goodwood Road	138	Goodwood Road
Unley Road	Unley Road	17/13-23	Unley Road
Unley Road	Unley Road	U5 57	Unley Road
Unley Road	Unley Road	87	Unley Road
Unley Road	Unley Road	183	Unley Road
Unley Road	Unley Road	4/213	Unley Road
Unley Road	Unley Road	221	Unley Road
Unley Road	Unley Road	223	Unley Road
Unley Road	Unley Road	235	Unley Road
Unley Road	Unley Road	259	Unley Road
Unley Road	Unley Road	259	Unley Road
Unley Road	Unley Road	2/376	Unley Road
Unley Road	Unley Road	300	Unley Road
Unley Road	Unley Road	292-294	Unley Road
Unley Road	Unley Road	246	Unley Road
Unley Road	Unley Road	244	Unley Road
Unley Road	Unley Road	244	Unley Road
Unley Road	Unley Road	242	Unley Road
Unley Road	Unley Road	*2/92	Unley Road
Unley Road	Unley Road	82	Unley Road
Unley Road	Unley Road	*4/78	Unley Road
Unley Road	Unley Road	26	Unley Road
Unley Road	Unley Road	16-18	Unley Road

The tenancy mix has remained consistent with previous reports, with the category “commercial” seeing the most movement in and out of the precincts, with food next.

This 12 month period has seen 102 new tenants, which is slightly lower than the 107 in the previous 12 month period.

### **3. ANALYSIS OF OPTIONS**

#### **Option 1 - The report be received.**

The information in the report will be used to help inform future planning and actions regarding growing the number of tenancies in the precincts of Unley.

### **4. RECOMMENDED OPTION**

Option 1 is the recommended option.

### **5. POLICY IMPLICATIONS**

#### **5.1 *Financial/budget***

- There is no identified budget implication at this time.

#### **5.2 *Legislative/Risk Management***

- There is no legislative or risk management implication identified at this time.

#### **5.3 *Staffing/Work Plans***

- It is anticipated that any future actions arising will be managed from existing staff resources.

#### **5.4 *Environmental/Social/Economic***

- The implementation of the recommendation will not have any positive or negative impacts on the local economy or specific local industries or businesses, until actions are identified.

#### **5.5 *Stakeholder Engagement***

- This information does not need to be communicated to a wider stakeholder group.

### **6. REPORT CONSULTATION**

No consultation has been undertaken

**7.     ATTACHMENTS**

Colliers International Commercial Vacancy Report – September 2016.

**8.     REPORT AUTHORISERS**

<b><u>Name</u></b>	<b><u>Title</u></b>
Peter Tsokas	Chief Executive Officer

# City of Unley

## Commercial Vacancy Report

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City of Unley

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September 2016

FINAL Version

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## 2 SUMMARY OF VACANCY RESULTS

The City of Unley has seen vacancy increase from 3.9 per cent in September 2015 to 4.9 per cent in September 2016. Increases in vacancy have been witnessed along Unley Road, Goodwood Road, Fullarton Road, Anzac Highway/South Road and Glen Osmond Road. A fall in vacancy was recorded for King William Road which is the lowest vacancy for this precinct since 2012. Duthy Street has recorded zero vacancy with this strip been a fully occupied since the survey commenced in January 2012.

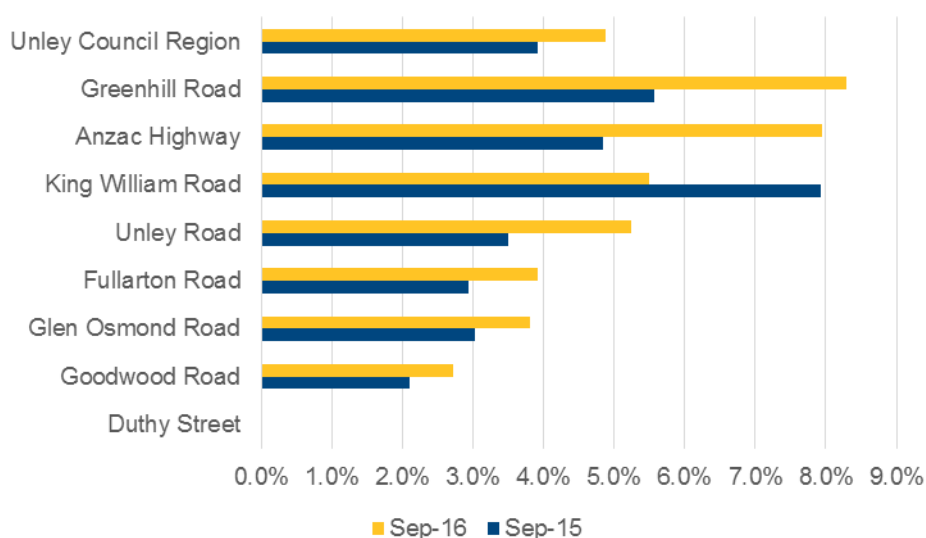
**Table 1. City of Unley Vacancy results by strip September 2016**

PRECINCT	Jan-13	Jul-13	Jan-14	Aug-14	Jan-15	Sep-15	Sep-16	No of tenants	No of vacancies
Unley Road	3.3%	4.2%	7.7%	6.6%	2.9%	3.5%	5.3%	385	17
King William Road	6.3%	8.9%	8.1%	8.9%	7.0%	7.9%	5.5%	205	19
Goodwood Road	5.9%	4.5%	5.0%	3.2%	3.0%	2.1%	2.7%	153	5
Fullarton Road	1.7%	13.3%	3.8%	6.2%	3.7%	2.9%	3.9%	80	0
Anzac Highway	8.5%	10.0%	8.1%	8.80%	8.9%	4.8%	7.9%	53	3
Glen Osmond Road	6.5%	6.6%	6.3%	5.2%	3.2%	3.0%	3.8%	142	0
Duthy Street	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	32	0
Greenhill Road	5.6%	7.5%	7.1%	7.5%	6.8%	5.6%	8.3%	NA	NA
<b>Unley Council Region</b>	<b>4.8%</b>	<b>5.3%</b>	<b>6.7%</b>	<b>6.2%</b>	<b>4.1%</b>	<b>3.9%</b>	<b>4.9%</b>	<b>1050</b>	<b>44</b>

Source: Colliers International/City of Unley (September 2016)

Table 1 above, reflects the total number of tenants and shop units in the City of Unley survey, and the vacancy rates over the last seven surveys. This also includes several non-commercial use buildings, specifically parks, churches, schools and Council chambers. Whilst such public buildings have been taken out of the vacancy count and churn factor, they remain in the tenancy mix review. Greenhill Road vacancy is expressed in square metres vacant as this is predominantly a commercial office precinct rather than a retail precinct. Greenhill Road therefore does not count number of tenants and is not included in the vacancy calculation of the total City of Unley.

**Chart 1: City of Unley vacancy rates by strip 2015 v 2016**

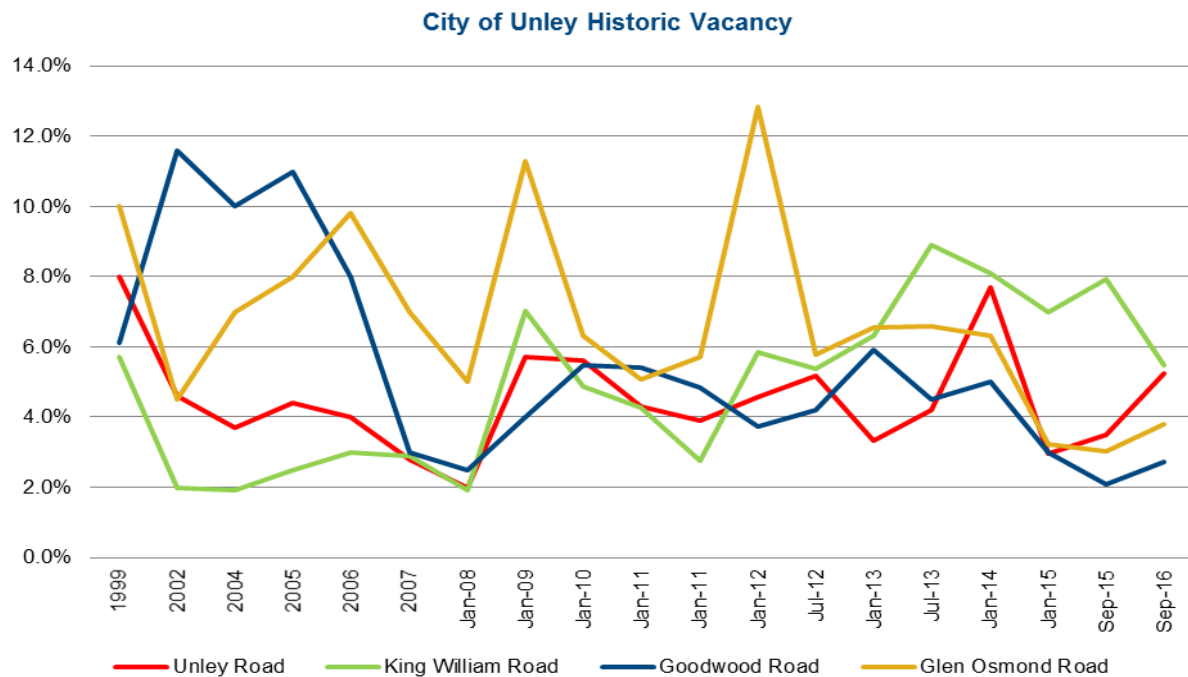


Source: Colliers International & City of Unley (September 2016)

Chart 1 shows the change in vacancy for each precinct over the last 12 months. As previously noted Duthy Street has had no recorded vacancy in both of these periods.

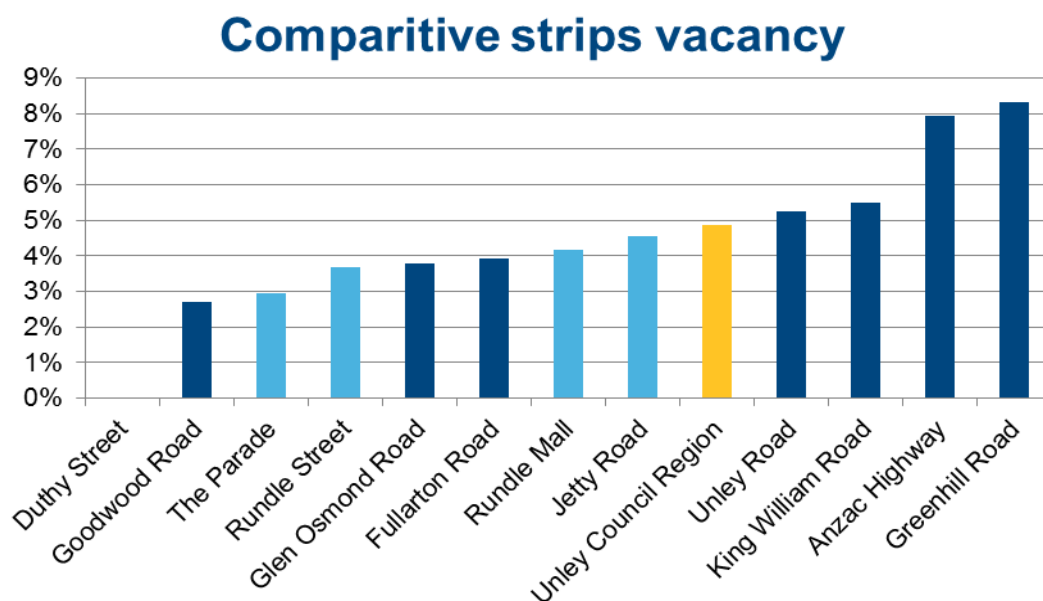
The City of Unley has collected vacancy rates for Goodwood Road, King William Road, Unley Road and Glen Osmond Road since 1999. Chart 2 depicts the historic vacancy for the major strips within the City of Unley. Not all precincts have data back to 1999 and are therefore not included in this graph. For more detailed data, a historical data table from 1999 until September 2016 can be found in Appendix 4.8.

**Chart 2: City of Unley vacancy rates by strip 1999-2016**



Source: Colliers International & City of Unley (September 2016)

**Chart 3: Comparative Vacancy with other retail precincts**



Source: Colliers International (September 2016)

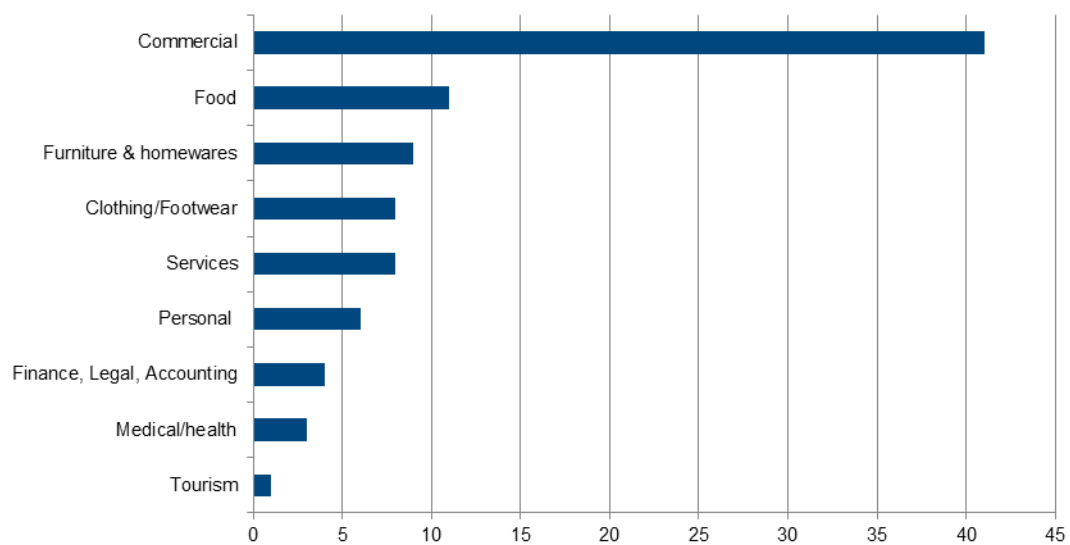


The City of Unley would also like to benchmark the vacancy of each of the precincts surveyed with the vacant rates of other key retail precincts in other council regions. Other precincts which are surveyed outside the City of Unley include Rundle Mall, Rundle Street, Jetty Road, the Parade and Prospect Road. Both Rundle Mall and Rundle Street have seen vacancy increase over the last 12 months. Jetty Road and The Parade both saw vacancy fall since the last survey for each precinct (Chart 3). Prospect Road has had a second survey and had a vacancy rate of 4.4 per cent. Duthy Street has still recorded nil vacancy. Greenhill Road vacancy rate has been included, but as it is calculated using square metres and not shop fronts it is not included in the total vacancy calculation.

