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 OAK FLATS TOWN CENTRE PLAN

The Oak Flats Town Centre Plan was endorsed by Council at its meeting of 3 February 2015, as a basis for the review of relevant Council Policy including Shellharbour Local Environmental Plan 2013, Shellharbour Development Control Plan, Shellharbour City Council Section 94 Contributions Plan 2013 and the capital works program.

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**OAK FLATS TOWN CENTRE PLAN**

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with sub-consultant services provided by Hill PDA, CHROFI, GTA Consultants and Alluvium Consulting

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# Terminology

Abbreviation	Name
LEP	Local Environment Plan
DCP	Development Control Plan
ESD	Ecologically Sustainable Development
WSUD	Water Sensitive Urban Design

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*1.0 Introduction*

## 1.0 Introduction

### 1.1 BACKGROUND

Shellharbour City Council required the preparation of a town centre plan for Oak Flats. In response to this requirement McGregor Coxall has been commissioned by Shellharbour City Council to prepare a Town Centre Plan for Oak Flats that helps to create a vibrant, inclusive, safe, attractive, connected, convenient, accessible and commercially successful town centre.

The aims of this study are to provide written and graphic development guidelines for Oak Flats Town Centre in a form adaptable for inclusion in the Shellharbour DCP. Key scope of works addressed in the study are as follows;

- Conceptual block building envelope sketches with optional upper floor residential or upper floor commercial or upper floor commercial/residential;
- Development appearance/character including colours/materials palette;
- Public domain treatment/usage including integration with private domain;
- Transport /parking provisions - this will need to determine future supply needs and where increases in public parking may be needed, based on future development capacity; and
- Maps of Centres specifying required active frontages, awning weather protection, building envelopes/setbacks, splayed corners, corner elements and entry statements, focal points, public domain treatments including possible gathering areas/meeting places and transport/parking provisions.
- Any recommended amendments to LEP 2013 as it relates to development of Town Centres.

### 1.2 OAK FLATS TOWN CENTRE

Oak Flats is recognised as a Town under the Department of Planning and Environment's Illawarra Regional Strategy (2006-31). Oak Flats is situated on the south-western shores of Lake Illawarra and surrounded by the suburbs of Shellharbour City Centre to the south-east and Albion Park Rail to the west. The town centre is defined by Central Avenue, a local high street that connects directly to Pioneer Drive. Located to the south of Central Avenue is Oak Flats Railway Station and Princes Highway, with Lake Illawarra positioned to the north of the town centre. Key landmarks along the high street are the Oak Flats Library and a collection of local shops.

### 1.3 STUDY BOUNDARY

Figure 1.01 illustrates the existing Oak Flats Town Centre study boundary designated for this project. To ensure a comprehensive town centre plan the study boundary was extended to incorporate key town centre features such as the creek line south of Hopetoun Street and Oak Flats Primary School. The extension of the study boundary is not to develop in the zone but to investigate opportunities to establish a walkable public domain that connects seamlessly to the surrounding residential streets [Figure 1.03].

### 1.4 REPORT STRUCTURE

The town centre plan report structure reflects the design process undertaken in preparing this Plan for Oak Flats Town Centre. The following sections form the structure of this document;

- Section 2 looks to understand the complexities comprising a 21st Century town centre and the key principles that make a vital town centre;
- Section 3 provides an overview of existing background documents relating to State and Local Government policy;
- Section 4 applies the key principles that comprise a vital town centre against Oak Flats Town Centre;
- Section 5 identifies a series of key strategic moves to revitalise Oak Flats Town Centre;
- Section 6 presents the Oak Flats Town Centre Guidance based on the Shellharbour City Council's scope of works;
- The Appendix section contains a Consultation Kiosk Summary, the Economic Study produced by Hill PDA and a Parking Provisions Study prepared by GTA Consultants.

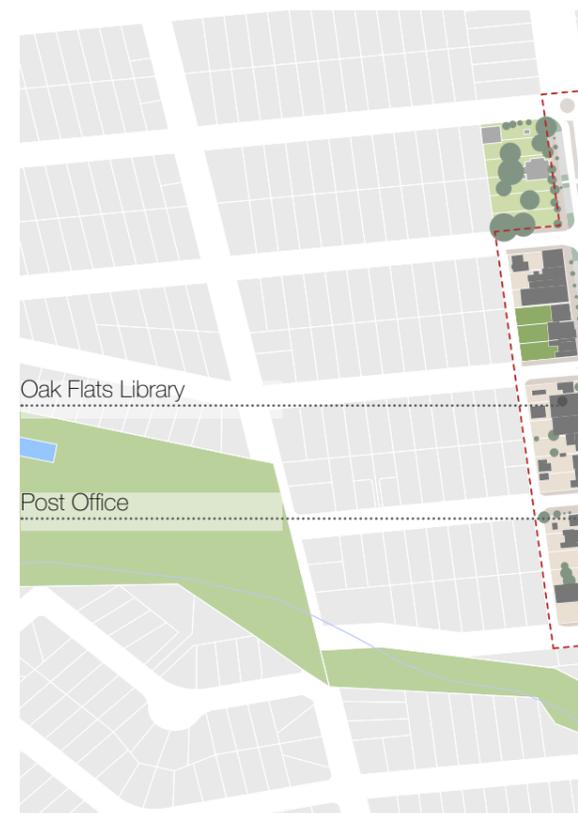


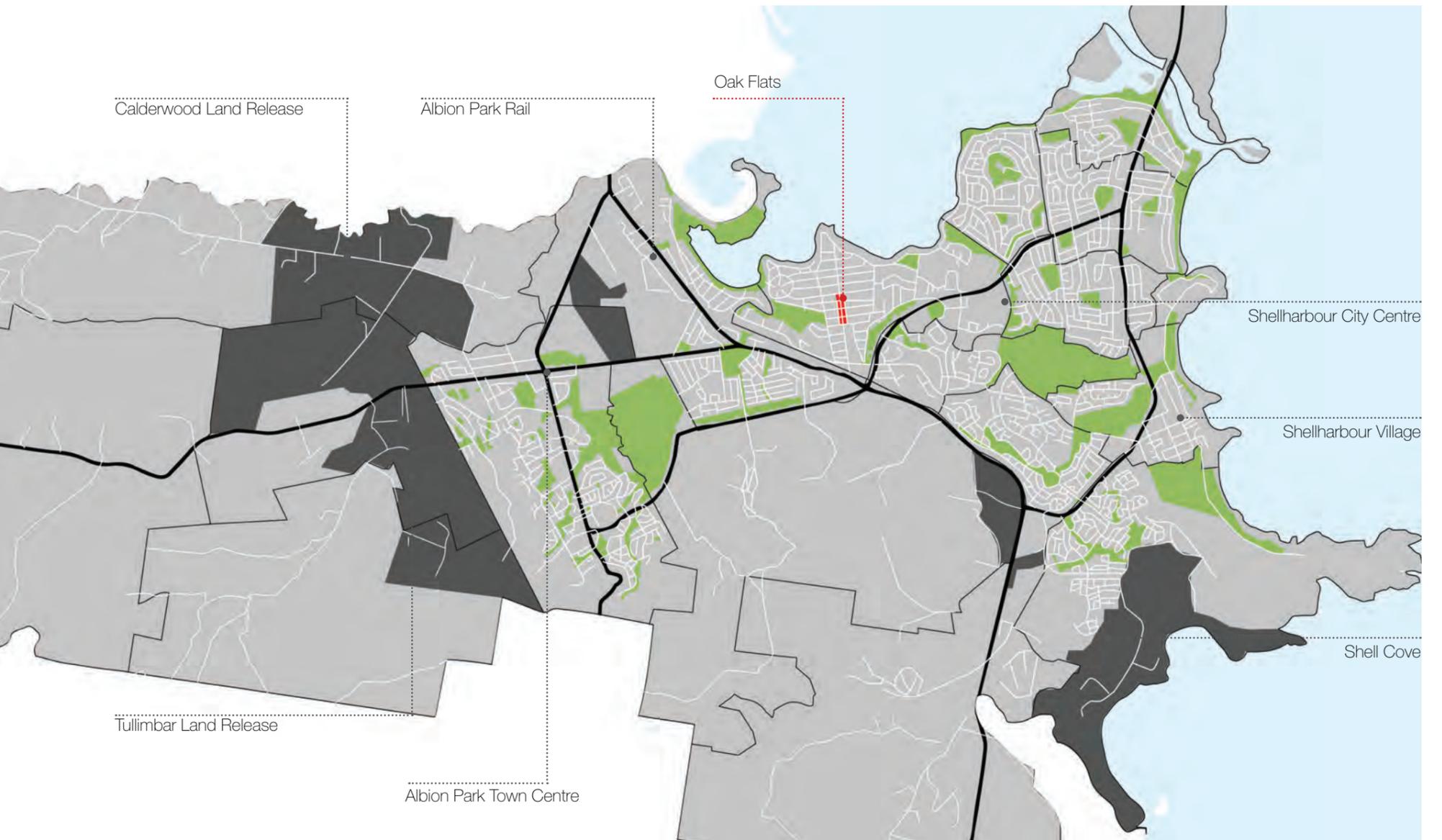
Figure 1.01 - Existing Town Centre Boundary



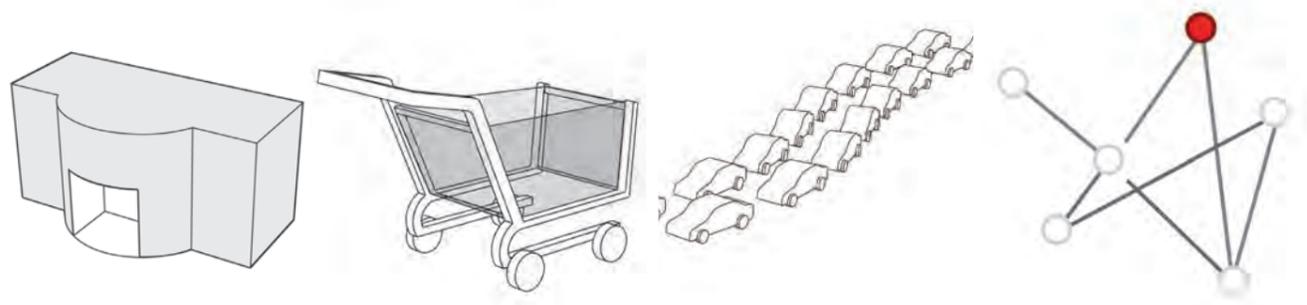
Figure 1.02 - Location Plan



Figure 1.03 - Proposed Town Centre Boundary







*2.0 The 21st Century Town Centre*

## 2.0 The 21st Century Town Centre

### 2.1 THE CHALLENGES FACING TOWN CENTRES TODAY

In order for any town centre to thrive in the future it is important to understand and identify the challenges facing town centres today. Convenience has become the new “buzz” word in our society, where the demand for easy access consumerism has radically changed the urban landscape.

The phenomenal growth of online retailing, the rise of mobile retailing, the speed and sophistication of the major national and international retailers, the modern and immersible experiences offered by today's new breed of shopping mall have all conspired to change today's town centre. Key contributing factors that have fed our society's demand for convenience are as follows;

- Growth of the Shopping Mall
- Rise of the Supermarkets
- Vehicular Dominance
- Online Culture

#### The Growth of the Shopping Mall

The lack of economic resilience within the traditional town centre has been exposed by the modernised shopping mall which has changed beyond recognition over the past 10 years. This success is largely due to the shopping mall's ability to evolve and change to the needs of the consumer. With shopping centres being ran like businesses, offering an enclosed environment that is designed for convenience the town centre has fallen by the wayside resulting in many town centres falling into a state of decline.

#### The Rise of the Supermarket

The traditional supermarket which sold groceries and food has modernised its offering to cater for the convenience of each consumer. Supermarkets have expanded their reach into home-wares, stationary, books, flowers etc effectively making it a “one-stop-shop” for local communities to utilise. The rise of the supermarket has resulted in four supermarket chains, [Woolworths, Coles, Aldi and IGA] having a total market share of 98% resulting in local independents town centre supermarkets struggling to compete.

#### Automobile Dominance

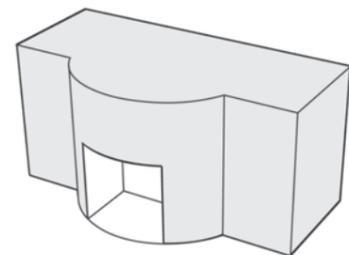
The emergence of the vehicle in Australia coincided with the post war ‘long boom’, where for 30 years Australia's economy continuously grew. This led to town centres, shopping malls and retail outlets all been designed around the vehicle, catering for mass car parking, wide road carriageways and high volumes of traffic. The vehicle has fuelled the convenience culture creating a car dependent society that associates easy car access, ample car parking and convenient shopping as the norm.

#### Online Culture

New technological developments now mean that the internet is one of the key threats to retail in our town centres. With 25% of Australia's population utilising the internet for online purchases, totalling almost \$13.5 billion in 2012, this growing trend is increasingly putting pressure on the town centre. Additionally the emergence of the mobile society means fewer shops are required in our town centres as the typical consumer can shop online directly from the mobile phone.



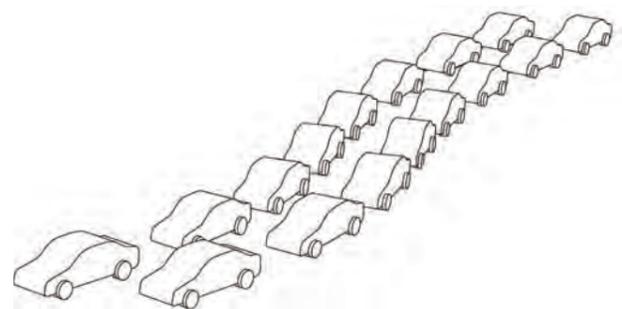
Convenience is the new ‘Buzz’ Word



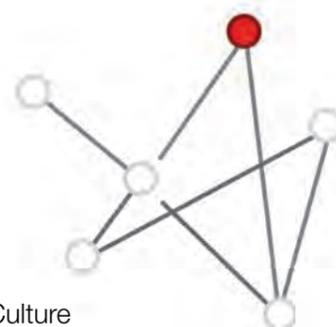
Growth of the Shopping Mall



Rise of the Supermarket



Automobile Dominance



Online Culture

## 2.2 CREATING A 'VITAL TOWN CENTRE'

### Uniqueness

Shopping habits and social attitudes have changed. For Town Centres to remain relevant and the focal point for communities and businesses as they have been in the past, they have to complement society's demand for convenience rather than compete.

Town centres have always been about much more than shopping. Retail is an important part of the town centre mix, but people also come for many other reasons, such as to visit cafés, restaurants, pubs, galleries, museums, cinemas, parks, hairdressers, beauty parlours, doctors and dentists, libraries, banks, solicitors, and estate agents. And there's a strong social factor too – the high street is often the place where local people come together to meet friends and join in community activities. It can provide a setting for shared experiences, and be a focal point of local identity, community pride, and common heritage and values.

High streets and town centres that are fit for the 21st century need to be multi-functional social centres, not simply competitors for stretched consumers. They must offer irresistible opportunities and experiences that do not exist elsewhere, are rooted in the interests and needs of local people, and will meet the demands of a rapidly changing world.

We believe that at the heart of any response to the challenges facing our town centres must be a recognition of the uniqueness of place and that these unique places are created and shaped by people who use them: they 'build it and they will come' model of retail development is no longer appropriate or sustainable. Town Centres can become places where we go to actively engage with other people in our communities; places where shopping is just one small part of a rich mix of activities including working, sharing, exchanging, playing and learning.

### Urban Design Principles of a Vital Town Centre

By acknowledging what challenges are facing today's town centres it is equally important to understand 'What principles make up a vital and vibrant town centre'. To do this we have identified four principles behind the urban environment which co-exist to make a vital town centre. The key principles that will be explained are as follows;

- Principle #1 - Economic Vibrancy
- Principle #2 - Urban Composition
- Principle #3 - Access and Movement
- Principle #4 - Environment

These principles of a vital town centre that we describe and illustrate are the essential components to a successful town centre environment, founded on new urbanist thinking and accepted principles of good urban and town centre design.

By understanding the urban design principles that make up a vital town centre, we can analyse and identify any particular areas where it is lacking, thus informing the town centre planning process. Although the key principles proposed will guide the master planning process, it must be noted that in reality these boundaries inter-relate with each other, reinforcing the complex relationships that interplay in creating a vital town centre.



## 2.3 PRINCIPLE 1: ECONOMIC VIBRANCY

Successful town centres typically have animation, vitality, and an urban ‘buzz’. By promoting people to the street, animation and vitality is created. To create this vitality and vibrancy a close grain of vibrant uses should be accommodated which respond to the surrounding public domain.

### *Close Urban Grain and Diversity*

Town centres that offer a close grain mix of uses, benefit the economy by encouraging a well connected catchment of customers to local businesses. A finer grain mix of uses within a town centre offers a viable alternative to large single use blocks, as its diversity ensures town centre streets are more resilient to economic uncertainty.

### *Flexibility and Adaptability*

The built form and public domain needs to be flexible and adaptable to cater for a variety of functions. The adaptability of individual buildings and public spaces is important not only to allow for physical change but also cultural and social change. The most successful places are products of growth over time, shaped by and able to accommodate changing economic conditions, development aspirations and cultural differences.

### *Community Heart*

The community heart acts as a focal point for social interaction, offering a variety of potential different uses and activities during the day and night. Essentially this focal point evokes a sense of place and ownership for the town centre community. Successful community hearts tend to be civic spaces, squares or a high street, where a variety of functions can be catered for, such as markets, festivals, theatre and relaxation for meeting others. It is imperative that a large proportion of the community heart is public and freely accessible at all times, to all users.

## 2.4 PRINCIPLE 2: URBAN COMPOSITION

“Bring half a dozen buildings together and an art other than architecture is made possible. Several buildings begin to happen in the group, which would be impossible for the isolated building. We may walk through and past the buildings and as a corner is turned an unsuspected building is suddenly revealed” (Cullen 2002). Essential to a well composed town centre is its street definition, sense of enclosure and legibility, ensuring a user is guided through a town’s key focus areas.

### *Definition and Enclosure*

Streets and public domain have a symbiotic relation with the built form and its density. If appropriately designed the urban environment can take a positive form and possess a sense of enclosure to the public domain.

### *Legibility*

The articulation of the built form and its relationship with the spaces that bound it are crucial to ensuring a legible network of town centre streets. By manipulating the nuances of scale and style, of texture and colour, as well as character, a route can have a strong and memorable identity that reflects its importance within a hierarchy, encouraging legibility.

### *Urban Character*

The character of a town centre is rooted in its urban structure, quality of urban spaces and the patterns of movement



and activity that exist. A town centre's character can be expressed through the form of urban blocks, the scale and size of the buildings and the spaces they create.

#### *Sense of Arrival*

Equally as important to a town centre's character is the sense of entering into a particular area. Successful town centres ensure that key access routes into a district offer individuals a sense of arriving to a collective entity or place, which may be achieved by physical separation or distinctiveness within the built form and spatial environment.

### **2.5 PRINCIPLE 3: ACCESS & MOVEMENT**

Cars form a dominant characteristic in many town centre's today, however the most vital town centres reconcile the importance of the pedestrian and cyclist, reducing the dominance of the vehicle and prioritising pedestrians, cyclists and modes of public transport.

#### *A Network of Pedestrian Accessible Routes*

"Emphasising walking as a viable mode of transportation with a strong impact on health is leading towards a more sustainable city and town centre, where energy consumption and a focus on a lively city during the day and night are part of the new city strategies" (Gehl 2009). The way a town centre is designed can contribute to an individual propensity to be physically active - to walk instead of drive. This can have a direct influence on improved health outcomes.

#### *Good Public Transport Links*

Good public transport can reduce vehicular use within a town centre, supporting the retention of open space, encourage traffic calming, promote walking and cycling, enhance social sustainability and encourage a more compact town centre that is easily accessed and used.

### **2.6 PRINCIPLE 4: ENVIRONMENT**

Essential to any vital town centre is the balance between hard and soft landscape, ensuring a symbiotic relationship between the urban and natural environment. As town centres expand, natural habitats are enveloped by the urban environment, altering the natural ecosystems and bringing the urban environment into direct contact with the natural environment.

#### *Public Domain*

A quality public domain beyond providing an aesthetic component for town centres, can create an ongoing series of systems, patterns and interactions between living things. Thus a vital town centre offers a public domain that responds to the user requirements and local ecosystems, creating a more balanced environment.

#### *Environmental Sustainability*

A vital town centre must be sustainable by responding to its environment and ecosystems within it, ensuring a resilience to extreme weather conditions. Additionally, through the appropriate planting of trees and vegetation, carbon dioxide can be sequestered, winds speeds can be reduced, shelter belts are established and dust pollution can be filtered. These considerations are essential for any vital town centre.







### 3.0 Background Information

## 3.0 Background Information

### 3.1 STATE GOVERNMENT

#### ILLAWARRA REGIONAL STRATEGY 2006-31 NSW

##### Overview

The Illawarra Regional strategy represents the agreed NSW position on the future of the Illawarra region. Its primary purpose concerns the availability of adequate land to sustainably accommodate the projected 2031 (25 year plan) employment and housing needs. The strategy is used by state agencies and public trading enterprises to plan future infrastructure needs.

It is implemented primarily through local environmental plans, the development control plan, and state policy. The strategy provides outcome and actions for the following;

- Economic development and growth
- Regional transport, housing and settlement,
- Energy and waste
- Rural landscape and rural communities
- Cultural heritage
- Natural environment.

##### Key Points

Oak Flats is defined as a 'Town' under the Illawarra Regional Strategy (2006-31). The Regional Strategy recognises that Oak Flats being a 'Town' is a small centre offering small to medium concentrations of retail, including supermarkets, health and other services with some residential uses. Reliant on high order centres for shopping and employment.

#### SEPP 65 & RESIDENTIAL FLAT DESIGN CODE

##### Overview

State Environmental Planning policy number 65 concerns the design quality of residential flat development. SEPP 65 Contains 10 design quality principles to assess and guide design. These principles are: Context, Scale, Built Form, Density, Resource, Energy and Water Efficiency, Landscape, Amenity, Safety and Security, Social Dimensions and Housing Affordability and Aesthetics. Residential Flat Design code aids SEPP65 providing guidance on applying these principles.

##### Key Points

SEPP 65 applies to the:

- Erection of a new residential flat building
- Substantial redevelopment or the substantial refurbishment of an existing residential flat building
- Conversion of an existing building to a residential flat building.

##### Preparation

Plan to include provisions to ensure achievement of design quality with regard to the publication Residential Flat Design Code

##### Adoption of Town Plans

Draft Plan to the design review panel (if any) constituted for the relevant area or region, and has taken into consideration any comments made by the design review panel.



### Primary Development Controls from the Residential Flat Design Code

#### Height

- Where the site is sloping or there are sharp changes in level, adjust the height plane by extending the height limit horizontally by 10-18 meters from the building line.
- Only use the Australian Height Datum (AHD) as a control in special circumstances.
- It is important rationale for height controls is included in design guideline as a communication tool for planners.

#### Building depth

- Whether there is a building envelope or not, the maximum internal plan depth of a building should be 18 meters from glass line to glass line.
- Free-standing buildings (the big house or tower building types) may have greater depth than 18 metres only if they still achieve satisfactory daylight and natural ventilation.

#### Building Separation

- For buildings over three storeys Building separation is proportionate to building height to facilitate better urban form and improved residential amenity.
- Up to 4 storeys/12 meters
  - 12 metres between habitable rooms/balconies
  - 9 metres between habitable/balconies and non-habitable rooms
  - 6 metres between non-habitable rooms
- 5 to 8 storeys/up to 25 meters
  - 18 meter between habitable rooms and balconies
  - 13 metres between habitable rooms/balconies and non-habitable rooms
  - 9 meters between non habitable rooms
- 9 storeys and above/ over 25 metres
  - 24 metres between habitable rooms/balconies
  - 18 metres between habitable rooms/balconies and non-habitable rooms
  - 12 metres between non-habitable rooms
- Allow zero building separation in appropriate contexts, such as in urban areas between street wall building types (party walls).

#### Setbacks

- Setbacks typically vary from none in city centres to 10 metres.
- In general, no part of a building or above ground structure may encroach into a setback zone. Exceptions are:
  - Underground parking structures no more than 1.2 metres above ground, where this is consistent with the desired street-scape (see Ground Floor Apartments)
  - Awnings
  - Balconies and bay windows.
- Where small setbacks occur, fencing and planting selec-

tion provides a separation between the public and private realms.

- Where the desired character is for a continuous street frontage, zero side setbacks are appropriate.

#### Floor Space Ratio (FSR)

- Determine FSR by calculating it at 80 percent of the building envelope in denser urban areas and at 75 percent in suburban areas.
- Floor space should be measured from the inside face of external walls and 1400mm above the slab. It includes:
  - Habitable space below ground (auditoria, cinemas, supermarkets)
  - Retail space (cafés) associated with main entrance and/or lobby.

#### Open Space

- The area of communal open space required should generally be at least between 25 and 30 percent of the site area. Larger sites and brownfield sites may have potential for more than 30 percent.
- The minimum recommended area of private open space for each apartment at ground level or similar space on a structure, such as on a podium or car park, is 25m<sup>2</sup>; the minimum preferred dimension in one direction is 4 metres. (See Balconies for other private open space requirements)

#### Ceiling Heights

- The following recommended dimensions are measured from finished floor level (FFL) to finished ceiling level (FCL). These are minimums only and do not preclude higher ceilings, if desired.
- In mixed use buildings: 3.3 metre minimum for ground floor retail or commercial and for first floor residential, retail or commercial to promote future flexibility of use
- In residential flat buildings or other residential floors in mixed use buildings: in general, 2.7 metre minimum for all habitable rooms on all floors, 2.4 metres is the preferred minimum for all non-habitable rooms, however 2.25m is permitted.
- Apartment Area
- Affordable housing (Australian Affordable housing service)
  - 1 bdr 50m<sup>2</sup>
  - 2 bdr 70m<sup>2</sup>
  - 3 bdr 95m<sup>2</sup>

## 3.2 LOCAL GOVERNMENT

### SHELLHARBOUR CITY COMMUNITY STRATEGIC PLAN 2013 - 2023

#### Overview:

The Shellharbour City Strategic Plan sets out community objectives, strategies and indicative outcomes for the future community and council vision for the city. The plan was developed through a range of engagement activities and focuses on four main sectors: Community, Environment, Economy and Leadership. Outlining the following 10 objectives within these categories.

- Vibrant, safe and inclusive City
- Active and healthy community
- Protects and promotes its natural environment Practices sustainable living
- A liveable City that is connected through places and spaces
- Infrastructure is planned and managed in a way that meets the community's needs
- Supported by a strong local economy with business and employment opportunities
- Welcomes, engages and attracts visitors
- Led by a Council that effectively represents the community
- Supported by a Council that is responsive, accountable and financially viable

#### Key Points:

- Strategies provide strong links to state and regional strategies

#### Community strategies focus on:

- Events and culture support.
- Quality accessible community and cultural facilities, programs and services.
- Active creative community and development of creative opportunities
- Opportunities for education and leisure.
- Access to relevant and responsive health and well-being services.
- Recreation and enjoyment of parks and open spaces.
- Recreation opportunities to cater for a broad range of ages, abilities and interests
- Development of network of pathways, cycle ways for incidental exercise and alternative transport options.

#### Environment strategies focus on:

- Management of catchments and delivery of projects, which protect biodiversity.
- Leadership in environmental planning and management
- Education on environmental suitability and management and facilitating community involvement in caring for the natural environment.
- Effective sustainable waste management
- Reduction of ecological footprint.
- Recognising, protecting and celebrating our heritage.

#### Economic strategies Focus on:

- A board range of sustainable quality and cost effective infer structure.
- Renewal of ageing assets to meet current and future community needs.
- Making Shellharbour a destination of choice for tourism and community based on a dynamic, responsive and sustainable industry.
- Opportunities for local business growth
- Positive city image and lifestyle
- Employment opportunities focusing of retaining young people, encouraging new workers and opportunities for the unemployed

#### Leadership strategies focus on:

- Mayor and councillors representing the community providing strong, cohesive and visionary leadership.
- Facilitation of strong communication with community.
- Respect and acknowledgement for aboriginal community as traditional land custodians.
- Clear framework for council activates, planning and policies
- Enhance organisational culture.
- Transparent and accountable financial management.
- Effective communication methods and technological provision of services.
- Risk minimization and critical business functions.
- Collaboratively planned emergency response.



### **SHELLHARBOUR CITY COUNCIL DELIVERY PROGRAM (2013-2017) OPERATIONAL PLAN (2014-2015)**

#### **Overview:**

This documents aligns a delivery program, operational plans, responsibilities, time-frames and key performance indicators With the objectives and strategies outlined above in the Shellharbour City Community Strategic Plan 2013 – 2023. Organised the same objective categories of Community, Environment, Economy and Leadership. The document sets out actions that the council will undertake during the financial year (operational plan) to meet the broader strategy (delivery program). It additionally puts forward how the council will measure success in achieving the desired outcome for each strategy and action.

#### **SECTION 94 CONTRIBUTIONS**

The Oak Flats Precinct, which is one of the smaller Precincts in land area, comprises a well established urban area. The provision of infrastructure within the Precinct is generally considered to be adequate for the existing and projected population, with the exception of the Community Centre. Council has constructed a new community centre for which it is now recouping the cost.

Oak Flats did not have a purpose built multi-functional community centre, with the Oak Flats Progress Association Hall and Oak Flats Library serving the community needs. With the deterioration of the Progress Hall it was necessary to provide for a new centre to meet current and future need. This infrastructure has now been constructed and Council is seeking to recoup some of the costs incurred.

### **LIBRARIES AND MUSEUM STRATEGY 2024**

#### **Overview:**

Shellharbour City Libraries & Museum Strategy 2024 has been developed to provide a direction on the future of our Libraries, ensuring they are flexible, responsive and meet the needs of our dynamic and diverse community. It has strong emphasis on not only the new City Library, but also on the development of our branch libraries. The Strategy is designed to guide Council's planning and investment for libraries and the museum over the next ten years.

#### **Key Facts on Existing Oak Flats Library:**

- Built in 1976;
- Size 405sqm;
- Uninviting exterior;
- Doorway is difficult to access;
- Central sunken area is difficult to access;
- Inflexible smaller rooms and second doorway/ porch.

#### **Key Facts on Proposed Oak Flats Library:**

Oak Flats Library will be retained at its current location and accessibility and layout will be improved. Oak Flats Library is well located, highly visible, busy village library that plays an important role in activating the main street. The library will receive basic refurbishments including a new service counter and altered entrance to meet accessibility standards. Interior flexibility will be improved to help future-proof of the library and provide spaces for activities, programs and technology.



### SHELLHARBOUR CITY COUNCIL RESOURCING STRATEGY 2013 - 2023

#### Overview:

The resourcing strategy ensures there is an appropriate mix and delivery of infrastructure services combined with the availability of sufficient financial and human resources. The strategy informs the development of the Shellharbour Community Strategic Plan (CSP) and describes the resources Council is going to utilize to achieve the Objectives and Strategies.

It is made up of key components

- Sustainable Financial Strategy (SFS)
- Long Term Financial Plan (LTFP)
- Asset Management Plan (AMP)
- Workforce Management Plan (WMP)

#### Key Points:

- Financial Sustainability
- Maintaining and operating assets within acceptable levels of service balanced against available funding has presented a challenge to Council over recent years.

City Council's primary objectives in managing these are:

- To be sustainable in the management all assets
- To provide a desirable level of service for the assets under its stewardship for the existing and future community
- Council must have a Workforce Management Plan (the plan) to ensure that it has the right mix of people, skills and resources to use when and where they are needed. This will enable Council to plan its future workforce needs to place Council in the best position to deliver on the objectives outlined in the CSP.



### SHELLHARBOUR HERITAGE INVENTORY

#### Overview:

The study area contains two items of heritage significance under Shellharbour Local Environmental Plan 2013. These are Oak Flats Subdivision & Road Layout (SHI0033) & Central Avenue Brush Box Row (SHI 0345)

The Oak Flats subdivision layout and road network is reputed to have association with the Walter Burley Griffin school as practiced in Australia and exhibits strong associations with the 'city beautiful' & 'garden suburb' movements. Additionally, the Central Avenue Brush Box Row is closely entwined with the settlement history of Oak Flats.

#### Key Points

- Original subdivision in 1926, contemporary with layout of Canberra, (thus street names reflect Federal leaders) and considered ahead of its time;
- Residential development began in earnest in the 1920s when Oak Flats, Lake Illawarra South and Albion Park Rail were subdivided and holiday homes constructed;
- The Oak Flats area was originally granted to John Horsley in 1821 and known as the 'Oak Flats' run;
- The core layout of Oak Flats is of note as it was reputedly influenced by Walter Burley Griffin, with his distinctive use of vistas. In this case, Central Avenue forms a vista to the Lake Illawarra and the mountains on the opposite shore.
- The road layout around Knob Hill making full use of the topography. The street names commensurate founders of federation and early federal politicians;
- The Central Avenue Brush Box row are closely entwined with the white settlement history of Oak Flats. There is also a strong historic association with the prominent dairying industry in the area;
- The Brushbox trees are closely linked to, and integral with, the cultural landscape that defines the holiday and coastal culture of the Shellharbour local government area.



**SHELLHARBOUR OPEN SPACE STUDY**

**Needs for the Study**

The Illawarra Regional Strategy: 2006-31 (the Regional Strategy) identifies Shellharbour as the local government area (LGA) in the region that has:

- Passive open space (or parks);
- Active open space (or sporting grounds); and
- Community facilities.

“...taken the major responsibility for regional Greenfield land releases over the last 30 years at Albion Park, Blackbutt, Flinders and Shell Cove. As the current estates reach completion, the focus for Shellharbour will shift towards urban renewal opportunities around towns and centres such as Oak Flats.” (Department of Planning 2007)

**Key Points**

- Pedestrian access to Oak Flats provides for some further opportunities, particularly in spatial links between the Lake Illawarra foreshore areas.
- The spatial distribution of parks in Oak Flats is highly skewed to larger district parks and sporting facilities, leaving Oak Flats as the only established suburb with a notable deficit of local parks.
- Possible integration of local park spaces with the community centre or school may be options for developing such a facility in this location.
- The quality of parks in Oak Flats are in generally poor condition, though some district parks and the Oak Flats citywide sporting area are of a much higher standard.
- Oak Flats contains a neighbourhood centre, a library, a senior citizens centre, a child care and early childhood centre and a swimming pool.

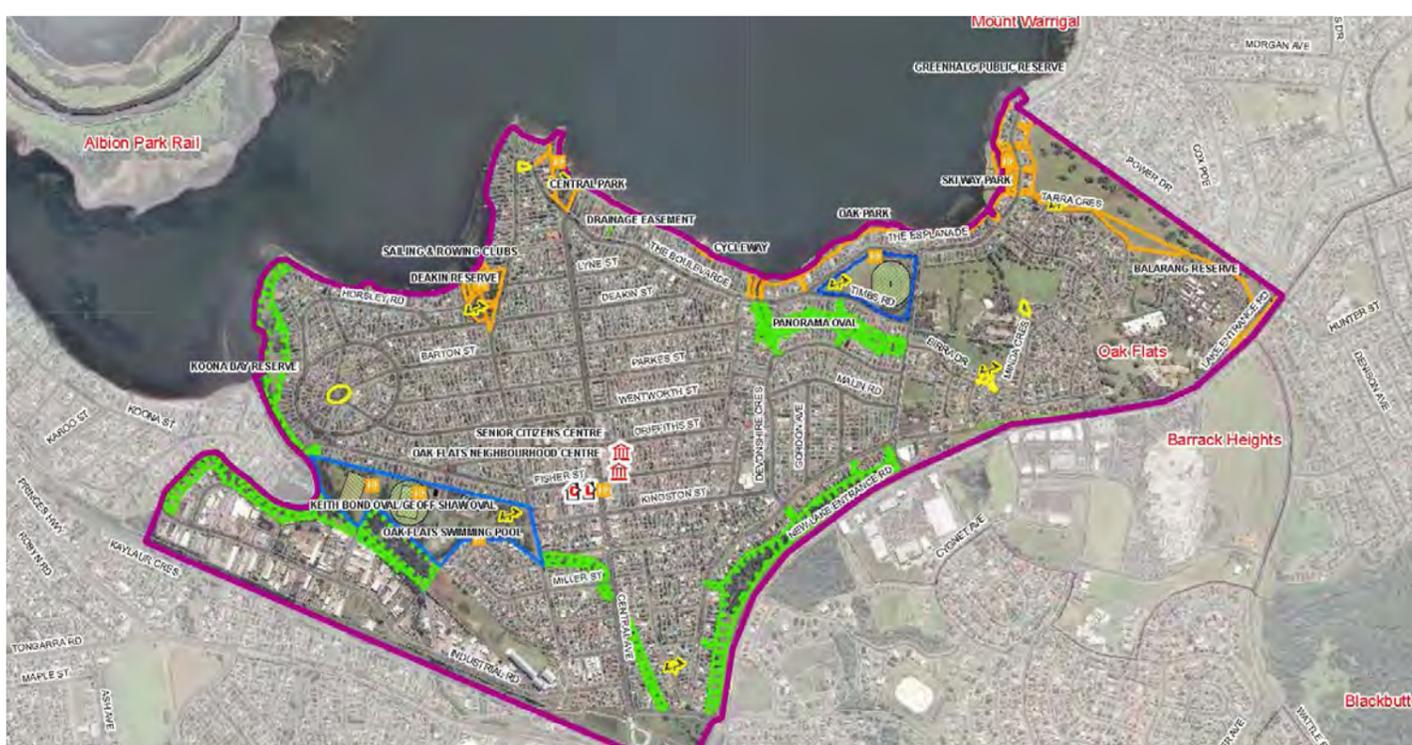
**Council Brief**

Shellharbour City Council commissioned GHD Pty Ltd to undertake a comprehensive open space, recreation and community needs study of the Shellharbour LGA. The purpose of the study is to provide Council with the information and planning tools to strategically plan for future open space, recreational and community facilities to meet the needs of the Shellharbour LGA to the year 2021.

