

**OAKDEN AND GILLES PLAINS
STRUCTURE PLAN
EMPLOYMENT LANDS ASSESSMENT**

Prepared for:
Renewal SA

Date:
05.08.2019

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Document Control

Revision	Description	Author	Date
v1	Draft for Client Review	Holmes Dyer Pty Ltd	15.05.2019
v2	Issue for Council	Holmes Dyer Pty Ltd	22.05.2019
v3	Final	Holmes Dyer Pty Ltd	05.08.2019

Approved by: Not yet approved

Date: Not yet approved

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1 – INTRODUCTION

1. Introduction

1.1. Purpose

Renewal SA engaged Holmes Dyer Pty Ltd, together with Arup and Alexander Symonds, to prepare the Oakden and Gilles Plains Structure Plan.

This assessment forms part of the investigations to inform the Structure Plan and a rezoning of the land at Oakden and Gilles Plains.

Much (but not all) of the land under investigation is under the control of the State Government, notably SA Health, Department of Human Services (DHS) and Department of Environment and Water (DEW). A significant portion of this land is now surplus to requirements and may be divested for development by others. At the same time, a number of parcels of land are likely to retain their institutional use into the medium – long term. These include James Nash House, SAHMRI and TAFE, which contribute substantially to employment within the area.

This assessment seeks to establish whether any land should be identified for non-residential development purposes and, if so, where and how much.

1.2. Structure Plan Area

The Structure Plan area is located approximately 10 kilometres north-east of the Adelaide CBD, in the local government area of Port Adelaide Enfield. It is generally bound by Grand Junction Road to the north, Blacks Road to the east, Fosters Road to the west, and the interfacing residential area to the south, in the suburbs of Oakden (part of) and Gilles Plains (part of).

The Structure Plan area comprises approximately 110 hectares of land and represents one of the most significant infill development opportunities within the inner urban area.

It is expected that the area could support a new community of around 2,000 homes.

The land is currently zoned Residential, Mixed Use and District Centre in the City of Port Adelaide Development Plan (Consolidated 6 February 2018).

The Structure Plan area is shown in Figure 1 below.

Figure 1. Oakden and Gilles Plains Structure Plan Area



1.3. Study Area for the Employment Lands Assessment

The study area for the employment lands assessment is generally bound by:

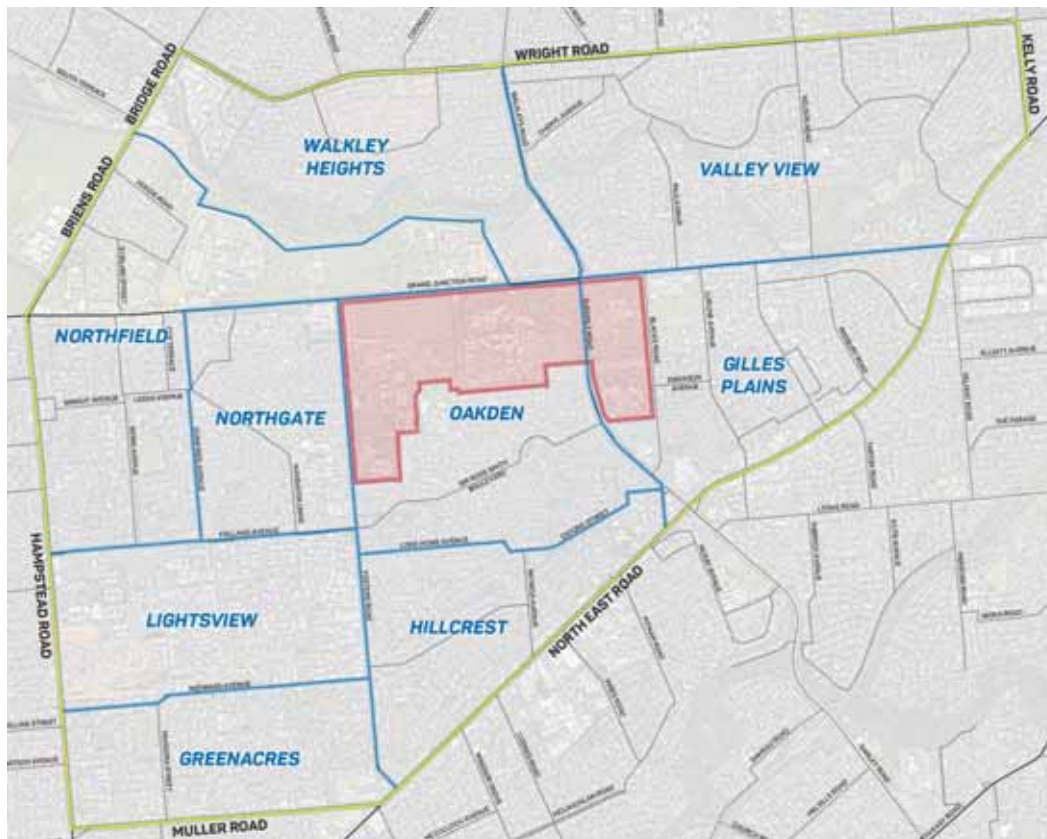
- North: Wright Road (Valley View and Walkley Heights)
- East: Kelly Road (Valley View)
- West: Bridge Road (Walkley Heights), Briens Road (Northfield) and the main road environment of Hampstead Road (Northfield, Lightsview and Greenacres)
- South: main road environments of Muller Road (Greenacres) and North East Road (Hillcrest, Gilles Plains and Valley View).

The study area generally takes in the suburbs of Walkley Heights, Northfield, Northgate, Lightsview, Greenacres, Oakden, Gilles Plains, Hillcrest and Valley View as well as suburbs either side of the main road environments of Hampstead Road, Muller Road and Main North Road.

The study area is well serviced by road, with existing infrastructure and telecommunication facilities, important precursors for employment.

The study area is shown in Figure 2 below.

Figure 2. Study Area



1.4. Types of Employment Land

Employment lands are described as “areas where development is focussed primarily on the creation of places for people to work across a wide variety of industries, supporting business innovation, growth and investment. They require connections to markets through priority corridors for freight, telecommunications and other infrastructure, and to local industries to enable them to exchange goods and services.”¹

The following types of employment land form part of this assessment:

- Retail and commercial uses to support a new residential population in the Structure Plan area;
- New or expanded institutional activities such as those already located in the Structure Plan area; and
- New commercial activities seeking a location within the broader locality.

While industrial uses, including manufacturing, could be considered for the subject land, these activities provide challenges to manage interfaces with established surrounding residential areas and have accordingly, been discounted from evaluation. Further, given the extensive availability of industrial land in other more suitable

¹ State Planning Policy 9: Employment Lands

locations and the widely acknowledged demise in manufacturing, the rationale for industrial land is further diminished for this locality.

This assessment therefore does not attempt to provide a detailed evaluation of every possible employment lands opportunity that might arise for the Structure Plan area. Rather, it addresses broad land use categories to establish a general position on the delivery of employment lands within the Structure Plan area.

1.5. Report Structure

The investigation findings are reported in six main sections:

1. **Introduction:** outlines the context for this investigation.
2. **Employment Role and Function:** provides high level scene setting of the economic and planning drivers and key issues and considerations for the Structure Plan area.
3. **Population and Growth:** provides information about employment characteristics in the study area and implications for employment lands in the Structure Plan area.
4. **Employment Lands Assessment:** assesses existing supply and future demand for employment lands in the Structure Plan area.
5. **Structure Plan Opportunities:** identifies opportunities for employment lands in the Oakden and Gilles Plains Structure Plan area and provides land use and policy guidance to inform the structure planning process.
6. **Conclusion:** provides an overall summary of the employment lands assessment.

2 – EMPLOYMENT ROLE AND FUNCTION

2. Employment Role and Function

2.1. Overview

A range of State Government and Port Adelaide Enfield Council strategic documents have informed this employment lands assessment for the Structure Plan area. This section provides a summary of drivers of change and key issues and considerations for the structure planning process.