The total churn rate for the City Of Unley over the last 12 months was 18.4 per cent which is significantly higher than the churn rate of 8.9 per cent recorded in the six months to January 2016. Major changes in tenant types over the last six months and longer term are depicted in Charts 4 to 6. Over the last 12 months there were 102 new tenants which moved into the City of Unley. This is lower than the 107 tenants that moved in during 2015. The major tenant categories to move in to the City of Unley were commercial (50%), with Food and service retailers which accounted for 19.6 per cent and 11.8 per cent respectively of the new tenants in the City of Unley.

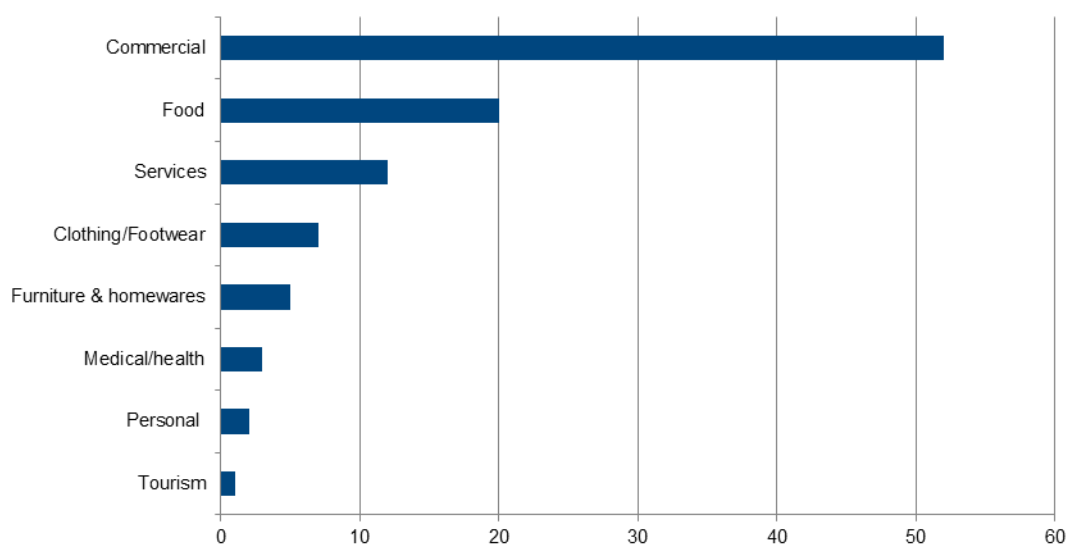
There were 91 tenants which moved out of the City of Unley which were predominantly commercial (45%), Food (12.1%) and Furniture/homewares (9.9%).

**Chart 4: Number of tenants moving OUT by category 12 months to Sept 2016**



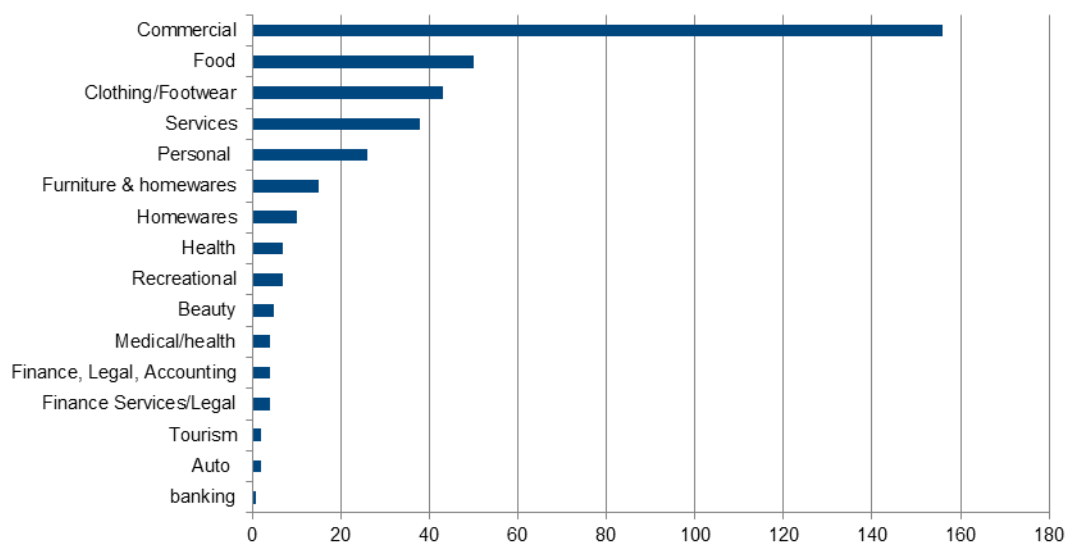
Source: Colliers International (September 2016)

**Chart 4a: Number of tenants moving IN in 12 months to Sept 2016**



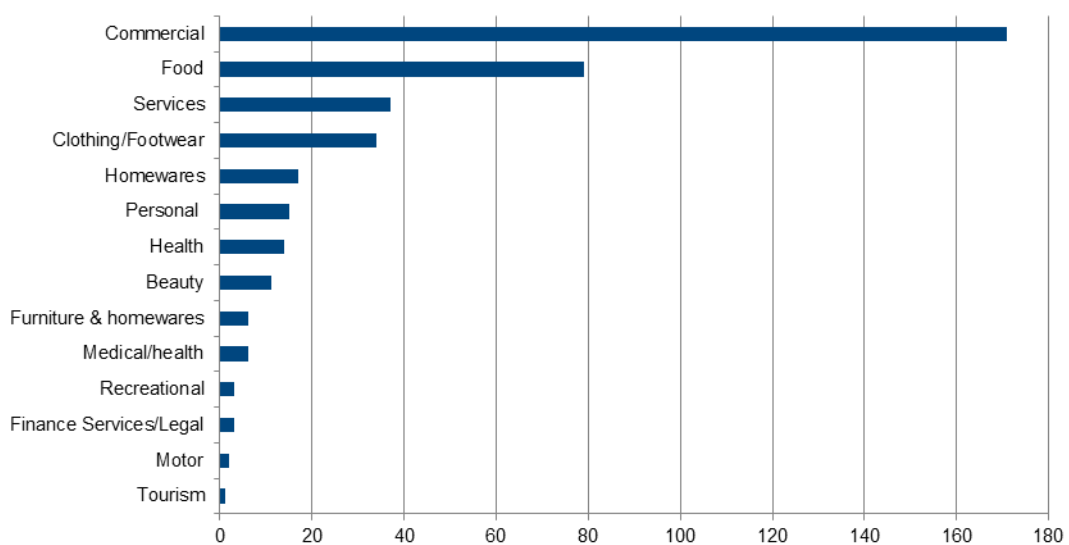
Source: Colliers International (September 2016)

**Chart 5: Number of tenants OUT by category from January 2013 to September 2016**



Source: Colliers International (September 2016)

**Chart 6: Number of tenants moving IN from January 2013 to September 2016**



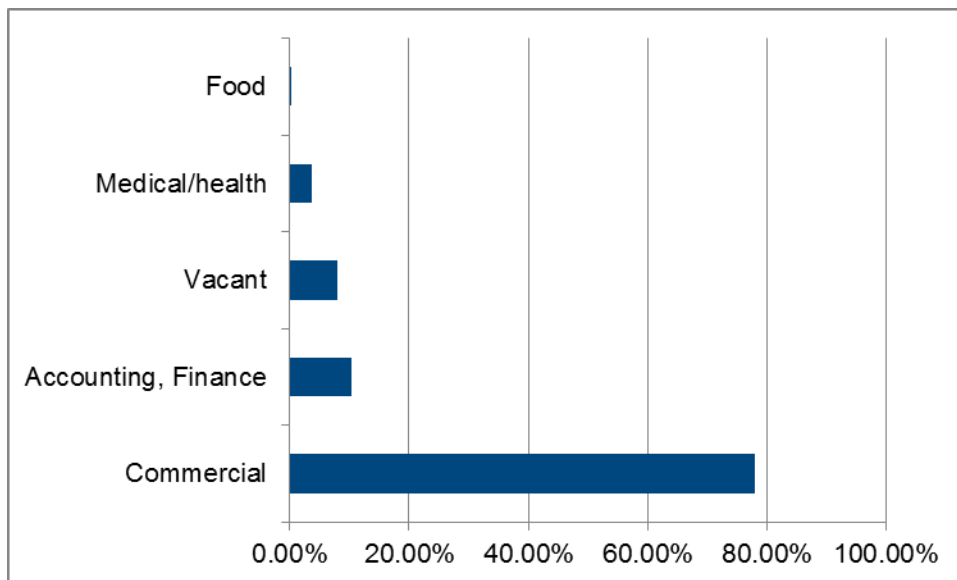
Source: Colliers International (September 2016)

## 2. TENANCY MIX

### 2.1. Greenhill Road

The section of Greenhill Road that is surveyed for the City of Unley falls within the Fringe office market within the Property Council of Australia office market report survey. Vacancy in this section of Greenhill Road was recorded at 8.3% in September 2016 up from 5.6% in September 2015. There was 120,793 square metres of stock in this section of Greenhill Road, which has increased from the last survey. This is due to the completion two buildings are undergoing refurbishment and now available for lease. These projects were at 128 Greenhill Road, Unley and 123 Greenhill Road, Unley. There was also the completion of 6-8 Bartley Cress, Wayville (2,653 sqm) in late 2015 which was fully occupied by Resthaven on completion. There is only one project in the pipeline for Greenhill Road which is located at 86 Greenhill Road, Wayville (2,300 sqm) which is seeking pre-commitment prior to construction commencing.

**Chart 7: Greenhill Road Tenancy Mix Graph**

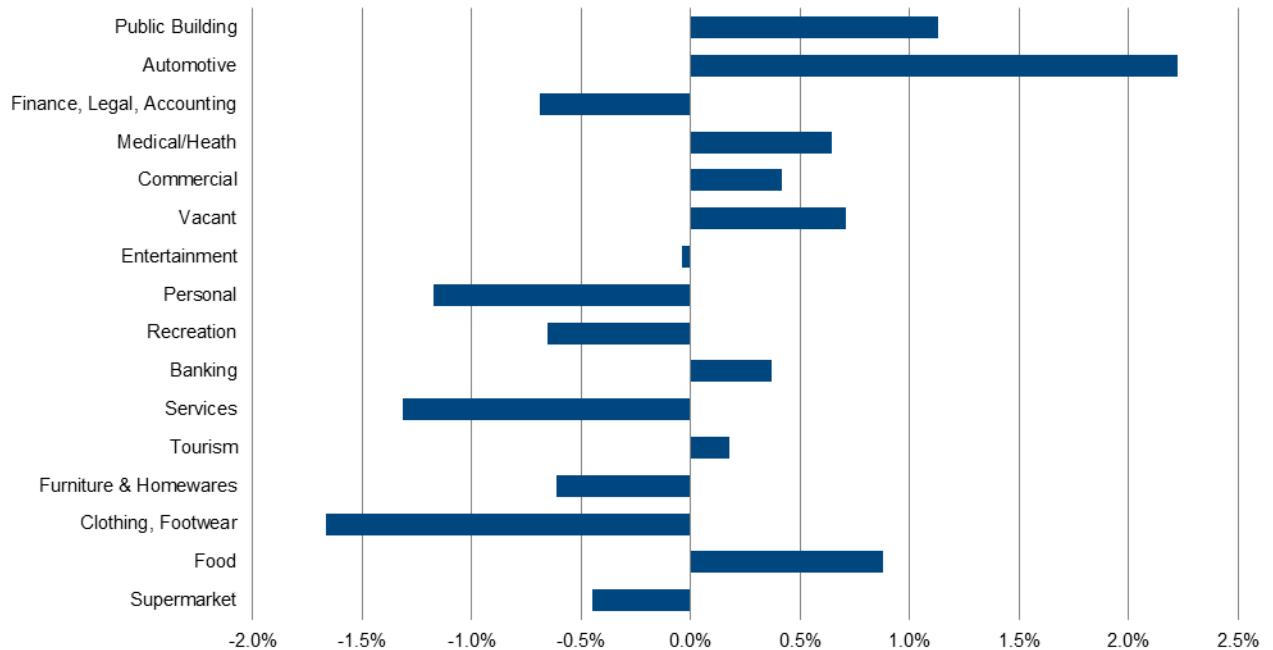


Source: Colliers International (September 2016)

## 2.2. Unley Road

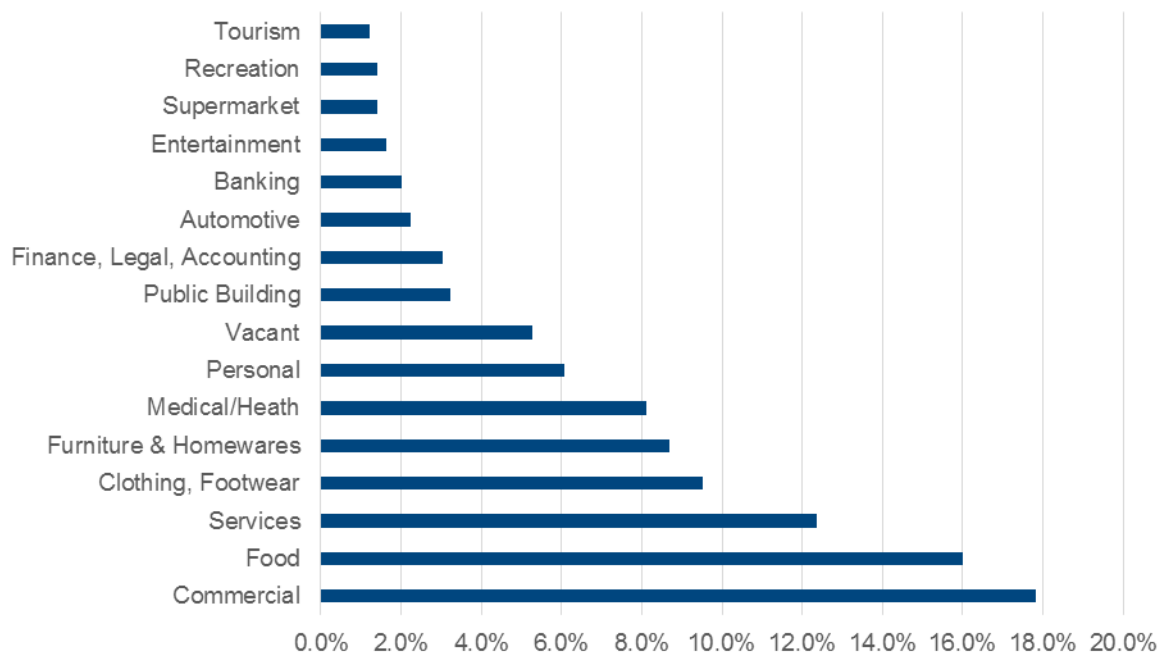
Vacancy on Unley Road increased over the last 12 months with a vacancy rate of 5.3 percent in September 2016 compared to 3.5 percent in September 2015. Food, commercial and service based tenants account for the majority of tenants along Unley Road. Over the last 4 years there has been more food and automotive retailers with less services, Clothing/footwear and personal retailers.