**Overview**

In planning for long term resident needs in the Shellharbour local government area, Council has initiated this Open Space, Recreation and Community Facilities Needs Study to ensure that Council is planning now for the City’s needs all the way through to 2021.

The Needs Study Report provides the basis for moving ahead with a range of findings that will enable Council to confidently direct the development of open space, parks, sporting fields and community facilities. The three key areas of the project are:







#### *4.0 Understanding Oak Flats Town Centre*

## 4.0 Understanding Oak Flats Town Centre

### 4.1 CONTEXTUAL POSITIONING

This section establishes an understanding of Oak Flats Town Centre both physically, economically and environmentally by assessing it against the key principles that make a 'Vital Town Centre'.

Oak Flats is a small town and historic area of Shellharbour City. In the vicinity of the town centre is Lake Illawarra to the north with Burroo Bay to the west and Hennegar Bay to the east. Central Park on the headland between these two bays connects the main road of Central Avenue with the foreshore. The road layout subdivided in 1926 is laid out around Knob Hill making full use of the topography. The town centre is located at a midway point between the Oak Flats Railway Station and the foreshore. This is the town's retail precinct and runs between Hopetoun Street in the south and Wentworth Street in the north.

#### Economic Positioning

While Shellharbour City has seen a population growth since 1991, Oak Flats has seen a decline in population over the last decade. This is largely because Oak Flats has progressively been built out and now remains an older more established residential area of the City.

On the contrary, new residential areas such as Shell Cove, Flinders and Blackbutt have all experienced strong growth rates. These localities have proved popular due to their proximity to Shellharbour City Centre, the provision of new services (e.g. schools and community facilities) and in some cases their proximity or views to the water.

The trade area for Oak Flats Town Centre consists of its immediate surrounding residential population. However, with the recent upgrade of Stockland Shellharbour, Oak Flats might experience further competition. A summary of this upgrade is as follows:

- Stockland Shellharbour, in Shellharbour City Centre, is one of the largest shopping centres in the Illawarra region and has recently undergone a \$330 million re-development. Stockland Shellharbour now has Myer, Woolworths, Coles, Target, Kmart, JB Hi-Fi and over 220 speciality stores and services.

#### Access and Movement Positioning

Pioneer Drive located South of Central Avenue acts as a key connector road from Oak Flats to the Regional New Lake Entrance Road and to the Princes Highway connecting Oak Flats to Shellharbour City and surrounding context. Oak Flats is additionally serviced by the Oak Flats Railway Station which is part of the regional rail network.

#### Environmental Positioning

Oak Flats Town Centre's surrounding natural environment works as a great asset. Located on a high point, the town centre has broad vistas to the surrounding escarpment as well as towards Lake Illawarra.

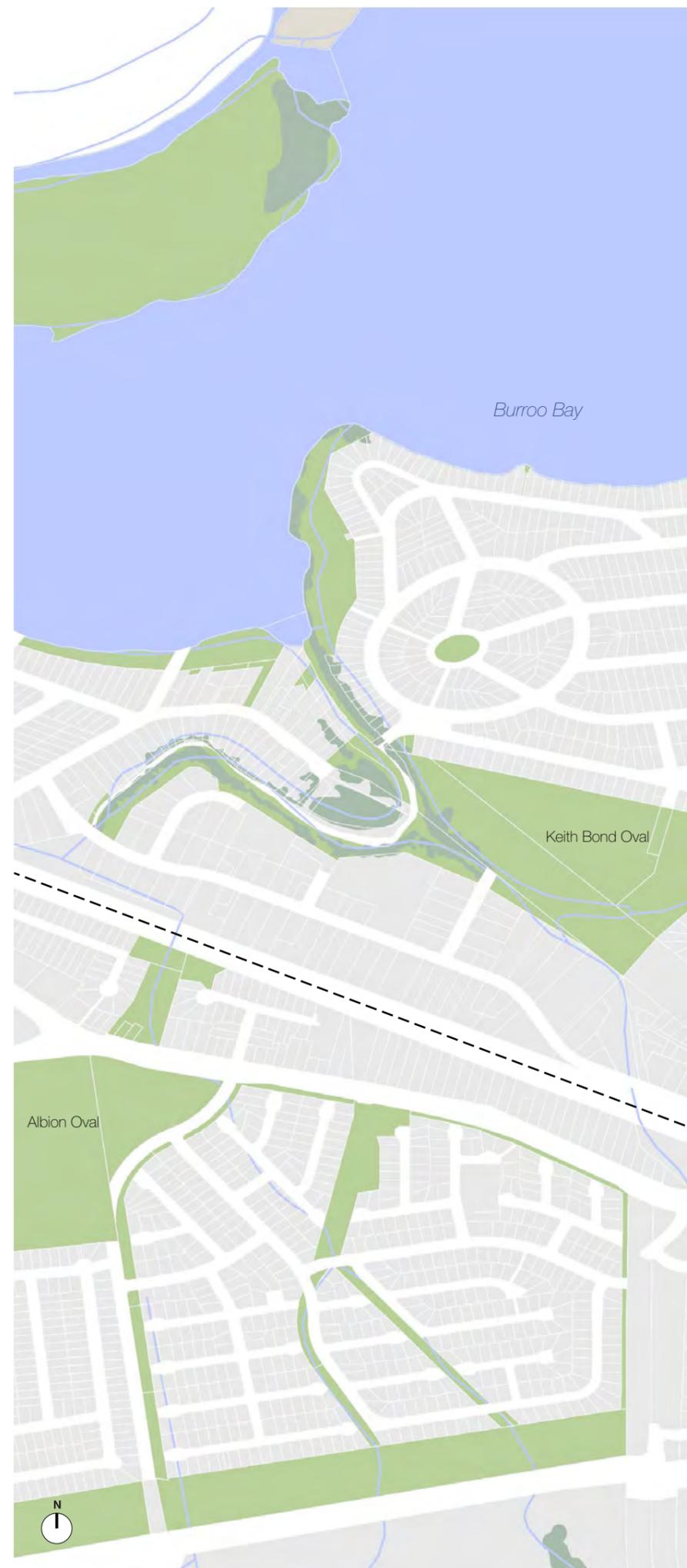
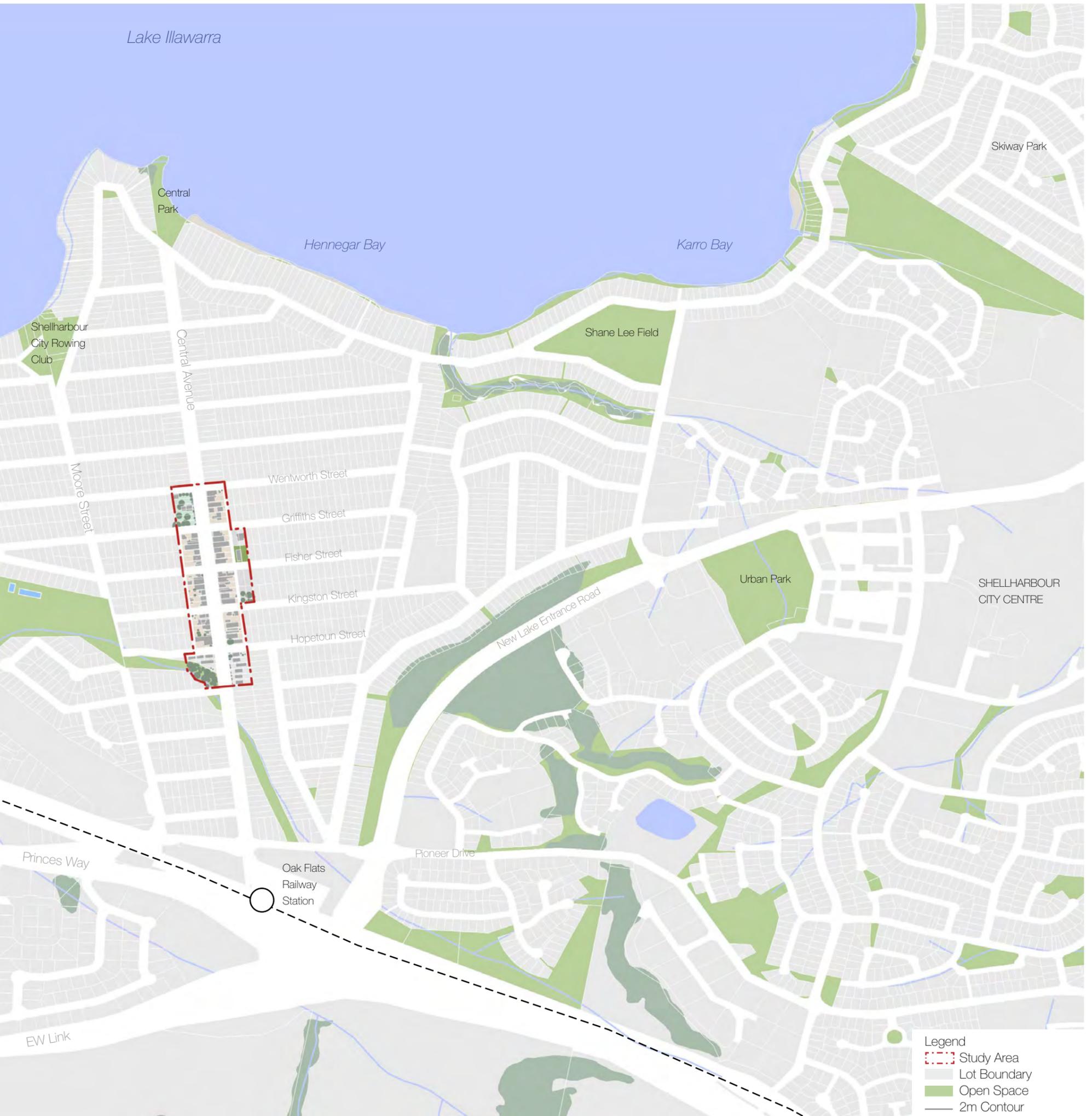


Figure 4.01 - Context Plan



## 4.2 ECONOMIC VIBRANCY

A key priority for the town centre plan is to guide built form, which promotes an economic vibrancy and activates the pedestrian environment. The below headings offer an understanding of what economic vibrancy exists within Oak Flats Town Centre today.

### Land Use Mix

As a neighbourhood centre, Oak Flats Central Avenue has a land use mix of retail, cafés, commercial and community facilities. The strip has many take away shops and restaurants however little outdoor dining.

The total gross lettable area [definition can be found on p43 of Appendix B: Hill PDA Report] floor space in the Oak Flats retail precinct is around 10,630sqm (excluding community uses), of which 7,080sqm is being used for the retail of goods.

Oaks Flats has around 46 individual shops of which 3 were vacant at the time of survey. There are no indoor retail centres or enclosed shopping centres. There are 75 shop front premises along the strip retail areas of Oak Flats, of which 33% are used for commercial services, mainly by medical practitioners. There is little shop top commercial/retail space, with only one medical suite of 333sqm occupying such accommodation in the centre.

Oak flats is lacking of an anchor tenant such as a 2,000 – 3,000sq.m supermarket.

Oak Flats has community facilities including a popular local library as well as a neighbourhood centre and senior citizens centre. There are currently no recreation, entertainment or fitness facilities in Oak Flats Town Centre, however Oak Flats swimming pool is a short distance to the southwest.

### Economic Performance

Oak Flats is a busy town centre which provides regular shopping and services to the local area of Oak Flats. As it is supported by close by higher order centres for

employment and broader shopping options, its trade area only includes residents located within the suburb. This constrains its potential extension. However due to its “high street” urban form it has the potential to be an attractive and active local strip. Currently the strip includes shopping, commercial and community services and has a small grocery store. Oak Flats is also currently undergoing development replacing the previous “Welcome Mart” with an IGA.

### Land Use Zoning [LEP 2013]

Oak Flats Town Centre’s current land use zoning is characterised as a B2 Local Centre which accommodates local retail and commercial uses. The blocks directly to the east and west of the B2 Local Centre which terminate at Moore Street and Leamington Road are zoned as R3 Medium Density Residential. To the north and south of the B2 Local Centre are R2 Low Density Residential zones, with the exception of the RE1 Public Recreation zone to the south west.



Figure 4.02 - Land Use Zones [LEP 2013]

**Community Heart**

The town centre block within Oak Flats Town Centre that has been identified as the community heart lies between Fisher & Griffiths Streets. The community heart retains all of the town centres outdoor dining, most take away and eat in

food shops, retail as well as the local Foodworks, and bottle shop. An IGA is also currently under construction next door to the existing Foodworks.



Figure 4.03 - Community Heart

**Edges**

Oak Flats Town Centre consists of Central Avenue, an active high street that offers a variety of independent retail and commercial businesses. The Avenue is characterised by largely fine grain (varied frontages approximately every 6m with limited bulky building

envelopes) & active building frontage. However, largely due to topography, street activation along this central spine is limited. To the back, service lanes, shops are categorized by large inactive zones for service functions many of which are car parks.



Figure 4.04 - Town Centre Edges

### 4.3 URBAN COMPOSITION

A key priority for the town centre plan is to create high quality streets through appropriate scale and massing. The below headings offer an understanding to what the urban composition of Oak Flats Town Centre is today.

#### Height of Building [LEP 2013]

The LEP specifies a maximum building height of 11.0m within the town centre, which would accommodate buildings up to three storeys in height. The surrounding residential lots

however have a maximum building height of 9.0m allowing for two storey dwellings.



Figure 4.05 - Height of Buildings [LEP 2013]

#### Existing Building Heights

The majority of built form within Oak Flats Town Centre sits well below the permissible height and is single storey local shop fronts with a height of around the 3.0m range. Approximately nine buildings within the site boundary are

double storey ranging between 7.5m and 9.0m. Only one building between Fisher and Griffiths Street reaches the height limit of 11.0m.



Figure 4.06 - Existing Building Heights

**Floor Space Ratio [LEP 2013]**

At present, the LEP permissible Floor Space Ratio [FSR] for Oak Flats town centre is largely 1.5:1 with surrounding residential land 0.7:1 and 0.5:1. However, the existing built

form sits mostly below these ratios with an average being 0.5:1 within the town centre and 0.3:1 for the surrounding residential context.

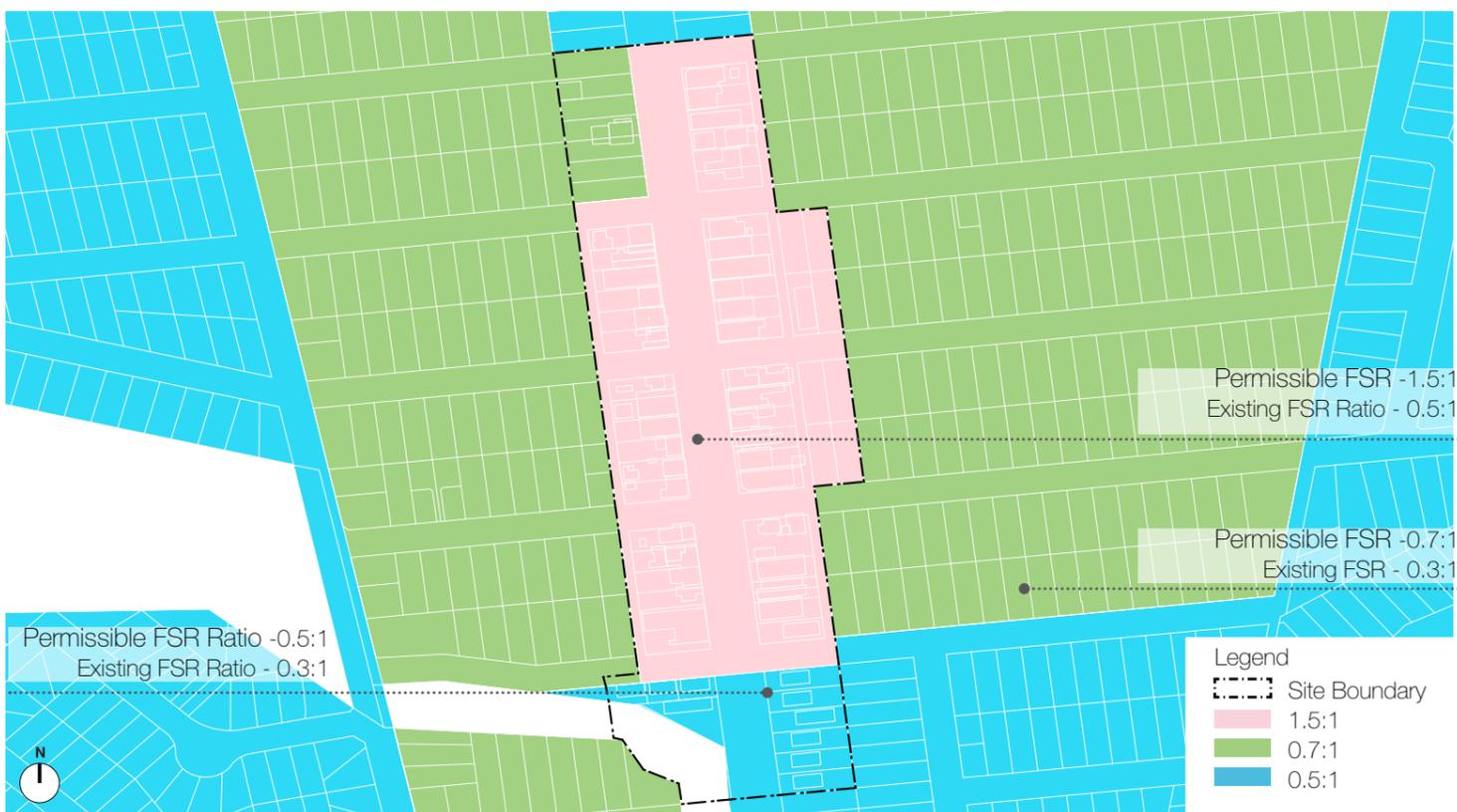


Figure 4.07 - Floor Space Ratio [LEP 2013]

**Gateway Entrances**

The primary entry points to Oak Flats Town Centre are located at the five major intersections along Central Avenue. At present the majority of these intersections offer little sense

of arrival due to poorly positioned planters, low quality built form, inadequate uses, wider road intersections and vacant spaces. It is crucial that these arrival points are improved, so to enhance the town centre arrival experience.



Figure 4.08 - Gateway Buildings

**Town Centre Character**

Oak Flats Town Centre is characterised by a strong heritage street grid, consistent setbacks and fine grain built form with some unique frontages. However with many façades in poor condition alongside poorly integrated public domain, crossings, planters and furniture, Oak Flats Town Centre is not reaching its true potential. The key characteristics of Oak Flats Town Centre are as follows.

- **Character Area 1: Wentworth to Griffiths Street** - This section of Central Avenue is defined by the Oak Flats primary school and fence to the west as well as a variety of retail, commercial and residential uses along the eastern

edge. Key buildings and spaces of note are the pedestrian crossing and Petrol Station.

- **Character Area 2: Griffiths to Fisher Street** - This area is the busiest and most active within the town centre. Its character is largely defined by retail uses including many restaurants and cafés with some alfresco dining particularly along the western edge. The area is identified as the most built up of all four areas, housing a local grocery store and IGA, bottle shop as well as some residential and commercial uses. This area also includes the neighbourhood centre located on Fisher Street, one block east of Central Avenue.



Character Area 1. View towards the eastern Central Avenue building frontage



Character Area 1. View south along Central Ave



Character Area 1. Inconsistent streetscape



Character Area 1. School boundary edge



Character Area 2. View towards the western Central Avenue building frontage



Character Area 2. Active streetscape



Character Area 2. View north along Central Avenue

– **Character Area 3: Fisher to Kingston Street** - This area is characterised by a mix of mostly commercial and retail uses within single storey structures, with the exception of the library and ex-baby health centre on Fisher Street. Due to topography the street is defined by a large planter that divides Central Avenue into an upper and lower level. Running parallel with Central Avenue are Reynolds and Ayers Lane with the latter accessing a large surface level car park. Other buildings and spaces of note include the lane way link between Central Avenue and the car park and the vacant plot adjacent to the library.

– **Character Area 4: Kingston to Hopetoun Street** - Central Avenue in this area is divided by a large planter and level change with few pedestrian crossings across Central Avenue. Building stock is mostly fine grain while some buildings such as the boat yard and large St Vincent's De-Paul create an light-industrial character. The zone is a mix of commercial and retail uses and currently has little activity with the exception of the post office on the corner of Kingston Street and Central Avenue. Other key buildings include the Oak Flats medical practice on the corner of Hopetoun Street.



Character Area 3. View south along Central Avenue



Character Area 3. View along Ayers Lane



Character Area 3. Oak Flats Library



Character Area 3. Ramp crossing



Character Area 4. View south along Central Avenue



Character Area 4. Poorly activated streetscape



Character Area 4. Walled road division

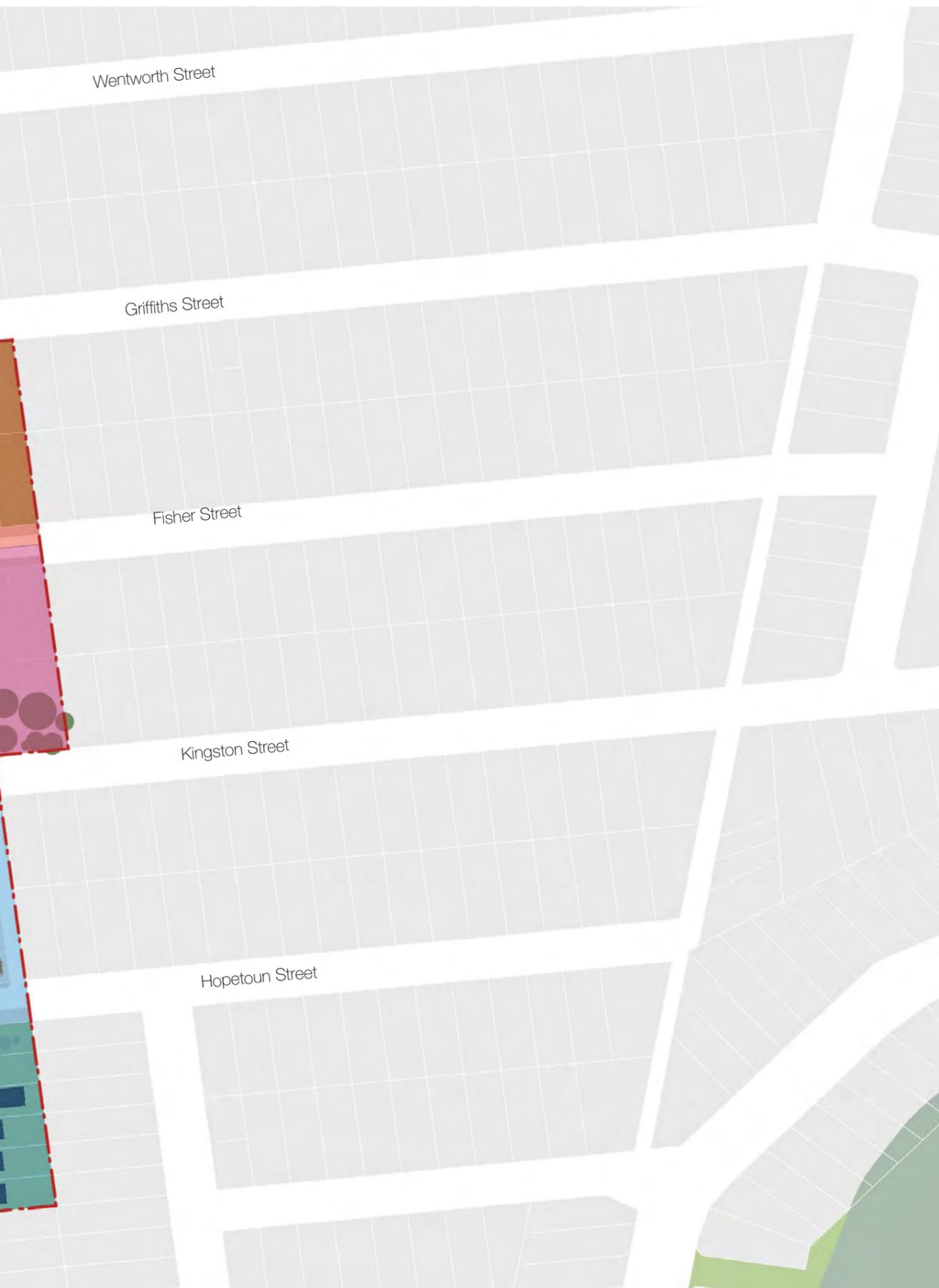


Character Area 4. Rear lane

*Town Centre Character Plan*



Figure 4.09 - Existing Character Plan



- Legend
- Site Boundary
  - Character Area 1
  - Character Area 2
  - Character Area 3
  - Character Area 4

### 4.4 ACCESS AND MOVEMENT

A key priority for the town centre plan is to promote pedestrian links, cycling and greater use of the local public transport system. The below headings offer an understanding of what access and movement patterns exist in Oak Flats Town Centre today.

#### Street Hierarchy

Oak Flats is located close to the Princes Highway which can be accessed via the regional New Lake Entrance Road and local Pioneer Drive. Central Avenue forms the major local road for the town centre connecting to Pioneer Drive and the Oak Flats Railway Station to the south and Central Park in Hennegar Bay to the north. The town centre is located

centrally between these two points and runs along Central Avenue intersecting with local minor roads- Hopetoun, Kingston, Fisher, Griffiths and Wentworth Streets. Parallel to Central Avenue these four blocks are also serviced by Reynolds Lane to the west and Ayers Lane to the east.

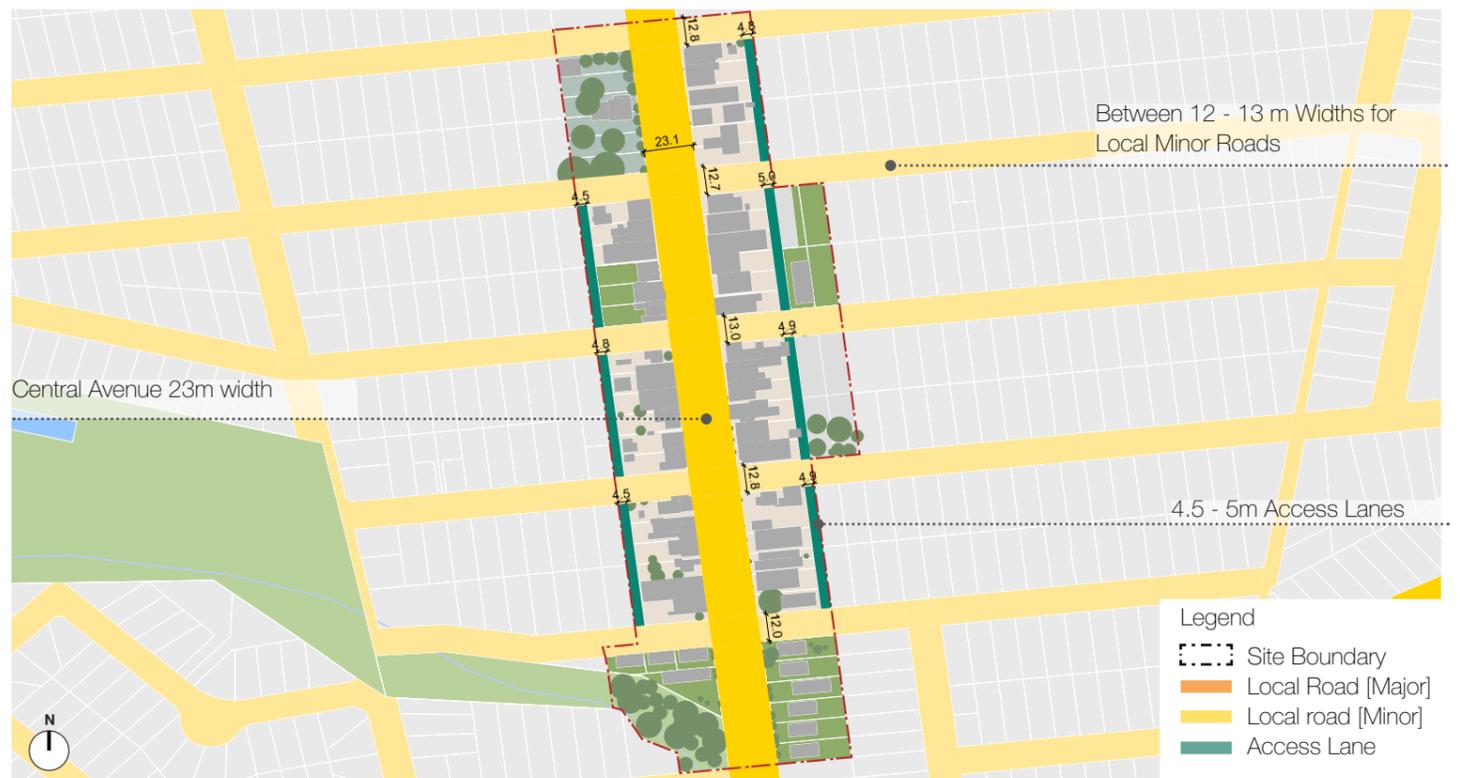


Figure 4.10 - Street Hierarchy

#### Access and Parking

Oak Flats Town Centre has a large provision of car parking, which support the high street. Overall, the recorded peak demand for the study area occurred on Saturday at 11:00 am, with an overall car parking demand of 61%. With the

exclusion of private and other parking provisions, car parking demand within publicly available spaces was 79%. On-street car parking on Central Avenue was consistently busiest between Fisher Street and Griffiths Street during both the Thursday and Saturday survey periods.

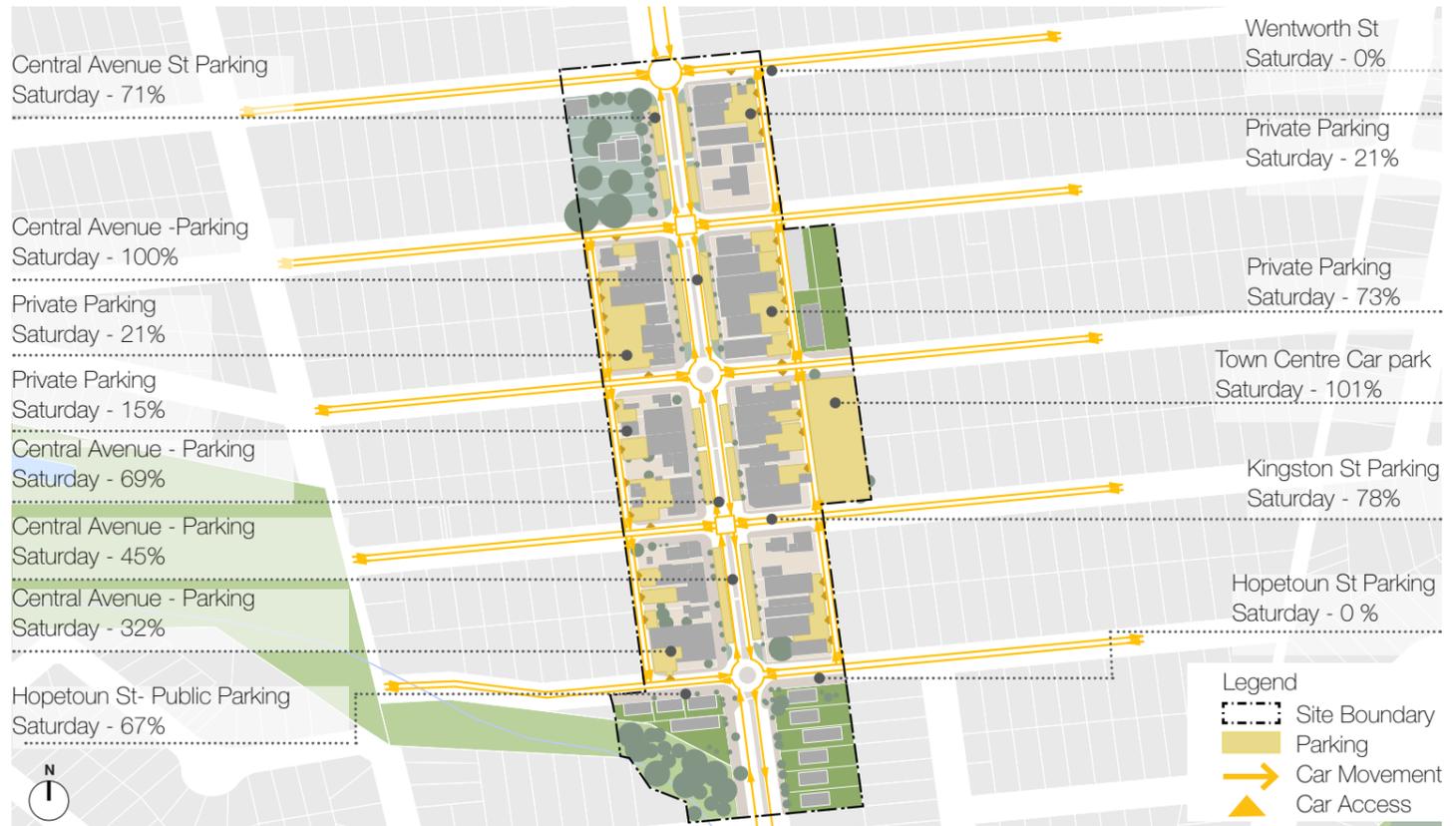


Figure 4.11 - Access and Parking

**Public Transport and Pedestrian Links**

Oak Flats Town Centre is a 10-15 (880m) minute walk north of the Oak Flats Railway & Bus Interchange. The centre is limited by one bus in each direction near Fisher Street. The stop is serviced by buses #77 to Shellharbour & Shellharbour City Centre, #76 to Shellharbour, #51

to Wollongong and the #37 Lake link. There is limited pedestrian connectivity between the east and west of Central Avenue between Hopetoun and Fisher Street. North-south Pedestrian links at major intersections are additionally indirect due to planter box placement.



Figure 4.12 - Public Transport and Pedestrian

**Cycle Network**

Oak Flats has limited existing and proposed cycle connections with one shared path to the west along Moore Street which connects to the town centre via Fisher

Street but terminates at Central Avenue. No direct routes between the town centre and the Railway Station have been proposed.



Figure 4.13 - Cycle Network

### 4.5 ENVIRONMENT

A key priority for the Town Centre Plan is to ensure the vision for the town centre responds to the existing environmental conditions, offering a balanced environmental experience for the local community. The below headings offer an understanding to the environmental characteristics existing within Oak Flats Town Centre today.

#### Heritage

Oak Flats is unique in that it has a heritage listed street layout which was reputedly influenced by Walter Burley Griffin, with distinctive use of vistas to Lake Illawarra and the surrounding escarpment. The centre additionally has a row

of significant Brush Box trees along Central Avenue, north of Wentworth Street and south of Hopetoun Street which relate to the settlement of Oak Flats.