2.2. Drivers of Change

The 30 Year Plan for Greater Adelaide Update 2017 (The 30 Year Plan) outlines how Adelaide should grow to become more **liveable, competitive and sustainable**. The 30 Year Plan supports a new urban form with an emphasis on revitalisation of existing urban areas and creating neighbourhoods that are: enjoyable places to live; improve access to public transport, community services, open space and employment; demonstrate good design; and are more compact, walkable communities.

This focus on creating great places to live is reinforced in the City of Port Adelaide Enfield, *City Plan 2030*, which seeks '*Place Making: A City where people love to be*' as one of five key outcomes. Another key outcome: '*Economy: A City of Opportunity*' focuses on local economy, jobs and prosperity and directly relevant to future employment lands. To test community perception and satisfaction with aspects of its City Plan, the City of Port Adelaide Enfield undertakes an annual community survey. In response to the 2018 survey, Council has identified as a priority, '*building a strong connection to place and equitable access and participation across the City,*' including '*connection to local places and neighbourhoods.*'

South Australia's **new planning system** under the *Planning, Development and Infrastructure Act 2016* (PDI Act) provides the statutory planning instruments to support delivery of key planning outcomes. At the highest order, **State Planning Policies** are now in place and will be given effect through the Planning and Design Code (which will ultimately replace Development Plans).

The Oakden and Gilles Plains Structure Plan is informed by the **Principles of Good Planning** under the PDI Act and seeks to apply State Planning Policies spatially to the Structure Plan area as the most contemporary policy available. This assessment has had regard to **State Planning Policy 9: Employment Lands**.

2.3. Key Issues and Considerations

2.3.1. Transition in Employment

Employment is changing, as new economic drivers such as information and communications technology; health sciences; and emerging knowledge industries (and retail and commercial sectors) replace traditional manufacturing (*State Planning Policy 9: Employment Lands*). This has seen employment in manufacturing decline from 13.9% in 2006 to 7.6% in 2016 (-361 people). Planning for employment lands therefore needs to be more flexible, underpinned by appropriate residential densities, and better utilisation of public transport (walking and cycling) to link people with jobs (*The 30 Year Plan*). This approach is consistent with the City of Port Adelaide Enfield's *Economic Development Strategy 2020*, which seeks to create an environment for emerging industries to establish in the Council area; and build on its profile as an affordable place to live, work and invest.

2.3.2. Health Care, Ageing and Disability Services

The health care and community services sector is one of the fastest growing sectors in Australia.³ The City of Port Adelaide Enfield *Economic Development Strategy 2020* notes demand for health services will rise as the population ages and lives longer and as the rate and degree of chronic health conditions increases as the population lives longer. In and around the Structure Plan area² more people are employed in health care and social assistance than any other industry and the proportion has increased over-time (14.2% in 2006 to 16.8% in 2016 (+592 people)). The need for employment lands for health and service providers is identified at a regional³ and local⁴ level and within residential growth areas subject to service need and land use demand planning. As is emerging economic opportunities within aged care, specialist services (including disability), social assistance and for local health facilities.

2.3.3. Education and Training

The Structure Plan area includes the Gilles Plains TAFE SA site and the SAHMI site and is in near proximity of Heritage College, Cedar College and St Paul's College. In and around the Structure Plan area⁵ approximately 8% of the population is employed in education and training (up from 7.2% in 2006 or +244 people). The City of Port Adelaide Enfield *Economic Development Strategy 2020* seeks to retain and support TAFE SA and other existing and potential education and learning providers in the City. This includes ensuring supporting infrastructure such as technology, telecommunications, transport and learning hubs is available to support access to education and development of learning specialisation to attract domestic and international students. At a preschool and primary school level, *The 30 Year Plan* calls for facilities (primary school, child care centre, or kindergarten) within 1 kilometre (or a 15-minute walk).

² ABS Census data Northgate-Oakden-Gilles Plains, 2006 to 2016.

³ Northern Economic Plan 'Look North', January 2016, Government of South Australia.

⁴ City of Port Adelaide Enfield, Economic Development Plan 2020.

⁵ ABS Census data Northgate-Oakden-Gilles Plains, 2006 to 2016.

2.3.4. Green Industries and Technologies

Expansion of green industries, technologies, building innovation and energy efficiency are encouraged by *The 30 Year Plan* to build economic capability and resilience to climate change. Identifying and progressing economic opportunities such as green industries is supported in The City of Port Adelaide Enfield's *Living Environment Strategy 2017-2022*. Non-residential and employment lands are typically high consumers of energy and may provide opportunities to deliver alternative energy supplies such as renewable energy, co-generation and smart grid/green grid technology. The use of renewable energy sources and neighbourhood level alternative energy supplies and storage has the potential to reduce energy costs and carbon footprint. Electric vehicles (and a future of driverless technologies) may warrant electric charging points such as in activity centres and public car parks.

2.3.5. Specialised Employment Areas

The emergence of specialised employment areas, such as Tonsley, are recognised in *State Planning Policy 9: Employment Lands* which notes “*Business and industry clusters, particularly in mixed-use precincts or co-located with research institutions, should seek to foster efficiency and innovation by interacting with these institutions.*” Development of an integrated employment and mixed-use precinct could conceivably be appropriate within the Structure Plan area which comprises existing mixed-use, education (TAFE SA) and research (SAHMI) facilities (albeit disparately). The City of Port Adelaide Enfield's *Economic Development Strategy 2020* actively encourages attraction of new industry and innovation to the Council area.

2.3.6. Activity and Employment Centres

The Structure Plan area is located approximately 100 metres from the Northgate Shopping Centre to the south, approximately 1.6 kilometres from the Greenacres Shopping Centre to the south, approximately 300 metres from the Gilles Plains Shopping Centre to the south east, and approximately 1.2 kilometres to the commercial strip development along North East Road to the south. *The 30 Year Plan* identifies that walkable neighbourhoods as part of the new urban form should have near access to an activity centre which includes local shops, services and a range of community facilities within 800 metres (approximately 10-minute walk) and a range of Employment Centres (zoned land) within 5 kilometres (approximately 20-minute cycle). Based on the location of existing centres, there is opportunity for a new activity centre in the Structure Plan area (refer Section 5.2). This is consistent with Council's *Economic Development Plan 2020* which calls for new development and community renewal projects to incorporate neighbourhood retail and commercial precincts and link them with public transport systems and networks. The need to build links between the retail sector and training providers (such as TAFE SA) is also identified.

2.3.7. New Retail Formats

The changing structure of retailing requires a range of different formats including online, large format outlets, main streets and mixed-use precincts. This includes growth in stores outside of traditional retail precincts (City of Port Adelaide Enfield *Economic Development Strategy 2020*). Council has reported that growth in cultural diversity has seen a spike in new businesses in some locations (such as Prospect Road) which includes multi-cultural restaurants and specialised supermarkets. Some new retail formats have the potential to provide tension

with activity centres which provide a range of shopping, administrative, cultural, entertainment and other facilities co-located (*State Planning Policy 9: Employment Lands*). In response, SA has adopted new principles of retail planning as shown in Table 1. Council, through its *Economic Development Strategy 2020* has identified the need for careful planning and management of large-scale retail development to minimise impacts on smaller, local retail precincts and businesses.

Table 1. Principles of Retail Planning

Existing centres	Recognise existing activity centres, main streets and mixed-use areas as the primary place for commercial and retail activity.
Expansion	Allow for expansion of designated centres at ‘edge-of-centre’ locations.
New activity centres	Allow new activity centres to be established to support equitable and convenient access to services, while supporting productive settlement patterns.
Hierarchy	Protect higher-order centres that support a productive settlement pattern, while allowing for smaller-scale activity centres to emerge and diversify.
Urban design	Reinforce the role of land use policies to guide urban form and place-making in mixed-use activity centres.