**Table 5: Unley Road Tenancy Mix Changes Jan 2012 to Sept 2016**



Source: Colliers International & City of Unley (September 2016)

**Chart 8: Unley Road Tenancy Mix Graph**

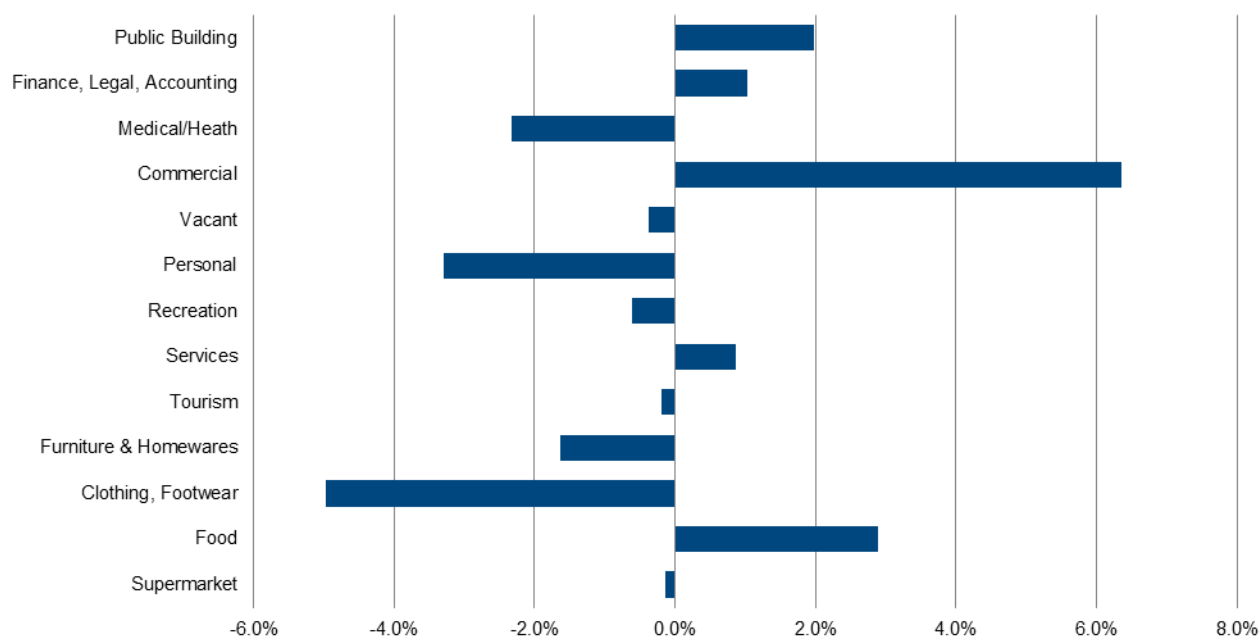


Source: Colliers International & City of Unley (September 2016)

## 2.3. King William Road

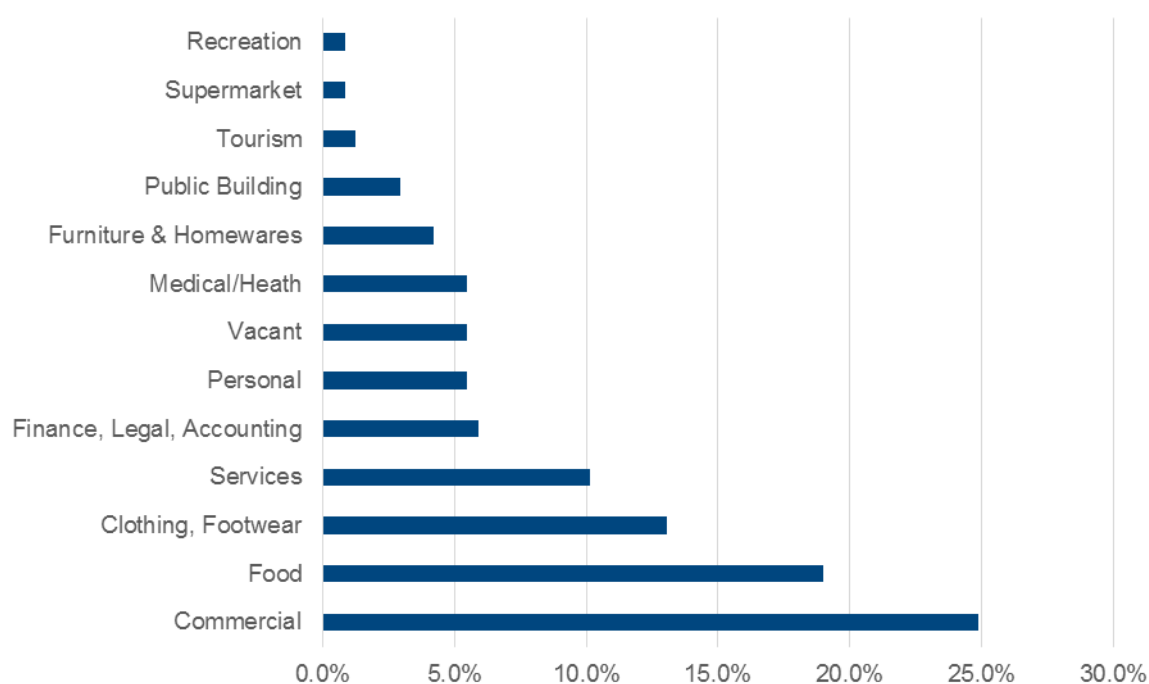
King William Road has seen vacancy fall from 7.9 per cent in September 2015 compared to 5.5 percent in September 2016. This is the lowest vacancy recorded for King William Road since 2012. Changes in tenancy mix include an increased share for food and commercial tenants. This offset with falls in the personal and clothing and footwear categories. Appendix 4.7 provides a list of tenancy movement less vacancies.

**Table 6: King William Road Tenancy Mix changes 2012 - 2016**



Source: Colliers International & City of Unley (September 2016)

**Chart 9: King William Road Tenancy Mix Graph**



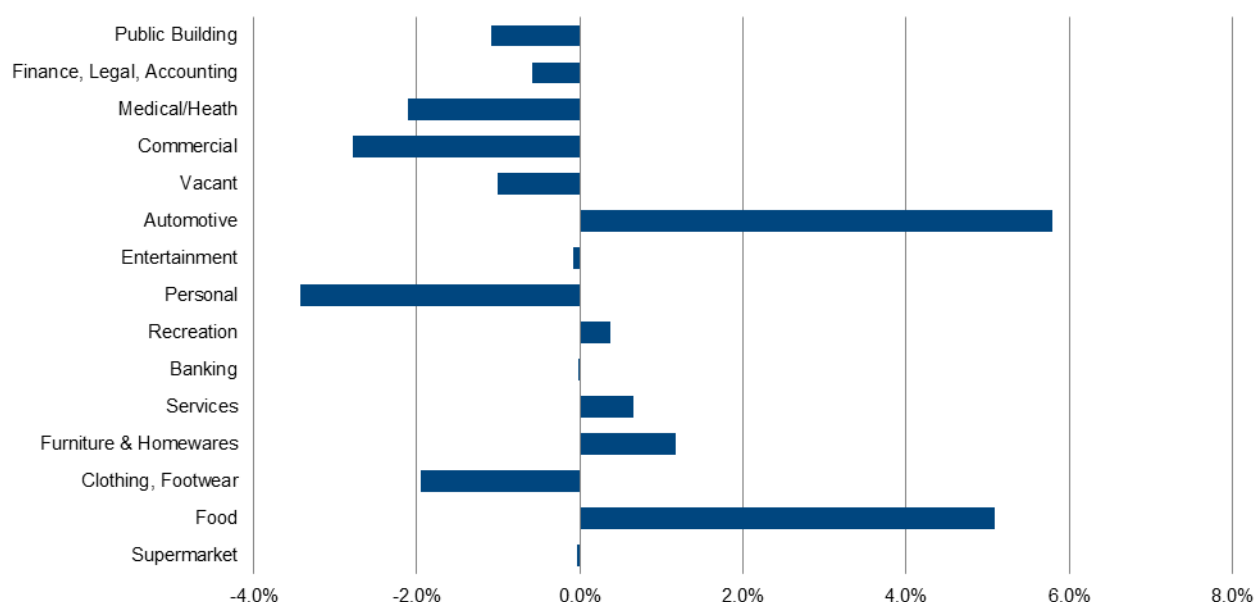
Source: Colliers International & City of Unley (September 2016)

## 2.4. Goodwood Road

Goodwood Road also saw a small increase in vacancy up to 2.7 per cent compared to 2.1 per cent in September 2015. After Duthy Street, Goodwood Road has the second tightest vacancy rate across the City of Unley. Commercial, Food and Service tenants make up the majority of the tenants along Goodwood Road. Several stores have been demolished along Goodwood Road, opposite the show grounds to make way for a new development, although no construction has commenced over the last 12 months. A list of tenant movement is provided in Appendix 4.6.

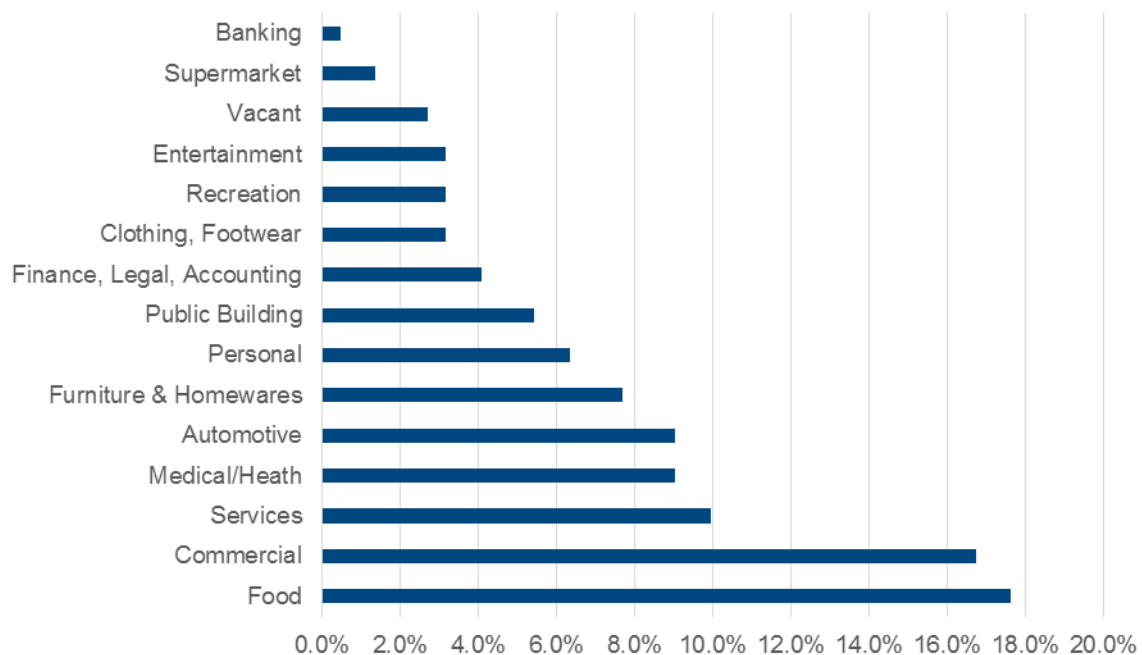
**Chart 10: Goodwood Road Tenancy Mix 2012-2016**

Goodwood Road	Jan-12	Jul-13	Jan-14	#####	Jan-15
Supermarket	1.40%	1.36%	1.30%	1.40%	1.36%
Food	#####	#####	#####	#####	#####
Clothing, Footwear	5.12%	5.00%	4.60%	5.40%	5.45%
Furniture & Homewares	6.51%	8.18%	7.50%	6.30%	5.45%
Tourism	0.00%	0.00%	0.00%	0.00%	0.00%
Services	9.30%	9.09%	8.80%	#####	#####
Banking	0.47%	0.45%	0.40%	0.50%	0.45%
Recreation	2.79%	2.73%	2.10%	3.20%	3.18%
Personal	9.77%	7.27%	7.10%	7.70%	7.73%
Hotel	3.26%	3.18%	2.90%	3.20%	3.18%
Cars/Serviceing	3.26%	2.73%	7.90%	3.20%	3.64%
Vacant	3.72%	4.55%	5.00%	3.20%	2.27%
Commercial	#####	#####	#####	#####	#####
Medical/Heath	#####	#####	#####	#####	#####
Finance, Legal, Accounting	4.65%	4.55%	4.20%	4.10%	4.09%
Public Building	6.51%	6.36%	5.00%	6.30%	6.36%



Source: Colliers International & City of Unley (September 2016)

**Chart 11: Goodwood Road Tenancy Mix Graph**

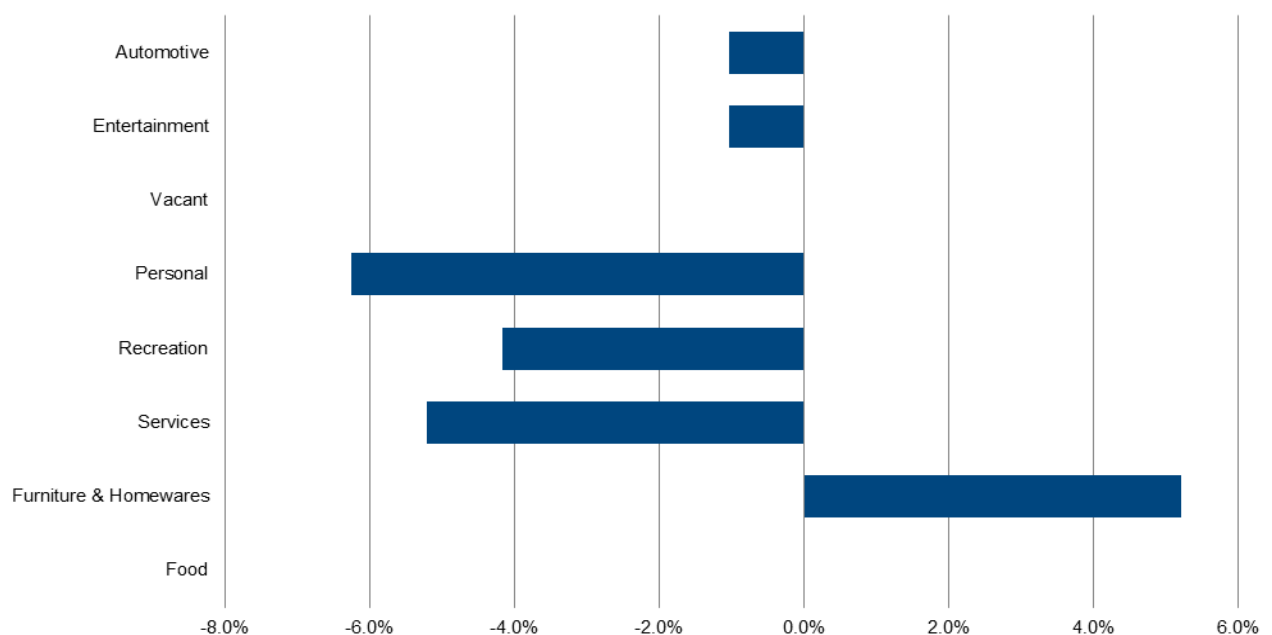


Source: Colliers International & City of Unley (September 2016)

## 2.5. Duthy Street

The data set used for the City of Unley includes commercial/retail buildings along George Street, Duthy Street and Leicester Street. Duthy Street still has no vacancy recorded in September 2016 with no vacancy recorded in this precinct since January 2012. Food retailers are still the dominant occupier for Duthy Street. There were no tenant changes over the last nine months.