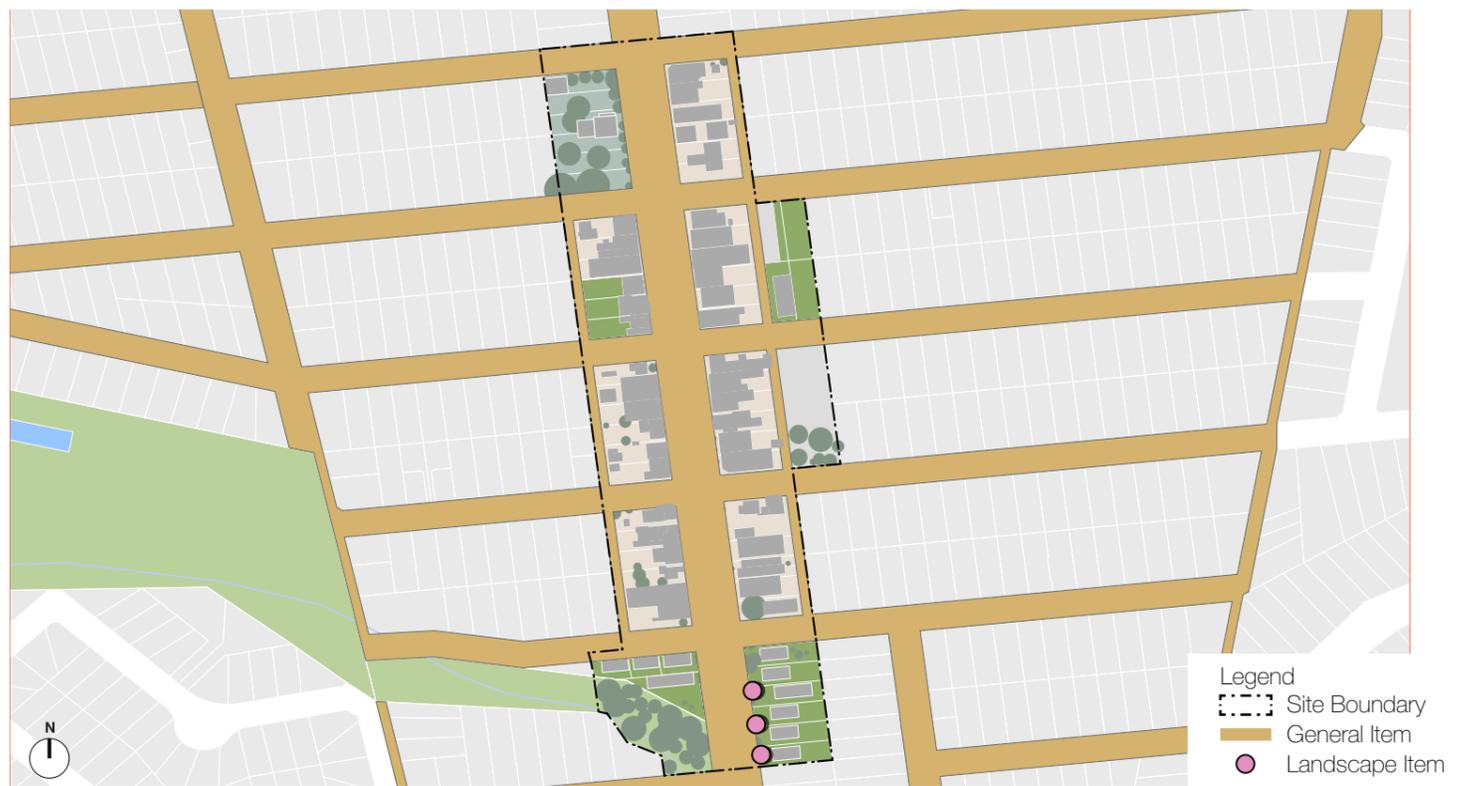


Figure 4.14 - Heritage

#### Hard and Soft Landscape

The town centre is located along Central Avenue between Wentworth and Hopetoun Street. A large planter characterises Central Avenue between Fisher and Hopetoun Street. The town centre footpaths have been recently upgraded with bitumen and stone ending, with each

property's lot boundary being bounded by concrete. This material inconsistency detracts the town centre's character. Street trees are frequent and mature but are at a low height from over trimming, reducing walkability and interrupting views to the local architecture.



Figure 4.15 - Hard and Soft Landscape

**Topography and Views**

Oak Flats is located at a high vantage point within the landscape offering large scenic views to the surrounding hills, suburbs and countryside. Key views include; western scenery from Fisher Street/Central Avenue intersection. Central Avenue to the south of Fisher Street offers large

vistas of the southern hills, especially at the median strip crossing and along the eastern sidewalk. Other views include distant vistas across Lake Illawarra From Fisher Street to the north.



Figure 4.16 - Topography and Views

**Flooding**

Oak Flats Town Centre is located on high ground eliminating flooding issues for the majority of the town centre. Some

flooding occurs to the south west of the boundary along the creek line.



Figure 4.17 - Flooding





*5.0 Strategising Oak Flats Town Centre*

## 5.0 Strategising Oak Flats Town Centre

### THE KEY STRATEGIC MOVES

Building off the analysis produced for Oak Flats Town Centre a series of six key strategic moves have been established that look to incrementally phase the transformation of Oak Flats Town Centre into a vibrant and vital town centre. These broad strategic moves have informed the development of the Oak Flats Town Centre Plan.

#### Key Move 1: Establish a Community Heart

Oak Flats is defined by a strong community and unique fine grain character that establishes it as an active local centre for the surrounding Oak Flats neighbourhood. However with no central public space, little street activation, poorly connected blocks and many dull frontages, the true potential of Oak Flats is not being fully maximised.

Strategic move 1 looks to enrich and draw from the existing community facilities and council land through establishing a central public space and community hub. Introducing a central public space will support a diverse range of age groups, encourage them to spend more time in the town centre, provide a space to gather, meet, socialise and host community events such as markets and outdoor libraries.

The aims of this strategic move are as follows;

- Remove existing semi detached ex-baby health centre and establish a new public plaza for community activities.
- Remove existing public toilet block and Rural Fire Service allowing the introduction of alfresco dining space.
- Establish a public space for community gatherings on the northern edge of Oak Flats Town Centre Library;
- The public space should be flexibly designed to accommodate a variety of activities such as buskers, seating, pop-up stores, cafés and temporary art exhibitions.
- Refurbish Oak Flats Town Centre Library allowing for increased floor space for the incorporation of additional uses such as a cafe with alfresco dining as well as improved facilities for existing services such as adult learning, public access and free wifi.
- Passive Surveillance can be improved on the public library site through improved building and space activation, establishing a safer town centre environment.

The south-eastern corner of the Fisher Street / Central Avenue Intersection can be enhanced to allow more outdoor seating and enhanced amenity.

Lot 63 on the south-western corner of the Fisher Street / Central Avenue Intersection can be transformed into a new public space for community gatherings.



Figure 5.01 - Key Move 1: Establish a Community Heart



Outdoor Library/ Public Space



Public Space/Markets/Community Events



Public Space/ Community Garden



Temporary Outdoor Library



Public Space/Temporary Activation/BBQ Fundraiser



Public Space/ Community Centre & Youth Skate facilities



Public Library/Community Space



Alfresco dining activating a community space

**Key Move 2 : Connect the High Street**

*“...walking and cycling to local shops is good for business and good for the local economy and is essential to the success of town centre revitalisation strategies” [Heart Foundation, 2010]*

Central Avenue forms the central spine and high street for Oak Flats Town Centre. However, a key challenge facing the centre is its poor connectivity both across Central Avenue and between the town centre blocks. This strategic move focuses on enhancing pedestrian connectivity within the town centre, encouraging a more walkable and accessible centre. The aims of this strategic move are as follows;

- Strengthen pedestrian links between the eastern and western edge of Central Avenue.
- Improve pedestrian crossing points at Wentworth,

Griffiths, Fisher, Kingston and Hopetoun Streets within the town centre.

- Reduce road crossing distances where possible along the high street, encouraging greater mobility within and around the town centre.
- Investigate stepped pedestrian crossings along the raised central reservation located between Fisher Street and Hopetoun Street.
- Introduce clear signage and way-finding in the town centre.
- Remove street clutter including signage, fixed planters and inappropriate tree planting along the footpaths to improve street legibility and movement along the high street.
- Introduce passive methods to reduce vehicular speeds such as footpath & corner widening, parking paving and planting to reduce the visual dominance of the road.

Identify appropriate locations public domain and planter expansion on corners to reduce pedestrian crossing distances.

Strengthen Pedestrian link across Central Avenue in the vicinity of the library.

Investigate stepped pedestrian crossings along the raised central reservation located between Fisher Street and Hopetoun Street.



Figure 5.02 - Key Move 2: Connect the High Street



Public domain steps embrace level change



Enhanced Visual and Pedestrian links



Integrating planters and steps for access and amenity



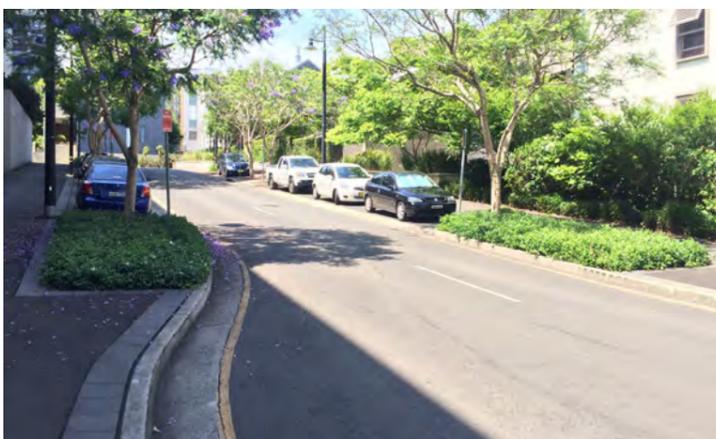
Planters integrated into the streetscape and parking



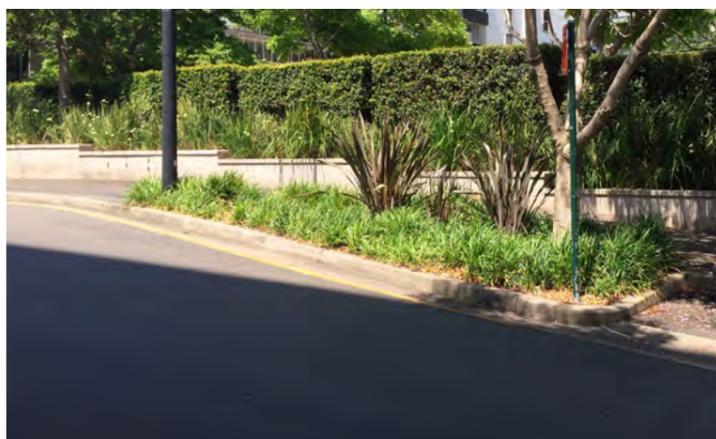
Defined steps and crossings embrace street level change



Steps between street levels embrace public art



Reduced road width to reduce traffic speed



Planters and parking integrated together reducing road width

**Key Move 3 : Animate the High Street**

*“Successful town centres typically have animation, vitality, and an urban ‘buzz’. By promoting people to the street, animation and vitality is created.”*

Oak Flats Town Centre offers a strong urban structure that assists in establishing a well defined high street. However, at present the streets and urban blocks that characterise the town centre offer very little street activation, resulting in a relatively under-used streetscape. This strategic move aims to utilise the town centre footpaths and introduce a variety of uses that activate the Oak Flats high street. The aims of this strategic move are as follows;

- Enhance the high street environment through improved street tree planting and planters.
- Identify and transform selected car parking spaces into temporary seating areas and community gardens encouraging animation along Central Avenue.

- Encourage local businesses to utilise the footpaths for alfresco dining and temporary seating.
- Encourage local businesses to extend their produce such as flowers, fruit and vegetables into the street. This should include both temporary and permanent opportunities for artwork e.g. this could take the form of street art murals which are changed periodically, as well as art displays in shop front windows and permanent art sculptures and installations.
- Create opportunities for outdoor libraries, local art displays and street art to continually activate the high street.
- Establish cycle parking facilities along Central Avenue to encourage more people to cycle through the town centre.
- Expand the night-time economy and extend trading hours.
- Introduce contemporary street furniture and lighting along the high street that responds to the character of Central Avenue. This could be in the form of public art & can create as well as reflect town character.

Investigate existing street tree potential for larger growth and/or the potential for replacement.

Create opportunities for Alfresco such as temporary parklets and on street dining.

Public domain improvements along Central Avenue establishing a defined network of paths and street car parking;

Investigate opportunities for community gardening.

Improve public domain furniture, planting orientation and placement so to enhance links, views and amenity

Encourage outdoor displays/ planting/seating



Figure 5.03 - Key Move 3: Animate the High Street



Planter Boxes enhance street edge definition and amenity



Outdoor dining parklet supports local food industry



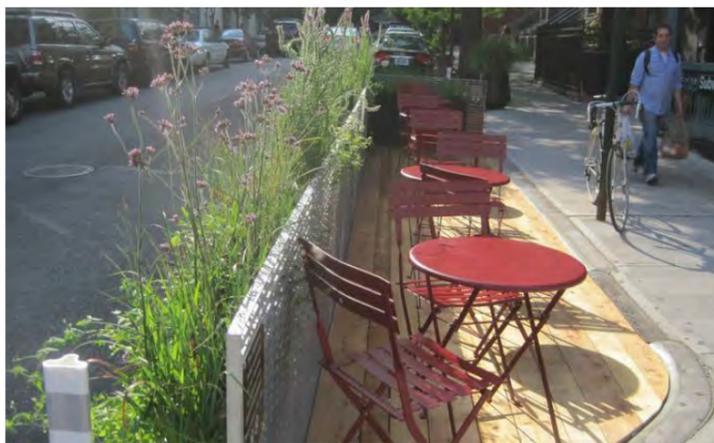
Community Garden promotes community and healthy eating



Bike racks encourage local biking over driving



Kerb-side stools activate and enhance the streetscape



Kerb-side alfresco enhances amenity



Outdoor floral display activates the street and encourages sales.



Street side bookstore encourages pedestrians to linger

**Key Move 4 : Revitalise the Facades**

*“People are drawn into shops when facades and shopfronts are interesting to look at, to touch and to stand beside. High quality facades and shop fronts create a welcoming sensation and encourage people to walk and stay in a centre” [Gehl, 2009]*

Oak Flat Town Centre’s high street plays an important role in supporting the local community. However, with pockets of under-utilised land and deteriorating façades, the appearance of the high street needs to be enhanced. The strategic move focuses on rejuvenating the existing building façades along the high street. By introducing improved building frontages along the high street, the visual appearance and identity of the town centre can be improved. Key aims that can be drawn from this strategic move are as follows;

- Introduce a lively, varied sequence of ground floor façades establishing a greater experience for people.
- Encourage façades to be more open and inviting to develop a stronger evening economy.
- Ensure facade rejuvenation reinforces the high street urban character.
- Encourage appealing and fashionable shop fronts that strengthen the high street character.

Enhanced school fence continues colourful high street character.

Facade rejuvenation along Central Avenue to improve the high street experience and strengthen Oak Flats identity and local economy.

Local art walk creates exciting link between Central Avenue and Ayers Lane Car Park.



Figure 5.04 - Key Move 4: Revitalise the facades



Colourful Store-fronts collectively create street uniqueness



Store-front displays add to street character



Bright facade adds to high street amenity and character



Façades contribute to unique store identities



Soft colours can brighten a high street



Transparent shop fronts enhance the pedestrian experience



Bright School fence creates a playful identity



Local murals embrace public art in previously dull spaces

**Key Move 5 : Address the Laneways**

Oak Flat Town Centre’s urban blocks address Central Avenue, reinforcing a high street feel. However, a key challenge facing the town centre is the lack of frontage and activity along the rear laneways. This strategic move proposes re-addressing the rear laneways so that they are overlooked, active and offer business expansion opportunities in the town centre. The aims of this strategic move are as follows;

- Encourage events and markets, busking and street performance along the rear laneways to highlight future activation opportunities.
- Encourage business owners to enhance the rears of their properties so that a collection of active uses address the laneway.
- Establish ground floor active uses along the fronts of the laneway ensuring pedestrian activation.
- Incorporate cafes, restaurants, local businesses and community workshops where locals and invited guests share a range of skills along the laneway, to enliven, activate and improve passive surveillance.
- Generate an evening culture through restaurant/cafes and quality lighting.
- Establish a public domain that accommodates both pedestrian traffic and service vehicles for the adjacent businesses.
- Establish cycle parking facilities along the laneway.
- Integrate cycle laneways along the laneway roads encouraging cycling in the town centre and improved passive surveillance to the rear of the town centre properties.
- Activate laneways with temporary or permanent public art commissions.

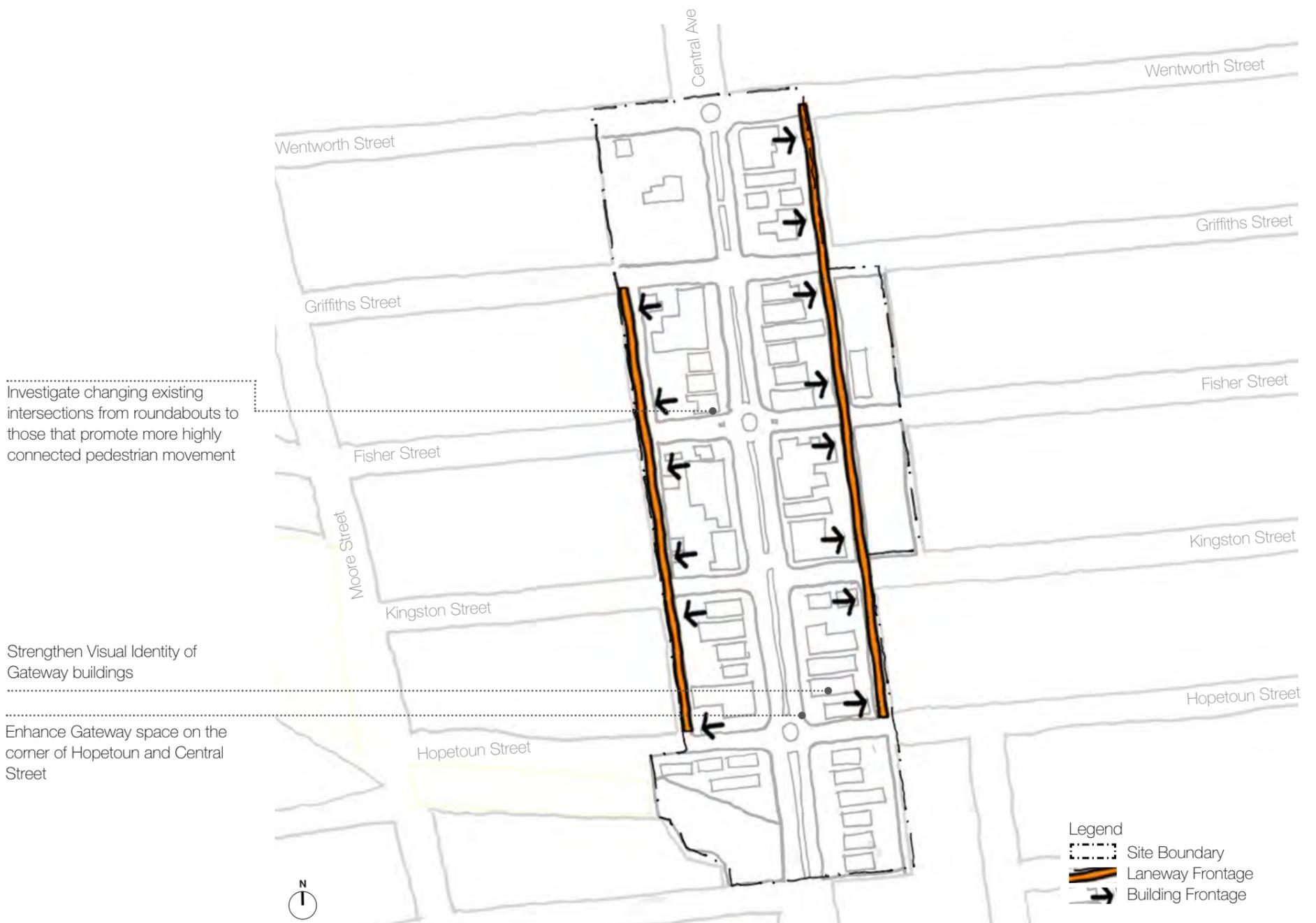


Figure 5.05 - Key Move 5: Address the Laneways



Temporary events change people's perception of laneways



Laneway events and busking can enliven dead spaces



Small businesses front onto rear laneways



Historic murals animate service laneways



Community Facade Treatment



Cycling along a laneway improves passive surveillance



Rear building frontages activate laneways



Businesses are encouraged to open up to rear laneways

**Key Move 6 : Strengthen Gateway Corners**

Oak Flats Town Centre is located at the junction point of five key road intersections. These key road intersections are Wentworth, Griffiths, Fisher, Kingston and Hopetoun Street. To enhance the town centre's local significance these intersections and their associated buildings should be improved to strengthen the sense of arrival when entering the town centre. This strategic move proposes strengthening the town centre's arrival experience through improved corner developments and a simplified road intersection that encourages a greater flow of pedestrian movement. The aims of this strategic move are as follows;

- Refurbish or redevelop the corner sites of each road intersection so that they address the pedestrian footpaths.
- Integrate appropriately scaled buildings alongside the key road intersections.

- Establish buildings along the edges of key routes so to increase a sense of enclosure and improve the perception of arriving into Oak Flats Town Centre.
- Improve pedestrian connections at key intersections improving legibility in the town centre.
- Incorporate open and transparent façades on corner sites so to improve passive surveillance.



Figure 5.06 - Key Move 6: Strengthen Corner Gateways



Legible pedestrian crossings integrate with corner buildings



Active and transparent corner treatments animate a street



Alfresco dining activates street corners



Corner buildings enhance the town centre arrival experience



Corner buildings bring a sense of street enclosure



A simple palette of colours brings richness to streets



Medium density buildings define the street



Corner buildings improve street safety





*6.0 Oak Flats Town Centre Guidance*

## 6.0 Oak Flats Town Centre Guidance

### 6.1 TOWN CENTRE PLAN APPROACH

Oak Flats has the physical attributes to become a vibrant and idyllic local centre characterised by a bustling and intimate high street, a collection of cultural facilities and a network of active laneways. It is through these characteristics that Oak Flats Town Centre can be enhanced to become a lively and bright community centre supporting a well connected pedestrian friendly environment, active public space and on-street dining.

To ensure the Town Centre Plan responds to the client brief this section of the report has been broken down into a series of sub-sections that reflect Shellharbour City Council's scope of works. The scope of works requires the consultant to prepare the following for the town centre;

- Conceptual block building envelope sketches with optional upper floor residential or upper floor commercial or upper floor commercial/residential;
- Development appearance/character including colours/materials palette;
- Public domain treatment/usage including integration with private domain;
- Transport /parking provisions - this will need to determine future supply needs and where increases in public parking may be needed, based on future development capacity; and
- Maps of Centres specifying required active frontages, awning weather protection, building envelopes/setbacks, corner elements and entry statements, focal points.
- Any recommended amendments to LEP 2013 as it relates to development of Town Centres.

### 6.2 THE TOWN CENTRE PLAN - KEY ASPECTS

The Oak Flats Town Centre Plan proposes a concentrated core of town centre uses along Central Avenue north of Hopetoun Street and south of Wentworth Street, including both Ayers and Reynolds Lanes. The intention of this strategy is to ensure a critical mass of activity in the heart of the town centre, whilst ensuring excellent pedestrian links to the surrounding context. Central Avenue forms the primary active street within Oak Flats Town Centre enhancing the town centre's sense of arrival. A new public space and upgraded library establishes a community heart and defined centre to Oak Flats on Central Avenue and Fisher Street. Existing public spaces such as the town centre public domain and neighbourhood centre are proposed to be upgraded with temporary and permanent activities as well as additional facilities encouraging people to spend more time in the town centre. This also ensures that there is ample opportunity for interaction within the wider community.

Key aspects of the town centre plan are as follows;

#### 1. Oak Flats Town Square

- To create a gathering space for residents, a new public space and community hub is proposed on the corner of Fisher Street and Central Avenue.

- The public space should be activated by a mix of temporary events as well as possible extra library floorspace for a cafe, outdoor dining as well as a park.

#### 2. Oak Flats Library

- The library should be maintained and upgraded to open out towards Central Avenue and Oak Flats Town Square reflecting its unique role as the heart of the town centre.

#### 3. Neighbourhood Centre

- The neighbourhood centre and surrounding open space should be upgraded and activated with provisions for a new adventure play facility for children and a community garden.
- The library upgrade should allow for increased floor space for the incorporation of additional uses such as a cafe with alfresco dining as well as improved facilities for existing services such as adult learning, public access and free wifi.

#### 4. Ayers Lane & Reynolds Lane

- New medium density mixed use/ residential should be introduced along Reynolds and Ayers Lanes to increase population, housing supply and passive surveillance within the town centre.
- New town house style development should have flexible uses and encourage live-work and shared offices spaces.
- Walking and cycling should be encouraged to further activate lane-ways as well as increased amenity through street trees, plantings and art.
- Parking should be accessed off rear laneways.

#### 6. Central Avenue

- A rich variety of uses are proposed in the revitalised town centre core, including cafes, restaurants, shops and other retail and business premises;
- Ground floor retail/commercial and street activation define the town centre's ground level, ensuring a vibrant buzz within the centre;
- Local businesses should be encouraged to engage with the street.

#### 6. Creek Link

- The creek link between Central Avenue and the Oak Flats swimming pool should be upgraded providing strong cycle and pedestrian links.
- The creek line should be enhanced to address water quality and flooding.

#### Heritage Considerations and Requirements

Future development will be required to consider setting and context of indigenous and non-indigenous heritage places in and adjacent to the town centre. Heritage items will also have specified requirements under Shellharbour LEP 2013 and Shellharbour DCP. Development will need to consider the existing street layout and maintain significant view lines and vistas.



Figure 6.01 - Oak Flats Town Centre Plan

### 6.3 CONCEPTUAL BLOCK BUILDING

This sub section relates to point 1 of Shellharbour City Council’s scope of works which requires the consultant to prepare;

- Conceptual block building envelope sketches with optional upper floor residential or upper floor commercial or upper floor commercial/residential.

Key ‘Concept Building Block’ objectives for the Oak Flats Town Centre Plan are as follows;

- To achieve good building frontage within the town centre;
- To strengthen street definition and continuity through infill opportunities.
- To enhance passive surveillance and community safety through adopting crime prevention through environmental design principles (CPTED);
- To enhance links between town centre destinations
- To improve legibility through good built form;
- To enhance solar access to buildings;
- To ensure a diverse building mix;
- Establish an integrated mix of uses including local services

The concept building block objectives are achieved through the following plans.

#### Infill Developments

Oak Flats is fortunate to have an existing continuous built edge along Central Avenue within the town centre. This

built edge contributes significantly to the character of the town centre and the activity present. It has been identified however, that an upgrade to selected buildings and in particular infill development to address the frontages to Ayers and Reynolds Lanes could significantly increase the appeal and activation across the town centre.

A high level site analysis has identified a collection of existing buildings and vacant spaces for removal and redevelopment. These selected buildings were assessed as low architectural quality, not of heritage significance and in a strategic position to enhance the character of the town centre. The vacant spaces are currently under-utilised for either formal or informal parking or not utilised at all.

The Oak Flats Town Centre Plan adopts an approach that identifies development opportunities on these under-utilised or vacant sites. These infill sites have the opportunity to reconsolidate and strengthen the town centre.

The town centre plan proposes an indicative arrangement of building blocks to address this need for infill projects along Central Avenue, Ayers and Reynolds Lanes and the intersections of Griffiths, Fisher, Kingston and Hopetoun Streets with Central Avenue. Each identified infill site aims to strengthen existing assets within the town centre such as improving street activation and connectivity, encouraging a greater street enclosure and enhancing existing public facilities.

*Note: Following this project any buildings selected for removal should be evaluated through a separate feasibility study that is informed by this Town Centre Plan.*



Figure 6.02 - Consolidated Parcels Plan

## Form and Footprint

Oak Flats Town Centre today offers a town form and footprint with a diversity of building size and stock that contribute to its local atmosphere. It is important when designing the Oak Flats Town Centre Plan to integrate this existing fine grain form into the proposed development allowing it to seamlessly knit into the surrounding urban fabric, continuing and adding to those layers.

The proposed concept block buildings respect the existing building form and footprint, establishing a seamless relationship between new and old buildings. They also aim to strengthen key movement corridors, public spaces and laneways so that a greater concentration of people are attracted to Oak Flats.

A range of blocks and spatial types have been employed that accommodate modern building footprints whilst respecting the local urban form. Key development principles underpinning the concept block building layout are as follows;

- Solar access is optimised through ensuring appropriate building separation and maximising north aspect whilst maintaining good building frontage onto streets based on SEPP 65 Design Guidelines.
- All concept building blocks are designed to optimise thermal performance, thermal comfort, and day lighting so to improve a buildings energy efficiency.

- All concept building blocks should ensure visual privacy and acoustic privacy through adopting SEPP 65 design principles.

Oak Flats Town Centre's proposed concept building blocks adopt CPTED principles through ensuring the following initiatives;

- All building blocks maximise passive surveillance ensuring buildings front onto public spaces and streets, particularly the laneways.
- The concept building blocks and public realm are designed to promote legibility through a well defined network of streets and public spaces.
- The design of the building blocks in relation to the public domain reduces the occurrence of vulnerable spaces by creating active spaces between buildings, and defining and addressing well travelled routes.
- The design of the building blocks respects and contributes to the diversity of building stock and plot scale within the town centre.



Figure 6.03- Form and Footprint Plan

**Land Use**

The distribution of land uses within the town centre is rationalised to activate the length of the high street by offering a diverse mix of uses, building economic resilience into the town centre economy as well as activating the streets during the day and night. Proposed land uses aim to stimulate and support existing uses and businesses within the centre.

To ensure clarity in understanding the distribution of land uses proposed within the Oak Flats Town Centre Plan only the proposed built form land uses have been highlighted. However, it is intended that existing buildings should accommodate ground floor retail/ commercial uses with optional upper floor commercial/ residential uses. In addition all community building functions should be retained.

Key aspects of the land use configuration that must be considered are;

- The grouping and infilling of ground floor retail and commercial uses along Central Avenue will establish a concentrated critical mass of active uses.
- The refurbishment of the library and associated public open space on the corner of Central Avenue and Fisher Street at the heart of the town centre ensures excellent opportunities for the community to meet and relax.
- The increased focus on outdoor dining and evening activities along Central Avenue as well as Ayers and Reynolds

Lanes will strengthen the town centre, particularly from a safety viewpoint.

- New built form within the centre to accommodate optional upper floor residential or upper floor commercial or upper floor commercial/residential. There is also an opportunity for the upper floor residential to be used as live work units encouraging business start-ups in the town centre.
- The car park fronting Ayers Lane is defined by active ground floor retail and commercial ensuring improved passive surveillance.
- Improved building frontages on either side of the intersections of Hopetoun, Kingston, Fisher and Griffiths Streets with Central Avenue will define and activate these entry points to the town centre.

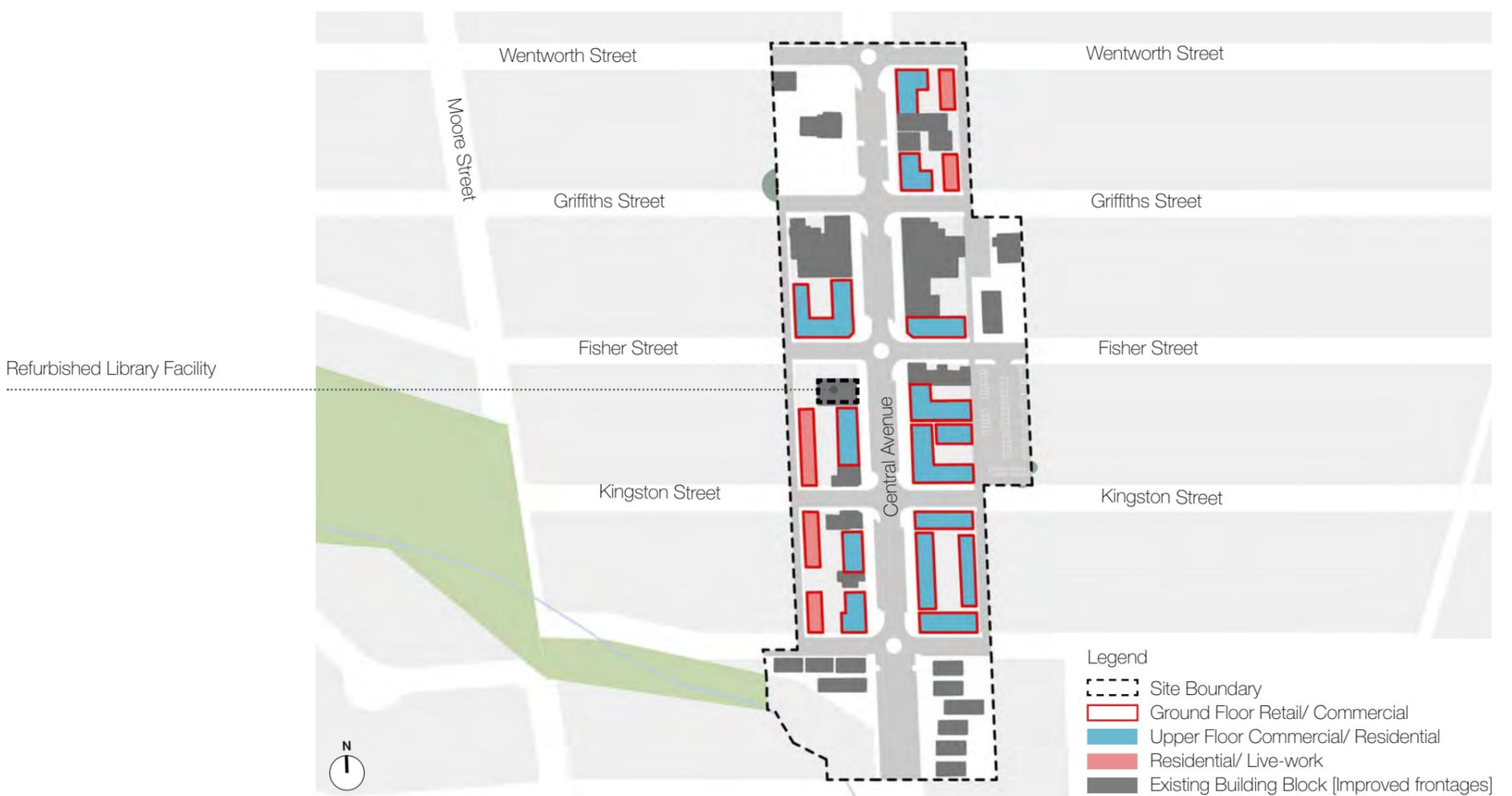


Figure 6.04 - Land Use Plan

**Massing and Scale**

The design approach to massing and scale has been established to protect and enhance the character of Oak Flats Town Centre as a town. The reason for this is Oak Flats is characterised by a variety of building heights with breaks in scale, rhythm and continuity that contribute to its fine grain urban form. Any future buildings in the centre should respect the variety in scale and massing.

Key objectives of the proposed massing and scale plan are to;

- Establish a building height that will free up opportunities for residential development within the town centre.
- Ensure future development respects and responds to the town centre varied building heights.
- Ensure scale and massing responds to a developments strategic positioning within the town centre.

The proposed scale and massing of the town centre fulfils these objectives by introducing a flexible building scale to encourage continued varied building height without constraining local opportunity for development. The massing and scale has been designed to encourage future residential living within the town centre while retaining an appropriate height and scale for an intimate town centre environment. Key aspects of the scale and massing plan that must be considered are;

- The proposed concept building blocks along Central Avenue are recommended to vary between 2 - 4 storeys [9-15 metres] with height emphasis being particularly important for corner properties. This is to ensure a well defined street that offers a sense of enclosure.
- Massing height should be focused along Central Avenue while blocks fronting Reynolds and Ayers Lanes are recommended to be a lower scale to reflect the street hierarchy and residential context.



Figure 6.05 - Scale and Massing Plan

## 6.4 CHARACTER AND APPEARANCE

This sub section relates to point 2 of Shellharbour City Council's scope of works which requires the consultant to prepare;

- Development appearance/character including colours/ materials palette;

Key 'development appearance/ character' objectives for the Oak Flats Town Centre are as follows;

- To achieve a development character that responds to its proposed uses and Oak Flats Town Centre's status as a 'Town' in the Illawarra Regional Strategy.
- To ensure new development contributes positively to the public realm through respecting and complementing the existing scale, style and ambience of Oak Flats Town Centre.
- By enhancing existing town centre characteristics through facade treatment, upkeep, rejuvenation and refurbishment suggestions.

### Key objectives

Oak Flats offers a local centre atmosphere that is well loved and respected by locals and visitors alike. Future developments and refurbishments should respect and enhance this environment, further activating the centre and adding to its charm.

The following five character and appearance objectives are informed by visual, aesthetic, public, social and urban strategies which aim to secure and enhance the character of Oak Flats Town Centre.

### Street Level Activation & Engagement

Oak Flats cafe & outdoor eatery culture should be enhanced through appropriate street level activation that stimulates the economy and seamlessly integrates with the town centre's character.

### Building Height Variation and Street Rhythm

Oak Flats Town Centre's evolution has resulted in a layering of built form that brings building height and architectural variety to the streetscape. Future buildings should respond to existing architectural cues so to reinforce the building rhythm experienced along Central Avenue.

### Fine Grain Attention

Oak Flats Town Centre's character reflects a finer grain of buildings and land uses. Future development should employ a fine grain approach that respects the existing centre's low scale, varied character.