2.3.8. Jobs Growth

Jobs growth within the Council area and northern region are clear objectives of both the City of Port Adelaide Enfield and the Government of South Australia through various policy and strategy documents. This is largely in response to the regional economy being driven by traditional sectors of employment; rising unemployment levels; and to meet future population growth. The greatest proportion of people in the Structure Plan area and surrounds work in hospitals and aged care residential services, followed by supermarkets (and grocery stores), government administration, and cafes and restaurants (refer to Section 3.3). These top industries of employment reflect in part the existing institutional land uses in the Structure Plan area and future likely employment uses; and reflect industries identified in Council’s *Economic Development Plan 2020* for targeted growth (education and training, creative industries, tourism, retail and services, aged care and disability support and professional services). The *Economic Development Plan 2020* recognises the importance of new younger residents and its growing migrant population as part of the future workforce. It seeks to attract higher value employment and businesses but also includes a focus on small business and entrepreneurship to create job opportunities.

2.3.9. Walkable Neighbourhoods

The 30 Year Plan calls for healthy, walkable neighbourhoods where people can afford to live, learn, work and play, that offer a wide range of services that can easily be reached on foot or by bicycle, including schools, health care, shops, parks, sports facilities and public transport. The Plan speaks to creating ‘streets for people’ so that streets are green and leafy ‘places’ to spend time as well as providing cycling and walking friendly ‘links.’ The concept of ‘link’ (fast, efficient and minimise travel time) and ‘place’ (encourage people to linger, stay longer and extend time

spent in an area) is used to describe the dual function of streets. Walkable communities are intended to be vibrant places with opportunities for physical activity, connection with nature, social interaction, options for active travel and public transport use, and diverse housing options. The assessment⁴ of the Structure Plan area is that it is currently not walkable (noting the surrounding areas of Walkley Heights, Northgate and Oakden are also not particularly walkable. This indicates a strong need for non-residential land uses accessible on foot in the Structure Plan area.

2.3.10. Commuter Travel

The 30 Year Plan calls for development within 400 metres (approximate 5-minute walk) to a high frequency bus stop or 800 metres (approximately 10-minute walk) to a train station, tram or O-Bahn stop. Much of the Structure Plan area is serviced by public transport; however, the simple presence of a route does not provide a good indication of frequency or how useful a public transport service it provides in terms of connecting to useful destinations (such as employment). Much of the Structure Plan area does not have access to a bus stop within a 5-minute walk (however, this is largely a function of the current lack of walking connectivity).⁶ The bus network surrounding the Structure Plan area is largely low frequency and due to the existing lack of development, routes to the east and west of the site do not currently stop adjacent the site.

⁶ Oakden and Gilles Plains Structure Plan, Technical Studies, May 2019, prepared by Arup.

3 – POPULATION AND GROWTH

3. Population and Growth

3.1. Overview

This section provides information about employment characteristics in the study area and implications for employment lands in the Structure Plan area. The assessment is based on 2016 Australian Bureau of Statistics census geography for the Northgate-Oakden-Gilles Plains Statistical Area 2 (SA2) which is intended to represent a community that interacts together socially and economically. The assessment is made with reference to Port Adelaide Enfield local government area (LGA) and Greater Adelaide as a benchmark.

3.2. Population Characteristics

In 2016, the Northgate-Oakden-Gilles Plains SA2 had a combined population of 24,592 persons representing approximately 20.3% of the local government area of Port Adelaide Enfield.

Table 2 below shows the population for Northgate-Oakden-Gilles Plains SA2 increased from 18,985 persons in 2006 to 24,592 persons in 2016 which is an increase of 5,607 persons. This represents an annual average population growth rate of approximately 2.9% per year.

Table 2. Total Population (Usual Residence), Northgate-Oakden-Gilles Plains SA2

Year	Persons
2006	18,985
2011	20,795
2016	24,592

Source: ABS Census, 2006 to 2016

To ensure the economic and social viability of the community, population growth should be matched as far as possible with jobs growth. Of course, this must be tempered by local circumstances and employment market realities.

3.2.1. Age Profile

Table 3 below compares service age groups for Northgate-Oakden-Gilles Plains SA2, PAE LGA and Greater Adelaide.

Table 3. Service Age Groups, SA2 compared with PAE LGA and Greater Adelaide, 2016

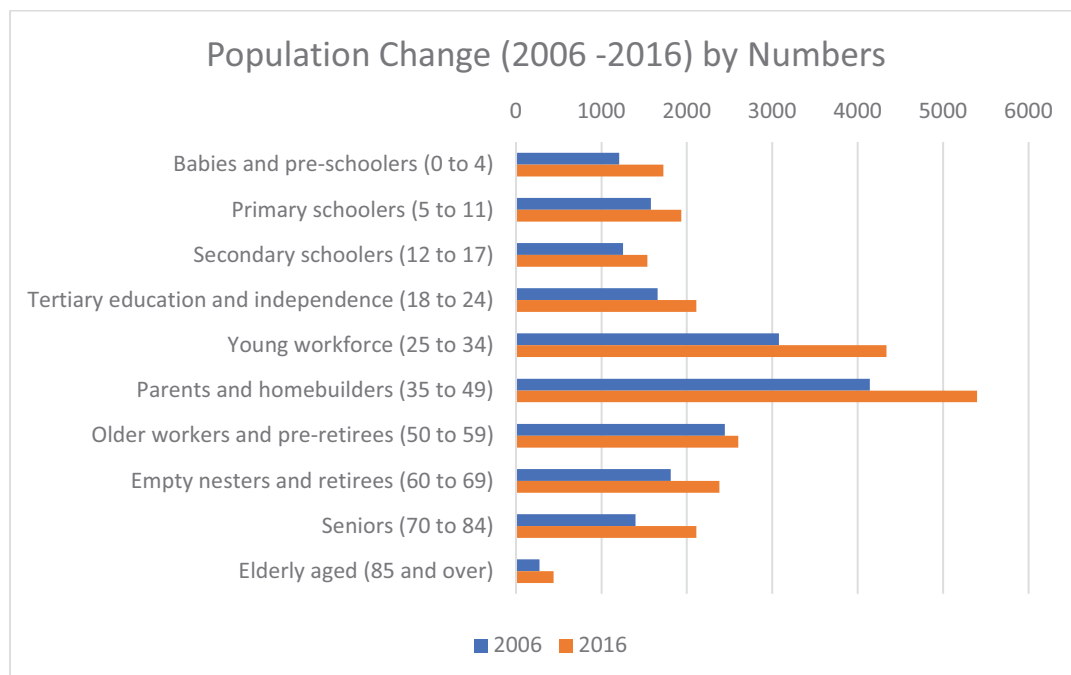
Service Age Groups	Northgate – Oakden – Gilles Plains (SA2)	Port Adelaide Enfield (LGA)	Greater Adelaide
Babies and pre-schoolers (0 to 4)	7.0%	6.3%	5.9%
Primary schoolers (5 to 11)	7.9%	7.6%	8.2%
Secondary schoolers (12 to 17)	6.3%	6.1%	6.9%
Tertiary education and independence (18 to 24)	8.6%	9.1%	9.5%
Young workforce (25 to 34)	17.6%	16.6%	13.8%
Parents and homebuilders (35 to 49)	22.0%	20.8%	19.7%
Older workers and pre-retirees (50 to 59)	10.6%	12.7%	13.1%
Empty nesters and retirees (60 to 69)	9.7%	10.1%	11.1%
Seniors (70 to 84)	8.6%	8.2%	9.3%
Elderly aged (85 and over)	1.8%	2.6%	2.6%

Source: ABS Census, 2016

Table 3 indicates Northgate-Oakden-Gilles Plains SA2 has a higher proportion of the population categorised as ‘Young workforce’ aged between 25 to 34 years (17.6%) compared with PAE LGA (16.6%) and Greater Adelaide (13.8%) and a smaller proportion of population categorised as ‘Older workers and pre-retirees’ (10.6%) compared with PAE LGA (12.7%) and Greater Adelaide (13.1%).

Figure 3 below shows the change in selected service age groups for the SA2 between the 2006 and 2016 Census periods.

Figure 3. Population Growth Chart for Northgate – Oakden – Gilles Plains SA2, 2006 to 2016



Source: ABS Census, 2016

Table 3 and Figure 3 indicate growth in the working population between 2006 and 2016 is comprised of younger workers and to a lesser extent older workers and pre-retirees. This relatively young working population provides a strong indication of a sustainable future workforce and again signals the importance of jobs growth matched to population growth where possible.