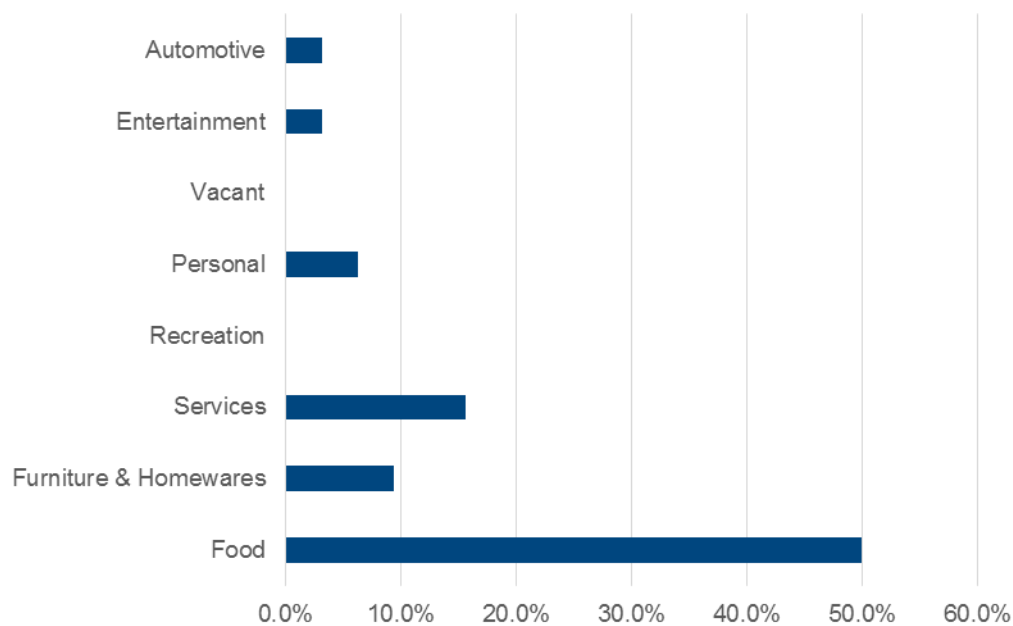
**Chart 12: Duthy Street Tenancy Mix Changes 2012-2016**



Source: Colliers International & City Of Unley (September 2016)



**Chart 13: Duthy Street Tenancy Mix**



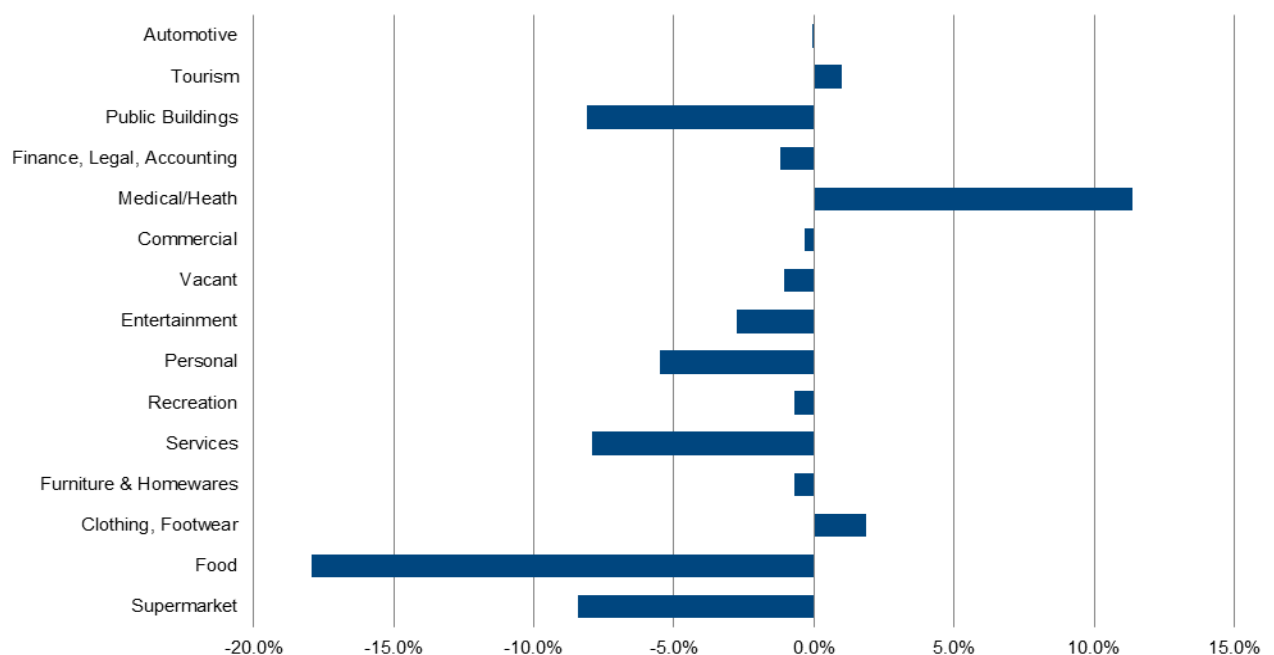
Source: Colliers International & City of Unley (September 2016)

## 2.6. Fullarton Road

The Fullarton Road precinct includes the tenancies of the Arkaba Shopping Centre located on the corner of Glen Osmond Road and Fullarton Road. Vacancy on Fullarton Road has increased from 2.9 per cent in September 2015 compared to 3.9 per cent in September 2016. Medical/health related tenants, food services account for the majority of the tenants in the Fullarton Road precinct.

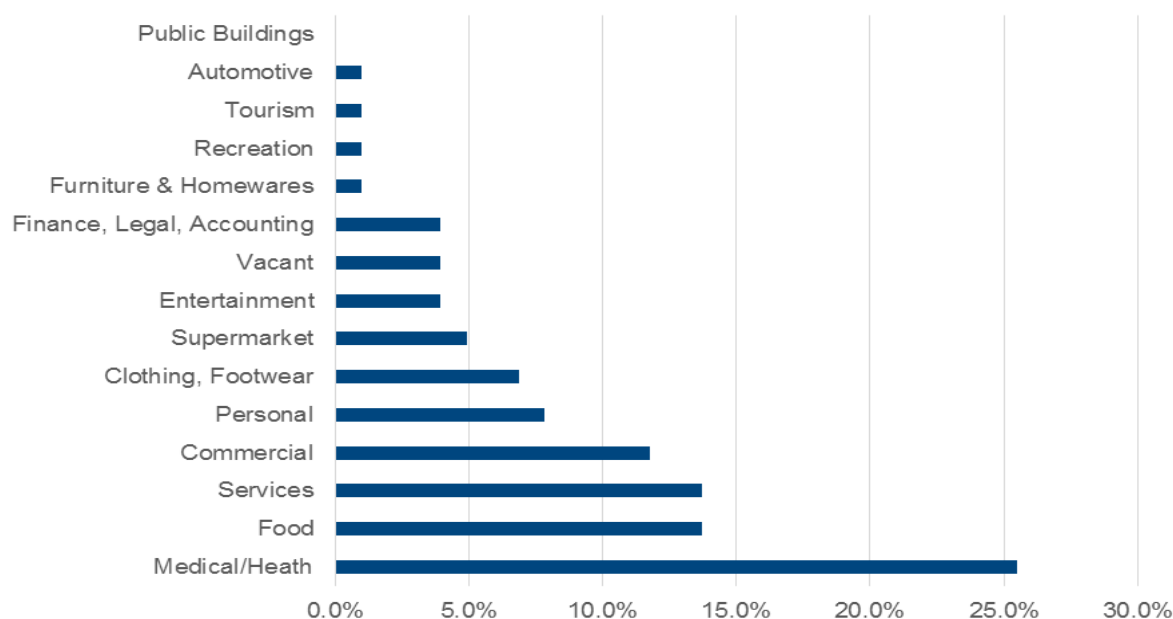
A list of tenant movement for Fullarton Road can be found in Appendix 4.5.

**Table 14: Fullarton Road Tenancy Mix Changes 2012-2016**



Source: Colliers International & City of Unley (September 2016)

**Chart 15: Fullarton Road Tenancy Mix**

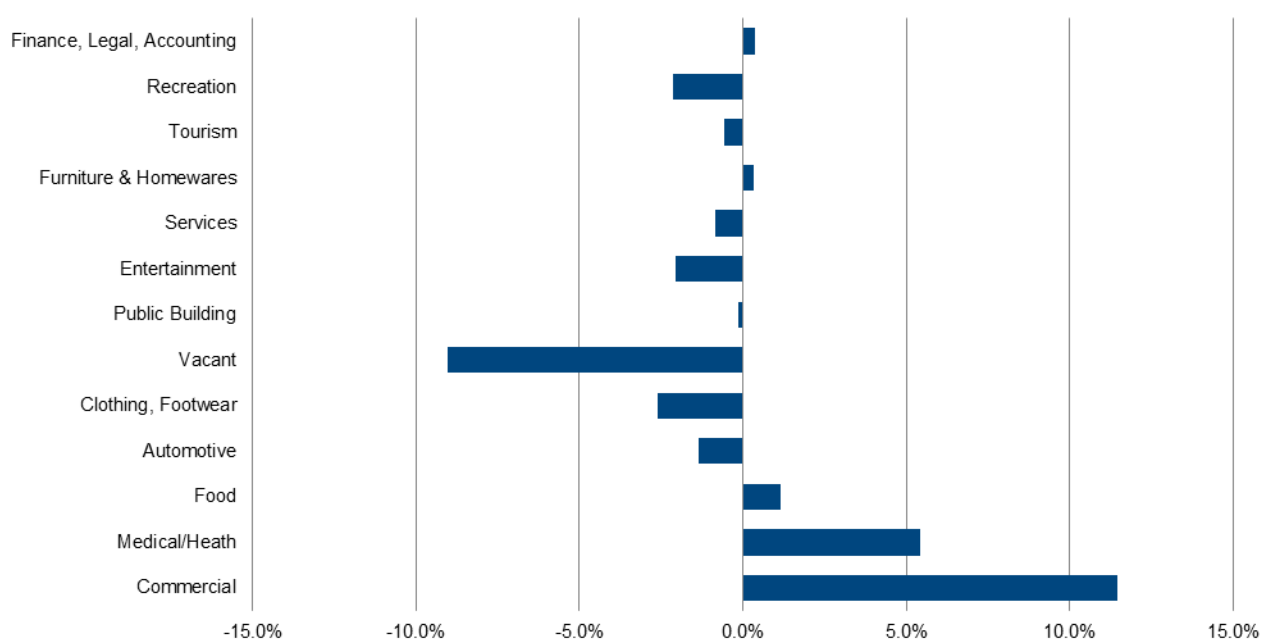


Source: Colliers International & City of Unley (September 2016)

## 2.7. Glen Osmond Road

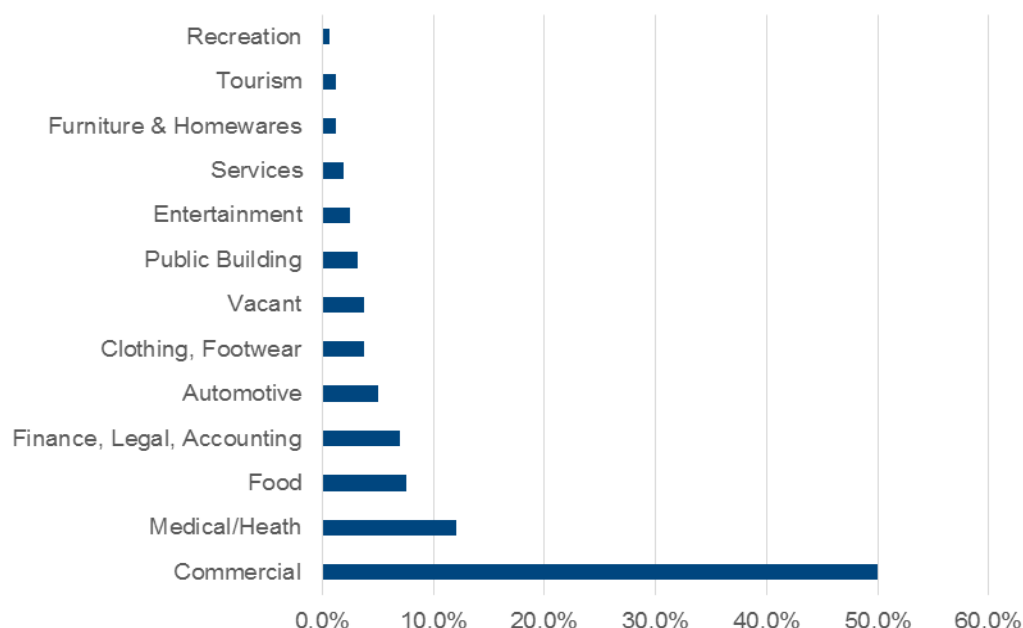
Glen Osmond Road is divided between the City of Unley to the west and the City of Burnside to the east. This report covers the western side of Glen Osmond Road only. Vacancy in this precinct has increased to 3.8 per cent from 3.0 per cent in September 2015. With the exception of current vacancies, a list of tenant movement is available in Appendix 4.4. Commercial tenants are the majority of the tenant type several large office buildings along Glen Osmond Road.