### Laneway Articulation

Existing laneways located parallel to Central Avenue reinforce the finer grain character experienced within Oak Flats Town Centre. Existing and future development should articulate the edge of the laneways with a variety of active uses and facade treatments.

### Public Emphasis

Part of Oak Flats uniqueness comes from its passionate community and core community facilities. Improved facilities, in particular the library and an adjacent public space, should be provided, maintaining a community focus that directly contributes to the activation of the town centre.

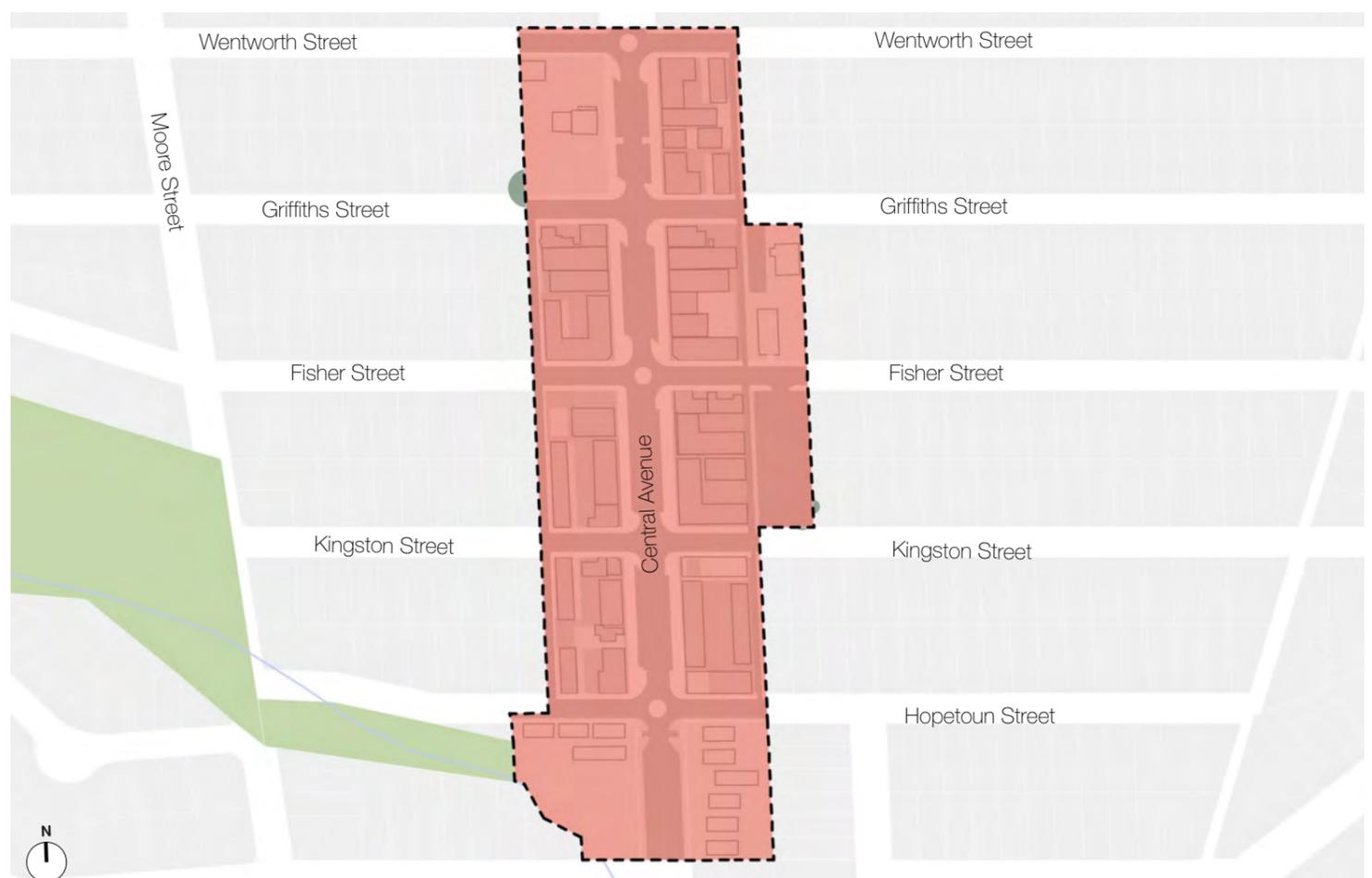


Figure 6.06 - Character Area Plan

**Street Level Activation & Engagement**

Street frontages throughout the town centre should aim to engage with and enliven the street. Designs such as service counters and seating facing onto the street as well as garden and alfresco dining further contribute to a vibrant public domain. Businesses should be encouraged to utilise the public domain as a part of their frontage. Key development initiatives encouraged are;

- Inviting - A lively, varied sequence of ground floor façades to improve the street level experience;
- Transparency - Attractive frontages that offer a high level of transparency and variation to encourage activities to spill out into the streets;
- Evening activation - Street level façades should be inviting at night as well.



**Building Height Variation & Street Rhythm**

Oak Flats Town Centre has a range of building heights and sizes which contribute to its unique town character. To maintain this rhythm it is important future development continues to provide a variety of heights and styles ranging from old and new designs. The contemporary architecture should be respectful to the quality building stock in the town centre, taking cues from datum heights, material treatment

and scale. Key development initiatives encouraged are;

- Vertical facade rhythms - Vertical facade treatments establish a street rhythm making walks more interesting.
- Building height deviations - Differing roof treatments strengthens street rhythm.



**Fine Grain Attention**

A fine grain collection of buildings appeal to people and encourage a greater diversity of uses along the high street. People are more drawn to areas with a rich variety of shop fronts and façades. Oak Flats Town Centre already contains a fine grain character which should be embraced, refreshed and revitalised. Future development should respect fine grain responses. Key development initiatives encouraged are;

- Narrow Frontages - Future development should encourage small, narrow and compact shop fronts reinforcing a fine grain character;
- Colour Variety - Changes to facade colour break up the linear definition of building frontages;
- Relief in frontages - Varied setbacks strengthen fine grain attention along the building frontages and façades.



**Laneway Articulation**

Oak Flats is fortunate to have a series of laneways and links between its town centre spaces. These spaces should be activated by consistent frontage, providing a variety of uses, public domain, public art and planting schemes. Possible uses include small coffee shops, bars, residential and live/work spaces. Lanes can also operate as green and cycle links and should be incorporated into the town centre paving plan. Key development initiatives encouraged are;

- Ground floor uses should open out onto the existing

laneways;

- Transparent and open frontages are encouraged to integrate the public and private domain together;
- Ensure laneway paving indicates a shared street environment.
- Public art such as murals and high quality street art are encouraged to bring animation to blank walls and façades;
- Day and night time uses are recommended to ensure diversity and regular activation.



**Public Emphasis: Public Buildings**

Quality community facilities are needed along Central Avenue and Fisher Street to ensure the community has a place to meet. The proposed upgrade to the library should also look to activate the proposed public open space to its northern edge with the possibility of additional cafes and uses on its western edge in the future. It will not only provide

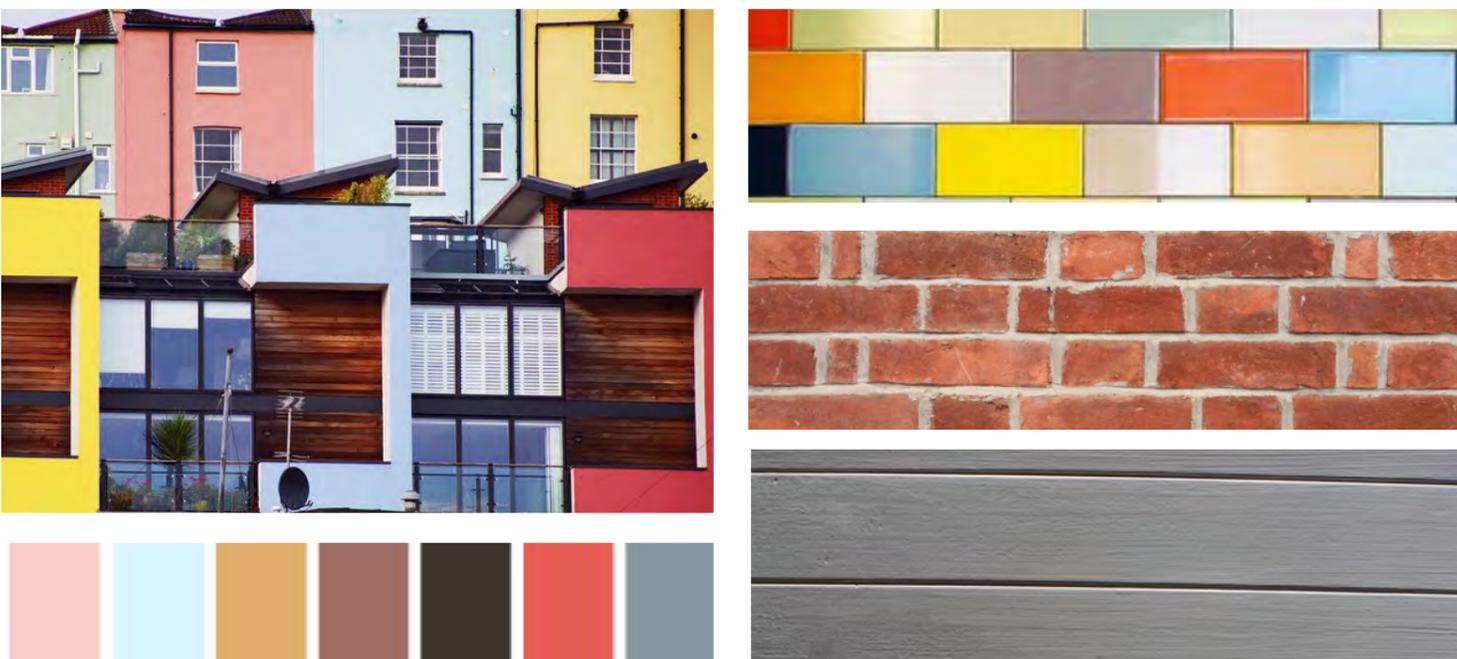
a community meeting place but can activate future changes to the library building incorporating potential cafe/dining opportunities. This public open space would galvanise the sense of a heart to Oak Flats Town Centre. These public buildings should be designed to host a range of different public activities.



**Colour & Material Attention: Palette**

A unique, bold and varied colour palette should be adopted along Central Avenue in order to enhance the town centre look and feel. Colours have been selected as a rough guide based on the existing bright trends along the high street. The colour scheme welcomes a range of materials and colours which complement each other through their achievement of a unique identity particular for smaller scale buildings. Larger scale buildings should look toward using more subtle or darker tones with potential for bright coloured

highlights to emphasise and define architectural features such as windowsills, doors and details. The use of painted wood, coloured tiles and other materials which bring the architectural individuality of a place to life are encouraged. These materials additionally work well with the proposed consistent materiality for the public domain.



### 6.5 PUBLIC DOMAIN TREATMENT

This sub section relates to point 3 of Shellharbour City Council's scope of works which requires the consultant to prepare;

- Public domain treatment/usage including integration with private domain;

Key public domain treatment objectives for Oak Flats Town Centre are as follows;

- To develop an integrated and consistent landscape across the town centre;
- Establish network of connected public spaces, laneway links and laneways throughout the town centre.
- Redefine the laneways to increase the amenity and liveability.

#### Public Domain Plan

The town centre is structured around public domain treatments which collaboratively work to form a visually connected town centre. A key aim of the proposed public domain is to ensure a consistency in treatment that responds to its intended function and the land uses that border it. Key public domain treatments proposed in the town centre plan are as follows;

#### Laneways

Reynolds and Ayers Lane should be enhanced via new treatments as well as street furniture and elements which emphasise a shared pedestrian/cycle priority zone while adding to the lane-way amenity.

#### Public Space

Oak Flats Town Square should provide the community with a place to congregate as well as a location where social events and gatherings may occur.

#### Town Centre Footpaths

Footpath treatments should complement the existing colour and style. Footpaths should be treated right up to the edge of shop fronts and the back ends of car parks along corners to create an integrated public domain. For further detail please refer to the Footpaths and Treatments section.

#### On-Street Parking

On-street parking treatment should vary from the asphalt road material and be integrated with planting to reduce vehicular speeds and increase street amenity.

#### Street Planting

Street planting should enhance the town centre character and be properly integrated into parking and footpaths as well as additional elements such as planter boxes and light planters. Planting may also act as a buffer between alfresco dining and car parking.

#### Street Trees

Street trees should be retained or replaced to continue tree lined street feel. Additional floral trees should further enhance median strips and add to the town character and sense of enclosure. For further detail please refer to the Planting sections.



Figure 6.07 - Public Domain Treatment Plan

**Laneways**

The Laneways add to the fine grain feel of Oak Flats creating quieter spaces for cyclists, pedestrians and residents within the town centre. Bike parking, street trees, planting, public street furniture and fine grain frontage work

together to create intimate lanes applicable for programs such as residential town living, live work spaces and cafes. Consistent paving treatment for the pedestrian and the vehicle is essential to communicate shared hierarchy.



**Central Avenue**

Central Avenue being the town centre high street is the central spine of activity for the town centre. This street should be enhanced to prioritise pedestrian movement and encourage staying activities within the centre. Increased pedestrian crossings and defined connections across Central Avenue should create a safe environment for pedestrians, while planters, flexible furniture and increased treated footpath space particularly on corners should

encourage increased alfresco dining. Street elements such as furniture, light planters and bins should enhance footpaths. Public domain materiality and colour should be simple and consistent along the high street. Whilst surface finishes can vary to define key spaces such as alfresco dining forming a base for the colourful flexible seating, bright façades and floral planting.



**Fittings & Lighting**

The character of furniture, fittings and lighting is critical to communicating the identity of the town centre as a whole. Attention to this level of detail will help prevent the town centre from feeling disjointed and will enhance links visually and spatially. Due to the current building stock and character, Oak Flats calls for a bright design aesthetic with a neutral base to help accentuate its character. Fixed fittings should adopt a neutral pallet while flexible fittings such as umbrellas, outdoor dining, window planters should be bold to enhance street character. Lighting should be warm and tonally consistent, highlighting the architectural assets such as coloured façades. Lighting can also be used to enhance street furniture design and trees, encouraging the public to linger during the evening. Larger scale lighting should also aim to enhance the centre through additions such as hanging planters. Signage along Central Avenue should

be consistently hung/displayed to reduce clutter while laneway signage may be less controlled and responsive. Signage design in both spaces however should be flexible in materiality/form to embrace the unique character/colour/aesthetic of each front.

All lighting and furniture must adhere to CPTED principles such as;

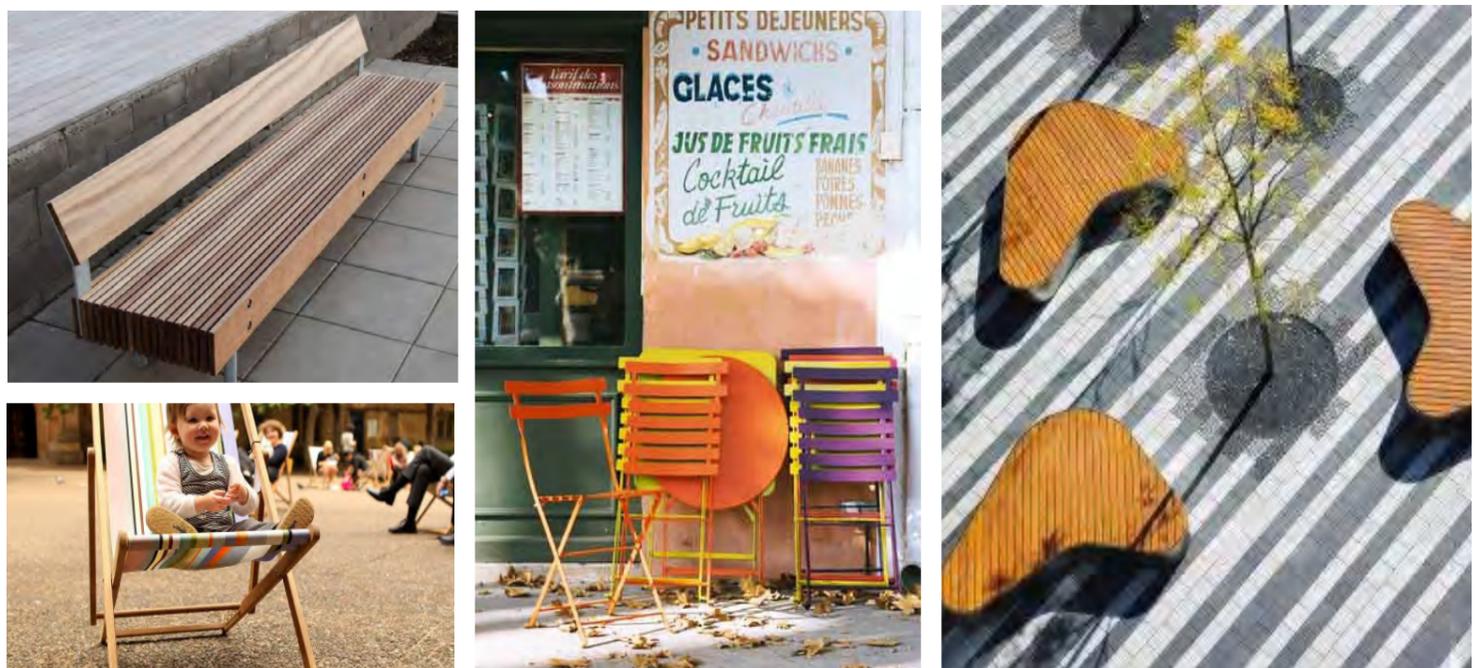
- Street furniture layout should be designed to minimise occurrence of concealment of spaces;
- Lighting design should enhance surveillance and ensure visual corridors are maintained;
- Seating should be provided in public spaces encouraging public ownership of the public realm.



**Furniture**

Street furniture should honour the character of the town as a bright and active local town centre. Furniture should comprise of a mix of fixed and flexible options. Fixed furniture should have a simple and consistent wooden pallet

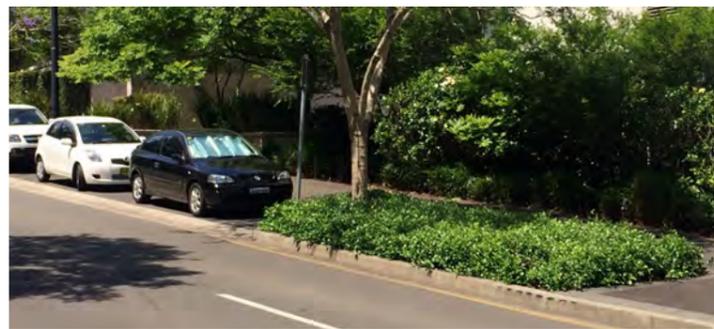
and aesthetic while flexible furniture should embrace the variety, colour and vibrancy of the town.



**Footpaths and Treatments**

Footpath design and treatment is critical to achieving a consistent public domain and town centre identity. Parking provisions should be integrated with the landscape design providing visual breaks with planting or street furniture. Pedestrian links should be expressed through defined connections. By integrating planting with parking divisions

the streets will develop a stronger sense of enclosure enhancing the quaint character of Oak Flats Town Centre. High street paving treatment variation should define movement zones within the centre.

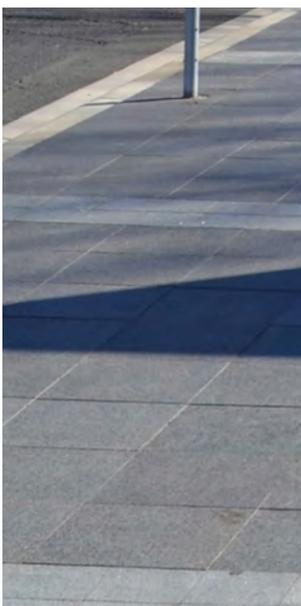


**Material palette**

Oak Flats Town Centre has undergone public domain improvements including footpath treatments in recent times. In the longer term a change in paving treatment is proposed to further lift the character of the town centre. The proposed paving is bluestone pavers with exposed aggregate infill. Any future works should relate in tone and extend fully to the edge of buildings along the high street for a consistent and wholly integrated public domain. It is also recommended that a finer grain of pavers is implemented within the centre to strengthen its character. The following materials provide illustrations of the indicative solutions proposed for Oak Flats Town Centre. They are examples for illustrative purposes only.

**Materials**

The public domain materials have been suggested in order to achieve consistency along Central Avenue. The paving should adopt a finish and scale variation to define spaces, laneways and building use. This paving colour scheme should enhance the centre look and feel of Oak Flats in accordance with the existing character of the area. The selection of colours and surfaces should account for the need to avoid graffiti.



Consistent paving



Varied paving treatments establish a space hierarchy



Change Paving finish and scale to define laneways/ pedestrian priority areas

**Planting: Groundcovers and Shrubs**

Planting should embrace a variety of endemic species, native to the coastal plain region of Illawarra. Street planting should adopt a variety of ground-covers, grasses, shrubs and trees depending on the necessary coverage. Planting for Oak Flats should prioritise floral plants with a long flowering period to enhance the character of the town

centre. Planting must not interfere with sight lines and must ensure the intent of view lines and vistas achieved as a result of the subdivision layout are not compromised as well as adhering to CPTED principles. Priority species of shrubs and ground cover are outlined below. For other species refer to the Illawarra Natives Garden Guide.



*Carpobrotus glaucescens* (Pigface)



*Scaevola aemula* (Fairy Fan Flower)



*doryanthes excelsa* (Gymea Lilly)



*Hibbertia scandens* (Guinea Flower)



*Carex appressa* (*Carex appressa*)



*Crinum pedunculatum* (Crinum Lily)



Fuchsia Heath (*Epacris longifolia*)



Coastal Tea-tree (*Leptospermum laevigatum*)



White Correa (*Correa alba*).

**Planting: Trees & Climbers**

Street trees should be a combination of existing species which add to the Oak Flats character and future proposed species. Future tree and climber planting should embrace species native to the coastal plain region, maintain the existing heritage brush box row and ensure the intent of

view lines and vistas achieved as a result of the subdivision layout are not compromised. For other species refer to the Illawarra Natives Garden Guide.



Lilly Pilly (*Acmena smithii*),



Ornamental Pear Tree (*Pyrus calleryana*)



Tuckeroo (*Cupaniopsis anacardioides*)



False Sarsaparilla (*Hardenbergia violacea*)



Ornamental Pear Tree (*Pyrus calleryana*)

### 6.6 TRANSPORT/ PARKING PROVISIONS

This sub section relates to point 4 of Shellharbour City Council's scope of works which requires the consultant to prepare;

- Transport /parking provisions - this will need to determine future supply needs and where increases in public parking may be needed, based on future development capacity.

GTA Consultants have provided a detailed assessment on Oak Flats Town Centre's transport and parking provisions, which is located in Appendix C. This section provides a summary of key planning initiatives proposed through the Oak Flats Town Centre Plan.

Key 'transport and parking' objectives for the Oak Flats Town Centre are as follows;

- Integrate car parking into the town centre footpaths, planting and material treatments, reducing the width of the asphalt roads;
- Develop a walk-friendly environment across the town centre including improved pedestrian crossing points;
- Establish a connected & safe cycle network
- Enhance access to public transport.

#### Access and Parking

Oak Flats currently has an oversupply of parking for the town centre with space available to allow for future development. Underutilised space is able to accommodate between 3,420 - 6,840 sqm of floor area before additional parking facilities will be required.

The town centre should retain a range of parking options with

the majority of the site being serviced by on-street parking, the town centre car park and private internal parking. The aim is to deliver a public environment that is practical in its level of parking provision but not visually dominated by the car. The range of parking solutions across the town centre plan include;

- Nose to kerb parking provided for Central Avenue between Hopetoun and Wentworth Street along the western edge and between Fisher and Wentworth Streets on the eastern edge.
- Surface kerb side parking along Hopetoun street, Kingston Street, Fisher Street, Griffiths Street and Wentworth Street as well as between Hopetoun Street and Fisher Street along the eastern edge of Central Avenue.
- Town centre car park along Ayers Lane & Fisher Street.
- Reducing the parking requirements associated with residential developments to, 0.5 spaces per 1-bedroom unit, 1.0 spaces per 2-bedroom unit, 1.5 spaces per 3-bedroom unit, and no visitor spaces, to improve the viability of development in Oak Flats (saving \$25,000 to \$45,000 per car space).

Note: Key community feedback and site analysis findings has indicated the current condition of junctions and roads is unsafe for pedestrians due to lack of formal crossings and large road widths. Current RMS standards require specific pedestrian volumes in a town centre prior to any pedestrian crossings being proposed. A key recommendation from this study is to undertake a detailed investigation in evaluating alternative options to improve pedestrian prioritisation in Oak Flats Town Centre.



Figure 6.08 - Access and Parking Plan

### Pedestrian and Cycle Network

Oak Flats already contains a network of footpaths, links and crossings. However the high street is still relatively disconnected as these are not working to their full potential and can be dangerous and disjointed at crossings and intersections. The type of parking provisions along Central Avenue additionally make cycling difficult within the town centre. The following key pedestrian and cycle opportunities can enhance connectivity within Oak Flats Town Centre.

- Laneways should be used to create cycle links within the town centre.
- Paving should be extended to the edge of road with integrated planters at all intersections to minimise the width of asphalt at all crossings.
- Investigation of all intersections for means to increase pedestrian priority.
- Improved pedestrian crossing points across Central Avenue should be investigated between Fisher and Hopetoun Streets. This should include the possibility for additional stairs and landings that are clearly visible to vehicles as well as road treatment changes to indicate the presence of pedestrians and create awareness.
- Footpaths along the eastern edge of Central Avenue between Hopetoun Street and Fisher Street should be widened where possible.
- Consideration should be given to providing scooter parking.
- On street car parking should be re-treated to reduce the

dominance of asphalt in the town centre as a passive measure to reduce vehicular speeds for greater pedestrian safety.

- Increased planting to road edges at intersections with Central Avenue should visually narrow the road to create a sense enclosure when entering the high street and passively reduce traffic speeds for greater pedestrian safety and amenity. Planting should not obscure pedestrian or motorist visibility.

Shellharbour City Council has already established a Shared Use Path Strategy, with a proposed off road cycle link along Moore street. The intention of the town centre plan is to recommend additional links along Ayers and Reynolds Lane that connect directly to Central Avenue strengthening the town centre's cycle link to Oak Flats Railway Station.

### Public Transport

The town centre plan looks to further develop Oak Flats Town Centre's public transport offering and encouraging greater community use of the local bus network, with less of a reliance on the vehicle. The following initiatives can enhance the public transport offering within Oak Flats Town Centre, creating a more sustainable town centre;

- Improve the existing bus network through an increase in bus frequency encouraging greater community use of the bus system.
- Improve the two bus stop facilities in the town centre, enhancing the town centre character and encouraging greater use of the public transport.



Figure 6.9 - Bus, Pedestrian and Cycle Plan

### 6.7 MAPS OF OAK FLATS TOWN CENTRE

This sub section relates to point 5 of Shellharbour City Council's scope of works which requires the consultant to prepare;

- Maps of Centres specifying required active frontages, awning weather protection, building envelopes/setbacks, corner elements and entry statements and focal points.

Key objectives for the Oak Flats Town Centre that respond to the list of maps are as follows;

- To facilitate 'active edges' on the high street and its links to promote a safe and vibrant street life during the day and night;
- To establish appropriate shading within the town centre through awning treatment and shaded outdoor seating;
- Establish appropriate setbacks that reflect the character of the town centre by considering existing neighbouring properties and centre character;
- Strengthen the built form character at key entry points to enhance the sense of arrival and identity of the town centre.

#### Active Frontages

Active frontages enliven the ground floor street level with commercial and retail uses. Semi-active frontages relate to areas which have good urban frontage such as residential and community buildings but do not support active functions such as retail and commercial.

Street frontages throughout the town centre should aim to enliven the street and encourage mixed uses at ground floor which enhance and activate the public domain. The high street should provide covered entries, open and visible façades and spatial provisions for alfresco dining. Spatial design such as service counters and seating facing onto the street should activate frontages further.

Business should be encouraged to utilise the public domain as a part of their frontage. Examples include : windowsill seating, hole in the wall style businesses, use of public domain alfresco, bi-fold doors and business permeability from the street. Businesses with front facing facades and lawn space are encouraged to open this space to the customer and the public to further activate edges.



Figure 6.10 - Active Edges Plan



Hole in the wall frontages should be encouraged



Public Domain Alfresco Dining



Transparent facades improve street activation

**Building Envelopes and Setbacks**

Building setback is the distance between the boundary of a site and proposed or existing building edge. Appropriate building envelopes and setbacks dictate the sense of enclosure experienced along a street [for building envelopes please refer to section 6.3 p52].

The distribution of setback distances is based on the role and character of the built form. With the study area being a town centre it is important that the proposed setbacks allow for a sense of enclosure reflecting a more urban setting.

The proposed setbacks in the Oak Flats Town Centre Plan ensure a level of flexibility is applied to future development.

- Future town centre buildings should be setback 0m to 2m from the front boundaries across all of the study area.
- Side and rear setbacks may vary in the context of amenity, solar access and privacy.

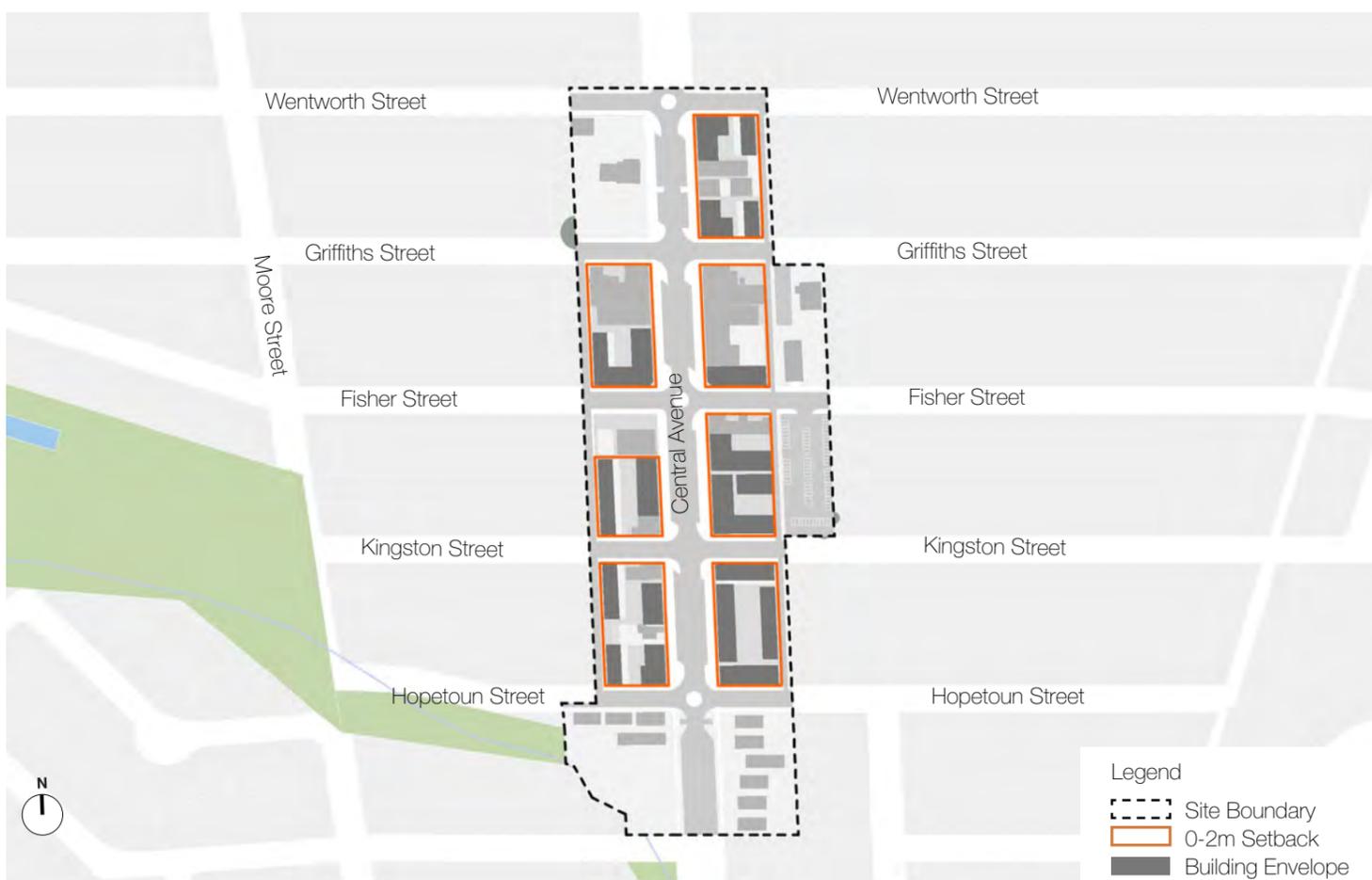


Figure 6.11 - Building Setbacks Plan



### Awnings & Signage

Awnings and signage significantly affect the amenity, appearance and character of streetscapes and the pedestrian environment. Key strategies for Oak Flats Town Centre are as follows;

- Ensure consistent awning treatment along the Central Avenue, strengthening the sense of enclosure along the road;
- Introduce varied awning treatments within the town centre laneways to reflect the finer grain development characterising the town centre;
- Reduced signage will be an important treatment within the town centre ensuring that the building architecture and public domain remain uncluttered.

#### Awnings

An awning is a cantilevered horizontal roof like structure projecting from a building and providing shelter to the footpath. Key aims for the awning treatments are as follows;

- To improve pedestrian amenity by providing weather pro-

tection to footpaths in appropriate locations;

- To encourage awnings that possess a high quality of architectural design that reflects the architecture of its building while also complementing the streetscape;
- To encourage awning forms that provide good levels of lighting to footpaths and to ground floor spaces within buildings.

#### Consistent Awning Treatment

- Lighting is required on the underside of awnings to supplement existing street lighting and 'spill' lighting from shop-fronts and other ground floor uses.
- Signs are to be consistent with the overall design of the awning.
- The awning ceiling and underside of the fascia should be consistent.
- Awning colour is to suit the architecture of the host building and the adjoining awnings.
- The underside of the awning is to be not less than a typi-



Figure 6.12 - Awnings and Signage Plan



Coloured Canopy treatments bring colour to the streetscape



Main high streets often have consistent awning treatments to define the high street



Soft canopy awning treatments bring variety to laneways

- cal floor to ceiling height of 3200mm above the footpath.
- Steps for design articulation and to accommodate sloping streets should be incorporated into the awning treatment.
- Awnings should be setback to accommodate utility poles, street trees, street lighting and smart-poles.

**Varied Awning Treatment**

- Soft canopies can be used rather than rigid awning treatments.
- The underside of the awning is to be not less than a typical floor to ceiling height of 3200mm above the footpath.
- Is not required to Integrate signage in design.
- Allows for use of varied colours, styles and sign types.
- May provide weather protection for shop fronts and diners however is not required to provide consistent weather protection.
- Awnings or canopy's should be setback to accommodate utility poles, street trees, street lighting and smart-poles.

**Signage**

Signs help users navigate the town centre and identify the location of business and services. Signage can strongly add to or detract from the character of a town centre.

Key aims for signage treatments are as follows;

- To maintain the small scale & fine grain character of Oak Flats.
- Signage should be integrated with and reflect the character of the building.
- The number of signs per business should be kept to a minimum to avoid street clutter.



Consistent awning treatment should integrate lighting.



Minimal signage reflecting the character of small business.



Consistent awning treatment integrating signage



Varied treatments enhancing the character of small business.



Consistent awning and signage treatment complement the building architecture.



Awning style should vary within the town centre laneways.

**Focal Points**

A focal point is essentially the community heart of a town centre. It is a gathering area for social interaction, offering a variety of potential different uses and activities during the day and the night. Essentially the focal point evokes a sense of place and ownership for the town centre community. Successful community hearts tend to be civic spaces, squares or a high street, where a variety of functions can be catered for, such as markets, festivals, theatre and relaxation for meeting others. It is imperative that a large proportion of the community heart is public and freely accessible at all times, to all users.

The Oak Flats Town Centre Plan locates three focal points along the high street. These three focal points are;

**1. Library and Public Space (Corner of Central Avenue & Fisher Street)**

- Upgraded library building, with potential frontage onto public space.
- The public space will provide a meeting place for the community, with seating and shade trees and potentially cafe/dining.

**2. Central Avenue (Between Hopetoun Street & Wentworth Street)**

- A vibrant high street with bold frontages activated by alfresco dining, public seating and cafes for locals and tourists.

**3. Oak Flats Neighbourhood Centre**

- Upgraded park with potential for a community garden and adventure play facilities offering a space for community education and engagement.
- Consider sculptural elements and creative play opportunities for all ages & abilities.