3.2.2. Cultural Diversity

Table 4 below compares country of birth for Northgate-Oakden-Gilles Plains SA2, Port Adelaide Enfield (PAE) LGA and Greater Adelaide.

Table 4. Top 5 overseas countries of birth* SA2 compared with PAE LGA and Greater Adelaide, 2016

Birthplace	Northgate – Oakden – Gilles Plains (SA2)		Port Adelaide Enfield (LGA)	Greater Adelaide
	No.	%	%	%
India	1,317	5.4%	4.7%	2.0%
England	926	3.8%	4.6%	7.4%
China (excluding SARs and Taiwan)	907	3.7%	2.4%	1.8%
Vietnam	361	1.5%	3.8%	1.1%
Philippines	345	1.4%	1.4%	0.8%

Source: ABS Census, 2016 *by number of residents and proportion born overseas

Table 4 shows that the SA2 had a significantly higher proportion of population from India (5.4%) and China (3.7%) compared with PAE LGA (4.7% and 2.4%) and Greater Adelaide (2.0% and 1.8%). Time series data from the 2016 ABS Census indicates that the Indian born population increased by 1,158 persons between from 2006 to 2016 and over the same period the Chinese born population increased by 744 persons.

This suggests that the study area may comprise a diverse skills-base associated with overseas arrivals. The migrant population may also provide opportunities for small business growth including multi-cultural restaurants and specialised supermarkets.

3.3. Employment Characteristics

Table 5 below shows the total number of employed persons (full-time and part-time) for Northgate-Oakden-Gilles Plains SA2 increased from 7,802 persons in 2006 to 10,084 persons in 2016 which is an increase of 2,282 persons. This represents an annual average growth rate of approximately 2.2% per year.

Table 5. Total Employed Population (full-time and part-time), Northgate-Oakden-Gilles Plains SA2

Year	Persons
2006	7,802
2011	8,572
2016	10,084

Source: ABS Census, 2006 to 2016

The average annual growth rate in jobs was less than the average annual growth rate of the population (noting not all growth in the population is attributable to persons of working age). Nevertheless, jobs growth has been relatively strong in this locality.

3.3.1. Employment Status

Table 6 below compares employment for Northgate-Oakden-Gilles Plains SA2, Port Adelaide Enfield (PAE) LGA and Greater Adelaide.

Table 6. *Employment SA2 compared with PAE LGA and Greater Adelaide, 2016*

Employment Status	Northgate – Oakden – Gilles Plains (SA2)	Port Adelaide Enfield (LGA)	Greater Adelaide
Employed full-time	55.8%	54.4%	54.0%
Employed part-time	31.8%	31.5%	33.5%
Away from work	4.4%	4.8%	4.8%
Unemployed	8.0%	9.3%	7.7%

Source: ABS Census, 2016

Compared with Greater Adelaide (54.0%), Northgate-Oakden-Gilles Plains SA2 (55.8%) and Port Adelaide Enfield LGA (54.4%) had similar full-time employment numbers and part-time employment (33.5% for Greater Adelaide, 31.8% for Northgate-Oakden-Gilles Plains SA2 and 31.5% for Port Adelaide Enfield).

In 2016, Northgate-Oakden-Gilles Plains SA2 (8.0%) had a slightly lower rate of unemployment compared with Port Adelaide Enfield LGA (9.3%) and a slightly higher rate of unemployment compared with Greater Adelaide (7.7%).

3.3.2. Occupation and Industries of Employment

The tables that follow detail occupation of employment (Table 7) and top industries of employment (Table 8) for Northgate-Oakden-Gilles Plains SA2 compared with Port Adelaide Enfield (PAE) LGA and Greater Adelaide.

Table 7. *Occupation of employment, SA2 compared with PAE LGA and Greater Adelaide, 2016*

Occupation of Employment	Northgate – Oakden – Gilles Plains (SA2)	Port Adelaide Enfield (LGA)	Greater Adelaide
Professionals	24%	20.7%	22.3%
Clerical and Administrative Workers	14.9%	13.6%	14.1%
Technicians and Trades Workers	12.5%	13.4%	13.2%
Community and Personal Service Workers	12.2%	12.7%	12.3%
Labourers	10.5%	12.3%	11.5%
Managers	9.8%	9.8%	9.8%
Sales Workers	9.1%	9.1%	9.8%
Machinery Operators and Drivers	5.3%	6.7%	5.5%

Source: ABS Census, 2016

Northgate-Oakden-Gilles Plains SA2 shows a high proportion of professionals (24%) and clerical and administrative workers (14.9%) which collectively account for 38.9% of employed residents in comparison to Port Adelaide Enfield LGA (34.3%) and Greater Adelaide (36.4%).

Table 8. Top industries of employment, SA2 compared with PAE LGA and Greater Adelaide, 2016

Top Industries of Employment	Northgate – Oakden – Gilles Plains (SA2)	Port Adelaide Enfield (LGA)	Greater Adelaide
Hospitals (except Psychiatric Hospitals)	5.2%	4.3%	4.5%
Aged Care Residential Services	3.8%	3.5%	3.1%
Supermarket and Grocery Stores	3%	2.8%	2.9%
State Government Administration	2.8%	2.4%	2.3%
Cafes and Restaurants	2.5%	2.7%	2.3%

Source: ABS Census, 2016

In addition, Northgate-Oakden-Gilles Plains SA2 shows a high proportion of people working in hospitals, aged care, supermarket and grocery stores and State Government administration compared with Port Adelaide Enfield LGA and Greater Adelaide. Northgate-Oakden-Gilles Plains SA2 (2.5%) shows a lower proportion of people employed in cafes and restaurants in comparison to Port Adelaide Enfield LGA (2.7%).

3.3.3. Journey to Work Characteristics

The locality, as defined by the Northgate-Oakden-Gilles Plains SA2, currently contains 5,261 jobs (as at the 2016 Census). This number has grown from 4493 jobs as at the 2011 Census, reflecting a very strong growth rate of 3.2% per annum over this period.

Nearly 20% of those jobs are filled by persons resident within the locality and nearly 60% of jobs are filled by persons from the north eastern quadrant of Adelaide and from surrounding suburbs.

The employed population (worked full-time and part-time) within the locality is 10,084 persons (6,422 persons full-time and 3,662 persons part-time), hence, the area provides for a workplace to employed persons ratio of 52.1%, which ranks the area well above that of a dormitory suburb but still an area of daily net out migration.

4 –EMPLOYMENT LANDS ASSESSMENT

4. Employment Lands Assessment

4.1. Overview

This section assesses: the available supply of land zoned for employment uses in the study area; existing land uses and possible surplus land available for (re)development in the Structure Plan area; and demonstrated demand for employment lands as indicated by commercial/ business property transactions over-time.

4.2. Supply of Employment Lands

4.2.1. Land Zoned for Employment

Figure 4 below shows land in the study area that is currently potentially available for employment land uses (based on existing zoning). Zones of most relevance include:

- Commercial
- District Centre
- Home Industry
- Industry
- Light Industry
- Local Centre
- Mixed Use
- Neighbourhood Centre
- Suburban Neighbourhood