**Table 16: Glen Osmond Road Tenancy Mix Changes 2012-2016**



Source: Colliers International & City of Unley (September 2016)

**Chart 17: Glen Osmond Road Tenancy Mix**

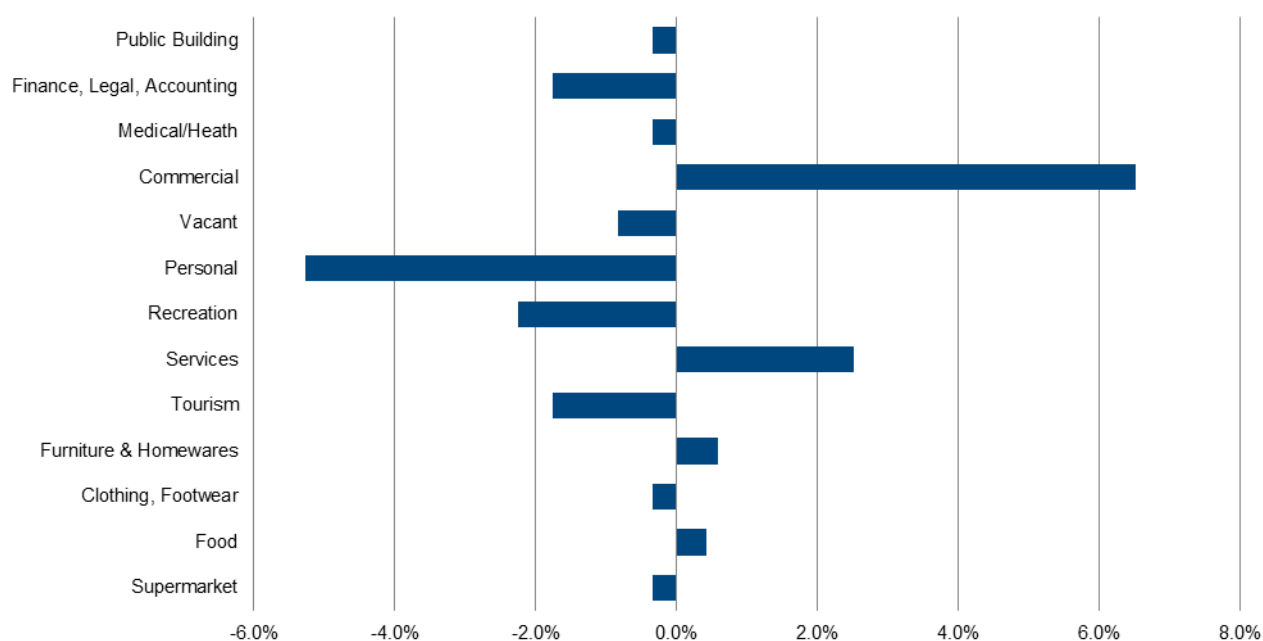


Source: Colliers International & City of Unley (September 2016)

## 2.8. Anzac Highway/South Road

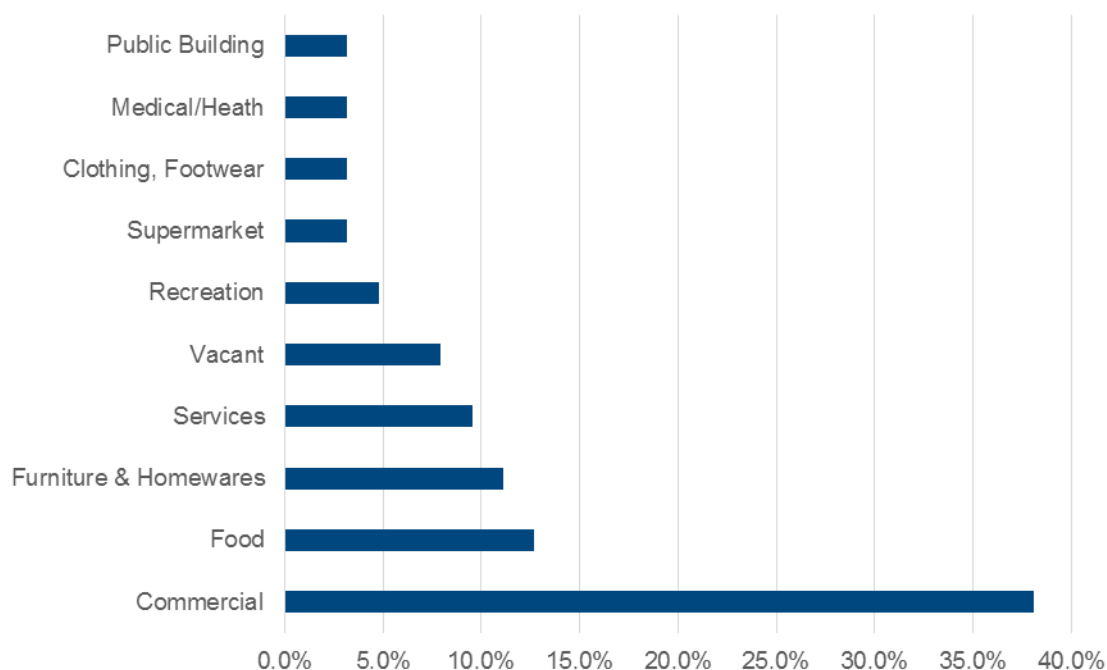
Vacancy has increased to 7.9 per cent compared to 4.8 per cent recorded in September 2015. Commercial tenants remain the dominant tenant category along the combined precinct of Anzac Highway and South Road. A list of tenant movement is available in Appendix 4.5.

**Table 18: Anzac Highway/South Road Tenancy Mix Changes 2012-2016**



Source: Colliers International & City of Unley (September 2016)

**Chart 19: Anzac Highway/South Road Tenancy Mix**



*Source: Colliers International & City of Unley (September 2016)*

## **3. BACKGROUND**

### **3.1. Background & Scope**

City of Unley has undertaken a vacancy survey of the City of Unley periodically since 1999. They have undertaken surveys every six months since January 2012. The City of Unley approached Colliers International regarding vacancy count figures for commercial properties within the City of Unley council region. The following precincts are included within the boundaries of the City of Unley:

- King William Road
- Unley Road
- Goodwood Road
- South Road
- Glen Osmond Road
- Anzac Highway
- Fullarton Road
- Duthy Street
- Greenhill Road

### **3.2. Process**

Greenhill Road

As Greenhill Road is comprised of office buildings with multiple tenants it is proposed that the vacancy rate is based on the square metres available, due to multiple tenants within a building leaving part rather than whole building vacancy. Colliers International believes that this would give a better representation of the vacancy rate. The Property Council of Australia conducts a vacancy survey of this market with the figures being released in February and August. It is proposed that we use this data to determine the vacancy rate on Greenhill Road. It is also proposed that there is no tenancy mix for this part of the survey as it is difficult to determine the amount of space a tenant occupies in a building with multiple tenants.

#### All other strips

For the remainder of the strips data collection is based on the number of shops along the strip. If a store takes two shop fronts it is counted as two shop fronts for the tenancy mix, but only counted as one tenant and therefore one vacancy.

The initial data collection was done through field work. The data was then entered into a template for each strip. Thereafter, the template calculates the vacancy rate and tenancy mix on the strip. All data collected excludes residential properties.

The report delivered to the Council includes each precinct, the vacancy rate, change compared to last survey, also the turnover factor where the tenant has changed between surveys (as of January 2013), and tenancy mix. Comment will also be made on new construction and refurbishment.

## 4. APPENDIX

### 4.1. Tenancy Mix Classifications

- **Supermarket**
- **Food** – butchers, Fruit & Veg, Bakery, Takeaway, Café, restaurant, specialized food retailers
- **Department store**
- **Stand-alone store** – large format retailing stores which are not include in a category below
- **Clothing & footwear** – clothing, footwear, fabrics & other soft goods
- **Furniture & homewares** – Furniture, homewares, Domestic hardware, electrical, appliances, music
- **Tourism** – Tourist information, Travel Agents, duty free, souvenir
- **Services** - Hairdressers, beauty salons, processing & photocopying, key cutting & shoe repairs, optometrists, watch repairs
- **Banking**
- **Recreation** – computers, IT, sports, camping, toys & games, Music, DVD, Newspaper, books, stationary, cameras
- **Personal** – pharmaceutical, beauty, antiques, florist, watches, jewellery, mobile phones, discount variety
- **Entertainment** – pubs, hotels and bottle shops
- **Automotive** – car & motorbike sales, servicing, windscreens, exhausts, tyres, service stations
- **Offices** – office use such as real estate, building trades, and other office use tenants (excluding medical and legal finance and accounting which are accounted for separately)
- **Finance, legal & accounting** –
- **Medical/health** – medical practices, physio, dental, chiropractic
- **Public Buildings** – includes schools, churches and aged care
- **Exclude** – residential or under refurbishment so excluded from stock

#### 4.2. List of Tenant Churn - Glen Osmond Road

no	Precinct	Tenant	Type	Movement
36	Glen Osmond Road	Alpha Residential	Commercial	In
56	Glen Osmond Road	la venezia	food	Out
56	Glen Osmond Road	Indilicious	food	In
70	Glen Osmond Road	harvey World Travel	tourism	Out
70	Glen Osmond Road	Travellers Choice	tourism	In
62-66	Glen Osmond Road	CPMS	Commercial	In
62-66	Glen Osmond Road	Pallitive care	Commercial	In
62-66	Glen Osmond Road	Hydroplan	Commercial	In
90b	Glen Osmond Road	nohannahs	Clothing/Footwear	Out
90b	Glen Osmond Road	Strategy Road	Commercial	In
NA	Glen Osmond Road	Wolves recon	Commercial	In
94	Glen Osmond Road	Bout Paw s	Services	In
106	Glen Osmond Road	Seven Candles	food	In
108	Glen Osmond Road	Bartercard	Commercial	Out
118A	Glen Osmond Road	Scholfeld and robinson	Commercial	Out
118A	Glen Osmond Road	sass place	Commercial	In
118B	Glen Osmond Road	Magnetite Mines	Commercial	In
118B	Glen Osmond Road	Braemar Constructions	Commercial	In
128	Glen Osmond Road	BE Building services	Commercial	Out
128	Glen Osmond Road	Optimal Dental	Commercial	In
202-208	Glen Osmond Road	Next generation finance	Commercial	Out
202-208	Glen Osmond Road	Astra Zeneca	Commercial	Out
202-208	Glen Osmond Road	Terrimin	Commercial	In
202-208	Glen Osmond Road	Arinex	Commercial	Out
202-208	Glen Osmond Road	The Pharmacy Guild	Commercial	In
5/256	Glen Osmond Road	Platies in Sync	Services	In
NA	Glen Osmond Road	Moreland vision planning	Commercial	Out
288	Glen Osmond Road	Vehcile solutions australia	Commercial	In
320	Glen Osmond Road	Myrtle Bank Dental	Medical/health	In
334	Glen Osmond Road	Lima Orthopeadic	Medical/health	Out

#### 4.3. List of Tenant Churn – Unley Road

no	Precinct	Tenant	Type	Movement
2/13-23	Unley Road	Menicon	Commercial	In
33	Unley Road	Andrew Griffin Optometrist	Medical/health	Out
35	Unley Road	Destination for Men	Commercial	Out
35	Unley Road	Kabuki	Services	In
37	Unley Road	Dentures by Design	Services	In
41	Unley Road	Trunk shank	Commercial	In
41	Unley Road	Deliner IT	Commercial	In
41	Unley Road	Enoki	Commercial	Out
55	Unley Road	Melwaki	Furniture & homewares	Out
55	Unley Road	Fitness Bot	Services	In
NA	Unley Road	Synergy People Solutions	Commercial	In
67	Unley Road	Dunks on Unley	food	Out
67	Unley Road	Harcourts	Commercial	In
83	Unley Road	Unique Invitations	Personal	Out
83	Unley Road	Our Beautiful Pieces	Furniture & homewares	In
83	Unley Road	Supreme Quilts	Services	Out
83	Unley Road	Hurbert & mavis	Commercial	In
87	Unley Road	Savvy	Commercial	Out
160	Unley Road	Adelaide Discount Appliances	Commercial	In
3/213	Unley Road	Suchie Couture	Clothing/Footwear	In
4/215	Unley Road	Start with legs	Clothing/Footwear	Out
235	Unley Road	Oak on Unley	food	Out
235	Unley Road	OPA	food	In
235	Unley Road	Abeo Architects	Commercial	Out
259/269	Unley Road	Zambero	food	In
259/269	Unley Road	Unley Asian Supermarket	food	Out
305	Unley Road	Walsh Boyce Key accountants	Commercial	In
259/269	Unley Road	Police Station	Commercial	Out
305	Unley Road	Factor utb	Commercial	In
315	Unley Road	Caring Choice	Commercial	In
352	Unley Road	Canterbury lace	Furniture & homewares	Out
5/348	Unley Road	Podanics	Medical/health	In
310	Unley Road	Willy Wags	Clothing/Footwear	In
302	Unley Road	Iamar group	Commercial	Out
302	Unley Road	Metro Designer Cakes	Food	In
302	Unley Road	Kabuki Hair	Services	Out
Metro	Unley Road	Metro Nails	Services	In
259	Unley Road	Sahara	food	Out
248	Unley Road	Vape	Services	In
248	Unley Road	Choices Flooring	Personal	Out
246	Unley Road	Meznar	Furniture & homewares	Out
236	Unley Road	Bite Mi	Food	In
234	Unley Road	Mehraad	food	In
190	Unley Road	Unley Shoe Repairs	Services	Out
190	Unley Road	bricks and stomes	food	In
190	Unley Road	New Morning Books	Personal	Out
190	Unley Road	Belle Property	Commercial	In
92	Unley Road	Pangolin Associates	Commercial	Out
*2/78	Unley Road	Physio Friend	Commercial	In
92	Unley Road	Oscars on Unley	Personal	Out
40	Unley Road	Nikita	food	Out
40	Unley Road	Sachas kitchen	food	In
26	Unley Road	McCullough & co	Commercial	Out
*16-18	Unley Road	Forbes Dowling Lawyers	Commercial	Out
*16-18	Unley Road	Essential convencing	Commercial	Out
*16-18	Unley Road	Your Health	Commercial	In



#### 4.4. List of Tenant Churn – Duthy Street, Anzac Highway & Fullarton Road

no	Precinct	Tenant	Type	Movement
433a	Fullarton Road	Country Bumpkin	Personal	Out
443a	Fullarton Road	Create a stitch	Personal	In
439	Fullarton Road	Made in Japan	Furniture & homewares	Out