Figure 6.13 - Focal Points Plan



Focal points integrate public buildings with public spaces



Shared streets establish a community focal point within the high street



The foreshore should accommodate both active and passive recreation

**Entry Statements**

Successful town centres ensure that key access routes into a district offer individuals a sense of arriving to a collective entity or place. This sense of arrival or entry statement may be achieved by physical separation or distinctiveness within the built form and spatial environment.

Oak Flats Town Centre has a number of elements that provide a sense of entry into the town centre, including the raised stone planter dividing the upper and lower levels of Central Avenue between Hopetoun & Fisher Streets. The central planting of flowering pears between Fisher and Griffiths Streets also promotes a sense of entry into the town centre. The proposed built form will also enhance the arrival experiences from both ends of Central Avenue and also from the adjoining streets.

Consideration should be given to include public signage at entry statement locations that acknowledges the Aboriginal people as the traditional custodians of this land.

To assist in understanding the role of these identified buildings and spaces the town centre plan has been broken

down into the following categories;

- Vehicular Gateway Entry Statements
- Pedestrian Gateway Entry Statements

**Vehicular Gateway Entry Statements**

Key vehicular gateway entry statements located within Oak Flats Town Centre reflect the arrival experience along the key vehicular road corridors. Key entry points identified as vehicular gateway entry statements are as follows;

1. Central Avenue and Hopetoun Street Intersection
2. Central Avenue and Kingston Street Intersection
3. Fisher Street and Central Avenue Intersection
4. Griffiths street and Central Avenue Intersection
5. Wentworth Street and Central Avenue Intersection

All buildings located in these areas should aim to instil a sense of arrival along the road corridors' arrival zone when entering Oak Flats Town Centre.



Figure 6.14 - Vehicular Gateway Entry Plan



Feature corner buildings improve arrival experience



Modern building insertions respect heritage and improve entry experience



Feature buildings can act as gateway landmark

**Pedestrian Gateway Entry Statements**

Key pedestrian gateway entry statements located within Oak Flats Town Centre reflect the arrival experience to major public spaces and the town centre from bus or train arrival points and major car parks. These routes are identified in the town centre plan as an important view corridor and pedestrian route. Key buildings and spaces identified as pedestrian gateway entry statements are as follows;

1. Hopetoun Street and Central Avenue Intersection.
2. Ayers Lane car park.
3. Oak Flats Library and surrounding proposed public space.

All buildings and uses located in these areas should aim to instil a sense of arrival within the key public spaces for pedestrians when entering Oak Flats Town Centre.



Figure 6.15 - Pedestrian Gateway Entry Plan



Public buildings with a public focus



Buildings and public spaces combine to create gateway entrances



Feature community buildings in public spaces provide intrigue and interest

### 6.8 LEP RECOMMENDATIONS

This sub section relates to point 6 of Shellharbour City Council’s scope of works which requires the consultant to prepare;

- Any recommended amendments to LEP 2013 as it relates to development of town centres.

Key LEP objectives for Oak Flats Town Centre are as follows;

- To ensure an appropriate land use zoning controls for the town centre to establish a well connected and vibrant mix of uses;
- To ensure height controls establish a sense of enclosure within the town centre and create incentive for future development;
- To ensure floor space ratio controls encourage a greater density and critical mass of people within the town centre;
- To ensure character of the town centre is maintained.

#### Land Use [LZN] Zoning Controls

The LEP recommendation for the Oak Flats Town Centre land use controls are as follows;

- Zone 1 - The existing B2 Local Centre Zone between Hopetoun Street and Wentworth street should be maintained to encourage continued activation along both Central Avenue as well as Reynolds and Ayers Lanes.
- Zone 2 - The Existing R3 Medium Density Residential Zone should be maintained
- Zone 3 - The existing R2 Low Density Residential zone should be maintained.

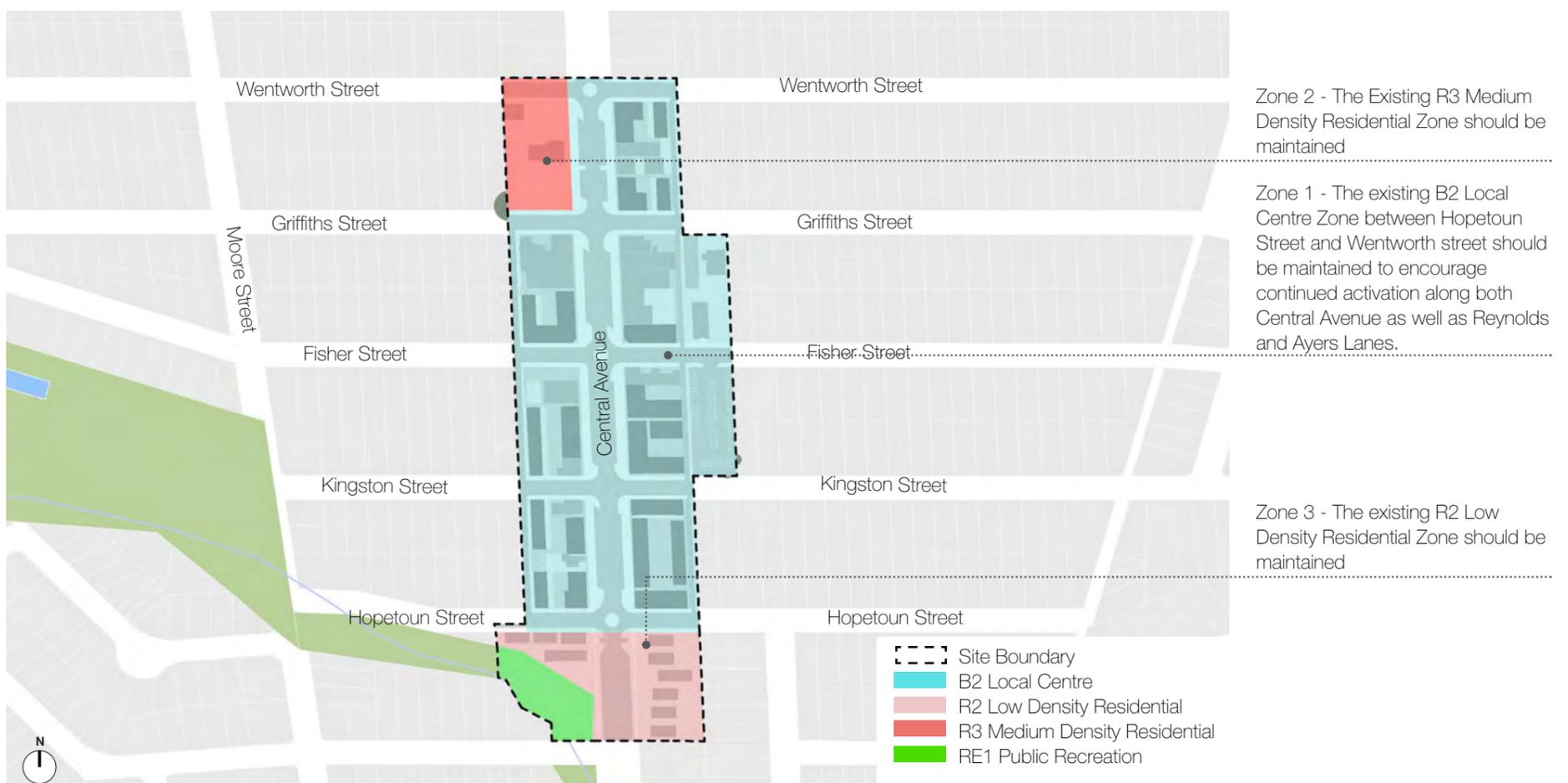


Figure 6.16 - Land Use Recommendations

### Height of Building [HOB] Zoning Controls

**Definition**

Height of Building means the vertical distance between ground level (existing) and the highest point of the building, including plant and lift overruns, but excluding communication devices, antennae, satellite dishes, masts, flagpoles, chimneys, flues and the like.

**Considerations**

- Key floor to floor height [including floor slab] considerations incorporated within this plan are as follows;
  1. Retail and Commercial - 3.5m to 4.5m
  2. Residential - 3.0m
- Pitched roofs are optional [Refer to section 6.4]

**Recommendations**

Oak Flats Town Centre contains a variety of building heights that add to the sense of quaintness and reinforce a town centre feel. The LEP 2013 height of building maps provide generic development guidance that prescribes a limit to

future buildings.

The key intention of the height of building recommendations is to ensure a consistent approach in the centre and incentivise the redevelopment of key sites. Key LEP recommendations for the Oak Flats Town Centre height of building [HOB] controls are as follows;

- Zone 1 - The existing 11.0m located between Hopetoun and Wentworth Street should be changed to 15.0m to enhance street definition along the high street and encourage greater investment and development in the town centre.
- Zone 2 - The existing 9.0m south of Hopetoun street should be retained.

Note: Hill PDA's report [Appendix B] states increasing the Height of Building (HOB) and Floor Space Ratio (FSR), as well as reducing parking requirements for higher density residential for the Oak Flats Town Centre may improve the viability of development in the town centre.

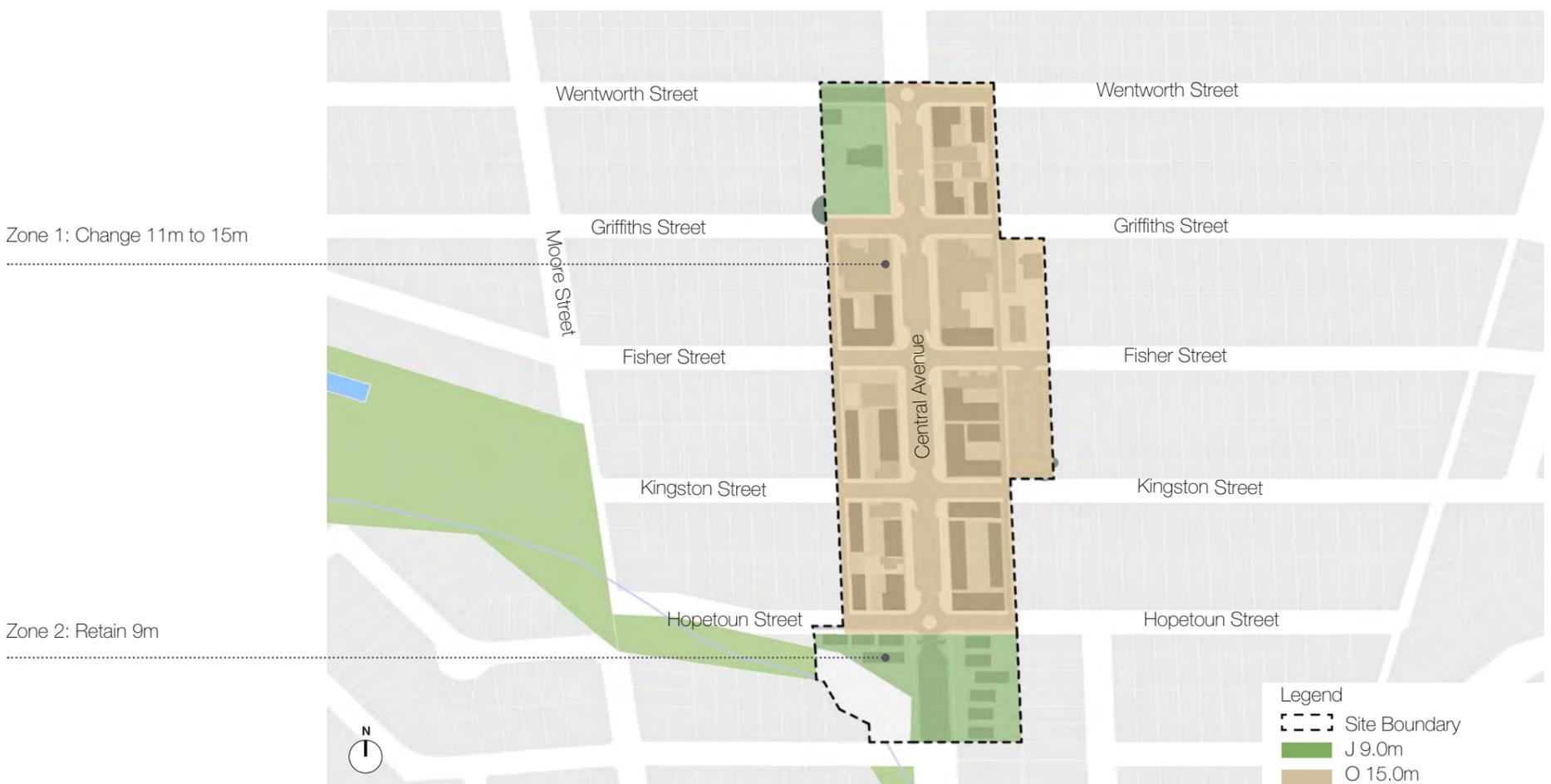


Figure 6.17 - Height of Building Recommendations

**Floor Space Ratio [FSR] Controls**

**Definition**

The floor space ratio of buildings on a site is the ratio of the gross floor area of all buildings within the site to the site area.

**Recommendations**

Oak Flats Town Centre suffers from under-utilised land and limited rear block activation. The current LEP FSR of 1.5:1 would not ensure appropriate site coverage, street enclosure and development viability.

The key intention of the FSR recommendations is to ensure a critical mass of development in the town centre, excellent street enclosure and incentivise the redevelopment of key sites.

The LEP recommendations for the Oak Flats Town Centre floor space ratio [FSR] controls are as follows;

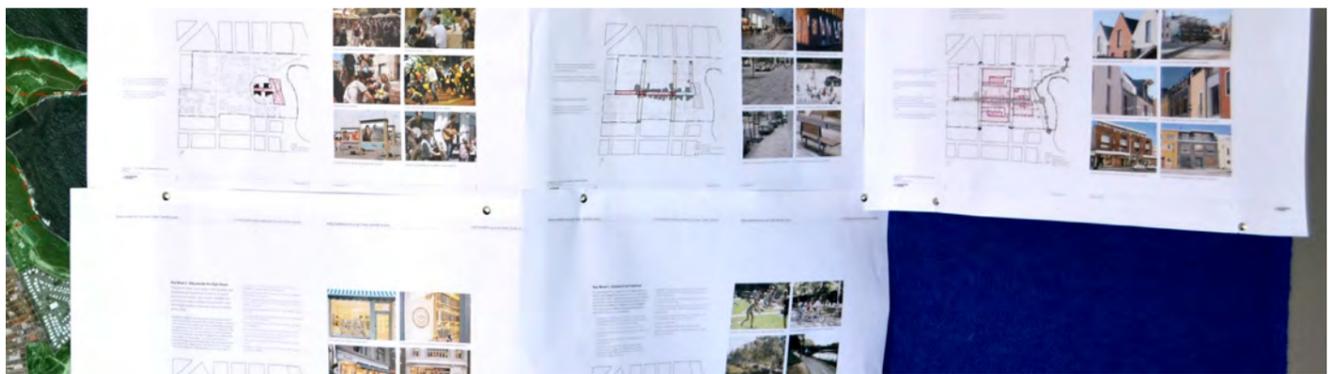
- Zone 1 - The existing 1.5:1 located between Hopetoun Street and Wentworth Street should be changed to 2:1 to strengthen density along Central Avenue, Ayers Lane & Reynolds Lane, improving viability [refer to appendix B] and encourage increased opportunities for downsized living in the town centre.
- Zone 2 - The existing 0.5:1 surrounding the town centre should be kept to retain the neighbourhood feel of Oak Flats.
- Zone 3 - The existing 0.7:1 should be retained.

Note: Hill PDA's report [Appendix B] states increasing the Height of Building (HOB) and Floor Space Ratio (FSR), as well as reducing parking requirements for higher density residential for the Oak Flats Town Centre may improve the viability of development in the town centre.



Figure 6.18 - Floor Space Ratio Recommendations





*Appendix A: Community Consultation Summary*

## Appendix A: Community Consultation Summary

### COMMUNITY ENGAGEMENT

To inform the development of the Oak Flats Town Centre Plan, a stage of consultation was undertaken to discuss the strategic ideas presented through the six strategic moves.

The key moves were exhibited at a community kiosk on the 23 October 2014. The community were asked to provide feedback on the strategic moves put forward for Oak Flats Town Centre.

Both the consultant team and Council carried out a range of conversations with the community at the Community Centre in Oak Flats Town Centre. Key points raised were noted and ultimately informed the town centre planning process.

The key message from consultation was an overarching support for the key strategic moves presented on the day. Key points noted are as follows;

- Street tree structural impact;
- Stronger enforcement of parking times along Central Avenue;
- Improve pedestrian safety for children;
- Capture views to the lake;
- More public seating along the street;
- Introduce bus routes appropriate for children & the elderly;
- Public Space & Skate Park should be located on key Fisher Street site;
- Address view and connection through the planted median strip;
- Remove baby health centre & re-locate RSL branch;
- Address parking especially between Fisher & Griffiths Streets;
- Scooter and Wheelchair friendly Town Centre;
- No road closures;
- Address dumping at the council bins in car park near the Church;
- Address areas without footpaths within the Town centre;
- Pop up Market space - car park suggested;
- Potential for an office supplies store;
- Maintain laneway access;
- Increase number of bus stops;
- No raising of rates to finance changes;
- Maintain wide streets;
- Address laneway amenity;
- Reduce town centre graffiti;
- Provide a space for youth;
- Maintain trees for amenity and shading;
- Address Eastern side of central avenue so the street is not too hot for alfresco in Summer;
- Level footpaths - address levelling issues;
- Increase seating space for cafes and alfresco street dining;
- Introduce shared office spaces;
- Include a memorial in the public space;

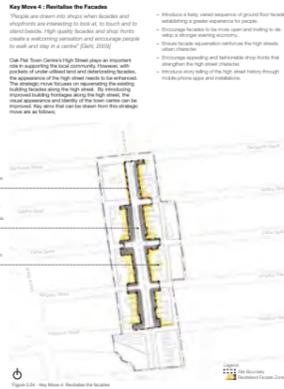
- Address road quality of Laneways;
- Introduce community gardening;
- Introduce professional public art;
- Reduce street clutter;
- Increase footpath widths;
- Introduce incentive scheme and assistance for shop owner to re-vitalised façades;
- Improved signage for parking spaces;
- Use laneways for rear parking;
- Need for more gardening in street;
- Stop council from charging for street use and commanding businesses to remove signage and displays;
- Address concrete area out the front of shop fronts;
- Ensure employer and employees use their laneway parking spaces;
- Address vandalism and safety, especially in laneways.

### Conclusion

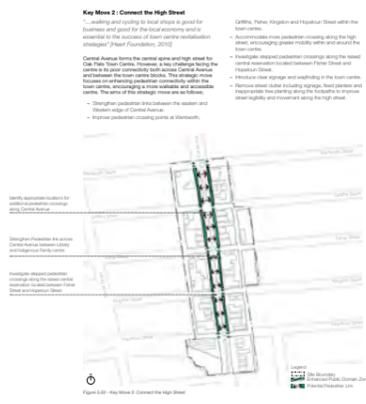
The community kiosk identified a range of ideas, actions and aspirations of the Oak Flats. This feedback will inform the development of the Oak Flats Town Centre Plan and development guidelines.



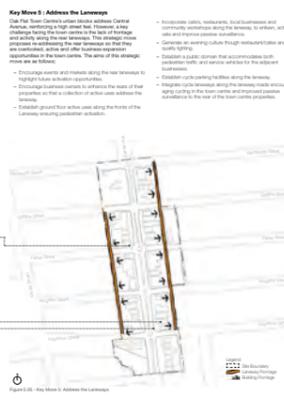
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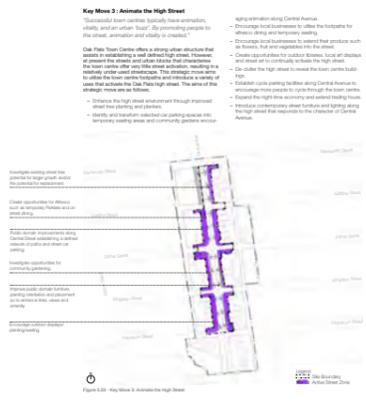
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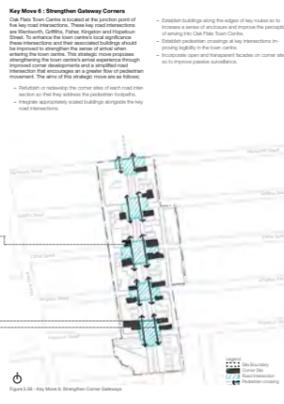
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Figure 7.01 - Kiosk Consultation Package





*Appendix B: Hill PDA: Property Market Appraisal*

## *Appendix B: Property Market Appraisal*



# Oak Flats Town Centre Plan Property Market Appraisal

Prepared for McGregor Coxall

January 2015

## Appendix B to the Oak Flats Town Centre Plan

The Oak Flats Town Centre Plan was endorsed by Council at its meeting of 3 February 2015, as a basis for the review of relevant Council Policy including Shellharbour Local Environmental Plan 2013, Shellharbour Development Control Plan, Shellharbour City Council Section 94 Contributions Plan 2013 and the capital works program.

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### Quality Control

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

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## 1 INTRODUCTION

HillPDA has undertaken a Property Market Appraisal to identify property related implications of forecast economic and residential growth in Oak Flats. The growth forecasts, together with an assessment of local property market characteristics, have informed a high level assessment of demand for appropriate land uses that meet the needs of Council, the community and the market.

In doing so, advice on land use mix and composition will inform the urban design and development options for the Oak Flats Town Centre Plan as being prepared by McGregor Coxall. The options may consider a range of cultural, civic, community, commercial, retail and residential development.

The overall outcomes of this project will inform the review of relevant Council policy including Shellharbour Local Environmental Plan 2013, Shellharbour Development Control Plan, Shellharbour City Council Section 94 Contributions Plan 2013 and the capital works program.

### Local Context

Oak Flats is situated on the south-western shores of Lake Illawarra and to the west of the Shellharbour City Centre. The Oak Flats retail precinct is focussed along Central Avenue. Outside of the precinct light industrial and bulky goods are provided along Industrial Road. The Oak Flats area accommodates the Lakeview Hotel, Oaks Hotel Motel, the NSW Rural Fire Service, as well as public sport and recreation facilities.

Oak Flats is identified as a Village in the Shellharbour retail and commercial centres hierarchy. The Shellharbour Retail & Commercial Centres Study (HillPDA 2008) observed that Oak Flats was underperforming as a retail centre, however its trading levels were sustainable. Oak Flats does not have an anchor tenant or medium sized supermarket. Demand modelling suggests that a medium sized supermarket in the range of 1,000 to 2,000sqm (e.g. Supa IGA) could be viable. Since this report a small format IGA is currently under construction on 76 Central Avenue and will replace the former Welcome Mart supermarket.

## Background Documentation and Consultation

The following documents were reviewed as background to this Property Market Appraisal:

- Shellharbour Retail & Commercial Centres Study, HillPDA (2008);
- Shellharbour Employment Lands Study, HillPDA (2009);
- Illawarra Regional Strategy (2006-2031);
- Shellharbour LGA Retail and Commercial Centres Study (2008);  
and
- Shellharbour LGA Employment Lands Study (2009).

The following individuals were consulted as part of the research process which informed this Appraisal:

- Colliers International Wollongong – Marta Amann (22 September 2014);
- Ray White, Oak Flats – Adam McGrath, (25 September 2014);
- MMJ Commercial, Wollongong – Tim Jones (25 September 2014);  
and
- Peter Taranto Real Estate – Tony Hunt (22 September 2014).

## 2 POPULATION AND HOUSEHOLD CHANGE

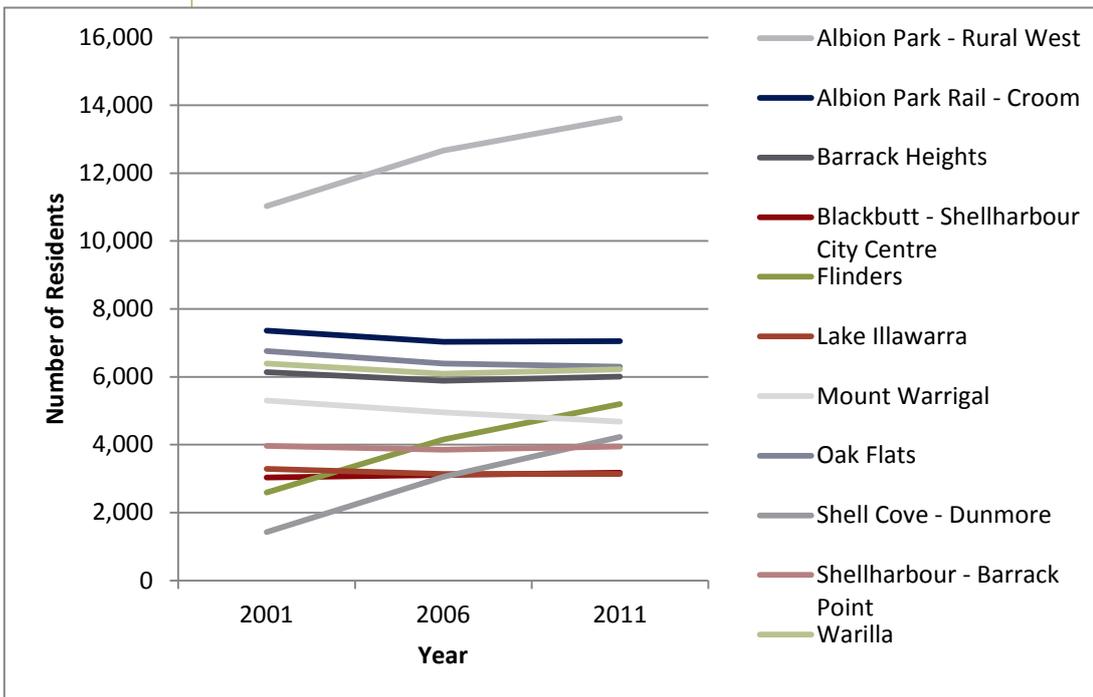
This chapter examines the key population and household characteristics of the resident population of Oak Flats. Comparisons have been made with Shellharbour City where appropriate. The analysis compares historical demographic trends with Council's population and household growth forecasts.

### Historical Population Growth

In 2011 Shellharbour City accommodated 63,605<sup>1</sup> persons, which represented growth of 6,196 persons or average annual growth of 1.0% since 2001.

As depicted in the figure below, Oak Flats has seen a decline in population over the last decade, from 6,759 in 2001 to 6,301 in 2011. This largely because Oak Flats has progressively been built out and now remains an older more established residential area of the City.

**Figure 1 Historical Population Growth in Shellharbour City by Locality (2001-2011)**



Source: Shellharbour profile.id (viewed December 2014)

<sup>1</sup> Source: Shellharbour profile.id. Shellharbour profile.id has sourced the population estimates from the Australian Bureau of Statistics Census Counts, 2001, 2006 and 2011. Please note the profile.id population estimates for 2011 differ from the forecast.id population estimates for 2011. This is because forecast.id estimates are derived from Estimated Resident Population from the Australian Bureau of Statistics, rather than the Census Count. The Estimated Residential Population factors in population missed by the Census and population overseas on Census night.

On the contrary, new residential areas such as Shell Cove and Flinders have experienced strong growth rates. These localities have proved popular due to their proximity to Shellharbour City Centre, the provision of new services (e.g. schools and community facilities) and in some cases their proximity or views to the water.

## Population Projections

The below table outlines the population projections for Shellharbour City by suburb and has been sourced from forecast.id. Compared to other locations within Shellharbour City, there is minimal change anticipated in Oak Flats' population from 2011 to 2031. Blackbutt - Shellharbour City Centre, Shell Cove, and the Rural Balance are anticipated to accommodate the majority of growth.

**Table 1 Shellharbour City Forecast Population Growth (2011 to 2036)**

Location	2011	2016	2021	2026	2031	2036	Change 2036-2011	Avg. Annual % Change
Shellharbour City	66,218	69,514	73,291	77,379	81,335	85,261	+19,043	1.0
Albion Park	13,287	13,317	13,279	13,374	13,541	13,596	+309	0.1
Albion Park Rail	7,236	7,072	6,955	6,935	6,992	7,114	-122	-0.1
Barrack Heights	6,276	6,343	6,285	6,266	6,298	6,354	+78	0.0
Blackbutt - Shellharbour City Centre	3,341	3,465	4,942	5,322	5,349	5,262	+1,921	1.8
Flinders	5,436	6,478	6,475	6,301	6,162	6,066	+630	0.4
Lake Illawarra	3,276	3,326	3,372	3,409	3,430	3,456	+180	0.2
Mount Warrigal	4,878	4,779	4,700	4,678	4,705	4,747	-131	-0.1
Oak Flats	<b>6,623</b>	<b>6,539</b>	<b>6,517</b>	<b>6,541</b>	<b>6,591</b>	<b>6,664</b>	<b>+41</b>	<b>0.0</b>
Rural Balance	1,049	1,315	2,502	5,603	9,378	13,267	+12,218	10.7
Shell Cove	4,203	6,147	7,524	8,124	7,930	7,610	+3,407	2.4
Shellharbour - Barrack Point	4,126	4,224	4,187	4,201	4,241	4,334	+208	0.2
Warilla	6,487	6,509	6,553	6,625	6,718	6,791	+304	0.2

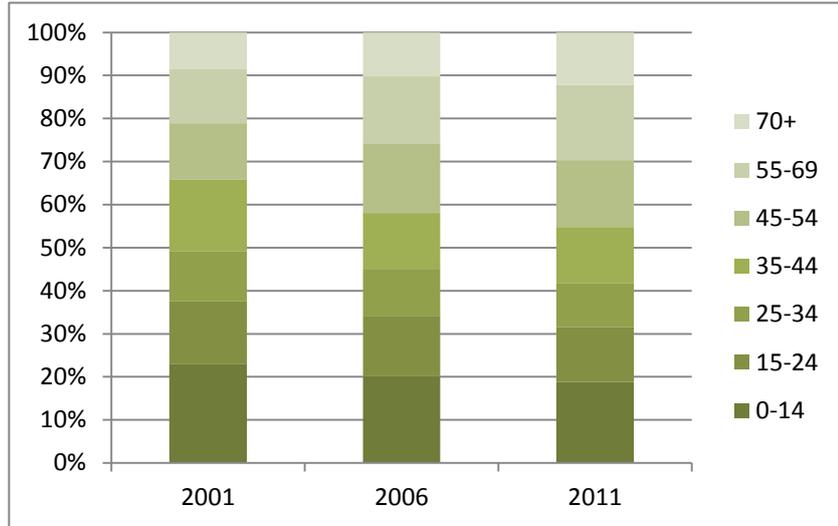
Source: Shellharbour forecast.id (November, 2014)

## Age Profile

In terms of the age profile of Oak Flats (refer to Figure 2):

- The area is aging. The median age increased from 35 years to 40 years over the period 2001 to 2011.
- Growth was particularly noticeable in the 55-69 years age cohort.
- Compared to Shellharbour City, there was a lower proportion of people in the younger age groups (under 15) and a higher proportion of people in the older age groups (65+) in Oak Flats.

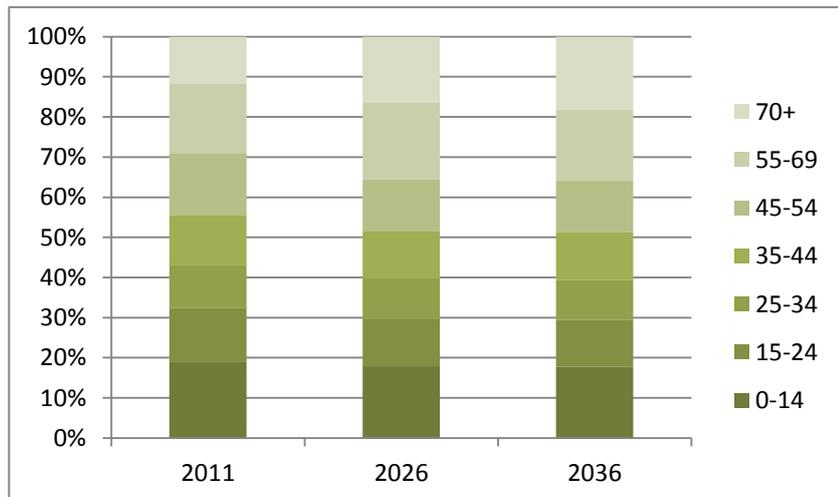
**Figure 2 Oak Flats Historical Age Structure (2001-2011)**



Source: Shellharbour profile.id (viewed November 2014)

Oak Flats is to continue to experience an aging population (see figure below) with the largest increase in persons between 2011 and 2036 forecast to be in ages 70 and above, which is expected to increase by 435 and account for 18% of the total persons in 2036.

**Figure 3 Oak Flats Forecast Change in Age Structure to 2036**



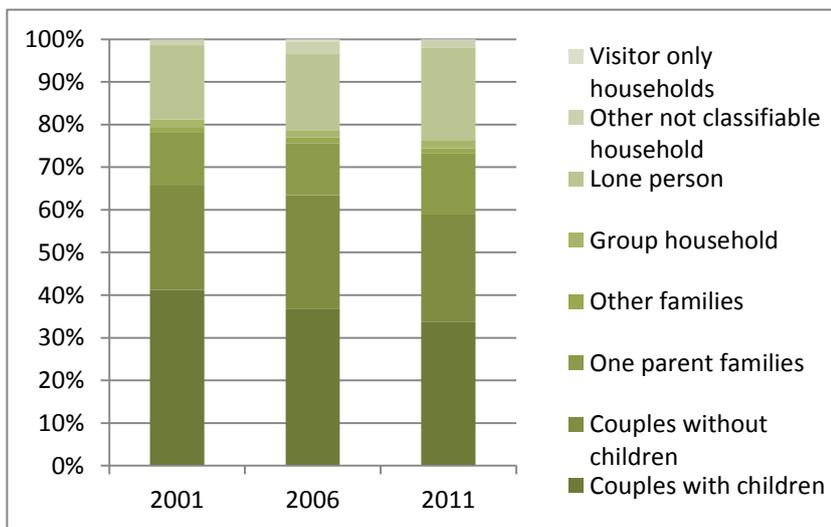
Source: Shellharbour forecast.id (November, 2014)

## Household Structure

There were 2,366 households in Oak Flats in 2011, slightly up from the 2,357 recorded in 2001<sup>2</sup>. In terms of the nature of households (refer to figure below):

- The proportion of couples with children has declined substantial from representing 41% of all households in 2001 to 34% in 2011. This has been offset by an increase in couples without children and lone persons. The above coupled with the aging population suggests there may be an increase in empty nester households.
- The proportion of lone person households experienced high rates of growth over the period. It is expected that this relates to an aging population rather than an increase in single persons relocating to Oak Flats.
- Over the period, the median household size has declined from 2.8 persons in 2001 to 2.6 persons in 2011. Declining household sizes were also experienced in other older established suburbs such as Warilla (2.5 to 2.4 persons).

**Figure 4 Oak Flats Historical Household Structure (2001-2011)**



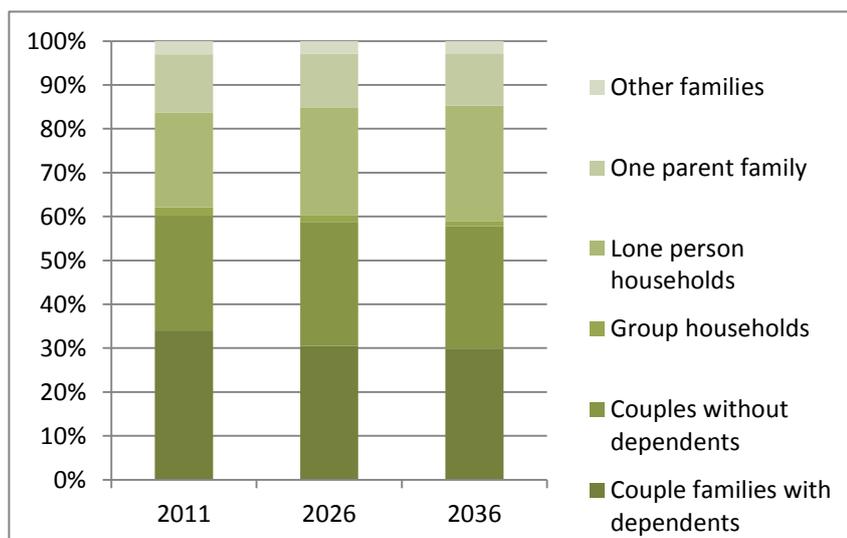
Source: Shellharbour profile.id (viewed November 2014)

The following graph compares forecast household change in Oak Flats. Oak Flats is anticipated to accommodate 2,695 households by 2036<sup>3</sup>. In the medium term to 2026 there is anticipated to be sharp growth in couples without children and lone person households.

<sup>2</sup> Shellharbour profile.id (viewed November 2014)

<sup>3</sup> Shellharbour forecast.id. (November 2014)

**Figure 5 Oak Flats Forecast Change in Household Structure to 2036**



Source: Shellharbour forecast.id (November, 2014)

The tables below sets income data and employment characteristics for the Oak Flats based on the 2011 ABS Census.