Figure 4. Employment Lands Study Area and Zoning

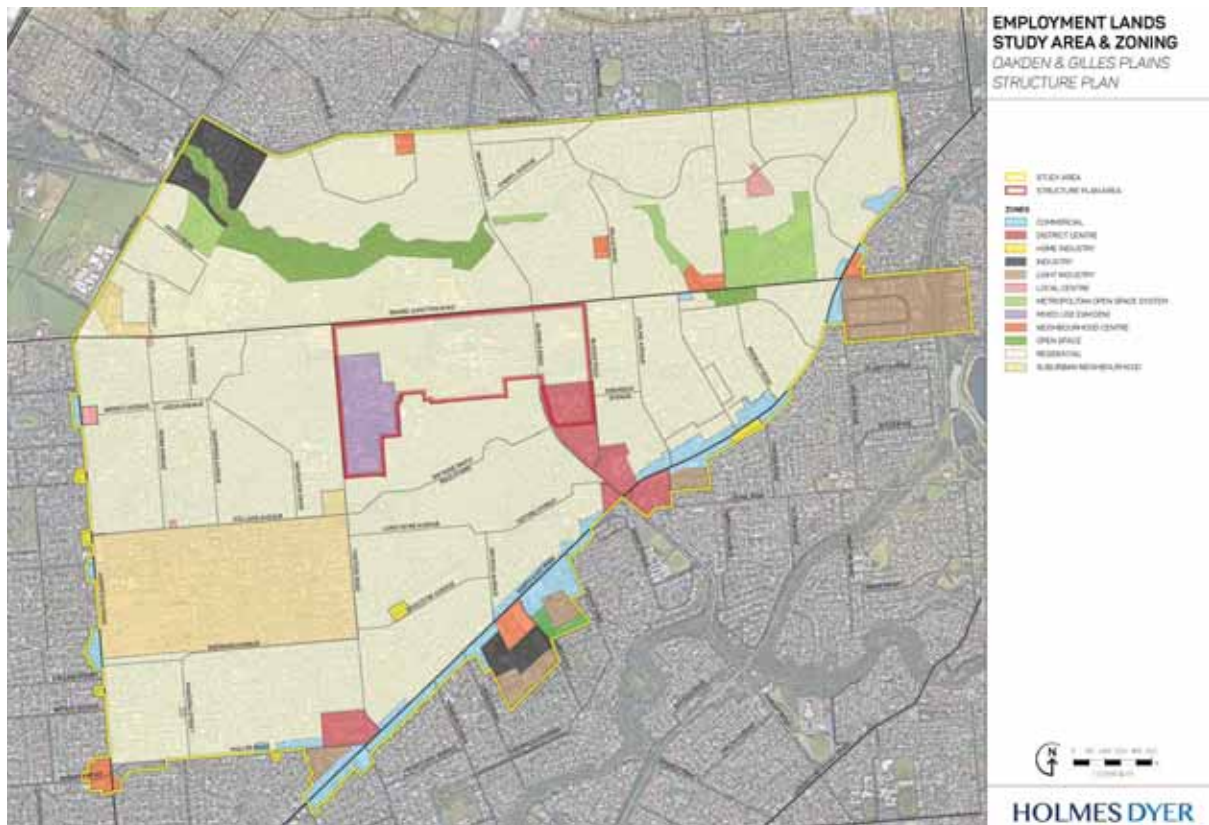


Figure 4 shows most of the existing employment zones are located along North East Road, with the District Centre Zone (Gilles Plains Shopping Centre) extending along Sudholz Road into the Structure Plan area, the Mixed Use Zone located within the Structure Plan area around Fosters Road and Hilltop Drive at Oakden (including James Nash House) and the institutional uses at Gilles Plains (SAHMRI and TAFE). Most of the sites within these zones are already developed, albeit that key sites, especially along North East Road have been redeveloped over-time and thus continue to contribute to the supply of employment lands.

Other employment zones include:

- Commercial strips along much of North East Road and pockets along Hampstead Road, Muller Road and Bridge Road.
- Five industry precincts within 2 kilometres of the subject land, at Windsor Gardens (2), Holden Hill (2) and Walkley Heights (1).
- A range of local, neighbourhood and district level centres:
 - » A further District Centre zone at Greenacres;
 - » Six neighbourhood centre zones including two within approximately 800 metres north-east of the Structure Plan area; and
 - » Five local centre zones to the north-east and south-west of the study area and generally not through the Oakden and Gilles Plains area.
- Two shopping locations at Northgate (Northgate Shopping Centre) and Briens Road (Northfield) zoned Suburban Neighbourhood.

The total area of each zone within the study area is as follows:

Table 9. *Total area of each zone within the Study Area*

Zone	Total Area (ha)
Commercial	52.74
District Centre	34.53
Local Centre	8.13
Home Industry	2.88
Industry	26.59
Light Industry	50.72
Mixed Use	25.45
Neighbourhood Centre	15.65
Suburban Neighbourhood	140.55

The Suburban Neighbourhood Zone (which covers Lightsview and some adjacent sites), although large, is utilised primarily for residential development purposes and therefore contributes a far lesser quantity of employment land than intimated by its overall size (140.55 hectares) recorded in Table 9 above.

Further the size of the District Centre at Gilles Plains (34.53 hectares) is unusually large by virtue of its inclusions of a range of vacant land and institutional uses. It is not expected that all of this land will be utilised for core District Centre functions (Gilles Plains Shopping Centre occupies only around 3.8 hectares of this zone).

4.2.2. Land Use in the Structure Plan Area

The current land uses within the Structure Plan area are shown in Figure 5 below.

Figure 5. Existing Land Uses



The Structure Plan area is predominantly institutional land uses, with education, private and non-private residential, vacant retail and commercial (vacant), and other vacant land uses also represented.

The proportion of various land uses within the Structure Plan area is:

- 1.58 ha Commercial
- 8.39 ha Educational
- 0.52 ha Residential
- 1.96 ha Non-private residential
- 64.52 ha Institutional
- 4.65 ha Recreation
- 0 ha Retail/Commercial
- 0.94 ha Utilities / Industry
- 20.67 ha Vacant

4.2.2.1. Existing and Former Facilities

Existing and former facilities include:

Existing Use	Comments
James Nash House	Sits on approximately 26 hectares of land and is a SA Health secure facility providing for state-wide forensic mental health services. The existing facility has been operating since approximately the mid 1980's and is currently subject to planned expansion to the east. Expansion plans will need to consider stormwater and services running in a generally north-south direction, existing titles-easements and appropriate buffer at the northern interface.
Former Hillcrest Hospital	Services at this site date from approximately 1929. Much of the land has been identified as potential providing for expansion of James Nash House.
Strathmont Centre	Government facility dating from the early 1970s to assist people with disabilities. Much of the site is no longer in use with residents relocated and the decision made to close the private swimming pool. The site is currently used as a base for government staff providing mobile services within the community. Much of the land has been identified as surplus to requirements.
Former Oakden Older Persons Mental Health Facility	Clinical services and facilities at the former SA Health facility have closed.
SAHMRI Preclinical imaging and Research Laboratories (PIRL)	Located in Gilles Plains as a research facility including veterinary services. SAHMRI has a lease agreement for use of the site until 2027. There are no immediate plans to relocate the facility.
TAFE SA Gilles Plains Campus	TAFE SA including veterinary and applied science centre, dental services and agricultural related studies. TAFE SA has a lease agreement for use of the site. There are no immediate plans to relocate the facility.
Oakden Fire Station	The current South Australian Metropolitan Adelaide Fire Service facility dates from 1991 and is staffed by approximately 40 staff for 24 hours a day, 7 days per week. There are no plans to relocate the facility.
Adelaide City Soccer Club Facility (and Oakden Hotel)	The current Adelaide City Soccer Club Facility is operated by Adelaide Juventus under license agreement (part of the land is owned by the Minister for Health). The playing fields are currently open for community use (except on match days). The existing privately owned Oakden Hotel site may be seeking to expand the range of potential uses (such as retail, residential, gymnasium, child care and petrol station) for the land on the corner of Fosters and Hilltop Drive (the Oakden Hotel site).
Other Existing Facilities	Other existing facilities include Community Centre, SA Ambulance Service, Disability Enterprise (Mobo), Student Accommodation and Retirement Living.