#### 4.5. List of Tenant Churn Goodwood Road

no	Precinct	Tenant	Type	Movement
35	Goodwood Road	Mineral bell	Commercial	Out
35	Goodwood Road	Red link	Commercial	Out
41	Goodwood Road	Australian Tourism College	Commercial	Out
57	Goodwood Road	Automotive refinish technology	Commercial	Out
57	Goodwood Road	Goodwood Floors	Commercial	In
57	Goodwood Road	Robayne	Commercial	In
43	Goodwood Road	Australian Bridal Fair	Commercial	Out
43	Goodwood Road	Commander Centre	Commercial	Out
43	Goodwood Road	House of Prints	Commercial	Out
87	Goodwood Road	Andrew McLachlan Accountants	Commercial	Out
87	Goodwood Road	Uni SA	Commercial	In
87	Goodwood Road	Stun one clothing	Clothing/Footwear	Out
89	Goodwood Road	Dora Nails	Services	Out
89	Goodwood Road	Global education Centre	Commercial	Out
89	Goodwood Road	Macbell Films	Commercial	Out
89	Goodwood Road	Stylistic creative hair design	Services	Out
89	Goodwood Road	Latner Production	Commercial	In
89	Goodwood Road	Ezittrade	Commercial	Out
89	Goodwood Road	Uncle Winstons	Services	In
89	Goodwood Road	Marya	Services	In
89	Goodwood Road	Progressive business Solutions	Commercial	In
93	Goodwood Road	Lindblom Lawyers	Commercial	Out
93	Goodwood Road	Terry Rielly Lawyers	Commercial	Out
135	Goodwood Road	Two Sisters	Food	In
123	Goodwood Road	Brown dog Café	Food	Out
123	Goodwood Road	Kazbah	Food	In
145	Goodwood Road	Sunflower shop	Clothing/Footwear	Out
145	Goodwood Road	Orana	Clothing/Footwear	In
147	Goodwood Road	Compass	Commercial	Out
147	Goodwood Road	KWY	Commercial	In
170	Goodwood Road	Everything vegan	Food	In
317	Goodwood Road	Curios Antiques	Furniture & homewares	Out
267	Goodwood Road	Sneaky Pickle	Food	In
2/267	Goodwood Road	Advanced Hydro & Vape	Personal	In

#### 4.6. List of Tenant Churn King William Road

no	Precinct	Tenant	Type	Movement
3	King William Road	Lindblom Law yers	Commercial	In
56	King William Road	Inner strength pilates	Medical/health	Out
155	King William Road	Inner strength pilates	Medical/health	In
32	King William Road	Dr John Ling	Commercial	Out
*3-50	King William Road	Prism Financial Planning	Commercial	In
*5-100	King William Road	Thailand Thai	Food	In
*4-62	King William Road	OMD	Commercial	In
70	King William Road	Flying Trunk	Commercial	In
90B	King William Road	Terrace Nixon Furnishing	Furniture & homew ares	Out
90B	King William Road	Advanced Aesthetics	Furniture & homew ares	In
*2-100	King William Road	Style Bar	Services	In
*2-100	King William Road	Mary Calandro Makeup	Services	Out
134	King William Road	Envy Hair and beauty	Services	Out
*4-100	King William Road	By Blackbird	food	Out
*4-100	King William Road	RASpe giftology	Furniture & homew ares	In
116	King William Road	Lars	food	Out
144a	King William Road	Cable	Clothing/Footw ear	In
128	King William Road	Café Luna Rosso	food	In
128	King William Road	Farina OO	food	Out
NA	King William Road	Shouz	Clothing/Footw ear	In
140A	King William Road	Shouz	Clothing/Footw ear	Out
144A	King William Road	5061	food	In
146	King William Road	The Strand	Services	In
146	King William Road	Fresh	Services	Out
154	King William Road	Pari	Furniture & homew ares	In
158	King William Road	Va Bene Shoes	Clothing/Footw ear	Out
158	King William Road	the fields	Food	In
NA	King William Road	Globi Latvita	food	In
179	King William Road	Zahr	food	Out
179	King William Road	Social House	food	In
*1/155	King William Road	Hunter & Harper	Clothing/Footw ear	Out
NA	King William Road	Aria Homes	Commercial	In
165	King William Road	Market import	Furniture & homew ares	Out
165	King William Road	Hanger	Clothing/Footw ear	In
155	King William Road	Moss River	Furniture & homew ares	Out
*9/165	King William Road	One Seven	Clothing/Footw ear	Out
*6/155	King William Road	Ecod	Clothing/Footw ear	In
*5/155	King William Road	Arrum Jew els	Personal	Out
*1/151	King William Road	Medi Pedi	Services	In
143B	King William Road	Williams Rugs & Gifts	Furniture & homew ares	Out
143B	King William Road	Ottoman trading	Furniture & homew ares	In
107-111	King William Road	Travel Associates	Commercial	In
*3-95	King William Road	Calder Harris Survey	Commercial	Out
*3-95	King William Road	Rec SA	Commercial	In
72	King William Road	Mental Health Co op	Commercial	In
45	King William Road	Lares Homes	Commercial	In
4	King William Road	Trix\axilia Consulting	Commercial	Out
27	King William Road	KW27	food	In
*13-15	King William Road	Leedman Partners	Commercial	Out
*13-15	King William Road	Brother industries	Commercial	Out
*13-15	King William Road	Enterprise Risk management solutions	Commercial	Out
*13-15	King William Road	Nata	Commercial	In
*13-15	King William Road	Seed Genetics	Commercial	In
*13-15	King William Road	Liquormark	Commercial	In
*13-15	King William Road	Corp conveyencing	Commercial	In
*13-15	King William Road	Calder Weath	Commercial	In
*13-15	King William Road	Ramsy Bros	Commercial	In
*13-15	King William Road	Ashman	Commercial	In
*9-11	King William Road	Lindblom Law yers	Commercial	In
*5-7	King William Road	Hill grove resources	Commercial	In
*5-7	King William Road	Ken Flint & associates	Commercial	In
*5-7	King William Road	AYSYS	Commercial	In
*5-7	King William Road	Australian First Mortgage	Finance, Legal, Accounting	Out
*5-7	King William Road	Eleanora Zappia & Associates	Commercial	Out
*5-7	King William Road	SFS	Commercial	Out
*5-7	King William Road	Alan Donald	Commercial	Out
*5-7	King William Road	Loans SA	Finance, Legal, Accounting	Out
*5-7	King William Road	Retirement Strategies	Commercial	Out
*5-7	King William Road	PGFS	Finance, Legal, Accounting	Out
*5-7	King William Road	LJ Hooker Financial	Finance, Legal, Accounting	Out

#### 4.7. Tenancy Mix Data Tables by Precinct

Unley Road	Jan-12	Jul-13	Jan-14	Aug-14	Jan-15	Sep-15	Sep-16
Commercial	17.4%	18.8%	16.1%	19.0%	20.0%	16.9%	17.8%
Food	15.1%	15.4%	15.4%	16.3%	16.2%	15.9%	16.0%
Services	13.7%	13.3%	12.6%	11.8%	12.6%	12.6%	12.3%
Clothing, Footwear	11.2%	10.6%	9.8%	10.4%	10.9%	9.5%	9.5%
Furniture & Homewares	9.3%	9.8%	10.0%	9.5%	10.2%	9.3%	8.7%
Medical/Heath	7.5%	7.7%	8.3%	7.4%	7.7%	7.6%	8.1%
Personal	7.2%	6.7%	5.9%	6.3%	6.4%	7.0%	6.1%
Vacant	4.6%	4.2%	7.7%	6.6%	3.0%	3.5%	5.3%
Public Building	2.1%	2.1%	2.0%	2.1%	2.1%	3.3%	3.2%
Finance, Legal, Accounting	3.7%	3.8%	3.0%	3.0%	3.0%	3.7%	3.0%
Automotive	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	2.2%
Banking	1.7%	1.7%	1.8%	1.7%	1.7%	2.1%	2.0%
Entertainment	1.7%	1.7%	1.6%	1.7%	1.7%	1.7%	1.6%
Supermarket	1.9%	1.9%	1.8%	1.9%	1.9%	1.9%	1.4%
Recreation	2.1%	1.7%	1.8%	1.5%	1.5%	1.5%	1.4%
Tourism	1.0%	0.8%	0.8%	0.8%	1.1%	1.2%	1.2%

King William Road	Jan-12	Jul-13	Jan-14	Aug-14	Jan-15	Sep-15	Sep-16
Commercial	18.5%	22.2%	23.1%	22.7%	22.9%	22.8%	24.9%
Food	16.1%	16.0%	16.7%	17.3%	17.7%	17.2%	19.0%
Clothing, Footwear	18.0%	15.1%	15.0%	13.3%	13.9%	13.5%	13.1%
Services	9.3%	9.8%	9.8%	10.7%	10.4%	9.7%	10.1%
Finance, Legal, Accounting	4.9%	4.0%	5.6%	3.6%	3.9%	5.9%	5.9%
Personal	8.8%	6.7%	6.4%	7.1%	6.1%	5.9%	5.5%
Vacant	5.9%	8.9%	8.1%	8.9%	7.4%	7.9%	5.5%
Medical/Heath	7.8%	8.0%	6.8%	8.0%	8.2%	6.7%	5.5%
Furniture & Homewares	5.9%	4.9%	4.3%	4.0%	5.2%	4.6%	4.2%
Public Building	1.0%	0.9%	0.9%	0.9%	0.9%	2.9%	3.0%
Tourism	1.5%	1.3%	1.3%	1.3%	1.3%	1.3%	1.3%
Supermarket	1.0%	0.9%	0.9%	0.9%	0.9%	0.8%	0.8%
Recreation	1.5%	1.3%	1.3%	1.3%	1.3%	0.8%	0.8%

<b>Goodwood Road</b>	<b>Jan-12</b>	<b>Jul-13</b>	<b>Jan-14</b>	<b>Aug-14</b>	<b>Jan-15</b>	<b>Sep-15</b>	<b>Sep-16</b>
Food	12.6%	13.6%	13.8%	15.4%	16.4%	15.4%	17.6%
Commercial	19.5%	20.0%	18.8%	19.9%	20.0%	18.4%	16.7%
Services	9.3%	9.1%	8.8%	10.0%	10.0%	9.8%	10.0%
Medical/Heath	11.2%	10.9%	10.5%	10.4%	10.5%	8.6%	9.1%
Automotive	3.3%	2.7%	7.9%	3.2%	3.6%	9.0%	9.0%
Furniture & Homewares	6.5%	8.2%	7.5%	6.3%	5.5%	6.8%	7.7%
Personal	9.8%	7.3%	7.1%	7.7%	7.7%	7.3%	6.3%
Public Building	6.5%	6.4%	5.0%	6.3%	6.4%	5.1%	5.4%
Finance, Legal, Accounting	4.7%	4.6%	4.2%	4.1%	4.1%	5.2%	4.1%
Clothing, Footwear	5.1%	5.0%	4.6%	5.4%	5.5%	4.3%	3.2%
Recreation	2.8%	2.7%	2.1%	3.2%	3.2%	3.4%	3.2%
Entertainment	3.3%	3.2%	2.9%	3.2%	3.2%	3.0%	3.2%
Vacant	3.7%	4.6%	5.0%	3.2%	2.3%	2.1%	2.7%
Supermarket	1.4%	1.4%	1.3%	1.4%	1.4%	1.3%	1.4%
Banking	0.5%	0.5%	0.4%	0.5%	0.5%	0.4%	0.5%

<b>Fullarton Road</b>	<b>Jan-12</b>	<b>Jul-13</b>	<b>Jan-14</b>	<b>Aug-14</b>	<b>Jan-15</b>	<b>Sep-15</b>	<b>Sep-16</b>
Medical/Heath	14.1%	0.0%	16.3%	24.7%	24.8%	25.5%	25.5%
Food	31.7%	26.7%	16.3%	14.4%	13.9%	13.7%	13.7%
Services	21.7%	21.7%	14.4%	13.4%	12.9%	13.7%	13.7%
Commercial	12.1%	15.5%	12.5%	13.4%	14.9%	11.8%	11.8%
Personal	13.3%	11.7%	6.7%	8.2%	7.9%	7.8%	7.8%
Clothing, Footwear	5.0%	6.7%	4.8%	3.1%	5.9%	6.9%	6.9%
Supermarket	13.3%	8.3%	4.8%	5.2%	5.0%	4.9%	4.9%
Entertainment	6.7%	6.7%	3.8%	4.1%	4.0%	3.9%	3.9%
Vacant	5.0%	13.3%	3.8%	6.2%	3.0%	2.9%	3.9%
Finance, Legal, Accounting	5.1%	0.0%	3.8%	3.1%	3.0%	3.9%	3.9%
Furniture & Homewares	1.7%	3.3%	2.9%	2.1%	2.0%	2.0%	1.0%
Recreation	1.7%	1.7%	1.0%	1.0%	1.0%	1.0%	1.0%
Tourism	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	1.0%
Automotive	1.0%		1.0%	1.0%	1.0%	1.0%	1.0%
Public Buildings	8.1%	0.0%	7.7%	0.0%	0.0%	0.0%	0.0%

Anzac Hwy/South Road	Jan-12	Jul-13	Jan-14	Aug-14	Jan-15	Sep-15	Sep-16
Commercial	31.6%	38.3%	33.9%	37.3%	38.3%	40.3%	38.1%
Food	12.3%	11.7%	11.3%	13.6%	13.3%	12.9%	12.7%
Furniture & Homewares	10.5%	8.3%	14.5%	10.2%	10.0%	11.3%	11.1%
Services	7.0%	6.7%	6.5%	8.5%	8.3%	9.7%	9.5%
Vacant	8.8%	10.0%	8.1%	6.1%	8.3%	4.8%	7.9%
Recreation	7.0%	6.7%	6.5%	6.8%	6.7%	4.8%	4.8%
Supermarket	3.5%	3.3%	3.2%	3.4%	3.3%	3.3%	3.2%
Clothing, Footwear	3.5%	3.3%	3.2%	3.4%	3.3%	3.2%	3.2%
Medical/Heath	3.5%	3.3%	4.8%	1.7%	1.7%	3.2%	3.2%
Public Building	3.5%	1.3%	3.2%	3.4%	3.3%	3.2%	3.2%
Tourism	1.8%	1.7%	1.6%	1.7%	1.7%	1.6%	0.0%
Personal	5.3%	1.7%	1.6%	1.7%	1.7%	1.6%	0.0%
Finance, Legal, Accounting	1.8%	1.7%	1.6%	1.7%	0.0%	0.0%	0.0%