**Table 2 Household Income Level Comparisons for Oak Flats**

	Oak Flats	Shellharbour City	Regional NSW
\$0-\$399	12.3%	12.7%	14.8%
\$400-\$799	21.2%	20.4%	22.6%
\$800-\$1,499	23.9%	22.5%	23.7%
\$1,500-\$2,499	21.1%	20.7%	16.7%
\$2,500-\$3,499	9.4%	10.2%	8.4%
\$3,500+	2.4%	3.2%	2.9%
All incomes not stated	9.6%	10.4%	10.8%

Source: ABS Community Profile 2011

**Table 3 Occupation Profile for Oak Flats and Shellharbour City**

Occupation	Oak Flats		Shellharbour City	
	2006	2011	2006	2011
Managers	8%	7%	9%	9%
Professionals	11%	12%	13%	14%
Technicians and Trades Workers	20%	19%	18%	18%

Community and Personal Service Workers	12%	12%	10%	12%
Clerical and Administrative Workers	13%	14%	14%	14%
Sales Workers	12%	12%	12%	11%
Machinery Operators And Drivers	10%	10%	11%	10%
Labourers	13%	12%	12%	11%
Inadequately described	2%	1%	2%	2%

Source: ABS Community Profile 2006 and 2011

From the above tables the following analysis of employment and income characteristics has been derived:

- The proportion of managers and professionals has remained level from 2006 to 2011 at 19% and remains below the Shellharbour City benchmark.
- The proportion of 'blue collar' workers in Oak Flats has declined from 43% in 2006 to 41% in 2011, however remains above the Shellharbour City average.
- Oak Flats contained a higher proportion of households earning less than \$1,499/week and a lower proportion earning greater than \$2,500/week or more when compared to the Shellharbour City Average and is generally in line with the Regional NSW profile.

### 3 RESIDENTIAL ASSESSMENT

This Chapter undertakes an assessment of the residential market in Shellharbour City and specifically in the Oak Flats suburb. It uses published data sources and conversations with local agents to provide an insight into the nature of residential market demand and supply in the Oak Flats locality.

#### Drivers of Demand

Low interest rates and improved business confidence since the Federal election has succeeded in stimulating the property sector in parts of Australia, including NSW, despite uncertainties in the global economy. Increased construction activity is reported<sup>4</sup> and business and consumer confidence is growing in most sectors.

The development of residential is driving more widespread renewal than any other land use at present, representing the 'highest and best use' from a development standpoint. Sales of development sites reflect this sentiment, with sites offering residential development opportunities observed to be principally driving sales activity in the development market.

A period of soft residential activity and growth since 2004 resulted in significant pent-up demand. This is a large contributing factor to the high levels of market activity currently witnessed, from generous premiums paid to assemble and amalgamate development sites to rapid and high level of pre-sales.

Late 2013 was the start of a property bubble in the NSW market evident by significant price rises, increase in development activity, buyer enquires and clearance rates. Residential property prices and investor interest over the 5 years prior to 2013 were quite flat and construction activity was failing to keep up with long term demand (which resulted in average household sizes or occupancy rates increasing slightly in the last inter-censal period). The recent upward trend in the residential market is a correction to the previous 5 years of flat growth.

The key drivers to Illawarra's residential property market are:

- Low interest rates underpinning affordability;
- High cost of ownership leading to a higher propensity for households to rent;

<sup>4</sup> Source: Property Week, Property Council of Australia (October 2013)

- Downsizing of empty nesters;
- Demographic trends leading to declining household sizes;
- Strong population growth from international migration and natural increase; and
- Strong demand from international investors particularly from Asia.

## Market Activity

Oak Flats is a predominately low rise and low density area. Oak Flats is considered an attractive destination for young professionals, young families and investors because of its proximity to Shellharbour City Centre and Shellharbour Village, employment opportunities and the lake.

Drawing from discussions with local agents active in Oak Flats undertaken in September 2014, the following observations are made about the owner occupier market:

- The profile of buyers comprises young professionals and small families, particularly in Shellharbour City Centre. There is also a local market comprising of 1st, 2nd and 3rd home buyers;
- Residential properties in Shellharbour City Centre, Shellharbour Village and Oak Flats have a strong take up rate. It was indicated that properties in these areas are typically absorbed within a few weeks of being listed. For Oak Flats this is attributed to low supply;
- There is strong demand from first-time homebuyers for representation in Oak Flats, Shellharbour Village and Shellharbour City Centre;
- Agents opined that buyers were attracted to Oak Flats due to the suburbs proximity to the lake, Stockland Shellharbour, beaches and employment hubs.
- Selling agents observe that new housing stock in Oak Flats are typically townhouses or villas and there is little financial incentive to buy apartments given that there is an availability of competitively priced detached homes.
- Apartments and units are focussed around Shellharbour City Centre given the proximity to amenities and typically command a premium over Oak Flats. The supply of apartments is extremely limited in Oak Flats which is a function of smaller lot sizes, fragmentation of ownership relatively low house prices.

## Rental Demand

Demand from the investor market drives a notable component of residential development and sales in Shellharbour City Centre, Shellharbour Village and to a lesser extent Oak Flats. 20.8% of households rented in Oak Flats in 2011, which is well below the NSW average and is indicative of the high proportion of home ownership within Oak Flats - largely a function of the lower sale price of homes at Oak Flats, making it affordable to buy.

Discussions with leasing agents revealed that:

- The renter market for Shellharbour City Centre and Shellharbour Village is characterised by a younger demographic, a prevalence of single persons and young couples attracted by the highly accessible nature of this location and proximity to the employment hub; and
- The renter market in Oak Flats is very limited, with the majority of homes predominantly owner occupied owing to the lower price of homes in Oak Flats. Further larger rental markets are typically associated with medium to high density developments and located along major rail nodes.
- The rental market in Oak Flats is predominately singles and young couples who are drawn to area's proximity to Shellharbour and affordable rental prices.

The median unit rental prices for 2-bedroom dwellings in the Shellharbour LGA is \$290 which is \$140 or 33% lower than NSW average (\$430)<sup>5</sup>. This is supported by analysis of realestate.com.au (September 2014) which found only six apartments are currently advertised for rent within Shellharbour Village and the surrounding suburbs (one 1-bedroom unit; four 2 bedroom unit and one three bedroom unit), with only one of these units located in Oak Flats. This is consistent with the local agent's observations that there is a low supply of units in Oak Flats.

## Residential Unit Sales

The median house price for Oak Flats in the year ending September 2014 was \$428,000 – an increase of 16% from the previous year. The

<sup>5</sup> Rent and Sales Report Issue 108, Housing NSW (June 2014)

median unit price for Oak Flats over the same period was \$306,000, which represents a 14% increase from the previous year.<sup>6</sup>

Since 1 March 2014 there have been eight apartment sales in Oak Flats, with an average apartment price of \$305,667. It should be noted that the majority of these apartments are older stock and include townhouses and villas.

Selling agents observe that new housing stock in Oak Flats are typically townhouses or villas rather than apartments owing to size of the lots and affordability in the area. The majority of units are typically located near Shellharbour City Centre which commands a premium over Oak Flats.

### New Apartments in the Local Area

Despite little development in the Oak Flats area, there have been two new developments in the surrounding suburbs which provide good comparisons (shown in the table below). Recent apartments in Barrack Heights and Shellharbour City Centre provide the most up to date prices being achieved in the area. It should be noted however, that units in Shellharbour City Centre are likely to attract a premium when compared to Oak Flats.

**Table 4 Recent Sales Activity of Residential Units in Barrack Heights and Shellharbour**

Development	Unit Type	Sale Price	Comment
Tahlia Apartments 121-125 Lake Entrance Road, Barrack Heights, NSW 2528	1b units (50sqm)	\$280,000 (\$5,600/sqm)	The Tahlia development consists of 18 apartments over 2 levels. Completion is anticipated October 2015. There are currently 10 remaining with 20% sold in the first two weeks on the market (February 2014).
	2b units (67-80sqm)	From -\$310,000 (\$4,600/sqm)	
	3b units (96sqm)	\$360,000 (\$3,750/sqm)	
1 Memorial Drive, Shellharbour City Centre	2b units (80sqm)	\$395,000 (\$4,940/sqm)	This mixed use development is anticipated to be completed by mid 2015 and consists of 6 units, with only 1 three bedroom unit remaining to be sold since the property was marketed in July 2014. Local agents advised that the sale of units was evenly split between owner occupied and investors (holiday home).
	2b units (95sqm)	\$420,000- \$449,000 (\$4,420- \$4,726/sqm)	

Source: HillPDA research September 2014

<sup>6</sup> Residex Report, September 2014

Shellharbour City Centre has some clear advantages over Oak Flats. It provides a far superior retail offer and has a strong market appeal due to the proximity to beaches, community services and employment.

Agents confirmed that although Oak Flats is predominately single storey detached housing, attached housing including new apartments would always be sought after due to the area being within close proximity to the Shellharbour City Centre and more competitively priced. Fast take up rates would be achieved if sale values were priced according to the current market.

Despite the above, apartments are not viable at this stage, meaning that there is insufficient profit for developers to overcome the risk of site acquisition, finance and redevelopment. The design and construction of any apartments in Oak Flats would need to be cost effective in order for such development to viable.

### **Medium Density Development Pipeline**

There are limited medium density developments within the suburb of Oak Flats, with only 20 townhouses and villas in the pipeline over the next few years. These projects are at various stages of commencement, with some under construction.

The following table depicts the type and mix of new residential units planned for delivery in Oak Flats and surrounding area over the next few years.

**Table 5 Strata Residential Supply Pipeline in the City of Shellharbour**

Address	Status	Completion	Dwelling Type	No.	Residential Mix
Pioneer Dr Oak Flats and Cnr Elizabeth Cct and Cubitt Rd, Flinders, OAK FLATS,NSW 2529	Construction	Aug-15	Townhouse	5	3+ bedroom: 100%
27 Fisher St, OAK FLATS,NSW 2529	Approved	Jun-15	Townhouse	3	3+ bedroom: 100%
66 Kingston St, OAK FLATS,NSW 2529	Approved	Dec-15	Villa	4	2 bedroom: 83%
			Townhouse	2	3+ bedroom: 17%
60 Kingston St, OAK FLATS,NSW 2529	Approved	Jun-15	Townhouse	3	3+ bedroom: 100%
7 Parkes St, OAK FLATS,NSW 2529	Approved	Jun-15	Villa	1	3+ bedroom: 100%
			Townhouse	2	
Mixed Use Development: 1 Memorial Dr, SHELLHARBOUR CITY CENTRE,NSW 2529	Approved	May-16	Units	6	2 bedroom: n/a 3+ bedroom: n/a Retail/commercial unit (152sqm); commercial unit (180sqm)
121-125 Lake Entrance Rd, BARRACK HEIGHTS,NSW 2528	Construction	Oct-15	Units	18	1 bedroom: 9%
			Townhouses	4	2 bedroom: 64% 3+ bedroom: 27%
Mixed Use Development: 43-45 Addison St, SHELLHARBOUR VILLAGE, NSW 2529	Approved	Apr-16	Units	13	1 bedroom: 23% 2 bedroom: 38% 3+ bedroom: 38% 4 retail premises (128sqm); Café (62sqm); 2 professional suites (110sqm).
31-35 Chapman Av, MOUNT WARRIGAL,NSW 2528	Approved	Oct-15	Strata Dwellings	8	1 bedroom: 25% 2 bedroom: 75%
19-23 Bradman Av, WARILLA,NSW 2528	Approved	Sep-15	Unit	10	2 bedroom: 100%
<b>Total</b>				<b>79</b>	

Source: Cordell Connect, HillPDA Research (October 2014)

The table above indicates that there are only 79 strata developments planned within City of Shellharbour, with units accounting for only 59%. The low supply of strata developments is indicative of the under-representation and lower demand for strata developments within this locality.

In addition to the above there are large greenfield release areas at Calderwood, Tullimbar and Shell Cove. The below table describes the potential sale prices of dwellings at the planned Shell Cove release area.

**Table 6 Residential Estate Pipeline in Shell Cove**

Development	Sale Price	Unit Type	Comment
Shell Cove Precinct	\$670,000	Detached 4br (284sqm internal)	This Australand development is a large scale project consisting of multiple uses at an approximated total value of \$436m (source: Cordell Connect).
	\$645,000	Attached 4br (214sqm internal)	
	\$550,000	Attached 3br (195sqm internal) Sample size: 24	There is an Aged Care/Seniors living component, with 128 single bedrooms and a further 98 independent living units.  The development will also create marina facilities, deliver open community space and involve work to the wetlands.  Business park with Gross Floor Area (GFA) of 31,000sqm and retail development GFA of 22,000sqm including a beachfront hotel.

Source: Cordell Connect and discussion with Australand.

## Key Findings from Market Research

This Chapter has indicated the following with respect to the residential market in Oak Flats:

- Residential demand emanates from young professionals and young families (including first time home buyers) who are attracted to the central location of Oak Flats and the affordability of the area;
- There is a limited supply of units in Oak Flats, with the majority of the new stock provided in Oak Flats typically townhouses or villas. This coupled with the relatively quick uptake of dwellings within the locality (as advised by local agents) suggests that there may be a latent demand for strata developments within Oak Flats;
- Whilst demand for housing is growing in the greater area, the redevelopment of properties and land from medium to high density within Oak Flats has been limited. Such a predicament is rarely a result of any one factor. Rather the successful redevelopment of an area relates to a range of market and socio-economic conditions including the ability to raise finance, the

availability of land for redevelopment (which relates to the willingness of existing land owners to sell), the cost of construction, the desirability of the Oak Flats by the market and the capacity of development permitted under the current planning controls;

- Whilst Oak Flats is considered a desirable location, the economics of redeveloping to medium density in the Study Area may not be at a stage whereby there is sufficient reward (i.e. profit) for the developer to overcome the risk of site acquisition, finance and redevelopment. This is particularly the case on smaller, more complex sites that are fragmented in ownership; and
- Increasing the Height of Building (HOB) and Floor Space Ratio (FSR) controls for the Oak Flats Town Centre, and/or reduction in on-site parking, may improve the viability of development. Notwithstanding, these incentives or relaxation of development standards, may not be effective in the short term given the limited demand of units and availability of competitively priced detached dwellings. However overtime, we would expect feasibility to improve with population growth, continued scarcity of land and shifting market preference to place rather than space.

## 4 RETAIL AND COMMERCIAL FLOORSPACE ASSESSMENT

This chapter examines retail trends and the market for retail and commercial floorspace in Oak Flats based on a review of Council's strategy for accommodating growth, a demand assessment of shopfront floorspace.

### Retail Trends

Retail is an important sector of the Australian Economy. In 2009-10 retail contributed 4.3% to the Country's Gross Domestic Product (GDP) and in 2011, 11% of Australian employees worked in the retail industry<sup>7</sup>. Recent trends suggest that retail sales are increasing after a decline following the GFC. Retail sales recorded growth of 3.0% between November 2011 and November 2012<sup>8</sup>. However, the rate of growth has not been even across retail sectors.

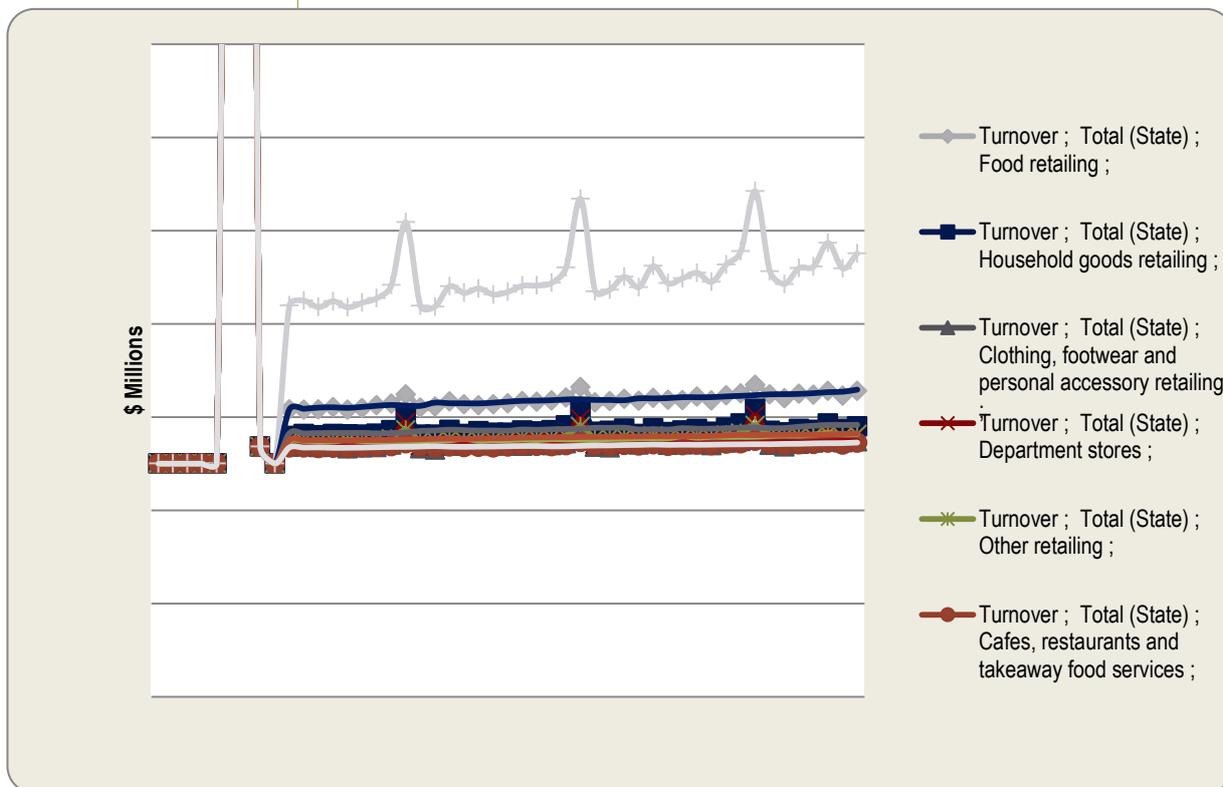
Since November 2008 spending has risen on cafes, restaurants and takeaway food services (31%) and retail food/groceries (18%). Spending on 'other retailing' – which is defined by the ABS as newspapers, books, stationary, flowers, recreational goods, pharmaceutical, cosmetic and toiletry goods – also recorded strong growth (18%). In contrast spending was much weaker in department stores (2%), household goods (6%) and clothing, footwear and personal accessory retailing (3%) over the same period (as shown in the Figure below).

Retailers in these latter non-food discretionary categories are therefore experiencing challenging times, as consumers have become cautious and increased household savings in response to uncertainty surrounding the national and global economy. The Reserve Bank of Australia recorded the savings rate at 10% of disposable income at the start of 2011 which was the highest level in 20 years.

<sup>7</sup> Source: ABS Census 2011

<sup>8</sup> Source: 8501.0 - Retail Trade, Australia, Nov 2012

Figure 6 Retail Trade in Australia November 2008 to November 2012



Source: : 8501.0 - Retail Trade, Australia, Nov 2012 – seasonally adjusted

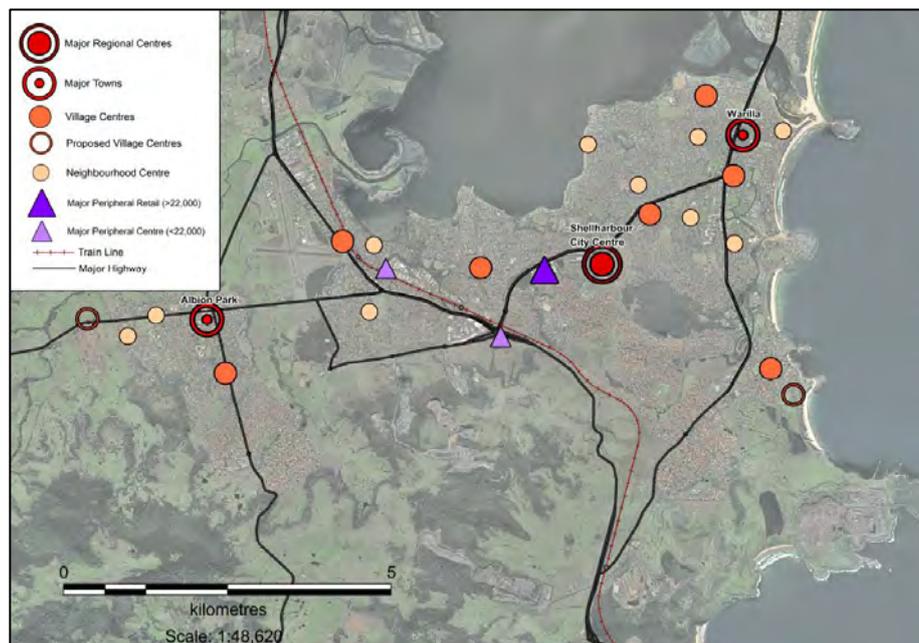
## Role and Function

The retail precinct of Oak Flats stretches some 500m along Central Avenue from the St Vincent de Paul Society (at the intersection of Hopetoun Street), to Oak Flats Primary School (at the intersection of Wentworth Street).

Oak Flats is recognised as a Town under DoPs Illawarra Regional Strategy (2006-31) and Village in the Shellharbour retail and commercial centres hierarchy (2008). Oak Flats provides regular shopping and services to the local area of Oak Flats and hence its trade area includes only those immediately surrounding residents located within the suburb. Whilst the centre only has a relatively small supermarket/grocery store, it does include a strip of shops for daily shopping. Oak Flats is reliant on higher order centres for broader shopping experiences and employment opportunities.

The following map identifies the centres hierarchy in the City of Shellharbour.

Figure 7 Shellharbour City Centres Hierarchy



Source: Map produced by HillPDA using MapInfo 12.0 software and Microsoft Bing © 2013 Microsoft Corporation

### Oak Flats

Oak Flats accommodated some 10,540sqm of Gross Lettable Area (GLA), of which 6,990sqm is attributed to retail and 3,550sqm to commercial services at the time of the survey<sup>9</sup>. Tenants typically included personal services and non-food specialty stores. Vacant space accounted for 757sqm of floorspace at the time of survey. Recent discussions with local agents suggest that vacancy levels have remained the same to date.

### Shellharbour City Centre

The City Centre is defined as a Major Regional Centre under the Draft Illawarra Regional Strategy (2006-31) and is the largest retail centre in Shellharbour City. The Centre developed out of the need for a central retail, commercial and civic centre in the LGA. The City Centre is located in the geographic heart of the urban area just south-west of Warilla, adjacent to Barrack Heights, and east of Albion Park Rail and Albion Park.

The retail precinct of the City Centre is focussed around Stockland Shellharbour, which has recently been redeveloped to a regional shopping centre of over 75,000sqm. The centre includes a new Myer store as well as Target, Kmart, Coles and Woolworths, 220 speciality

<sup>9</sup> Shellharbour Retail & Commercial Centres Study 2008

stores, a new and expanded fresh food precinct, and a community plaza with alfresco dining<sup>10</sup>. Whilst Stockland Shellharbour competes somewhat with smaller centres like Albion Park and Warilla Grove, it also competes with other regional centres such as Warrawong and Figtree.

Stockland Shellharbour is located adjacent to Council's administration building and within close proximity to the 15,630sqm City Plaza which is located along Memorial Drive. Between City Plaza and Stockland are a few strip retail tenancies (along Holm Place and Lamerton Crescent), including a 1,400sqm Aldi Supermarket. The Cygnet Centre is a recently completed commercial office and retail development opposite City Plaza and accommodates a variety of small and medium sized retail and commercial businesses.

The 2008 Retail Study indicated the Shellharbour City Centre accounted for almost 62,700sqm of total GLA, of which 45,000sqm was associated with retail uses and around 11,200sqm with commercial floorspace. The study did not take into account the expansion of Stockland Shellharbour, this has increased total GLA in the Centre to just under 100,000sqm of which around 75,000sqm would be retail uses.

#### Albion Park

To the west of Oak Flats is Albion Park which has been identified as a Major Town in the Shellharbour retail and commercial centres hierarchy. The main attractor is the 5,570sqm Albion Park Village Shopping Centre which is located at the intersection of Russell Street and Terry Street. The centre is anchored by a 3,200sqm Woolworths and includes 13 specialty shops accounting for 1,537sqm of shopfront space<sup>11</sup>. A Woolworths Petrol Station is also on the site which includes a 100sqm convenience store.

#### Albion Park South

Albion Park South, immediate to the south of Albion Park, provides some 2,100sqm of floorspace, of which 1,960sqm is associated to retail uses, and the remainder to the local doctor's surgery. The retail precinct accommodates around 10 tenancies, including 3 takeaway food stores, general clothing store, a sports clothing/school uniform store, hairdresser and appliance repair store.

<sup>10</sup> Source: <http://www.stockland.com.au>

<sup>11</sup> Source: Shopping Centre Directory 2013/14

### Albion Park Rail

Located east of Albion Park and west of Oak Flats, the Albion Park Rail retail precinct has various different clusters of retail and commercial activity stretched along Princes Highway, from the Central Business Park in the south to retailing in the north-west near the intersection with Creole Road and Mallee Street. The centre is relatively small by comparison to other centres in the City, partly due to retailing activity being fragmented along Princes Highway for a relatively long travel distance.

The 2008 Retail Study identified that Albion Park Rail accommodated 4,200sqm of GLA, of which 3,220sqm is attributed to specialty retail stores, and 460sqm to commercial services. A Masters store (13,500sqm) is currently under construction in Central Business Park.

### Ash Avenue/Pine Street Neighbourhood Centre

An Aldi supermarket of around 560sqm has been built in Albion Park Rail. The ALDI was built on a site previously identified in the 2008 Retail Study as the Ash Avenue/Pine Street Neighbourhood Centre. The Neighbourhood Centre is not located on a main road and is within a residential enclave of Albion Park Rail. That said, given the nature and offer of Aldi they do draw from a large trade area and are destinations in their own right.

### Warilla

Warilla provides two separate retail/commercial clusters which are described as follows:

- The enclosed Warilla Grove Shopping Centre is provided in the north of the suburb (corner of Shellharbour Road and Veronica Street. The centre provides over 11,600sqm of retail floorspace and is anchored by a Woolworths (4,229sqm) and Bi-Lo (2,399sqm) as well as 35 specialty stores; and
- Traditional strip retailing is provided along George Street and contains some 15,050sqm of retail and commercial floorspace (excluding community and utility uses). Of this, 49% (7,755sqm) is dedicated to commercial floorspace, whilst only a third (5,357sqm) is attributed to retail uses. The remainder is representative of automotive, recreational/cultural, or utility associated floorspace.

### Proposed Centres

There is a mixed use residential development in Tullimbar currently under construction that has been explicitly designed as an alternative

to low density urban sprawl. Initial plans for Tullimbar incorporated a town centre which would accommodate 3,300sqm of retail and 4,770sqm of commercial floorspace. The design of the centre was based on 'traditional village life' with a mix of shops, café's, taverns, a supermarket, town hall, sports oval, pavilion, and church. The centre is anticipated to be completed by 2016.

The release area of Calderwood proposes a future town and village centre. The town centre will be anchored by larger supermarkets, and include specialty stores, cafes and restaurants. The village centre is planned to include a supermarket and local shops to cater for every day needs. The exact timeframe for delivery of the centres is unknown, however it is acknowledged that the stage one subdivision is to enable the delivery of a future village centre.

A retail/commercial/hotel/community development is proposed as part of the planned Shell Cove Boat Harbour Precinct. The retail precinct will comprise:

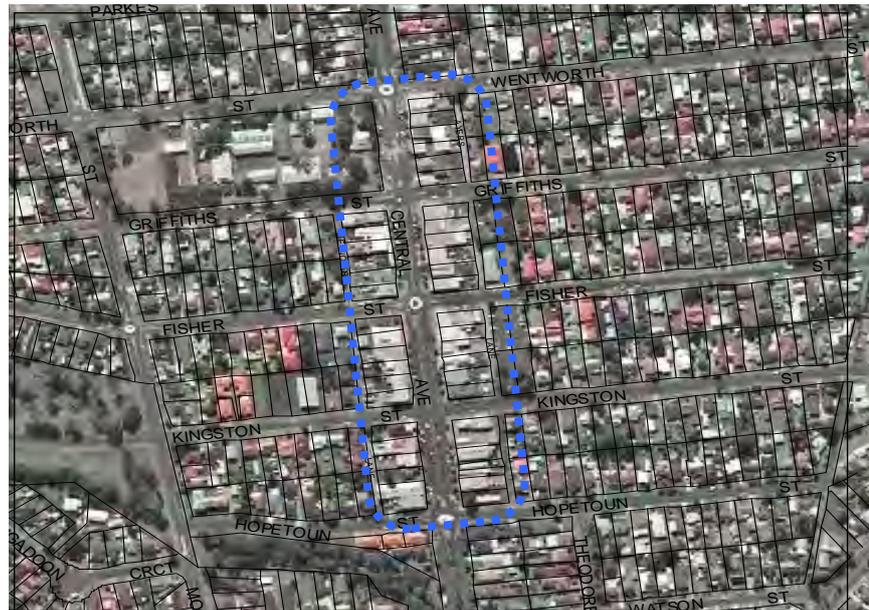
- A supermarket;
- Other retail floorspace;
- Commercial floorspace;
- Community facilities; and
- Tourist retail (including a tavern).

The development is still in early planning, with the exact timeframe for delivery unknown.

## Retail Context

Oak Flats's retail and commercial hub is focussed along Central Avenue. The aerial photo below identifies the retail core of the Oak Flats retail precinct.

**Figure 8 Oak Flats Retail Core**



Source: Google Maps

## Floorspace Supply

Total Gross Lettable Area in the Oak Flats retail precinct is currently around 10,630sqm (excluding community uses), of which 7,080sqm is being used for the retail of goods. The table below indicates the retail floorspace and types of retail businesses associated with Oak Flats.

**Table 7 Oak Flats Floorspace**

Shop Use	GLA (sqm)	No. Businesses
Supermarket	450	1
Convenience Store	133	1
Service Station Convenience Store	100	1
Discount Department Store	-	-
Specialty Food	556	4
Specialty Non Food	803	8
Clothing	572	3
Café & Restaurants	423	4
Take Away Food	520	5
Personal Services	1,319	11
Second Hand Goods	809	2
Bulky Goods	638	3
Vacant Retail	757	3
<b>Total Retail</b>	<b>7,080</b>	<b>46</b>
Commercial -General	912	6
Commercial -Finance	511	3
Commercial-Medical	1,436	11
Commercial-Real Estate	399	2
Commercial-Travel	68	1
Commercial-Legal	223	2
Commercial-Vacant	-	-
<b>Total Commercial</b>	<b>3,549</b>	<b>25</b>
Community	646	4
<b>Total Floorspace</b>	<b>11,275</b>	<b>75</b>

Source: Shellharbour Retail & Commercial Centre Study 2008. Floorspace has been updated to reflect current floorspace using Cordell and discussions with agents. The above figures also include the new IGA of 450sqm.

During the time of the survey<sup>12</sup> Oaks Flats had around 46 individual shops of which 3 were vacant. There were 75 shop front premises on the main street, of which 33% were used for commercial services, mainly by medical practitioners.

Since the survey the former 360sqm Welcome Mart on Central Avenue is in the process of being replaced by a small format IGA of some 450sqm and will be the only grocery store within the retail precinct. A desktop review based on Cordell records has indicated that there have been no significant retail or commercial developments that have occurred over the period of 2008 and 2014 and discussions with local agents have also suggested the vacancy rate is generally in line with the previous 2008 levels.

There is no main anchor tenant in the town centre and there are no indoor retail centres or enclosed shopping centres. There still remains little shop top commercial/retail space.

### **Retail Performance**

Oak Flats overall performance is on the low side particularly post the closure of the Welcome Mart supermarket, coupled with the redevelopment of Stockland Shellharbour, however trading remains sustainable. It has a small trade area due to its proximity to Shellharbour City Centre and Stocklands Shellharbour. The expansion of Stockland Shellharbour in close proximity to Oak Flats also constrains its potential expansion, with local agents advising that it has negatively impacted on Oak Flats performance. Due to the urban design and layout of the centre with its 'main street' theme, Oak Flats has the potential to be quite an attractive centre, although it lacks an anchor tenant such as a medium to large supermarket.

## **Shopfront Floorspace Demand**

In order to determine demand for shopfront floorspace in Oak Flats and the impact this will have on land uses in the centre, HillPDA has reviewed and updated the retail demand assessment. In doing so, HillPDA adopted the following methodology:

- Identify a resident trade area for the Oak Flats town centre;
- Determine the resident population of the trade area based on Council Forecasts and Bureau of Transport Statistics (BTS). Determine the total amount of resident retail expenditure

<sup>12</sup> Shellharbour Retail & Commercial Centre Study 2008.

generated by the trade area based on the ABS Household Expenditure Survey and MarketInfo data<sup>13</sup>;

- Escalate total resident retail expenditure from 2012 to 2031 based on population growth (adopting Council population forecasts) and growth in real retail spend (assumed at 1.1% per annum);
- Apply capture rates to available expenditure by retail store type reflecting the proportion of spend that could be retained by retail stores within the trade area; and
- Determine demand for retail floorspace (sqm GLA) in the trade area by applying target sales turnover rates (retail sales per square metre based on industry benchmarks) to total available retail.

### Identification of the Trade Area

It is recognised that the resident trade area of any retail centre is implicated by a range of factors including:

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

Based on the above, HillPDA has adopted a Main Trade Area (MTA) which covers the suburb of Oak Flats as shown in the map below.

<sup>13</sup> MarketInfo combines the data from the Census, Household Expenditure Survey and other sources to derive total expenditure by commodity type. This data, which was validated using taxation and national accounts figures, quantifies around 14% more expenditure than the ABS HES Survey. The ABS Retail Survey 1998-99 (Cat No. 8624.0) provides a cross tabulation of store type (defined by ANZIC), by commodity type. Multiplying the percentages in the cross tabulation by total dollars spent generates household expenditure by retail store type.

**Figure 9 Oak Flats MTA**



Source: Shellharbour 2013

### Trade Area Population

For the purpose of this analysis HillPDA have adopted Council forecasts over the period of 2011 and 2031, with the population projections decreasing from 6,623 in 2011 to 6,591 in 2031.

**Table 8 Oak Flats Forecast Population Growth (2011 to 2031)**

1. Year	2011	2016	2021	2026	2031	Change 2031-2011	Avg. Annual Change
Oak Flats Population Projections	6,623	6,539	6,517	6,541	6,591	-32	-0.0%

Source: Shellharbour forecast.id (November, 2014)

### Expenditure for Retail Space

Retail expenditure was sourced from:

- ABS Household Expenditure Survey 2003-04 which provides household expenditure by broad commodity type by household income quintile; and
- The MarketInfo 2012 database which is generated by combining and updating data from the Population Census and the ABS Household Expenditure Survey (HES) using “microsimulation modelling techniques”.

MarketInfo combines the data from the Census, HES and other sources to derive total HES by commodity type. This data, which was validated using taxation and national accounts figures, quantifies around 12% more expenditure than the ABS HES Survey.

**Table 9 Forecast Retail Expenditure Generated by Oak Flats Residents (\$m)**

YEAR	2012	2016	2021	2026	2031
Food & Groceries	29.1	30.1	31.7	33.6	35.7
Liquor Take-Away	4.2	4.4	4.6	4.9	5.2
Take-Away Food	4.9	5.0	5.3	5.6	6.0
Apparel	7.0	7.2	7.6	8.1	8.6
Homewares & Manchester	1.7	1.7	1.8	1.9	2.1
Bulky Goods	12.3	12.7	13.4	14.2	15.1
Other Goods	10.7	11.1	11.7	12.4	13.2
Selected Personal Services	2.1	2.2	2.3	2.4	2.6
Liquor Consumed On Premises	1.8	1.9	2.0	2.1	2.2
Meals in Pubs, Clubs, Restaurants	4.4	4.5	4.8	5.1	5.4
<b>TOTAL</b>	<b>78.2</b>	<b>80.8</b>	<b>85.1</b>	<b>90.2</b>	<b>96.0</b>

Source: HillPDA using Marketinfo 2012

The above forecast allows for 1.1% per annum real growth in retail spend per capita which is in line with historic growth from 1986 to 2010 and reflects growing affluence<sup>14</sup>.

The ABS Retail Survey 1998-99 (Cat No. 8624.0) provides a cross tabulation of store type (defined by ANZIC), by commodity type. Multiplying the percentages in the cross tabulation by total dollars spent generates household expenditure by retail store type. Turnover by retail store type generated by household expenditure is provided in the table below.

<sup>14</sup> Hill PDA Estimate based on data from ABS including Retail Sales, Consumer Price Index and Historical Population Statistics.