4.2.2.2. Possible Future Employment Lands

Excluding the land within the Structure Plan area identified as surplus to Government's requirements, there is approximately 7.7 hectares of land available for possible future (re)development as follows:

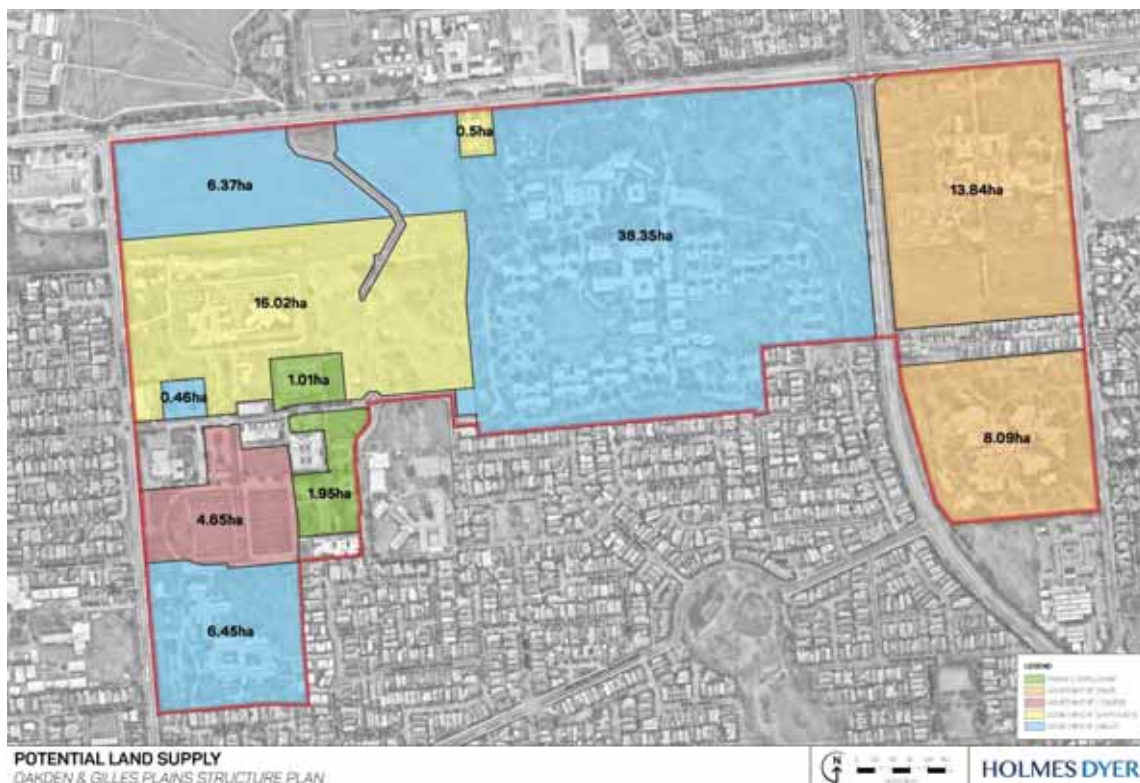
- Five contiguous land parcels comprising approximately 1.94 hectares along Heritage Court;
- An approximate 1-hectare parcel of land recently sold at 102-132 on Hilltop Drive;
- Land surplus to Adelaide City requirements; and
- Land potentially surplus to SA Ambulance Service requirements of approximately 0.46 hectares.

The proposed expansion of James Nash House will approximately double the area dedicated to this use and will ultimately more than double the capacity of these facilities. This alone represents an expansion of approximately 8 hectares to the employment lands in the Structure Plan Area.

Other than the expansion land identified for James Nash House, and existing facilities: Oakden Fire Station, SA Ambulance Service; all Government land holdings in the Structure Plan area between Fosters Road and Sudholz Road are theoretically available for employment (or residential) use. Land east of Sudholz Road could also be available in the future. This amounts to approximately 56 hectares west of Sudholz Road and approximately 22 hectares east of Sudholz Road.

Relevant parcels of land are shown in Figure 6 below.

Figure 6. Potential Land Supply in Structure Plan area



4.3. Demand for Employment Lands

The assessment of demand for employment lands considers the number of commercial/business (including industry) property transactions⁷ for the suburbs of Oakden and Gilles Plains as well as for those suburbs that comprise the study area (or part of) (refer to Section 1.3).

4.3.1.1. Transactions for Oakden and Gilles Plains

Commercial/business property transactions in the suburbs of Oakden and Gilles Plains over the last decade (2009 to 2018 inclusive) number only seven (7) sales, which represents less than one sale per year. This is largely unsurprising given existing zoning (refer Section 4.2.1) and limited employment generating land uses in these suburbs.

4.3.1.2. Transactions across the Study Area

Commercial/business property transactions in the suburbs that comprise the study area (refer Section 1.3), are shown in Table 10.

Table 10. Commercial and Business transactions in the Study Area, 2009 - 2018

Property Size	Number of Transactions
1-499m ²	32
500-999m ²	64
1,000-1,999m ²	26
2,000-4,999m ²	10
5,000-9,999m ²	6
10,000m ² +	4

Source: RP Data, 2019

Table 10 indicates 142 commercial/business sales over the last decade (comprised of 140 sales of improved land and two (2) sales of vacant land).

The area of property transacted amounts to approximately 227,000m² over 10 years (or approximately 22,700m² per annum) with an average property size of around 1500m² to 1600m². Only ten (10) transactions were for properties over 5,000m² in area and only four (4) of these were for sites over 10,000m² in area. One of the sales over 10,000m² in area was the sale of vacant land from the TAFE SA Gilles Plains site on Blacks Road in the Structure Plan area. This land was subsequently developed for residential purposes. Two-thirds of transactions involved sites of less than 1,000m² in area, which tends to suggest the trading of small commercial properties along main road frontages.

An assessment of sales value achieved indicates the most significant transactions typically involved supermarkets and shopping centres, which transacted for a high of \$2,400 per metre of site area with an average of around

⁷ Based on arms-length sales of fair consideration, source RP data

\$1,300 per metre of site area. Transaction values across all sales averaged approximately \$1,000 per metre of site area.

The type of land uses transacted included the following:

- Retailing
- Offices
- Warehouses
- Service stations
- Motor vehicle sales and repairs
- Wholesale trades
- Workshops/fabrication/industry
- Medical and professional consulting
- Community/recreation facilities

In summary, this assessment indicates demand for employment lands in the study area is typically supplied via small scale existing commercial properties along main road frontages. There are relatively low levels of escalation evident in pricing of properties over-time. It is therefore reasonable to deduce that there is not a shortfall in the supply of commercial land and floorspace opportunities to serve local market needs.

5 – STRUCTURE PLAN OPPORTUNITIES

5. Structure Plan Opportunities

5.1. Overview

This section identifies opportunities for employment lands in the Oakden and Gilles Plains Structure Plan area and provides land use and policy guidance to inform the structure planning process.

5.2. Retailing and Support Services

5.2.1. Residential Development Densities and Yields

The development of housing over the Structure Plan area will generate demand for retailing and a range of support services.

The delivery of housing in the Structure Plan area has been estimated using an anticipated housing density of 25 to 30 dwellings per hectare (noting guidance provided in *The 30 Year Plan for Greater Adelaide 2017 Update* is for average gross densities of development in transit corridor catchments of 25 to 35 dwellings per hectare).

Residential density varies across the Structure Plan area according to site characteristics including slope, tree cover and drainage requirements as well as likely market considerations impacting the ultimate yield.

Residential development yield is subsequently estimated across various precincts as shown in Figure 7 below.