Glen Osmond Road	Jan-12	Jul-13	Jan-14	Aug-14	Jan-15	Sep-15	Sep-16
Commercial	38.5%	53.9%	51.9%	54.2%	53.4%	50.4%	50.0%
Medical/Heath	6.6%	6.6%	7.6%	7.8%	9.9%	11.2%	12.0%
Food	6.4%	5.9%	7.0%	5.9%	6.8%	7.5%	7.6%
Finance, Legal, Accounting	6.6%	6.6%	6.3%	5.9%	5.6%	7.5%	7.0%
Automotive	6.4%	3.9%	4.4%	4.6%	5.0%	5.0%	5.1%
Clothing, Footwear	6.4%	4.6%	4.4%	5.2%	5.6%	4.9%	3.8%
Vacant	12.8%	6.6%	6.3%	5.2%	3.1%	3.0%	3.8%
Public Building	3.3%	3.3%	3.8%	3.3%	3.1%	3.1%	3.2%
Entertainment	4.6%	2.6%	2.5%	2.6%	2.5%	2.5%	2.5%
Services	2.8%	2.6%	2.5%	2.0%	1.9%	1.2%	1.9%
Furniture & Homewares	0.9%	0.7%	0.0%	0.7%	0.6%	1.2%	1.3%
Tourism	1.8%	1.3%	1.9%	1.3%	1.2%	1.2%	1.3%
Recreation	2.8%	1.3%	1.3%	1.3%	1.2%	1.2%	0.6%

DUTHY STREET	Jan-12	Jul-13	Jan-14	Aug-14	Jan-15	Sep-15	Sep-16
Food	50.0%	60.0%	46.7%	56.0%	56.0%	50.0%	50.0%
Furniture & Homewares	4.2%	4.0%	10.0%	12.0%	12.0%	9.4%	9.4%
Services	20.8%	12.0%	13.3%	16.0%	16.0%	15.6%	15.6%
Recreation	4.2%	4.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Personal	12.5%	12.0%	10.0%	8.0%	8.0%	6.3%	6.3%
Vacant	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Entertainment	4.2%	4.0%	3.3%	4.0%	4.0%	3.1%	3.1%
Automotive	4.2%	4.0%	3.3%	4.0%	4.0%	3.1%	3.1%

## 4.7. Vacant stores

Precinct	Sub-precinct	Street No.	Street Name
King William Road	King William Road	4	King William Road
King William Road	King William Road	32	King William Road
King William Road	King William Road	s2-92	King William Road
King William Road	King William Road	S1-92	King William Road
King William Road	King William Road	11/96	King William Road
King William Road	King William Road	102	King William Road
King William Road	King William Road	116	King William Road
King William Road	King William Road	116	King William Road
King William Road	King William Road	132	King William Road
King William Road	King William Road	154	King William Road
King William Road	King William Road	5/155	King William Road
King William Road	King William Road	4-155	King William Road
King William Road	King William Road	s5-7	King William Road
Anzac/South	Anzac Highway	*2-80	Anzac Highway
Anzac/South	Anzac Highway	80	Anzac Highway
Anzac/South	South Rd	655	South Rd
Anzac/South	South Rd	659	South Rd
Anzac/South	South Rd	711	South Rd
Fullarton Road	Fullarton Rd	439	Fullarton Rd
Fullarton Road	Fullarton Rd	3-389	Fullarton Rd
Fullarton Road	Fullarton Rd	1-389	Fullarton Rd
Glen Osmond Road	Glen Osmond Road	u5 202	Glen Osmond Road
Glen Osmond Road	Glen Osmond Road	238	Glen Osmond Road
Glen Osmond Road	Glen Osmond Road	290	Glen Osmond Road
Glen Osmond Road	Glen Osmond Road	290	Glen Osmond Road
Glen Osmond Road	Glen Osmond Road	332	Glen Osmond Road
Goodwood Road	Goodwood Road	37	Goodwood Road
Goodwood Road	Goodwood Road	41	Goodwood Road
Goodwood Road	Goodwood Road	93	Goodwood Road
Goodwood Road	Goodwood Road	138	Goodwood Road
Unley Road	Unley Road	17/13-23	Unley Road
Unley Road	Unley Road	U5 57	Unley Road
Unley Road	Unley Road	87	Unley Road
Unley Road	Unley Road	183	Unley Road
Unley Road	Unley Road	4/213	Unley Road
Unley Road	Unley Road	221	Unley Road
Unley Road	Unley Road	223	Unley Road
Unley Road	Unley Road	235	Unley Road
Unley Road	Unley Road	259	Unley Road
Unley Road	Unley Road	259	Unley Road
Unley Road	Unley Road	2/376	Unley Road
Unley Road	Unley Road	300	Unley Road
Unley Road	Unley Road	292-294	Unley Road
Unley Road	Unley Road	246	Unley Road
Unley Road	Unley Road	244	Unley Road
Unley Road	Unley Road	244	Unley Road
Unley Road	Unley Road	242	Unley Road
Unley Road	Unley Road	*2/92	Unley Road
Unley Road	Unley Road	82	Unley Road
Unley Road	Unley Road	*4/78	Unley Road
Unley Road	Unley Road	30	Unley Road
Unley Road	Unley Road	26	Unley Road
Unley Road	Unley Road	16-18	Unley Road

#### 4.8. Historic vacancy – City of Unley & comparative strips

PRECINCT	1999	2002	2004	2005	2006	2007	Jan-08	Jan-09	Jan-10	Jan-11	Jan-11	Jan-12	Jan-12	Jan-13	Jul-13	Jan-14	Aug-14	Jan-15	Sep-15	Sep-16
Unley Road	8.0%	4.6%	3.7%	4.4%	4.0%	2.8%	2.0%	5.7%	5.6%	4.3%	3.9%	4.6%	5.2%	3.3%	4.2%	7.7%	6.6%	2.9%	3.5%	5.3%
King William Road	5.7%	2.0%	1.9%	2.5%	3.0%	2.9%	1.9%	7.0%	4.9%	4.3%	2.8%	5.9%	5.4%	6.3%	8.9%	8.1%	8.9%	7.0%	7.9%	5.5%
Goodwood Road	6.1%	11.6%	10.0%	11.0%	8.0%	3.0%	2.5%	4.0%	5.5%	5.4%	4.8%	3.7%	4.2%	5.9%	4.5%	5.0%	3.2%	3.0%	2.1%	2.7%
Fullarton Road				7.0%	6.0%	2.8%	1.5%	0.0%	0.0%	1.1%	2.2%	5.0%	1.7%	1.7%	13.3%	3.8%	6.2%	3.7%	2.9%	3.9%
Anzac Highway												8.8%	8.5%	8.5%	10.0%	8.1%	8.80%	8.9%	4.8%	7.9%
Glen Osmond Road	10.0%	4.5%	7.0%	8.0%	9.8%	7.0%	5.0%	11.3%	6.3%	5.1%	5.7%	12.8%	5.8%	6.5%	6.6%	6.3%	5.2%	3.2%	3.0%	3.8%
Duthy Street												0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Greenhill Road												8.7%	6.3%	5.6%	7.5%	7.1%	7.5%	6.8%	5.6%	
<b>Unley Council Region</b>	<b>7.5%</b>	<b>5.7%</b>	<b>5.4%</b>	<b>6.6%</b>	<b>6.2%</b>	<b>3.7%</b>	<b>2.6%</b>	<b>5.6%</b>	<b>4.5%</b>	<b>4.0%</b>	<b>3.9%</b>	<b>4.6%</b>	<b>5.0%</b>	<b>4.8%</b>	<b>5.3%</b>	<b>6.7%</b>	<b>6.2%</b>	<b>4.1%</b>	<b>3.9%</b>	<b>4.9%</b>
Rundle Mall						2.3%	2.3%	3.1%	2.3%	2.5%	3.1%	1.9%	3.1%	0.7%	2.7%	4.7%	3.8%	3.7%	3.4%	4.2%
Rundle Street						1.0%	2.0%	0.0%	2.0%	1.0%	3.9%	0.0%	2.9%	0.7%	3.9%	0.0%	6.5%	6.7%	4.6%	3.7%
Jetty Road						0.5%	4.2%	2.2%	2.1%	3.3%	5.4%	5.3%	5.3%	4.9%	6.9%	7.9%	NA	NA	NA	4.6%
The Parade						1.5%	3.3%	3.3%	5.3%	4.8%	4.3%	5.7%	5.7%	8.3%	5.2%	6.8%	5.0%	5.3%	4.6%	3.0%
Prospect Road																				4.4%





## **INFORMATION REPORT**

<b>REPORT TITLE:</b>	ASSOCIATION COORDINATORS QUARTERLY REPORTS FOR THE PERIOD 1 JULY - 30 SEPTEMBER 2016
<b>ITEM NUMBER:</b>	34
<b>DATE OF MEETING:</b>	7 DECEMBER 2016
<b>AUTHOR:</b>	AKARRA KLINGBERG
<b>JOB TITLE:</b>	COORDINATOR BUSINESS AND ECONOMIC DEVELOPMENT

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### **1. EXECUTIVE SUMMARY**

As part of the Association Separate Rate Agreements, each Mainstreet Association is required to submit quarterly expenditure reports to Council. This report provides Members with the required expenditure reports for the period 1 July – 30 September 2016 as well as additional information on the activities of the Mainstreet Associations for the period 1 July – 30 November 2016.

Each Association has held their Annual General Meeting and undertaken a variety of different activities during this time.

At the time of writing this report, no report had been received from King William Road Traders Association.

### **2. RECOMMENDATION**

The Committee recommends to Council that:

1. The report be received.
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### **3. BACKGROUND**

Due to the timing of the Unley Business and Economic Development Committee meeting, the Mainstreet Trader Associations have only been asked to provide a report from 1 July – 30 September 2016, as quarter 2 is from 1 October – 31 December 2016. However below is additional information on the activities, achievements and challenges the Mainstreet Trader Associations have experienced from 1 July – 30 November 2016.

#### **Unley Road Association**

- Stephen Finos, Unley Road business owner and Vice Chair of the committee, was a finalist in the Mainstreet Australia Awards in the Mainstreet Champion category, and winner in the Mainstreet SA's Outstanding Contribution.
- Successful AGM held on 20 October 2016, with three new members joining the committee.
- A Restaurant and Dining folder initiative was distributed to Greenhill Road, providing offices with information on the catering opportunities on Unley Road.
- A full page advertisement was featured in SALife in August featuring restaurants and cafes on Unley Road with 6 new and established businesses participating.
- The inaugural Unley Road Small Business & Pride of Workmanship Awards was held in conjunction with the Rotary Club of Unley, and 120 traders, media, representatives from local organisations attended the presentation and Unley Road Together networking event at Unley Town Hall on 13 October 2016.
- A full page advertisement in SALife magazine featured the winners of the Small Business and Pride of Workmanship Awards 2016.
- The Association worked in conjunction with City of Unley and Sturt Football Club to coordinate and decorate Unley Road with double blue balloons in the lead up to the SANFL Grand Final.
- An Evening Under the Stars 2017 free community concert was registered as a 2017 Fringe event, with internationally acclaimed star Tony Pantano as the key performer for the evening, and gold coin donations from the evening going towards the Make A Wish Foundation.
- The Unley Road Association was invited to join the official party at the Unley RSL's Remembrance Day ceremony on 11 November 2016, and laid a wreath on behalf of all traders on the road.
- SALife Christmas full page advertisement is to be published in early December, with 7 Unley Road businesses participating.
- The last newsletter was distributed in September, with 474 subscribers, and 35% open rate.
- Numerous press releases have been sent on various business initiatives on the road.

### **Goodwood Road Business Association**

- The AGM was held on 13 September 2016 with 4 new members joining the committee
- Lighting has been installed in two trees on the road as a test for on-going lighting. This is to be funded from the Mainstreet Improvement Funding. It is anticipated that more trees will be lit up and the Association is currently obtaining quotes to also light sections of the verandas.
- A promotional video of Goodwood Road to be used at the Capri Theatre has been shot and is currently being edited. It is anticipated this will start being shown in early December.
- Christmas Fence Art will be installed on the Goodwood Primary School Fence in December. In great community collaboration, the children from Goodwood Primary School and St Thomas School have been involved. An on-going program of fence art for 2017 is currently being put together.
- Goodwood Post Office applied for, and received, an activation grant (\$100), and created a Letters to Santa box and display at the Post Office. Four other traders received grants previously.
- Ignite Outdoor Cinema Event will be held in Gilbert Street on Friday Dec 9. Several traders will be supplying food and drink. The committee will hold their Christmas drinks for members on that night, with all Elected Members and UBED Members invited to attend.
- The Welcome Connect project, to send information about Goodwood Road to new residents in the catchment area, is in the planning stage – it is anticipated that this will be a project for 2017.
- All Membership applications, 24 received, have been approved. Only three of these are Property Owners.

### **King William Road Traders Association**

At the time of this report being prepared; reports had not been received from the King William Road Traders Association.

The AGM held 27 September 2016

- Audited financials were not presented at the AGM
- An Auditor for 2016/17 was not appointed at the AGM
- A special meeting will need to be held to approve the 2015/16 financials and appoint and Auditor for 2016/2017
- Final costs regarding Variety of King William are still being analysed
- Council has been verbally advised that the committee will not be replacing the Marketing Coordinator at the present time.

### **Fullarton Road South Traders Association**

- The AGM was held 14 September 2016 with the same committee members elected.
- Additional general members have joined the association and will receive the Minutes of the meetings.