**Table 10 Retail Expenditure by Retail Store Type (\$m)**

YEAR	2012	2016	2021	2026	2031
Supermarkets & Grocery Stores	27.4	28.3	29.8	31.6	33.4
Specialty Food Stores	6.4	6.7	7.0	7.4	7.9
Fast-Food Stores	5.2	5.3	5.6	5.9	6.3
Restaurants, Hotels and Clubs*	6.2	6.4	6.7	7.1	7.6
Department Stores	5.7	5.9	6.2	6.5	6.9
Apparel Stores	5.4	5.6	5.9	6.3	6.6
Bulky Goods Stores	12.9	13.3	14.0	14.9	15.7
Other Personal & Household Goods Retailing	10.5	10.8	11.4	12.1	12.8
Selected Personal Services**	2.1	2.2	2.3	2.4	2.6
<b>Total Retailing</b>	<b>81.7</b>	<b>84.5</b>	<b>88.9</b>	<b>94.3</b>	<b>99.6</b>

Source: \* Turnover relating only to consumption of food and liquor (excludes all other types of revenue such as accommodation, gaming and gambling)

\*\* Selected Personal Services includes hair and beauty, laundry, clothing hire and alterations, shoe repair, optical dispensing, photos and hire of videos

Source: HillPDA Estimate using data from Marketinfo 2012 and ABS Retail Survey 1988-99 (Cat 8624.0)

The expenditure totals in the above two tables do not quite equate. This is because some expenditure is lost to non-retailers (such as internet shopping) and some revenue enjoyed by retailers is not household expenditure related including wholesale trade and the hire of equipment for example. As shown in the above table the suburb of Oak Flats generated \$81.7 million of retail expenditure in 2012, including \$27.4 million in Grocery and Supermarket retailing. Retail expenditure is expected to increase to \$99.6 million by 2031 (an increase of 22%). Of the expenditure generated within Oak Flats, a substantial proportion would be captured by Shellharbour City, including Stockland Shellharbour. There are opportunities for Oak Flats to retain a greater proportion of this expenditure through the inclusion of a medium sized supermarket (between 1,000sqm-2,000sqm) and improving the current retail mix. HillPDA adopted a range of capture rates as shown in the table below. The capture rates do not represent the current situation, but rather they are

aspirational targets that take account of the intended role and function of Oak Flats and an improved retail mix.

**Table 11 Oak Flats Assumed Capture Rates<sup>15</sup>**

Retail Store Type	Main Trade Area
Supermarkets & Grocery Stores	65%
Specialty Food Stores	60%
Fast-Food Stores	50%
Restaurants, Hotels and Clubs	50%
Department Stores	0%
Clothing Stores	15%
Bulky Goods Stores	15%
Other Personal & Household Goods Retailing	30%
Selected Personal Services	60%

Source: HillPDA 2014

Based on the above capture rates the proportion of resident retail spend retained by the Oak Flats Main Trade Area is shown in the following table. The analysis indicates that retail turnover available to retail facilities within the Oak Flats Main Trade Area is equivalent to \$35.6 million in 2016, equivalent to around 42% of total available expenditure. By 2031 retail turnover is forecast to increase to \$42.1 million, an increase of \$6.5 million over the period.

**Table 12 Potential Capture of Resident Expenditure in Oak Flats to 2031 (\$m)**

YEAR	2012	2016	2021	2026	2031
Supermarkets & Grocery Stores	17.8	18.4	19.4	20.5	21.7
Specialty Food Stores	3.9	4.0	4.2	4.5	4.7
Fast-Food Stores	2.6	2.7	2.8	3.0	3.1
Restaurants, Hotels and Clubs*	3.1	3.2	3.4	3.6	3.8

<sup>15</sup> Data relating to capture rates on the current situation is not available, however we would expect capture rates to be substantially lower than those indicated in Table 11, particularly for the 'Supermarket and Grocery Stores' category given the limited offer (i.e. the capture rate would be well below the 65% assumed in the current analysis).

Department Stores	0.0	0.0	0.0	0.0	0.0
Apparel Stores	0.8	0.8	0.9	0.9	1.0
Bulky Goods Stores	1.9	2.0	2.1	2.2	2.4
Other Personal & Household Goods Retailing	3.1	3.2	3.4	3.6	3.8
Selected Personal Services	1.3	1.3	1.4	1.4	1.5
<b>Total Retailing</b>	<b>34.5</b>	<b>35.6</b>	<b>37.5</b>	<b>39.8</b>	<b>42.1</b>

Source: HillPDA 2014

### Demand for Shopfront Floorspace

Demand for retail floorspace is forecast by applying target retail turnover density (RTD) rates to expenditure by target captured rates. Retail turnover density is measured by dollars per square metre per annum (\$/sqm/ann). Target RTDs vary depending on retail store type and composition.

The following table forecasts demand for retail floorspace (sqm) to 2031 based on the application of these target turnover rates to captured spend.

**Table 13 Demand for Retail Floorspace in the Oak Flats Main Trade Area to 2031 (sqm GLA)**

YEAR	Target Rate	2012	2016	2021	2026	2031
Supermarkets & Grocery Stores	10,000	1,779	1,804	1,852	1,915	1,973
Specialty Food Stores	7,500	515	522	536	555	571
Fast-Food Stores	7,500	344	348	358	370	381
Restaurants, Hotels and Clubs	4,500	688	697	716	740	768
Department Stores	3,500	0	0	0	0	0
Clothing Stores	5,000	163	165	170	176	181
Bulky Goods Stores	3,500	552	559	574	594	612
Other Personal & Household Goods Retailing	4,500	697	707	726	751	773
Selected Personal Services	3,200	391	397	407	421	437
<b>Total Retailing</b>	<b>6,719</b>	<b>5,129</b>	<b>5,200</b>	<b>5,339</b>	<b>5,520</b>	<b>5,696</b>

Source: ABS Retail Survey 1998-99 (escalated to 2007 dollars), JHD Retail Averages, Shopping Centre News, HillPDA and various consultancy studies

The results indicate the Main Trade Area demands approximately 5,129sqm (GLA) of retail floorspace in 2012, increasing to around 5,700sqm (GLA) by 2031. By comparison, based on the results of the 2008 Retail Study and known additions to the supply side during that time (e.g. IGA supermarket), HillPDA estimates there is around 7,000sqm of retail floorspace within the Main Trade Area.

Please note that the above target RTDs are industry benchmark or average levels. Retailers can trade sustainably at lower levels - as much as 25% or even 30% lower. In fact most of the retailers in Oak Flats are probably trading at considerably lower levels than shown in the above table given the high level of floor space in the centre.

The following table compares the estimate of current supply of retail floorspace to demand in 2031. The results indicate the Trade Area could be oversupplied by around 1,123sqm of retail floorspace in 2016. Despite this and the opening of small format IGA, there is an undersupply of supermarket and grocery floorspace and restaurant floorspace.

**Table 14 Comparison of Retail Supply to Demand in the Oak Flats Main Trade Area (sqm GLA)**

Retail Store Type	Supply 2014	2016	2021	2026	2031
Supermarkets & Grocery Stores	683	-1,121	-1,169	-1,232	-1,290
Specialty Food Stores	556	34	20	1	-15
Fast-Food Stores	520	172	162	150	139
Restaurants, Hotels and Clubs	423	-274	-293	-317	-345
Department Stores	0	0	0	0	0
Clothing Stores	1381	1,216	1,211	1,205	1,200
Bulky Goods Stores	638	79	64	44	26
Other Personal & Household Goods Retailing	803	96	77	52	30
Selected Personal Services	1,319	922	912	898	882
Vacancy	757	-	-	-	-
<b>Total Retailing</b>	<b>7,080</b>	<b>1,123</b>	<b>984</b>	<b>803</b>	<b>627</b>

Source: HillPDA 2014

Further to demand for retail tenancies is demand for shopfront space occupied by non-retail commercial uses. There are different types of commercial space such as:

- Non-retail in shopfront space which includes activities such as travel agents, banks, doctors suites and so on. These tend to make up around 5 – 7% of retail shopfront floorspace in a retail centre; and
- Non-shopfront commercial spaces that encompass stand-alone commercial buildings and shop-top commercial offices above shopfront retail – however it is unlikely this type of commercial office would be demanded in Oak Flats.

As a general rule, an additional 10-15% of specialty stores should be provided to accommodate these uses with a further 3-4% of specialty stores assumed to be vacant at any one time. Based on these assumptions, this would increase shopfront floorspace demand in the Main Trade Area to 5,767sqm (GLA) in 2012 increasing to 6,405sqm (GLA) in 2031.

Based on the results of the 2008 Retail Study and known additions to the supply side during that time, it is estimated there is around 10,600sqm of total retail and commercial shopfronts in Oak Flats in 2014. Should no additions occur, this will result in an oversupply of around 4,780sqm by 2016, decreasing to 4,220sqm by 2031.

## Implications

An important objective of any retail assessment is to achieve the right level of shopfront retail and commercial floorspace. An undersupply of floorspace creates the following issues:

- It reduces the range and availability of shopping opportunities and commercial services for customers and can lead to considerable escape expenditure to other centres as customers seek greater quantity, quality and convenience;
- It can lead to longer travel times for shopping and increased car use; and
- It results in increased congestion, parking difficulties and loss of convenience.

Correspondingly, oversupply of shopfront retail and commercial floorspace results in:

- High vacancies, low rents and neglect of retail centres;
- Inefficient use of land and other resources; and

- An uninviting appearance and ambience due to a lack of customers.

## Market Activity

Drawing from discussions with local agents active in Oak Flats undertaken in September 2014, the following observations are made about the retail market:

- The retail market is performing satisfactorily however has somewhat suffered from the redevelopment of Stockland Shellharbour;
- There could be demand for retail space if provided at a reasonable price, however the demand is not strong nor is it driving the market within this area;
- Historically, the demand for retail was generally driven by small local businesses; and
- Over the past 12 months around the town centre there has been approximately three shopfronts that have remained vacant over this period and this largely because of their dated appearance and smaller size.

## Sale and Rental Prices of Retail Developments

HillPDA undertook a desktop review of recent sale and rental prices of retail developments within Oak Flats<sup>16</sup>. The below tables outline the average sales and rental price of retail developments within Oak Flats. Due to the limited supply we have also considered sales within neighbouring suburbs Shellharbour Village, Shellharbour City Centre and Warilla which serve as good comparisons.

The sale prices for retail floorspace typically range between \$2,000 to \$3,165 per sqm within the Oak Flats and the surrounding area, with Shellharbour Village and Shellharbour City Centre commanding a slightly higher premium. Retail floorspace as part of a mixed-use development (for example 7/20-26 Addison Street, Shellharbour Village and 75 Cygnet Avenue, Shellharbour City Centre) were found to achieve significantly higher sales prices (i.e. in the range of \$6,091 to \$6,522). Retail floorspace within Warilla typically attracted lower sale prices compared to other comparable suburbs, which is reflective of the areas' more limited retail offer and removed nature.

<sup>16</sup> HillPDA also liaised with local agents regarding sale and rental prices within Oak Flats, who advised that there were unable to comment or confirm the average rental or sale price of retail developments in Oak Flats due to the limited supply of new stock.

The net rental price within Oak Flats, Shellharbour City Centre and Warilla ranges from \$150-\$297 per sqm.

The Oak Flats properties considered in the tables below were older stock and thus would be expected to achieve lower sales and/or rental return than that of new stock. As such we would expect new stock within the Oak Flats Town Centre to achieve sales prices greater than \$3,000 per sqm and rental prices greater than \$220 per sqm. However, as indicated by local agents, prices for retail floorspace at Oak Flats would need to remain financially economical in order to compete with the nearby Shellharbour City Centre, which currently offers a stronger retail offer (including full line Coles and Woolworths supermarkets, Myer and Target).

**Table 15 Retail Sales with Oak Flats, Shellharbour Village, Shellharbour City Centre and Warilla over the last 12 months**

Address	Suburb	Date	Price	Area	\$/sqm
58 Central Avenue	Oak Flats	4/06/2014	\$750,000	265	\$2,830
64 Central Avenue	Oak Flats	1/08/2013	\$750,000	370	\$2,027
Unit 7/20-26 Addison Street	Shellharbour Village	14/05/2014	\$450,000	69	\$6,522
Unit 11/20-26 Addison Street	Shellharbour Village	23/09/2013	\$115,000	37	\$3,108
25 Addison Street	Shellharbour Village	13/02/2013	\$1,700,000	887	\$1,917
35 Addison Street	Shellharbour Village	23/08/2013	\$750,000	237	\$3,165
35a Addison Street	Shellharbour Village	30/07/2013	\$750,000	237	\$3,165
5 Burra Place	Shellharbour City Centre	18/06/2013	\$6,510,000	3,148	\$2,068
75 Cygnet Avenue	Shellharbour City Centre	31/01/2014	\$670,000	110	\$6,091
2 Memorial Drive	Shellharbour City Centre	8/07/2013	\$6,060,000	2,271	\$2,668
10 Beverley Avenue	Warilla	4/03/2013	\$285,000	108	\$2,639
Shop 3 /12-14 Beverley Avenue	Warilla	4/05/2014	\$218,000	93	\$2,344
Shop 2/12-14 Beverley Avenue	Warilla	13/09/2013	\$235,000	77	\$3,052
12 George Street	Warilla	11/10/2013	\$1,610,000	1212	\$1,328
15 George Street	Warilla	27/03/2013	\$345,000	185	\$1,865
119 Shellharbour Road	Warilla	20/03/2014	\$540,000	247	\$2,186
144 Shellharbour Road	Warilla	12/11/2013	\$1,950,000	1,590	\$1,226

Source: HillPDA Research 2014 , PIM

**Table 16 Rental Prices within Oak Flats, Shellharbour City Centre and Warilla over the last 12 months**

Address	Suburb	Date	Rent p.a	Area	\$/sqm
58 Central Avenue	Oak Flats	4/06/2014	\$57,322	265	\$216
64 Central Avenue	Oak Flats	1/08/2013	\$71,500	370	\$193
5 Burra Place	Shellharbour City Centre	18/06/2013	\$801,617	3,148	\$255
2 Memorial Drive	Shellharbour City Centre	8/07/2013	\$611,118	2,271	\$269
10 Beverley Avenue	Warilla	4/03/2013	\$24,350	108	\$225
Shop 2/12-14 Beverley Avenue	Warilla	13/09/2013	\$22,872	77	\$297
12 George Street	Warilla	11/10/2013	\$182,000	1212	\$150
15 George Street	Warilla	27/03/2013	\$36,060	185	\$195
144 Shellharbour Road	Warilla	12/11/2013	\$240,000	1,590	\$151

Source: HillPDA research 2014, PIM

## Key Findings

The key findings of the 2014 determination of shopfront floorspace demand are:

- There is currently an undersupply of supermarket and grocery store floorspace which is anticipated to be equivalent to around 1,121sqm<sup>17</sup> by 2016; and
- Market research indicates there is limited demand for retail and commercial shopfronts in Oak Flats and this is unlikely to change. Shellharbour City Centre will continue to attract key retailers and service businesses, particularly whilst land and tenancies within the City Centre are available and are competitively priced. Oak Flats has the potential to capture a greater proportion of the MTA expenditure through the inclusion of a medium sized supermarket and improvement in the retail mix.

<sup>17</sup> This takes into account the 450sqm IGA currently under construction.

## 5 KEY IMPLICATIONS FOR OAK FLATS

The key implications and outcomes of this Report are:

- Issues surrounding the viability of higher density residential in regional town centres are not uncommon. Whilst many regional towns recognise the benefits of incorporating residential development into their town centres, they struggle to prove viable due to lower socio demographic profiles, lower income levels, lower end sales values, costly construction and less expensive housing alternatives including existing and lower-cost detached project homes;
- Historically, there has been limited pressure on infill development in Oak Flats given significant residential development land availability in greenfield areas. Residential development in Oak Flats is competing with available offer in Shell Cove, Blackbutt and Shellharbour City Centre – which are proving more popular locations by new residents and downsizers;
- Increased pressure is likely to be placed on aged services or on residential product appropriate for seniors given forecast aging of the population. However for people to downsize there needs to be either a price differential or significant lifestyle and amenity improvements (e.g. seniors who want to downsize and be able to walk to retail/community services), however there is not a big price differential between detached homes and new townhouse development in Oak Flats. Further selling agents observe that there is little financial incentive to buy apartments given that there is availability of competitively priced detached homes;
- New apartments are not viable at this stage since there is insufficient profit for developers to overcome the risk of site acquisition, finance and redevelopment. The design and construction of apartments in Oak Flats would need to be cost effective in order for such development to be viable;
- Further to the challenge of achieving higher densities in Oak Flats will be convincing new residents to move into a residential apartment or townhouse over purchasing a competitively priced detached dwelling in the locality;
- Increasing the Height of Building (HOB) and Floor Space Ratio (FSR) controls for the Oak Flats Town Centre, and/or reduction in on-site parking, may improve the viability of development. Notwithstanding, these incentives or relaxation of development standards, may not be effective in the short term given the

limited demand of units and availability of competitively priced detached dwellings. However overtime, we would expect feasibility to improve with population growth, continued scarcity of land and shifting market preference to place rather than space;

- The DCP stipulates that for Multi-Dwelling Housing/ Shop-Top Housing/Residential Flat Buildings/Mixed Use Development the following car parking requirements apply:
  - Residential car parking: a minimum of 1 car space/ 1 bedroom and 1.5 spaces / 2+ bedrooms
  - visiting car-parking: 0.25 space / one bedroom dwelling and 0.5 space / two + bedroom dwellings

Reducing the car parking requirements associated with these types of residential developments, particularly in light of the Subject Site's proximity to Oak Flats Station, would reduce developmental costs (with construction costs typically ranging from \$25,000 to \$45,000 per car space) and in turn could improve the viability of development at Oak Flats.

Notwithstanding we would still recommend an adequate provision of residential car parking at the Oak Flats Town Centre as this will add value and improve the overall attractiveness of apartments at Oak Flats. The majority of 2-bedroom buyers would strongly prefer one car space. 1.5 car spaces is excessive for most buyers. There is a market for a small component of units to have no car space. Visitor spaces add no measurable value to the apartments given the ample provision of street parking. For development in the town centre, immediately around it and towards the train station we recommend the following minimum spaces:

- 0.5 spaces per 1-bedroom unit;
- 1.0 spaces per 2-bedroom unit;
- 1.5 spaces per 3-bedroom unit; and
- No visitor spaces

Developers of course can always provide more spaces than the minimum;

- Oak Flats currently works as a convenience based centre – residents do not spend a significant amount of time within the centre;

- Improving the gateway into the centre (i.e. creating a sense of arrival) would encourage visitors or those passing through to stop;
- Given the layout of the centre along a main street, Oak Flats should consider a revitalisation strategy, with some beautification measures implemented which encourage more outdoor seating and attracting more eating places; and
- Oak Flats does not have an anchor tenant or medium sized supermarket, and this should be encouraged in the short term, with expenditure modelling indicating a supermarket in the range of around 1,500sqm (e.g. IGA Supa) would be viable.

## 6 DEFINITION OF TERMS

**Accessibility** – Refers to the extent to which people have access to employment, goods and services, either through proximity or transport links to places.

**Gross Floor Area** – Gross Floor Area (GFA) is Gross Lettable Area plus common mall spaces (including amenities), centre management area and plant rooms. In a typical indoor centre with at least one department store and supermarket the GLA makes up around 72% to 75% of the GFA.

**Gross Lettable Area** – Gross Lettable Area (GLA) is the common measure used for lease and for other descriptive purposes in retail centres and shops. It is usually defined as the total area of the lease and includes back of house, storage, offices and mezzanine levels but usually excludes loading docks and common mall spaces. GLA is more commonly used in the industry because it defines the area of the lease. Shopping centre owners report rents and turnover figures on the leased area and benchmarking is usually made on the GLA. For the purpose of HillPDA's demand modelling all floor areas expressed are in GLA.

**Household** – One or more persons that usually reside in the same private dwelling.

**Journey to Work** – Comprises datasets which analyse employment distribution and trends, including commute patterns.

**Main Trade Area** – In retail development, a main trade area is the geographical area from which a retail development generates the majority of its customers.

**Travel Zone** – A small geographic area used as the basis for Bureau of Transport Statistics (formerly Transport Data Centre) modelling and data analysis. Travel Zones provide a level of analysis between Census Collection District (CD) and Statistical Local Areas (SLA) as defined by the Australian Bureau of Statistics.

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6. This report does not constitute a valuation of any property or interest in property. In preparing this report HillPDA has relied upon information concerning the subject property and/or proposed development provided by the Client and HillPDA has not independently verified this information except where noted in this report.
7. In relation to any valuation which is undertaken for a Managed Investment Scheme (as defined by the Managed Investments Act 1998) or for any lender that is subject to the provisions of the Managed Investments Act, the following clause applies:

This valuation is prepared on the assumption that the lender or addressee as referred to in this valuation report (and no other) may rely on the valuation for mortgage finance purposes and the lender has complied with its own lending guidelines as well as prudent finance industry lending practices, and has considered all prudent aspects of credit risk for any potential borrower, including the borrower's ability to service and repay any mortgage loan. Further, the valuation is prepared on the assumption that the lender is providing mortgage financing at a conservative and prudent loan to value ratio.



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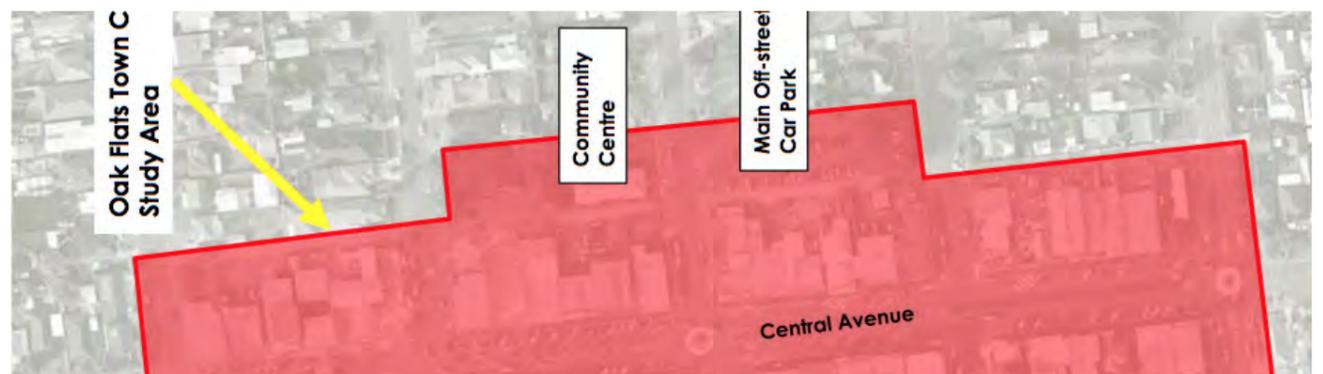
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*Appendix C: GTA Consultants: Car Parking Study*

## *Appendix C: Car Parking Study*



### Appendix C to the Oak Flats Town Centre Plan

The Oak Flats Town Centre Plan was endorsed by Council at its meeting of 3 February 2015, as a basis for the review of relevant Council Policy including Shellharbour Local Environmental Plan 2013, Shellharbour Development Control Plan, Shellharbour City Council Section 94 Contributions Plan 2013 and the capital works program.

# Oak Flats Town Centre Car Parking Study

**Client //** Shellharbour City Council  
**Office //** NSW  
**Reference //** 15S1037000  
**Date //** 17/12/14

# Oak Flats Town Centre

## Car Parking Study

Issue: B 17/12/14

Client: Shellharbour City Council

Reference: 15S1037000

GTA Consultants Office: NSW

### Quality Record

Issue	Date	Description	Prepared By	Checked By	Approved By	Signed
A	05/12/14	Final	Chris Slenders	Cameron Ward	Brett Maynard	Brett Maynard
B	17/12/14	Revised Final	Cameron Ward	Jason Rudd	Jason Rudd	

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# 1. Introduction

---

## 1.1 Background

Shellharbour City Council (Council) commissioned GTA Consultants (GTA) to undertake a car parking study of the Oak Flats Town Centre. The findings of the parking study will influence future parking provisions to be included within the town centre plan, which is currently being developed by McGregor Coxall on behalf of Council. The Oak Flats Town Centre Plan is to guide the future development and requirements of the town centre.

## 1.2 Purpose of this Report

This report sets out an assessment of existing car parking demand and characteristics of the Oak Flats Town Centre and future requirements based on proposed future development. This includes:

- o assessment of the supply and location of existing car parking
- o existing car parking demand
- o anticipated future development for the town centre
- o anticipated additional car parking requirements.

## 1.3 References

In preparing this report, reference has been made to the following:

- o parking demand surveys conducted on Thursday 18 and Saturday 20 September 2014
- o Shellharbour City Council Development Control Plan (DCP) 2013
- o Oak Flats Town Centre Plan (Preliminary Draft), Hill PDA, 16 December 2014.

## 2. Existing Conditions

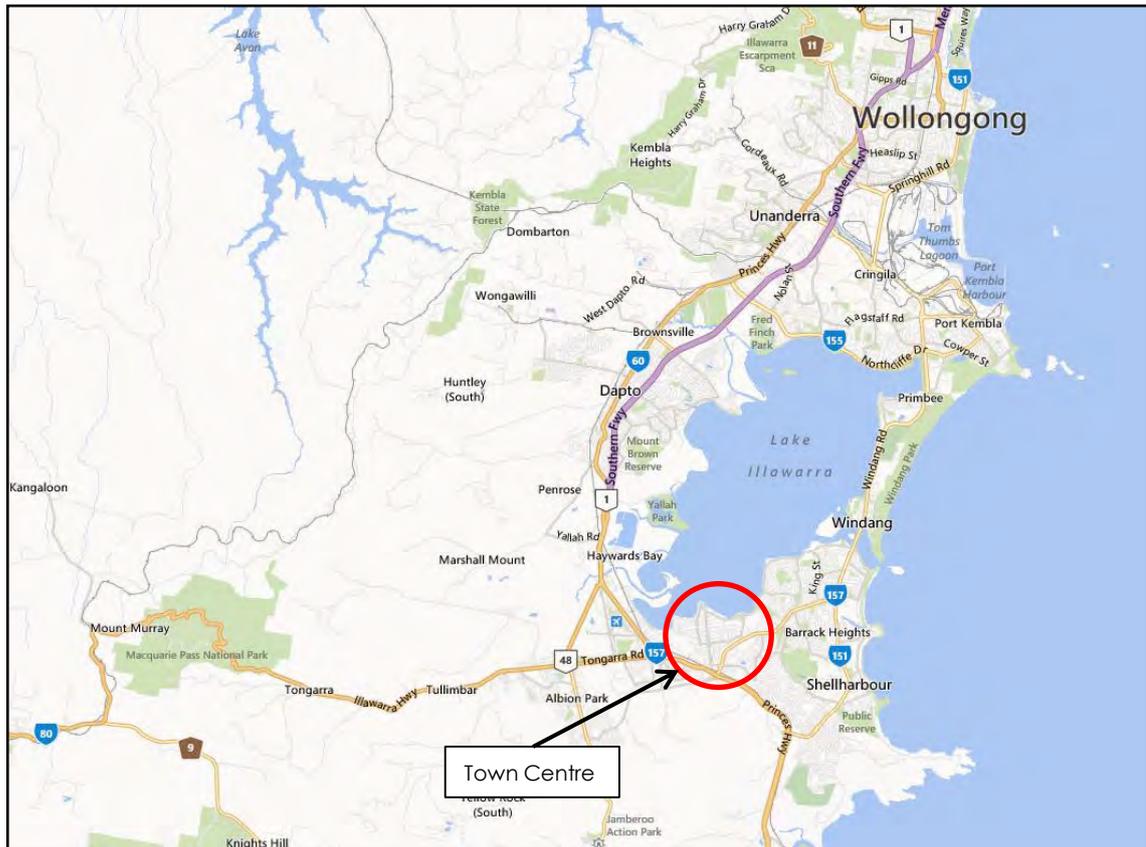
### 2.1 Study Area

The Oak Flats Town Centre is a small town centre that generally serves the local community with daily requirements such as convenience shopping, cafes and takeaway food, commercial/office, as well as personal and medical services.

Oak Flats Town Centre is located approximately 1.5km west of the Shellharbour City Centre, which is the primary activity area in the Shellharbour City Council area. Wollongong City is located approximately 17km to the north-east of the town centre.

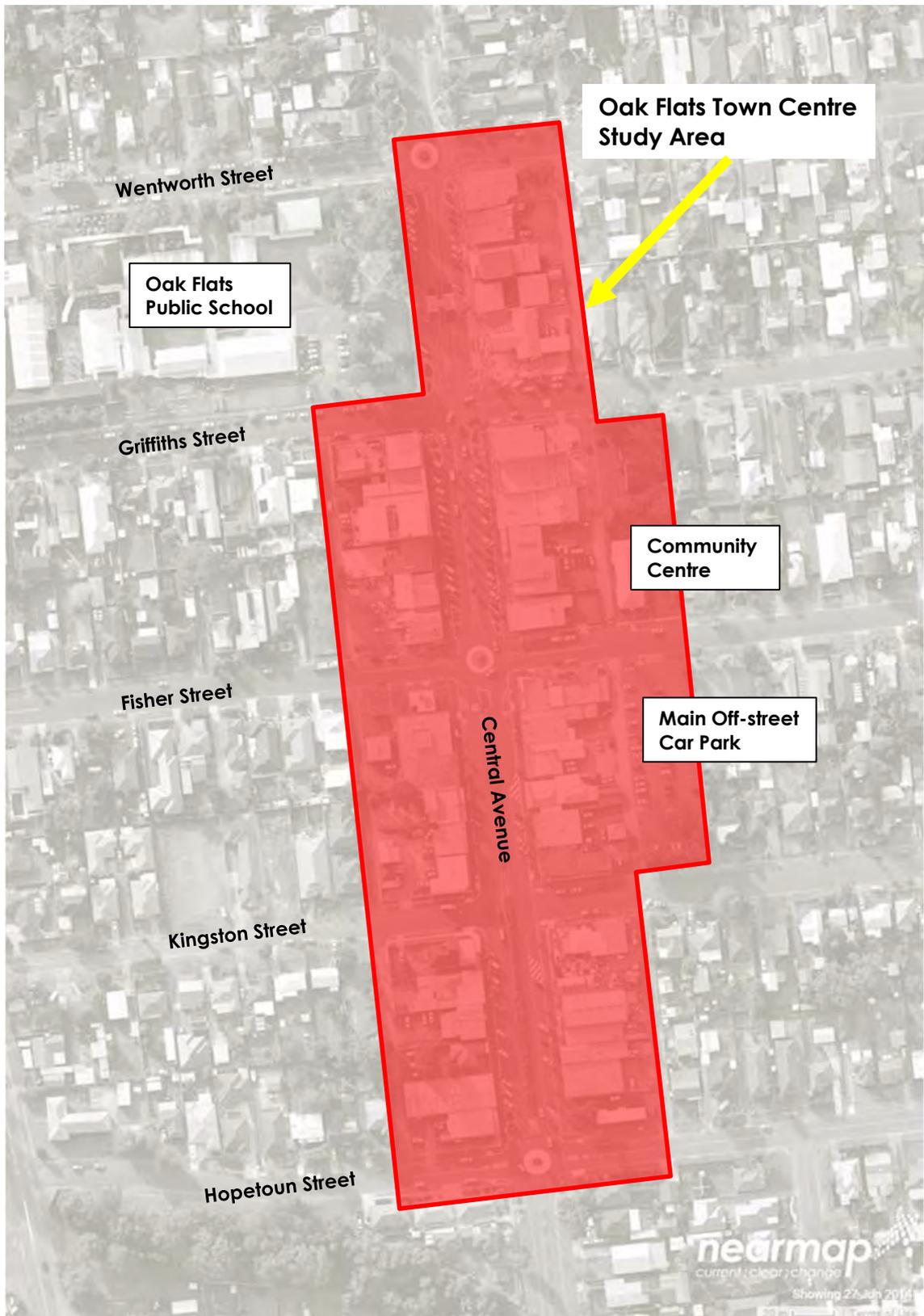
The regional context of the study area is shown in Figure 2.1. The extent and key features of the study area is shown in Figure 2.2.

**Figure 2.1: Regional Context**



Basemap source: Bing Maps

Figure 2.2: Study Area



Basemap source: Nearmap (used under licence)

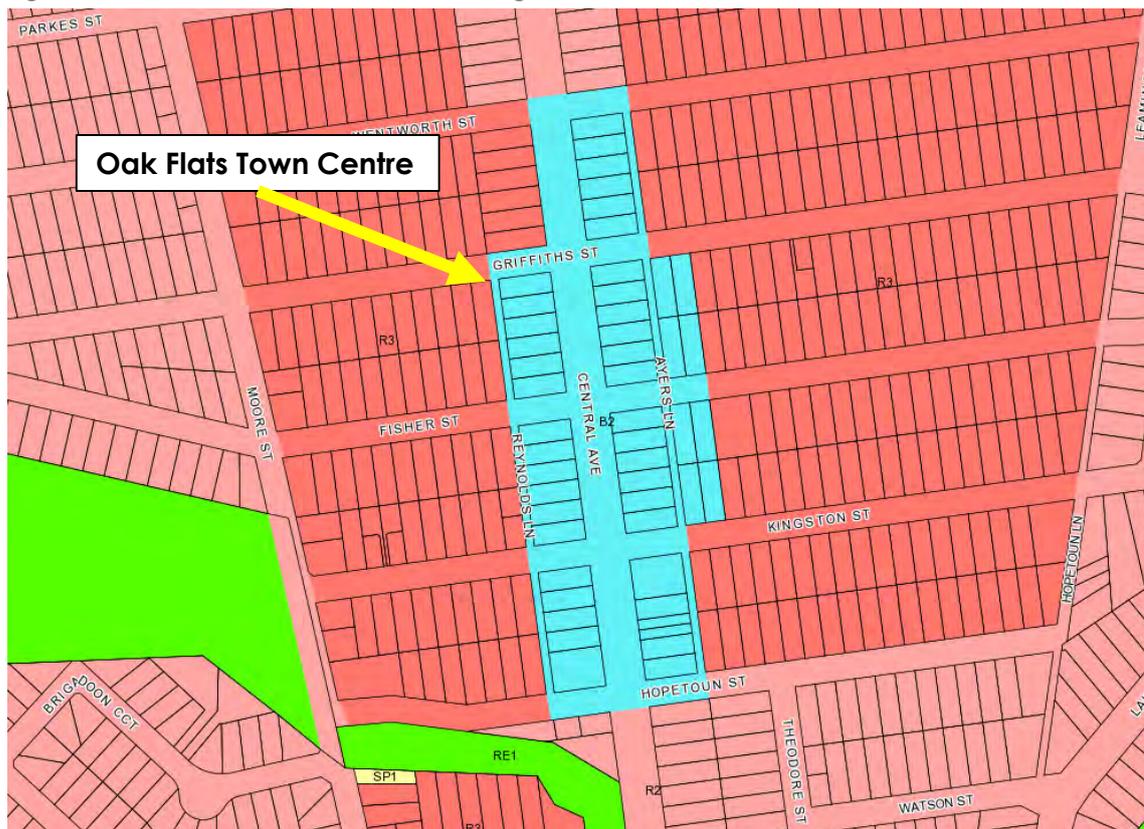
Central Avenue forms the main north-south road link within Oak Flats. It begins at Oak Flats Railway Station and Pioneer Avenue in the south and continues to The Boulevard. In the town centre, Central Avenue is divided by a central median. Between Hopetoun Street and Fisher Street, the central median also acts as a retaining wall; the east (southbound) carriageway being higher than the west (northbound) carriageway. Parking is configured as 45 degree angle parking on both sides of the carriageway between Hopetoun Street and Wentworth Street.

The commercial and retail land uses are generally accessed by the public along the Central Avenue frontage. A large portion of the land uses are food and beverage, particularly between Griffiths Street and Fisher Street. Reynolds Lane provides rear access to properties along the west side of Central Avenue. Ayers Lane provides rear access to properties along the east side of Central Avenue as well as access to a large off-street car park located between Fisher Street and Kingston Street.

## 2.2 Land Use Zoning

The study area is all zoned B2 (Local Centre) as shown in Figure 2.3, with the surrounding area zoned R3 (Medium Density Residential).

**Figure 2.3: Oak Flats Town Centre Land Zoning**



Basemap source: <http://www.mapping.shellharbour.nsw.gov.au> (accessed 17/09/2014)

The general objectives of B2 Local Centre zoning as stated in the Local Environmental Plan (LEP) 2013 are:

- o To provide a range of retail, business, entertainment and community uses that serve the needs of people who live in, work in and visit the local area.

- To encourage employment opportunities in accessible locations.
- To maximise public transport patronage and encourage walking and cycling.
- To allow for a limited range of residential accommodation while maintaining retail, business or other non-residential active uses at street level.