Figure 7. Precinct Location Plan

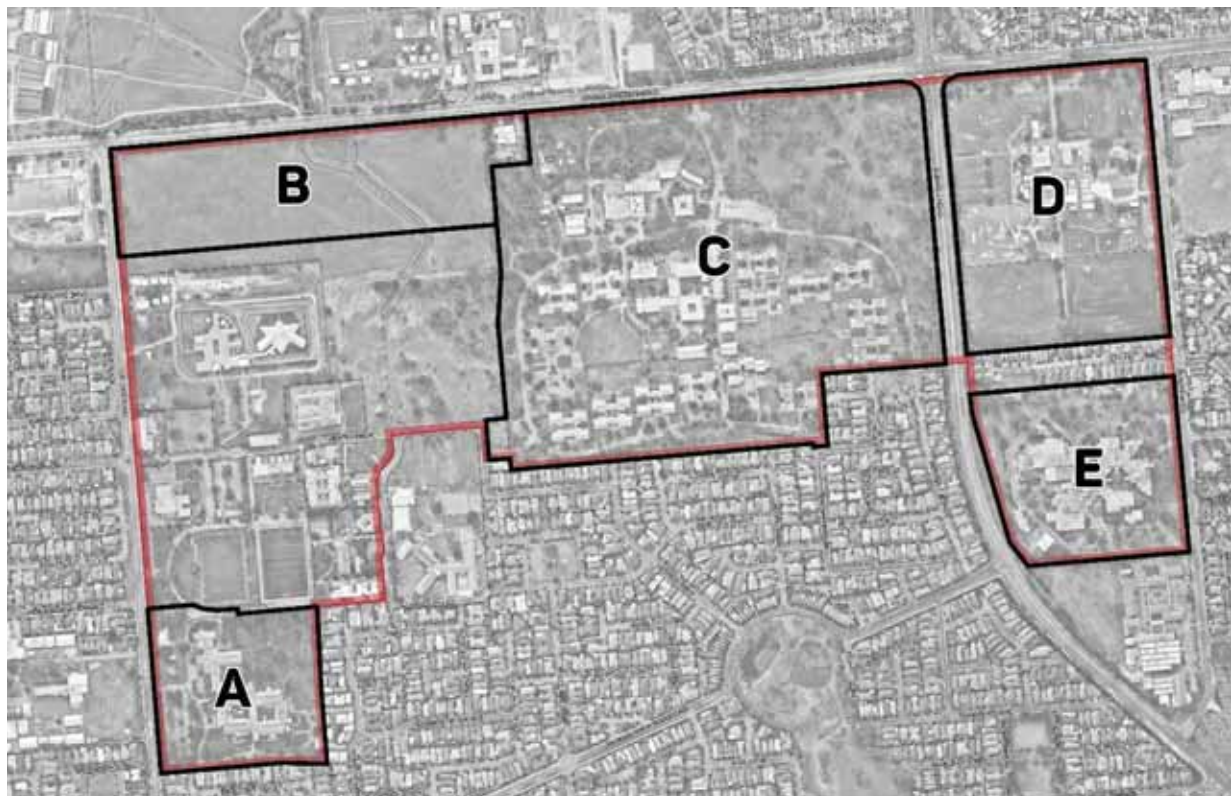


Table 11 below shows the estimated yield for the various precincts. The timing over which different land parcels can be brought to market will be determined by factors such as land ownership, existing use arrangements (such as lease or license), and market demand. Precincts A, B and C are expected to be capable of being brought to market in the short to medium term providing capacity for approximately 1,440 new homes, while the total capacity for new homes in the Structure Plan area is estimated to be just under 2,000 dwellings at full residential development.

Table 11. *Yields for various precincts*

Precinct	Dwellings
Precinct A	200 Dwellings
Precinct B	240 Dwellings
Precinct C	1,000 Dwellings
Precinct D	350 Dwellings
Precinct E	200 Dwellings
Total	1,990 Dwellings

5.2.2. Retail Catchments

The need or otherwise for retailing and support services has been assessed for the various precincts identified in the Structure Plan area (refer Figure 7), as follows:

- Precinct A is located on Fosters Road, less than 100m from the Northgate Shopping Centre. It is anticipated that Precinct A will be well served by the adjacent centre and will not require retail (commercial) floorspace within its boundaries.
- Precincts B and C represent the two ownerships across the site fronting Grand Junction Road, between Fosters Road and Sudholz Road. This area is the most remote area from existing retailing and is likely to require the development of such facilities to support future development of the Structure Plan area.
- Precinct D (if ever developed for residential purposes), is likely to partially contribute to any retailing (centre) established on Precincts B/C but is also likely to provide patronage to Gillies Plains Shopping Centre, via a direct link along Blacks Road and, to a lesser extent, the Valley View Shopping Centre, some 800 metres east along Grand Junction Road.
- Precinct E is in near proximity of the Gillies Plains Shopping Centre and is likely to be well served by this centre.

5.2.3. New Activity Centre Location

This assessment indicates the need for a new activity centre is warranted in the Structure Plan area.

The positioning of an activity centre to serve new residential development will have considerable implications for the size and drawing power of the development. An internalised centre is likely to be smaller and only serve the immediate locality. A centre located on a major arterial road frontage or intersection is likely to draw from a significant passing trade and from a wider catchment.

Given the existing location of Gilles Plains, Northgate and Valley View Shopping Centres, and the reasonable accessibility of those centres, the proposed positioning of a new centre is internal to Precinct C in a location poorly served by alternative centres. This inherently implies a smaller centre (local to neighbourhood scale) with more a limited drawing power.

5.2.4. Floorspace Demand

Based upon a future dwelling yield of 1,240 dwellings from Precincts B and C and a predicted household size of around 2.4 persons per household, nearly 3,000 residents can be expected to ultimately occupy these parcels. At a typical floorspace delivery of 2.1m² per persons, this equates with an overall demand for around 6,250m² to 6,900m² of retail floorspace.

Since development of a local activity centre to serve the daily and weekly needs of a population of around 3,000 is only likely to provide a limited range of retail choices, much of the retail spend generated by this population will be captured by surrounding Neighbourhood and District Centres. Higher order spending is likely to migrate to Regional Centres, bulky goods precincts and the CBD. Consequently, it is anticipated that a maximum of approximately 20 to 25% of floorspace demand generated by the incoming population could be expected to be captured within the development itself. This equates to a floorspace of around 1,250m² to 1,725m².

There may be a small capture of some spending from Oakden to the south, if suitable linkages between the areas are created, and some spending from Precinct D, if it is developed for residential purposes. These areas might add approximately 700m² to 900m² to the overall retail floorspace demand, requiring an ultimate centre size of around 2,000m² to 2,500m².

Non-retail uses, such as offices, medical, community services, child care and the like typically deliver additional floor area, that might range from 200m² to 800m², depending upon the ultimate composition of those facilities.

5.3. Institutional Activities

The Structure Plan area and surrounds has been the location for a range of Government affiliated Institutions over many years. Most of these uses in the Structure Plan area have already vacated their sites or are intending to vacate in the immediate future.

The notable exception is James Nash House, which is intending to double its size and has earmarked a large parcel of land for that expansion. This land is identified in and presented by the Structure Plan.

Beyond this expansion, no other expansion of institutional activities or new land holding requirements by other parts of Government have been identified. That said, both SAHMRI and TAFE are currently constrained by their

existing zoning which is limiting in terms of their current function and particularly limiting in terms of alternative future uses. It is appropriate that the Structure Plan address this constraint on operation of these sites.

5.4. Regional Commercial Opportunities

Beyond the requirements of existing institutions and the likely requirement for retailing services and facilities to serve the new residential population, land within the Structure Plan area could be utilised by activities seeking a location in the middle north-east suburbs to serve a wider customer base. Most existing businesses in the general locality have chosen to locate along North East Road, which provides a combination of accessibility, high volumes of passing traffic and a zoning regime that permits a range of retail, commercial and industrial land uses.

Within the Structure Plan area, the exposure and accessibility provided by Grand Junction Road, Sudholz Road and, to a lesser extent, Fosters Road, provide some potential for commercial development activities serving a regional customer base. The limitations of access to/from Grand Junction Road in particular, but also to/from both Sudholz and Fosters Roads, especially in the vicinity of the major intersections with Grand Junction Road, may limit the attractiveness of the land for high visitation uses which require ease of access.

These frontages are not recognised as preeminent commercial locations and interest would probably rely upon attracting a single major player or a long slow process of take up by multiple smaller players.

If any commercial use is to be supported, a mixed-use zoning approach which maintains a residential development outcome as an alternative land use capability (or other similar zoning outcome such as the Suburban Neighbourhood Zone), would be an astute approach to land in these locations.

The existing Mixed Use precinct located within the Structure Plan area and centred upon Hilltop Drive provides some opportunities for the satisfaction of future demand, most likely from local operators and typically from activities not requiring major public exposure. Some vacant land remains within this area and some sites might warrant redevelopment in the future. Demand for land in this location could be enhanced by a more accommodating planning regime that attracts a wider range of users and at increased intensity. The Fosters Road frontage could provide some exposure potential for new businesses.

5.5. Transport Access to Employment

The following assessment of transport access to potential future employment lands within the Structure Plan area and more broadly to other employment lands draws on the parallel investigation into Transport Impact undertaken by Arup.⁸

5.5.1. Access to New Activity Centre

For an area to be functionally walkable (or cyclable), useful destinations must be accessible by these modes within a reasonable travel time. The proposed activity centre location is considered well located and necessary (given existing poor walkability) from a transport perspective and will substantially improve the functional walkability and cyclability of the Structure Plan area.