#### **4. ATTACHMENTS**

- Fullarton Road South Traders Association Coordinator's Report – ending 30 September 2016
- Goodwood Road Business Association Coordinator's Report – ending 30 September 2016
- Unley Road Association Coordinator's Report – ending 30 September 2016
- King William Road Traders Association Report – No report provided

Income

Separate Rate funding	
Membership	\$14,000.00
<b>Total Income</b>	<b>\$14,000.00</b>

Additional Income

Item	
Banner Income	\$0
Mainstreet Improvement Budget	\$0
Event Sponsorship	\$15,400.00
<b>Total Income</b>	<b>\$15,400.00</b>

Administration

Activity	Budget	Quarter 1	Quarter 2	Quarter 3	Quarter 4	Prog Tot.	Prog/Bud. %
Marketing Coordinator Fee	\$4,140	\$1,035	\$0	\$0	\$0	\$1,035	25.00%
SA LIFE ADVERTISING	\$7,480	\$0	\$0	\$0	\$0	\$0	0.00%
Website Content/management	\$0	\$0	\$0	\$0	\$0	\$0	
Website Hosting	\$0	\$0	\$0	\$0	\$0	\$0	
Office Expenses	\$0	\$0	\$0	\$0	\$0	\$0	
Bookkeeping	\$0	\$0	\$0	\$0	\$0	\$0	
Insurance	\$1,487	\$0	\$0	\$0	\$0	\$0	
<b>Subtotal</b>	<b>\$13,067</b>	<b>\$1,035</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$1,035</b>	<b>7.92%</b>

Promotions & Marketing

Activity	Budget	Quarter 1 (\$)	Quarter 2	Quarter 3	Quarter 4	Prog Tot.	Prog/Bud. %
Event 1	\$400	\$0	\$400	\$0	\$0	\$0	0.00%
Contribution to Digital Strategy (FYE)	\$1,200	\$0	\$0	\$0	\$0	\$0	0.00%
<b>Subtotal</b>	<b>\$1,600</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>0.00%</b>

Total Administration & Projects

	14667.22	1035	0	0	0	1035	7.06%
<b>Total Operating Surplus</b>	<b>-667.22</b>						

Progressive Surplus

12965

2016-2017

Digital	Measure	Annual Target	Quarter 1	Quarter 2	Quarter 3	Quarter 4

Activity	Description	Measure	This Years Target	Quarter 1	Quarter 2	Quarter 3	Quarter 4	Act. Total	Target vs Act %
Press – SA Life	SA Life 1/2Page in 2 QRT and	Trader feedback at						0	#DIV/0!
Event 1	Christmas Street Party	Foot Traffic and attendance	20					0	0.00%

Goodwood Road Business Association - 2016-17 UBED Quarterly Report

<b>Income</b>		
Separate Rate funding	\$51,500.00	
Membership	0	
<b>Total Income</b>	<b>\$51,500.00</b>	
<b>Additional Income</b>		
Banner Income	\$10,717.50	
Mainstreet Improvement Budget		** this income is not included in the figures below
* budget for approved specific infrastructure projects	\$15,000.00	
Event Sponsorship		
<b>Total Income</b>	<b>\$30,717.50</b>	
Carry over funding from 2015/16		
<b>Total funds available 2016/17</b>	<b>\$14,000.00</b>	
<b>Expenditure - Marketing Levy and Banner Income</b>		
Administration	<b>\$76,217.50</b>	<b>**</b>

Activity	Brief Description	Budget	Quarter 1	Quarter 2	Quarter 3	Quarter 4	Prog Tot.	Prog/Bud. %
Marketing Coordinator Fee	8 hours per week @ \$60/hour	\$24,960	\$4,160				\$4,160	16.67%
Marketing Coordinator Expenses		NA	\$0				\$0	0.00%
Member Newsletter	Occasional, cost included in Misc.	NA	\$0				\$0	0.00%
Website Content Management	Inc. in Marketing Coordinator fee	NA	\$0				\$0	0.00%
Website Hosting	Hosting and SEO	\$600	\$575				\$575	2.30%
Social Media management	Inc. in Marketing Coordinator fee	NA	\$0				\$0	0.00%
Administration Coordinator Fee	Inc. in Marketing Coordinator fee	NA	\$0				\$0	0.00%
Administration Coordinator Expenses	Inc. in Marketing Coordinator fee	NA	\$0				\$0	0.00%
Office Expenses	Postage, PO Box etc.	\$500	\$190				\$190	0.76%
Book Keeping	2 hours per month @ \$60/hour + auditor's fee	\$2,000	\$240				\$240	0.96%
Insurance	Public Liability and Associations Liability	\$1,600	\$0				\$0	0.00%
Miscellaneous	Member Functions, networking, newsletters etc	\$3,000	\$15				\$15	0.06%
<b>Subtotal</b>		<b>\$32,660</b>	<b>\$5,180</b>				<b>\$5,180</b>	<b>15.86%</b>

**Promotions & Marketing**

Activity	Brief Description	Budget	Quarter 1 (\$)	Prog/Bud. %
Press Ads				
Cinema Advertising	Capri Cinema Advertising - production	\$3,000	\$0	
Welcome Connect	Promo campaign to new residents	\$5,500	\$0	0.00%
Social Media	Face Book advertising	\$1,200	\$267	0.00%
Event 1	SALA	\$3,000	\$3,524	
Event 2	Ignite Film Night	\$1,000	\$0	117.47%
Event 3	Streetscape Party	\$18,000	\$0	
Activations	Fence art etc	\$5,000	\$846	
Contribution to Digital Strategy (FYE)	Ongoing	\$2,381	\$595	16.92%
Miscellaneous		\$3,800		24.99%
<b>Subtotal</b>		<b>\$42,881</b>	<b>\$5,232</b>	<b>12.20%</b>

# Goodwood Road Business Association - 2016-17 UBED Quarterly Report

Digital	Measure	Annual Target	Quarter 1	Quarter 2	Quarter 3	Quarter 4
Member Newsletter	Open Rate					
Website Traffic	Page Views	TBA	TBA			
Social Media – Facebook	Page Likes (net)	2500	1829			
Social Media – Instagram	Followers (net)	200	113			

Activity	Description	Measure	This Years Target	Quarter 1	Quarter 2	Quarter 3	Quarter 4	Act. Total	Target vs Act %
Advertising at Capri Cinema	12 month contract from Dec 2016. Video in production	NA							#DIV/0!
Welcome Connect	Promotion to new arrivals in GR catchment area commence Jan 2017	Contacts	1500						
Customer Newsletter	Only when required			NA					
Event 1 - SALA	SALA	Participating Traders	20	21	NA	NA	NA	21	105.00%
Event 2 - Ignite Film Night	Support for CoU Event	Trader Participation	5	NA				0	0.00%
Event 3 - Streetscape Celebration	Pending completion of streetscape in 2017	Attendance Trader Participation	TBA	NA					
Activations - GR and Business Grants	Street Activations	Trader Grants	5	1					



# Goodwood Road Business Association - 2016-17 UBED Quarterly Report

Business Name	Address	Phone	E-mail	Contact Name	Member?	Other
<b>Quarter 1 (1/7/2016 - 30/9/2016)</b>						
<b>Businesses IN</b>						
Rollin Saigon (expansion) Marya Eyebrow and Beauty	128 89c	8357 7865	rollinsaigon@yahoo.com marya.jalali7@gmail.com	Nadia Marya Jalalo	Yes	
<b>Businesses OUT</b>						
SA Govt Energy Scheme	128					
<b>Quarter 2 (1/10/2016 - 31/12/2016)</b>						
<b>Businesses IN</b>						
Frock Me Out	No 89		hello@frockmeout.com.au	Jen weeks		Opens 18/11
<b>Businesses OUT</b>						
Carol's Classic Gifts	No 89					

2016- 2017

## Income

Separate Rate funding	\$107,700.00
Memberships	0
<b>Total Income</b>	<b>\$107,700.00</b>

## Additional Income

Item	
Banner Income	\$4,420.00
Mainstreet Improvement Budget	\$25,000.00
Event Sponsorship	\$20,000.00
<b>Total Income</b>	<b>\$49,420.00</b>

## Administration

Activity	Brief Description	Budget	Quarter 1	Quarter 2	Quarter 3	Quarter 4	Prog Tot.	Prog/Bud. %
Marketing Coordinator Fee		\$23,400	\$1,598				\$1,598	6.83%
Website Content/management and hosting		\$4,000	\$1,391	\$0	\$0	\$0	\$1,391	34.77%
PO Box		\$60	\$75	\$0	\$0	\$0	\$75	125.00%
Book Keeping and office expenses		\$3,000	\$540	\$0	\$0	\$0	\$540	18.00%
Other		\$270						
Insurance		\$1,278	\$0	\$0	\$0	\$0	\$0	0.00%
<b>Subtotal</b>		<b>\$32,008</b>	<b>\$3,603</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$3,603</b>	<b>11.26%</b>

## Promotions &amp; Marketing

Activity	Brief Description	Budget	Quarter 1 (\$)	Quarter 2	Quarter 3	Quarter 4	Prog Tot.	Prog/Bud. %
Advertising and Promotions	Adelaide Visitors Guide (booked for 2017)	\$40,816	\$756	\$0	\$0	\$0	\$756	1.85%
Member Services	Eastern Courier Messenger		\$440				\$440	1.08%
	Committee meeting and catering expenses	\$12,000	\$125	\$0	\$0	\$0	\$125	1.04%
	Sturt Football Club street decorations		\$164	\$0	\$0	\$0	\$164	1.36%
	Mainstreet Australia awards participation and travel		\$1,155	\$0	\$0	\$0	\$1,155	9.63%
Major Events	N/A	\$30,000	\$0	\$0	\$0	\$0	\$0	0.00%
Minor Events	Small Business & Pride of Workmanship Awards	\$10,000	\$96	\$0	\$0	\$0	\$96	0.96%
Contribution to Digital Strategy (FYE)	Ongoing	\$7,296	\$1,824	\$0	\$0	\$0	\$1,824	25.00%
<b>Subtotal</b>		<b>\$100,112</b>	<b>\$4,559</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$4,559</b>	<b>4.55%</b>

Total Administration & Projects	132120	8162.6	0	0	0	0	8162.6	6.18%
Total Operating Surplus	-24420						Progressive Surplus	99537.4

## 2016- 2017

Digital	Measure	Annual Target	Quarter 1	Quarter 2	Quarter 3	Quarter 4
Member Newsletter	Open Rate (%)	40	35			
Website Traffic	Page Views	12000	4004			
Social Media – Facebook	Page Likes (net)	2000	1131			
Social Media – Twitter	Followers (net)	1000	521			

Activity	Description	Measure	This Years Target	Quarter 1	Quarter 2	Quarter 3	Quarter 4	Act. Total	Target vs Act %
Advertising - Adelaide Visitors Guide (published in January 2017)	Full page ad focussed on tourist-friendly Unley Road businesses.	Distribution on Unley Road	200	0	0	0	0	0	0.00%
Advertising - SA Life magazine	Full page ad focussed on various Unley Road business sectors and events	Trader Participation	18	6	0	0	0	6	33.33%
Advertising - Eastern Courier Messenger Press	Advertisement for Unley Road Small Business & Pride of Workmanship Awards 2016	Nominations	50	120	0	0	0	120	240.00%
Promotions - Press releases	Promoting news from various Unley Road Association, and business initiatives	Press mentions	50	10	0	0	0	0	
Promotions - Sturt Football Club Grand Final	Installation of balloons along Unley Road to celebrate week leading up to SFC's win at the SANFL Grand Final	Balloons installed	500	500	0	0	0	500	100.00%
Promotions - Mainstreet Australia Awards	Vice Chair Stephen Finos nominated for Mainstreet Champion	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Members Services - Committee meeting	Catering expenses	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Minor Event - Unley Road Small Business & Pride of Workmanship Awards 2016	Joint initiative with Rotary Club of Unley to recognise Unley Road businesses and employees providing excellent customer service to the community.	Nominations	50	120	0	0	0	120	240.00%

# Unley Road Association

2016- 2017

Business Name	Address	Phone	E-mail	Contact Name	Member?	FB Group	Other
<b>Quarter 1 (1/7/2016 - 30/9/2016)</b>							
<b>Businesses IN</b>							
AV Financial Services	Lvl 1, Suite 2, 16-18 Unley Road	8377 7799	N/A	Mahrianne Haughey	No		
Alba Planning Solutions	Lvl 1, Suite 2, 16-18 Unley Road	7200 0025	mahrianne@albaplanning.com.au	Mahrianne Haughey	No		
Adelaide Vape Place	68 Unley Road	7200 0025	vapeplace78@hotmail.com	Chrissy Pongraz	Yes		
Beanstalk	3/12 Unley Road	8272 0900	russell@beantalk.com.au	Russell	No		
Chinese Giftware & Porcelain	148 Unley Road	8293 4908	N/A	Alison Thai	No		
<b>Businesses OUT</b>							
Big Egg Media	Shop 9, 13-23 Unley Road	7120 9921	edwin@bigeggmedia.com.au	Edwin Davis	No		

## DECISION REPORT

**REPORT TITLE:** UNLEY BUSINESS AND ECONOMIC  
DEVELOPMENT COMMITTEE MEETING  
DATES 2017

**ITEM NUMBER:** 35

**DATE OF MEETING:** 7 DECEMBER 2016

**AUTHOR:** KELLEY JAENSCH

**JOB TITLE:** EXECUTIVE ASSISTANT CITY  
DEVELOPMENT

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### 1. **EXECUTIVE SUMMARY**

To determine the meeting dates for the Unley Business and Economic Development Committee meeting for 2017.

Under the Terms of Reference the committee is required to meet on a quarterly basis.

### 2. **RECOMMENDATION**

That:

1. The report be received.
2. The Unley Business Economic Development Committee meet quarterly on the first Wednesday of the month at 6.30pm at the Council Chambers, 181 Unley Road Unley, with appropriate adjustments to accommodate other meetings, in accordance with the meeting schedule outlined below:

Wednesday,	1 March 2017
Wednesday,	7 June 2017
Wednesday,	6 September 2017
Wednesday,	6 December 2017

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### **3. RELEVANT CORE STRATEGIES/POLICIES**

Section 41 committees of the Council are authorised in their Terms of Reference to determine the time and place of their meetings. A schedule of meeting dates for 2017 is required and the Committee will meet quarterly on the first Wednesday of the month.

### **4. DISCUSSION**

Under the Terms of Reference the committee is required to meet on a quarterly basis. The committee is able to change the meeting dates if required.

### **5. ANALYSIS OF OPTIONS**

Option 1 – The Unley Business and Economic Development Committee meet quarterly on the first Wednesday of the month at 6.30pm at the Council Chambers, 181 Unley Road Unley, with appropriate adjustments to accommodate other meetings, in accordance with the meeting schedule outlined below:

Wednesday,	1 March 2017
Wednesday,	7 June 2017
Wednesday,	6 September 2017
Wednesday,	6 December 2017

Option 2 – Not adopt the schedule as proposed.

The Committee can make changes to the meeting dates proposed above.

### **6. RECOMMENDED OPTION**

Option 1 is the recommended option.

### **7. POLICY IMPLICATIONS**

#### **7.1 *Financial/budget***

- Payment of allowances for independent members has been budgeted for.

#### **7.2 *Legislative/Risk Management***

N/A

#### **7.3 *Staffing/Work Plans***

N/A

**7.4    *Environmental/Social/Economic***

N/A

**7.5    *Stakeholder Engagement***

Community consultation not required.

**8.    REPORT CONSULTATION**

Coordinator Business and Economic Development

**9.    ATTACHMENTS**

Nil

**10.   REPORT AUTHORISERS**

<b><u>Name</u></b>	<b><u>Title</u></b>
Peter Tsokas	Chief Executive Officer