In line with these objectives, the supply of car parking within the town centre should reflect the expectation that measures will be implemented to prioritise public transport, walking and cycling modes of travel over private vehicle usage. There is therefore potential to provide a reduction in the total number of car parking spaces to reflect this promotion of non-car based modes of travel. This is however also dependent on the provision of a reliable and efficient public transport system (buses) servicing the town centre as well as safe pedestrian and bicycle facilities.

## 2.3 Land Uses and Floor Areas

The Oak Flats Town Centre contains a range of land uses including the following:

- Retail
- Food and Beverage
- Medical
- Office
- Shop top housing.

A breakdown of land uses by floor area within the town centre is provided in Table 2.1. These floor areas were obtained from Hill PDA's Oak Flats Town Centre report. The floor areas are based on an assessment undertaken in 2008, however they have been verified by Hill PDA to be consistent with the current retail and commercial floor areas within the town centre. The only significant change within the town centre between 2008 and 2014 was an additional supermarket land use associated with a small IGA supermarket.

**Table 2.1: Oak Flats Town Centre Existing B2 Zoned Land Uses**

Land Use	Floor Area (sq.m)	No. of Businesses
Supermarket	450 <sup>[1]</sup>	1
Convenience Store	133	1
Service Station Convenience Store	100	1
Specialty Food	556	4
Specialty Non-Food	803	8
Clothing	572	3
Cafes & Restaurants	423	4
Take Away Food	520	5
Personal Services	1,319	11
Second Hand Goods	809	2
Bulky Goods	638	3
Vacant Retail	757	3
<b>Total Retail</b>	<b>7,080<sup>[1]</sup></b>	<b>46</b>
Commercial - General	912	6
Commercial - Finance	511	3
Commercial - Medical	1,436	11
Commercial - Real Estate	399	2
Commercial - Travel	68	1
Commercial - Legal	223	2
Commercial - Vacant	0	0
<b>Total Commercial</b>	<b>3,549</b>	<b>25</b>
Community	646	4
<b>TOTAL FLOORSPACE</b>	<b>11,275<sup>[1]</sup></b>	<b>75</b>

Source: Oak Flats Town Centre Plan Preliminary Draft, Hill PDA, 2014

[1] Supermarket data updated in 2014

## 2.4 Car Parking Rates

The car parking rates for future developments within Oak Flats Town Centre are detailed within Council's 2013 Development Control Plan (DCP). Rates relating to potential future land uses within the town centre are summarised in Table 2.2. Additional requirements such as loading facilities and set-down/ pick-up provision are also detailed in the DCP.

**Table 2.2: Shellharbour 2013 DCP Car Parking Rates**

Land Use	General Minimum Parking Space Requirement	Rate per 100sq.m	Staff, Bicycle and Motorcycle Parking Requirement(s)
Office/ Business Premises	1/ 40sq.m GFA	2.50	N/A
Retail Shop	1/ 35sq.m GFA	2.86	N/A
Supermarket/ Regional Centre	1/ 20sq.m GFA	5	1 bicycle and 1 motorcycle space/ 25 car parking spaces after the first 25
Bulky Goods Premises	1/ 45sq.m	2.22	1/ staff on-site
Licensed club	15/ 100sq.m internal and outdoor areas	15	1/ staff on-site
Reception Function Centre	The greater of 1/ 4sq.m of customer area (indoor + outdoor) 1/ 3 seats	say 25	1/ staff on-site
Restaurant	1/ 4sq.m customer area (indoor + outdoor)	25	2/ 3 staff on-site
Take Away Food No on-site seating	1/ 1sq.m of customer waiting area	say 25	2/ 3 employee 1/ home delivery vehicle
Take Away Food with on-site seating	The greater of 1/ 5 seats (indoor + outdoor) 1 / 2 seats (indoor)	N/A	2/ 3 employee
Take Away Food with on-site seating and drive through	The greater of 1/ 3 seats (indoor + outdoor) 1/ 2 seats (indoor)	N/A	2/ 3 employee
Medical Centre	The greater of 3/ health care professional 4/ 100sq.m	say 4	1/ all staff 1/ ambulance
Veterinary surgery	2/ veterinarian		1/ all staff
Shop-Top Housing	(Including visitor) 1.25/ 1 bed dwelling 2/ 2+ bed dwelling	N/A	N/A
Place of Worship Place of public entertainment	The greater of 1/ 4sq.m 1/ 5 seats	say 25	1/ staff 1 bicycle and 1 motorcycle space/ 25 car parking spaces after the first 25
Community/ Civic facilities	1 / 40sq.m GFA	2.5	1/ staff 1 bicycle and 1 motorcycle space/ 25 car parking spaces after the first 25
Gymnasium	The greater of 1/ 20sq.m or 1/ 2 students (additional requirements if back to back classes)	say 5	1/ staff

As can be seen from Table 2.2, a number of car parking rates are based on staff/ practitioner numbers instead of general requirements based on a floor area. This adds difficulty in the assessment of future parking requirements in the town centre as staff/ practitioner densities vary from land use to land use and may change over time following development approval. However, reasonable estimates can be calculated and will better reflect demand for staff/ employee parking.

## 3. Existing Parking Conditions

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Oak Flats Town centre car parking provisions comprise:

- on-street kerbside parking
- off-street public car parking
- off-street private parking, both formal and informal, generally located at the rear of the sites.

Kerbside parking is available on most streets within the study area.

A formalised off-street public car park is located at the rear of shops on the eastern side of Central Avenue, between Fisher Street and Kingston Street.

### 3.1 Car Parking Supply

Within the study area approximately 437 car parking spaces were identified. This quantum includes:

- 109 restricted spaces
- 100 unrestricted spaces
- 194 private spaces (estimated)
- 34 other spaces (loading zones, disabled spaces).

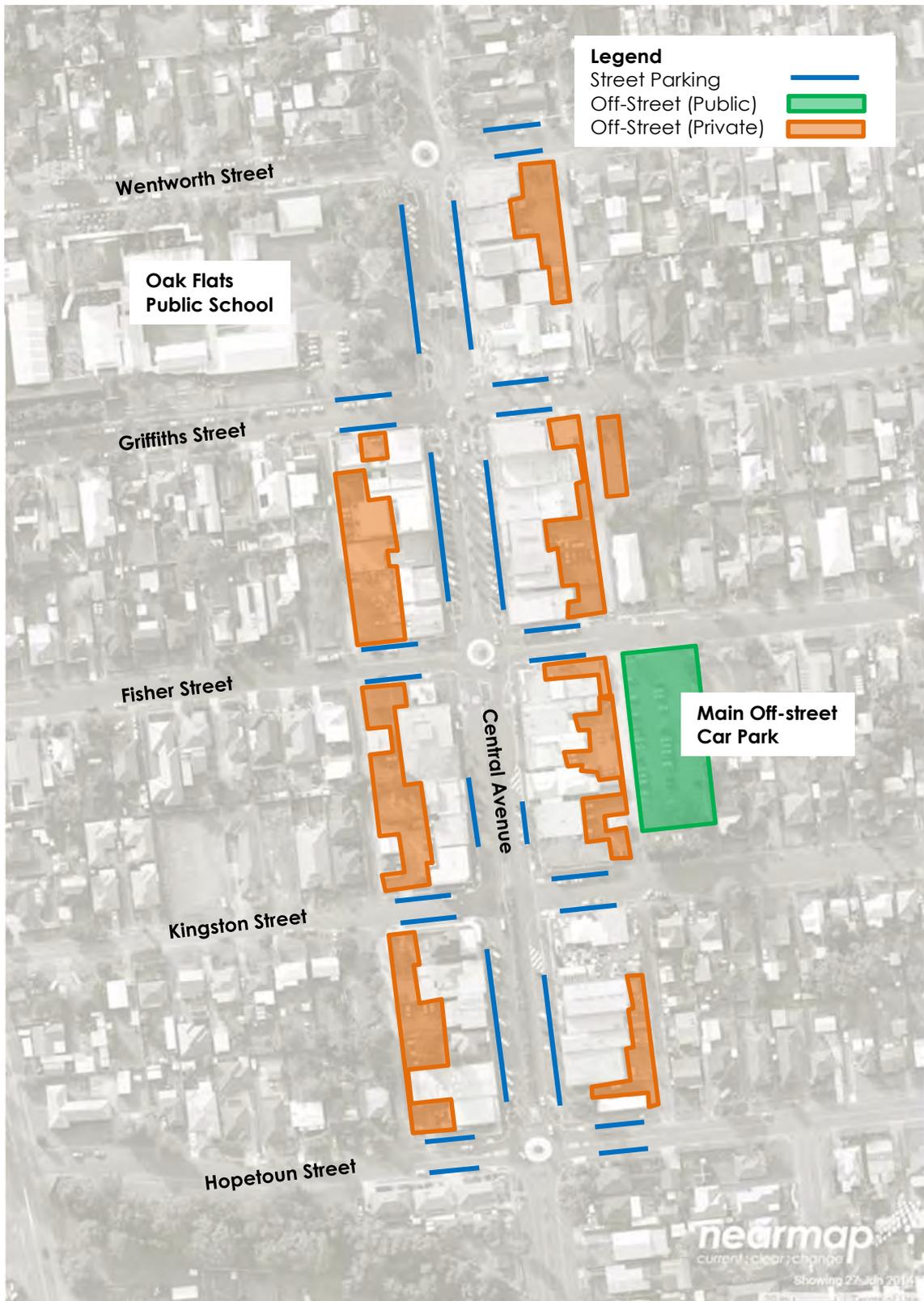
On-street spaces along Central Avenue and side streets near the main activity centres are generally restricted. The time restrictions noted in the parking surveys include 15 minute, 30 minute, 1 hour and 2 hour spaces.

Unrestricted car parking is available in the main car park (south-east corner of Fisher Street/ Ayres Lane) and on-street away from the key activity areas along Central Avenue. The main car park contains 73 parking spaces, including 3 disabled spaces.

Private car parking spaces generally occur in unmarked hardstand areas and as such supply was estimated by area measurements and on-site observation, with the assumption that vehicles will generally space out further in these areas (in which case a 3m space width was assumed). It is likely that formalising these areas would result in higher yields.

A map of the surveyed car parking areas is shown in Figure 3.1, with kerbside parking represented by blue lines and off-street parking areas represented by boxed areas. An inventory of car parking areas, supply and demand is provided in Appendix A.

Figure 3.1: Oak Flats Town Centre Car Parking Survey Areas



Basemap source: Nearthmap (used under licence)

## 3.2 Car Parking Demand

Parking demand surveys were undertaken by GTA Consultants within the town centre during the following periods:

- Thursday 18 September, hourly from 11:00am – 3:00pm
- Saturday 20 September, hourly from 10:00am – 12:00pm.

Car parking demand was relatively consistent throughout both survey periods. Total parking demand ranged between 219 and 251 spaces on the Thursday and 237 and 266 spaces on the Saturday. This represents a minor fluctuation in demand of up to 32 spaces during each survey period.

On the Thursday, the impact of school pick-up activity at the end of the survey period was most notable on roads directly adjacent to the Oak Flats Primary School. The school is located on the northern periphery of the town centre and as such the increase parking demand had a minimal impact on overall demands of the town centre.

The results of the above surveys are summarised in Figure 3.2 and Figure 3.3 for the Thursday and Saturday survey periods respectively.

**Figure 3.2: Thursday Parking Demand – Whole Study Area**

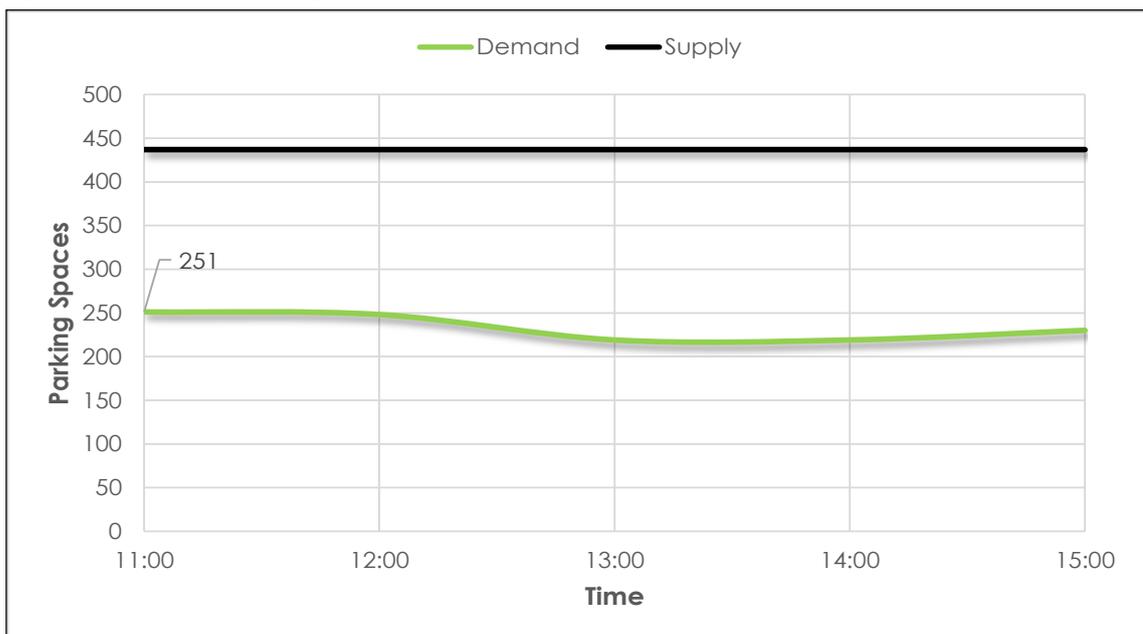
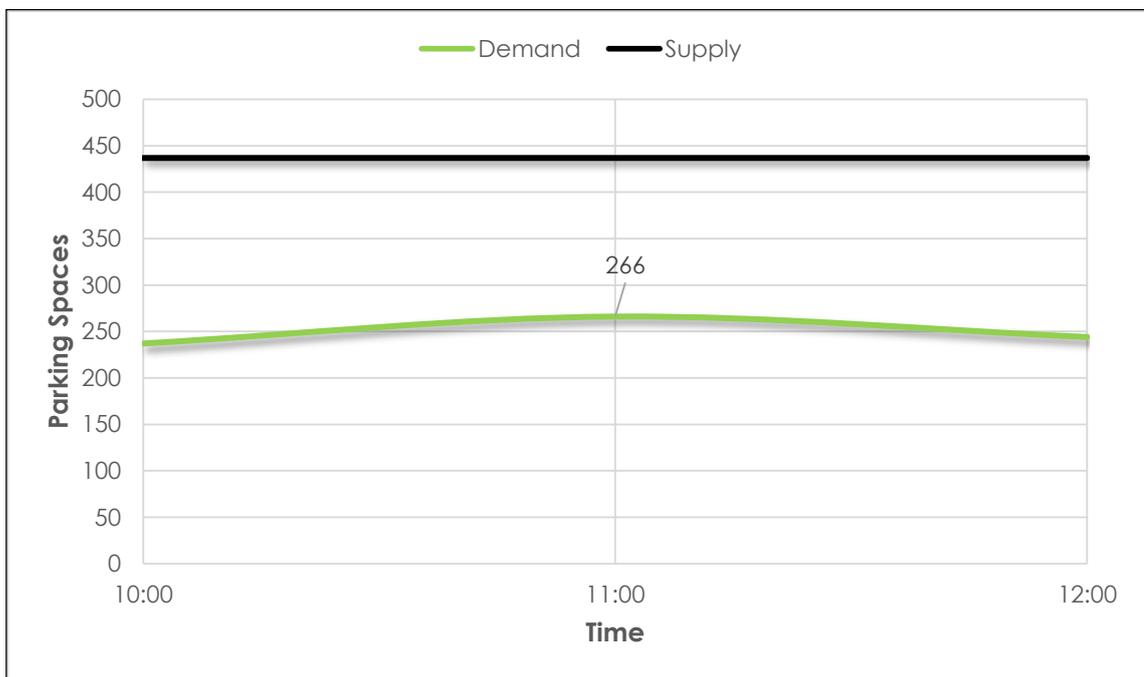


Figure 3.3: Saturday Parking Demand – Whole Study Area



### 3.2.1 Peak Demand Analysis

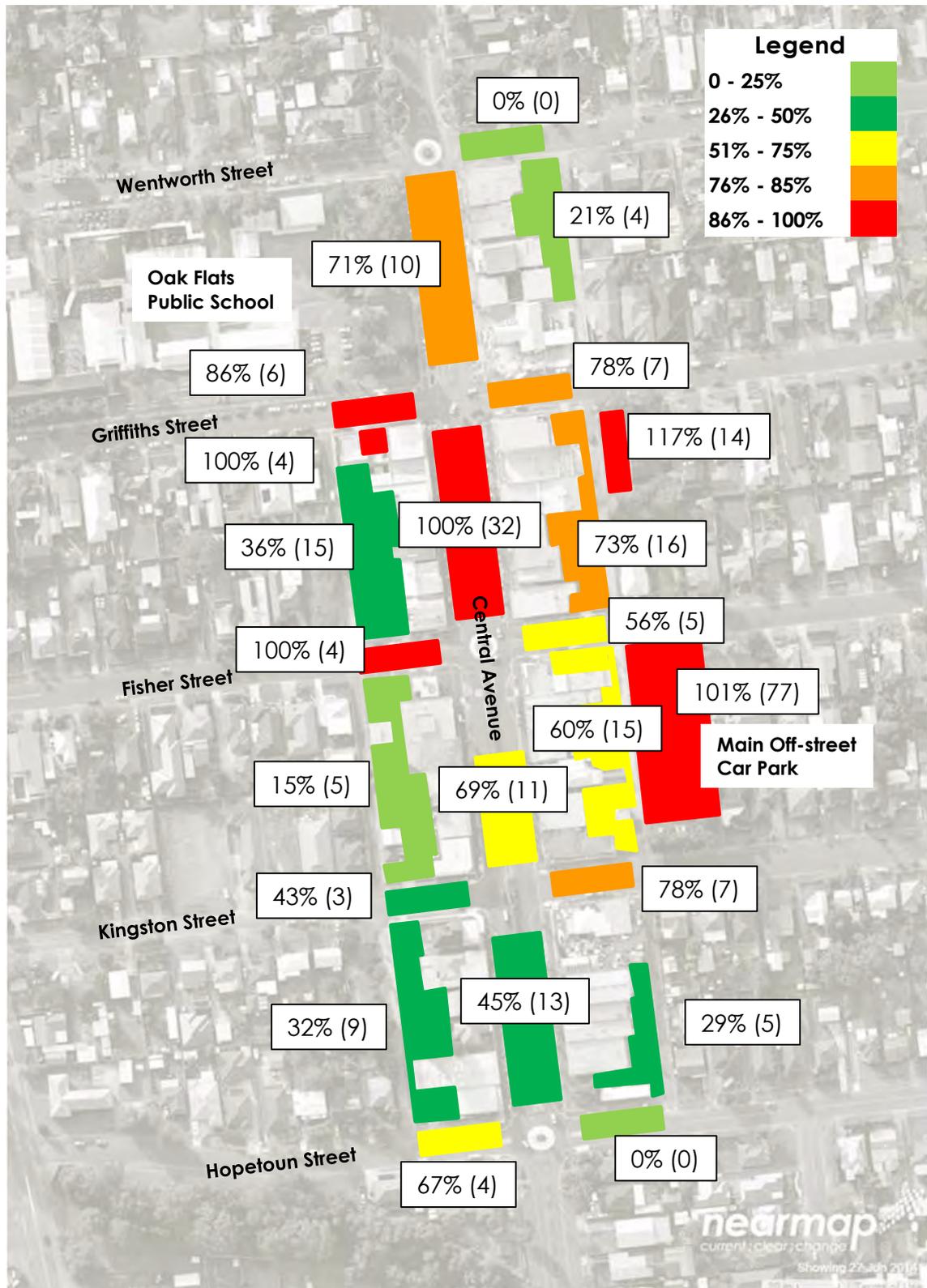
Overall, the recorded peak demand for the study area occurred on Saturday at 11:00am, with an overall car parking demand of 61%. With the exclusion of private and other parking provisions, car parking demand within publicly available spaces was 79%.

It was noted that during the Saturday surveys, markets were being held at the neighbourhood centre on Fisher Street. This activity contributed to the high parking demands within the main off-street car park between Fisher Street and Kingston Street.

On-street car parking on Central Avenue was consistently busiest between Fisher Street and Griffiths Street during both the Thursday and Saturday survey periods.

The peak parking demand (Saturday, 11:00am) is shown in Figure 3.4, and provides percentage demand and actual number of parked cars within defined zones.

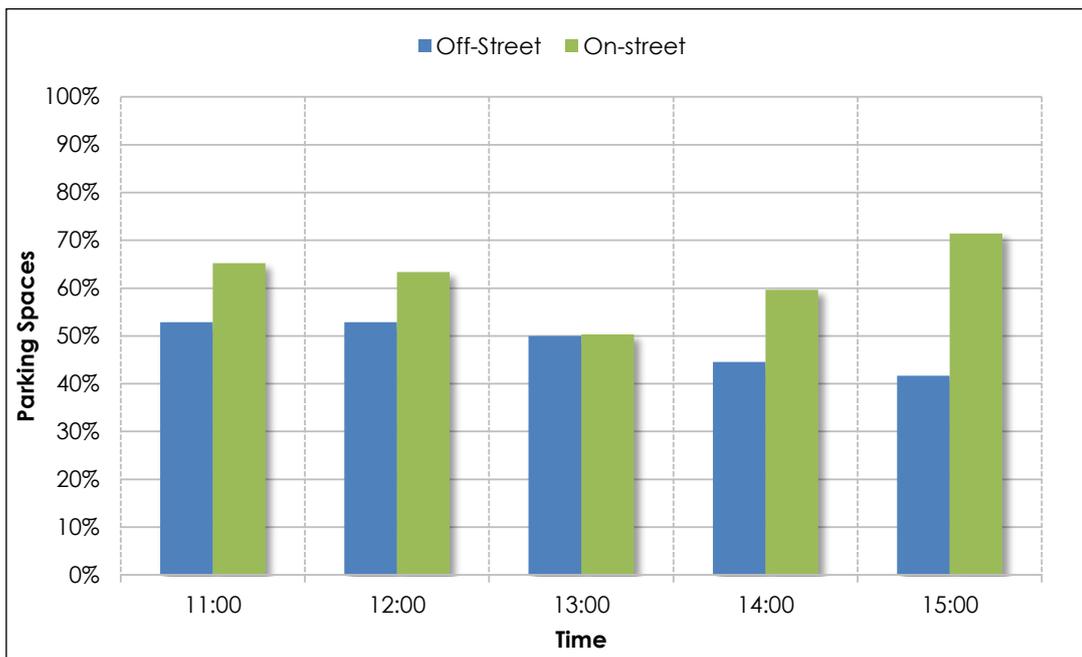
Figure 3.4: Peak Parking Demand – Saturday 11:00am



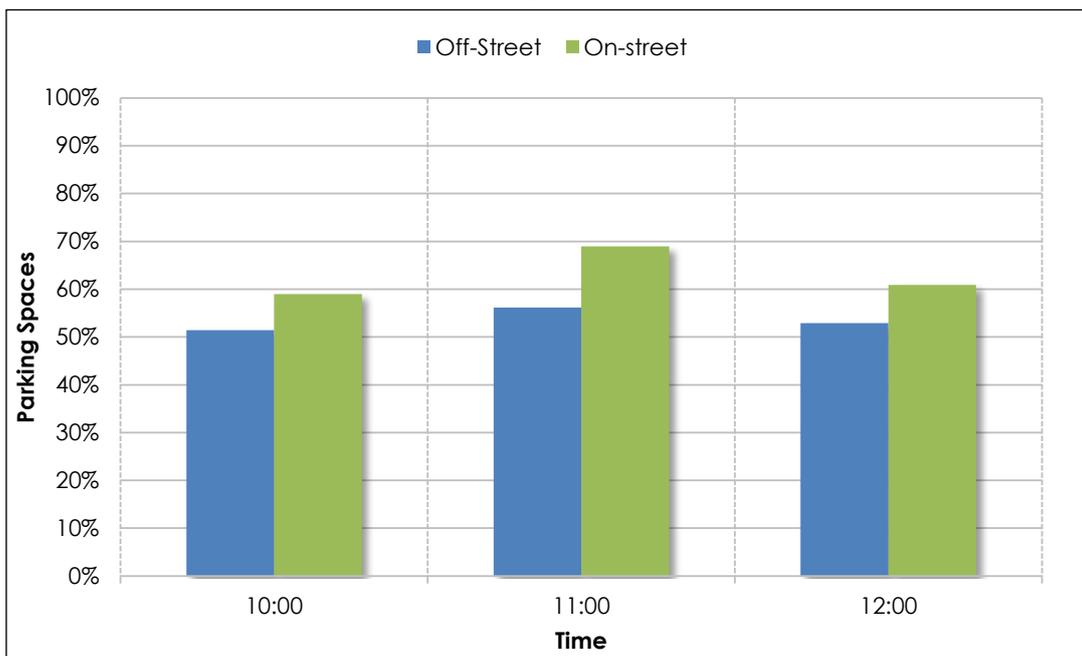
### 3.2.2 On-street and Off-Street Comparison

The on-street and off-street car parking demands for the Thursday and Saturday survey periods are shown in Figure 3.5 and Figure 3.6 respectively. These illustrate that on-street car parking is generally more popular. This can be attributed to the generally low demands of the town centre where most visitor demand can be accommodated on-street, with minimal deviation and/or circulation. The off-street demands can be attributed to longer term parking requirements and it is assumed that this would generally comprise employees and residents of shop-top housing.

**Figure 3.5: Thursday 18 September 2014 Parking Occupancy (Percentage)**



**Figure 3.6: Saturday 20 September 2014 Parking Occupancy (Percentage)**



### 3.2.3 Car Parking Controls

Car parking was separated into eight categories for analysis, as summarised in Table 3.1:

**Table 3.1: Oak Flats Town Centre Car Parking Controls**

Restriction	General Description	Quantum	Percentage
15 minute	Spaces adjacent to the post office and short term customer parking	9	2.0%
30 minutes	On-street spaces along Central Avenue between Fisher Street and Griffiths Street	16	3.6%
1 hour	On-street spaces along Central Avenue	12	2.7%
2 hour	On-street spaces along Central Avenue and along cross streets near to the busiest areas of Central Avenue	72	16.5%
Unrestricted	Off-street main car park and on-street spaces away from main activity area	100	22.9%
Private	Rear of shop parking	194	44.4%
Disabled	Scattered throughout the town centre	17	3.9%
Other	Loading, taxi and special use zones	17	3.9%
<b>Total</b>		<b>437</b>	<b>100%</b>

As can be seen in Table 3.1, there are relatively few restriction types for a town centre. It is noted that private parking areas account for approximately 44% of the total parking supply.

In terms of the publicly available parking (excluding disabled spaces), restricted car parking spaces demands varied between 59% and 77% over both days of the survey period. The restricted car parking spaces are generally located near to the highest traffic generating land uses along Central Avenue. This was most notable between Fisher Street and Griffiths Street. The overall occupancy of restricted spaces was always higher than the unrestricted spaces during the Thursday survey periods.

The unrestricted car parking demand ranged between 47% and 85% over both survey days. Demands were higher than restricted spaces for the full survey period on the Saturday. This is attributed to the community event which resulted in full occupancy of the main off-street car park during the Saturday survey period.

## 3.3 Future Increased Parking Demand Summary

Overall, the surveys indicate that the town centre has spare capacity to accommodate additional parking demand. The requirement for additional parking within the town centre is dependent on the location of future developments and availability of existing nearby car parking. As such, the available parking supply and anticipated future demand should be assessed as part of any future development.

During the surveyed peak parking demand period, approximately 171 vacant spaces were available within the study area, with the majority of these at the southern end of the town centre. Based on this, the town centre has capacity to absorb some additional retail/ town centre development without any substantial increase in public parking provision.

## 4. Development Capacity

### 4.1 Oak Flats Town Centre Plan

The Oak Flats Town Centre Plan is being developed by McGregor Coxall for Shellharbour City Council to guide the future development within the town centre, as well as improving connectivity across Central Avenue. The plan will also seek to encourage future development within the core retail zone, in particular south of Wentworth Street.

An overview of Oak Flats Town Centre Plan is shown in Figure 4.1 and shows the potential consolidation of existing buildings within the southern areas of the town centre. However no significant changes to retail/ commercial floor areas are proposed.

**Figure 4.1: Oak Flats Town Centre Plan**



### 4.2 Additional Development Capacity

Hill PDA has undertaken an assessment of the Oak Flats Town Centre which indicated that the town centre is unlikely to experience significant growth in retail/ commercial demand in the coming decades. This is due to an anticipated stable residential population and the close vicinity of the larger Shellharbour City Centre.

The Hill PDA analysis determined the lack of significant future growth would be due to:

- o Limited forecast population growth
- o Limited forecast residential dwelling growth

- o The Shellharbour City Centre attracting the majority of retail and services spending in the area, including residents of Oak Flats
- o The lack of an anchor tenant such as a 2,000 – 3,000sq.m supermarket.

In addition, the Hill PDA report notes:

*“Market research indicates there is limited demand for retail and commercial shopfronts in Oak Flats and this is unlikely to change. Shellharbour City Centre will continue to attract key retailers and service businesses, particularly whilst land and tenancies within the City Centre are available and are competitively priced. Oak Flats has the potential to capture a greater proportion of the MTA expenditure through the inclusion of a medium sized supermarket and improvement in the retail mix.”*

As such, it is anticipated that, unless the above factors change, the Oak Flats Town Centre floor area is likely to experience an overall negligible growth of approximately 550m<sup>2</sup>, spread throughout the land uses within the town centre.

### 4.3 Future Parking Requirement

As identified in Section 3 of this report, there is currently an oversupply of car parking within the Oaks Flat Town Centre when compared with observed parking demands. This oversupply has the potential to accommodate additional development within the town centre.

Based on Council's DCP parking rates for various land uses of between 1/20sq.m and 1/40sq.m, the underutilised town centre car parking spaces could theoretically accommodate an additional 3,420 – 6,840sq.m of floor area depending on land use. This estimate is based on approximately 171 vacant car parking spaces being available within the study area during the peak survey period. However, as noted in the economic assessment undertaken by Hill PDA, limited growth is expected in the town centre.

Larger retail outlets (i.e. Supermarket/ Mini-major Retail) generally favour the integration of parking within their development. As such, if a large supermarket (~2,000 – 3,000sq.m) was to be developed in the Oak Flats Town Centre, it would not be expected to have a measurable impact of the general availability of parking within the town centre.

## 5. Conclusion

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Based on the analysis and discussions presented within this report, the following conclusions are made:

- A parking survey of the Oak Flats Town Centre was conducted to assess existing demand and identify the likely parking requirements associated with future development of the Oak Flats Town Centre.
- The Oak Flats Town Centre currently contains approximately 437 car parking spaces in a range of on-street, off-street, formal and informal areas.
- The peak parking demand of 266 spaces (61% occupancy) was recorded at 11:00am during the Saturday survey period.
- Overall, on-street car parking experienced higher demand on the weekday and off-street car parking experienced higher demand on the weekend.
- Using Council's DCP parking requirements, the underutilised car parking spaces could accommodate between 3,420 – 6,840sq.m of floor area within the town centre (depending on land use) without the need for additional car parking facilities.
- Hill PDA's economic assessment indicates that there is limited potential for additional residential or retail growth within the town centre.
- Overall there is spare parking capacity within the Oak Flats Town Centre.
- There is spare parking capacity available within the Oak Flats Town Centre that can be utilised for the use of future redevelopment.

# Appendix A

---

## Car Parking Inventory

Street	On-street (S) Off-street (O)	Side	Between		Restriction			Demand								
								Thursday 18 September 2014					Saturday 19 September 2014			
								Supply	11:00	12:00	13:00	14:00	15:00	10:00	11:00	12:00
Reynolds Lane	O O O O	W W W W	Fisher	Griffiths	A B C D D	Private Private Private Disabled Private		20 8 5 1 8	11 6 4 1 4	11 5 3 1 4	9 4 2 1 4	9 3 3 1 4	9 5 3 1 4	5 4 3 1 2	6 5 2 1 0	
Griffiths Street	S S S S S O	S S N N S	Central Avenue	Reynolds Lane		Disabled Other UR 2P Disabled Private		2 1 1 2 4	0 1 1 0 0	0 0 1 2 2	0 0 0 0 2	0 0 1 1 1	2 1 2 2 4	1 1 2 2 4	1 1 2 2 3	
Central Avenue	S S	W E	Griffiths	Wentworth		2P UR		7 7	1 6	2 4	3 4	3 7	7 7	3 4	5 5	
Wentworth Street	S S	W S	Central Avenue	Ayres Lane		UR 2P		5 4	3 3	2 3	2 3	3 3	4 2	0 0	0 0	
Ayres Lane	O O O O	W W W W	Wentworth Street	Griffiths Street	E F G H	Private Private Private Private		4 8 6 1	2 4 3 1	2 4 3 1	2 4 4 1	2 3 3 1	2 3 3 1	0 2 2 0	0 2 2 0	
Griffiths Street	S S O	N S	Central Avenue	Ayres Lane		2P Disabled 1/4P		2 2 5	2 1 1	2 0 0	1 2 2	3 1 1	3 2 1	2 1 2	3 1 4	
Ayres Lane	S O O O O	E W W W W	Griffiths Street	Fisher	J K L M	Other Disabled Private Private Private		11 1 5 6 6 5	7 1 4 4 3 1	6 1 2 3 3 1	6 0 2 3 3 1	2 0 2 3 4 1	5 0 2 5 5 4	13 1 2 5 6 1	13 1 3 2 4 2	
Fisher Street	S S O	N S	Central Avenue	Ayres Lane		Other 2P Private		3 5	0 1 4	1 1 3	1 1 3	1 1 3	1 1 2	0 2 1	1 3 2	
Ayres Lane	O O O O O O	E E W W W W	Fisher Street	Kingston Street	N N O P Q R S	UR Disabled Private Private Private Private Private		73 3 4 7 3 7 4	37 1 1 2 1 3 3	46 0 1 4 1 4 3	43 0 0 3 1 4 3	32 1 0 0 0 2 2	31 1 0 2 2 3 2	73 2 3 5 1 3 3	74 3 2 6 1 3 2	
Kingston Street	S S	N S	Central Avenue	Ayres Lane		2P 2P		4 5	4 4	4 4	2 5	2 3	3 3	3 4	2 5	
Ayres Lane	O O O O O	W W W W W	Kingston Street	Hopetoun Street	T U V W X	Private Private Private Private Private		2 2 4 4 5	0 1 3 2 2	0 1 3 2 0	0 0 2 2 0	0 1 2 2 0	0 2 3 2 0	0 2 3 0 0	0 2 3 0 0	
Hopetoun Street	S S	N S	Central Avenue	Ayres Lane		UR UR		4 4	0 0							
Hopetoun Street	S S	N S	Central Avenue	Reynolds		UR UR		3 3	3 3	2 2	1 1	2 2	2 2	3 1	2 2	
Reynolds Lane	O O O O O	E E E E E	Hopetoun Street	Kingston	Y Z AA AB	Private Private Private Private Private		6 5 6 8 3	3 3 3 7 1	4 2 3 7 1	4 2 3 6 1	3 4 2 5 1	4 4 2 5 1	1 0 1 3 0	1 0 2 6 4	
Kingston Street	S S	N S	Central Avenue	Reynolds Lane		1/4P 2P		4 3	0 1	0 0	1 2	1 2	1 1	0 1	1 1	
Reynolds Lane	O O O O	E E E E	Kingston Street	Fisher Street	AC AD AE AF	Private Private Private Private		8 9 10 6	6 6 1 4	6 6 1 4	7 5 2 4	6 5 1 0	7 5 2 0	2 1 1 1	2 1 1 1	
Central Avenue	S S S	W W E	Fisher Street	Griffiths		Disabled 2P 1/2P		1 15 16	1 15 16	1 15 16	1 14 9	0 14 13	1 15 16	0 14 16	1 14 16	
Central Avenue	S S S	E E E	Fisher Street	Kingston Street		Disabled 1P Disabled		1 5 1	0 5 0	1 4 0	0 2 0	1 5 0	1 3 0	0 5 0	0 3 0	
Central Avenue	S S S	E E W	Kingston Street	Hopetoun		Disabled 2P Disabled 2P Other		1 14 1 1	0 3 0 0	0 5 0 10	0 4 0 9	0 6 0 12	0 6 0 12	0 2 0 8	0 4 0 9	
Central Avenue	S S S	W W W	Kingston Street	Fisher		1P Disabled Other		7 1 1	7 1 0	6 1 0	5 0 0	6 0 0	6 0 0	4 0 0	7 0 0	
Fisher Street	S S S	S S N	Central Avenue	Reynolds Lane		Disabled 2P		1 1	0 1	0 0	1 0	1 1	1 1	0 1	1 2	
<b>Total</b>								<b>437</b>	<b>254</b>	<b>250</b>	<b>221</b>	<b>220</b>	<b>231</b>	<b>239</b>	<b>272</b>	<b>245</b>

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