⁸ Oakden and Gilles Plains Structure Plan, Technical Studies, May 2019, prepared by Arup.

Improved pedestrian connectivity across Grand Junction Road between the southern portion of Walkley Heights and the Structure Plan area is also proposed such that the walking and cycling benefits of a new activity centre are extended to this area. The existing 70kph speed limit on Grand Junction Road represents a significant barrier to permeability across Grand Junction Road. In this regard, the transport assessment identifies a reduction to 60kph would be beneficial for creating connectivity to Walkley Heights.

The high-level assessment of vehicle access for the Structure Plan area indicates an east-west road connection between Fosters Road and Sudholz Road provides a logical road connection through the area and can appropriately provide vehicle access to a new centrally located activity centre. Design of this collector street should meet DPTI minimum requirements for bus travel to allow for a potential future coverage type route through the Structure Plan area.

5.5.2. Access to Other Employment Centres

The current assessment¹ of the ability for the public transport network to connect residents with locations of employment within a 45-minute journey indicates that although the Structure Plan area is serviced by multiple bus routes, they are largely ineffective in connecting residents with areas of employment within a convenient travel time. The closest high frequency, high capacity public transport corridor to the Structure Plan area is the O-Bahn busway, which can be accessed via Paradise Interchange, approximately 3 kilometres to the south east via Sudholz Road. Providing direct and high-quality walking access to services along Sudholz Road provides an opportunity to improve commuter access to the O-Bahn which is highly effective at connecting to locations of employment.

Sudholz Road is posted at 70kph for its length through the Structure Plan area between Grand Junction Road and Sir Ross Smith Boulevard. As the nature of abutting land use changes through development, consideration should be given to lowering the speed limit of this road to 60kph to improve walking permeability across this road. This will become particularly important as Sudholz Road hosts the highest quality and most useful public transport connection to the Structure Plan area. The transport assessment also recommends that a new bus stop be placed on Sudholz Road, adjacent the main collector streets for routes 500/501/502 to maximise public transport accessibility for future residents.

Useful public transport is also available via Foster Roads and in this regard the transport assessment recommends alteration to route 528 to provide connection further north on Fosters Road.

6 – CONCLUSION

6. Conclusion

The study area provides for a range of employment opportunities through main road frontages, centres, industry zones and mixed use precincts.

While the study area is not self sufficient in job numbers, it nevertheless provides a good number of job opportunities which have been growing very strongly over the intercensal period.

The opportunities for the delivery of employment land within the Structure Plan area can be summarised as follows:

- Provision of an activity centre to serve the incoming population by providing for the delivery of a range of retail, commercial, community and recreation opportunities;
- Facilitating the delivery of new or expanded educational facilities anywhere throughout the Structure Plan area;
- Maintaining and enhancing the existing mixed use area by improving the land use mix and development intensity capability of the zone and thereby catering for smaller scaled commercial activities;
- Expanding the mixed use offer to include the north west corner of the Structure Plan area, thereby providing an opportunity for larger scaled commercial development in this locality; and
- Expansion of James Nash House, involving a doubling of its capacity and land take.

Importantly, these mixed use areas should retain a residential development opportunity as an alternative to their development for commercial purposes so as to maintain market flexibility in their future use.

On the other hand, the inclusion of the TAFE site within the District Centre Zone, while consistent with the policy area created for that educational use, could continue to function under a range of different zones without compromising that continued educational use. Indeed, the SAHMRI site to the north currently operates within a residential zone, notwithstanding its institutional function.

Both of these sites would be better served by a single consistent zone which protects and facilitates their continued institutional use, but which creates increased flexibility for possible alternative use in the future.

7 – REFERENCES

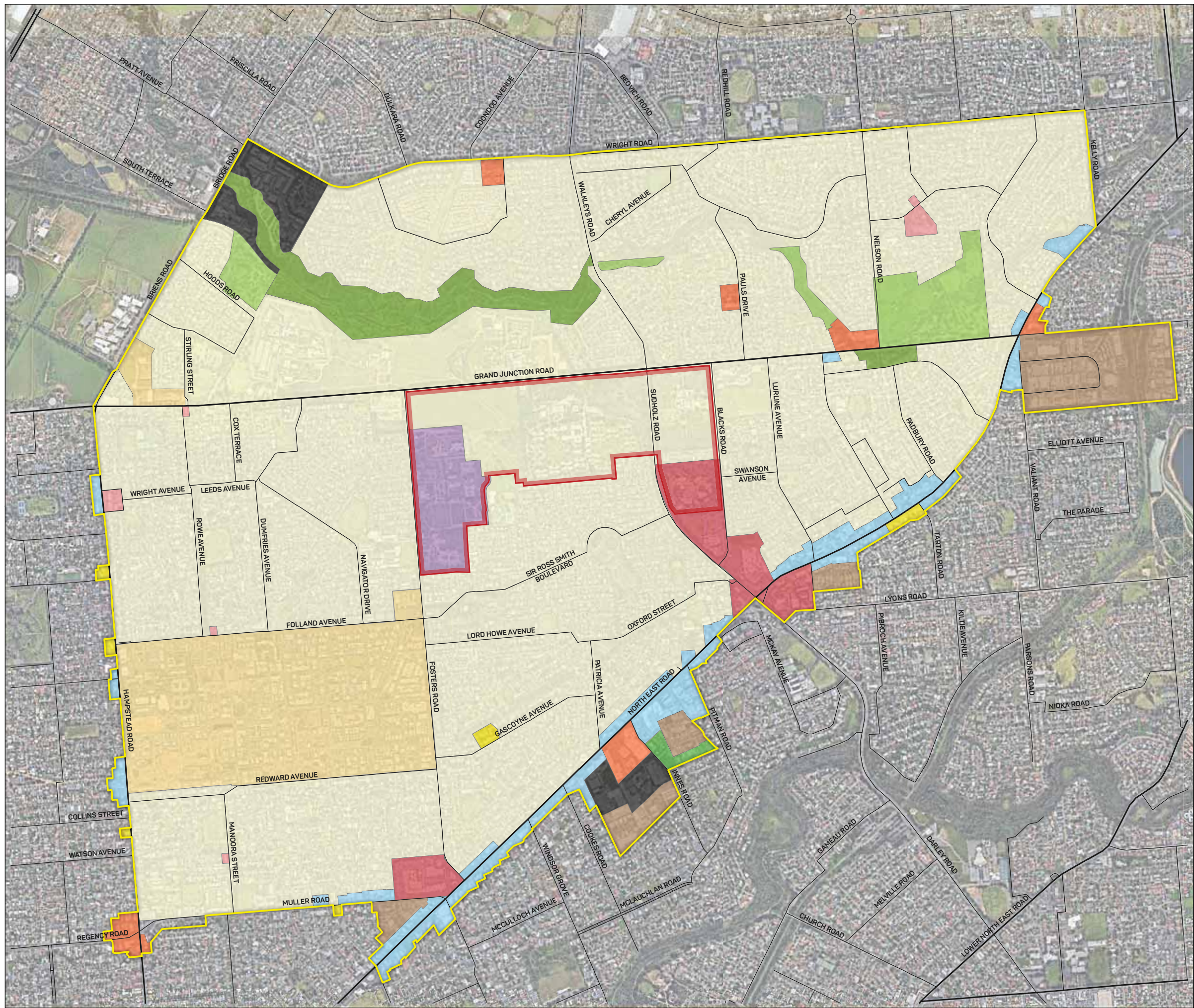
7. References

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- *The 30 Year Plan for Greater Adelaide 2017 Update*, Department of Transport, Planning and Infrastructure, Government of South Australia.

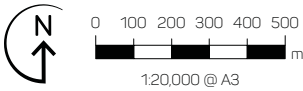
APPENDIX

Appendix 1. Land Zoned for Employment

**EMPLOYMENT LANDS
STUDY AREA & ZONING**
OAKDEN & GILLES PLAINS
STRUCTURE PLAN

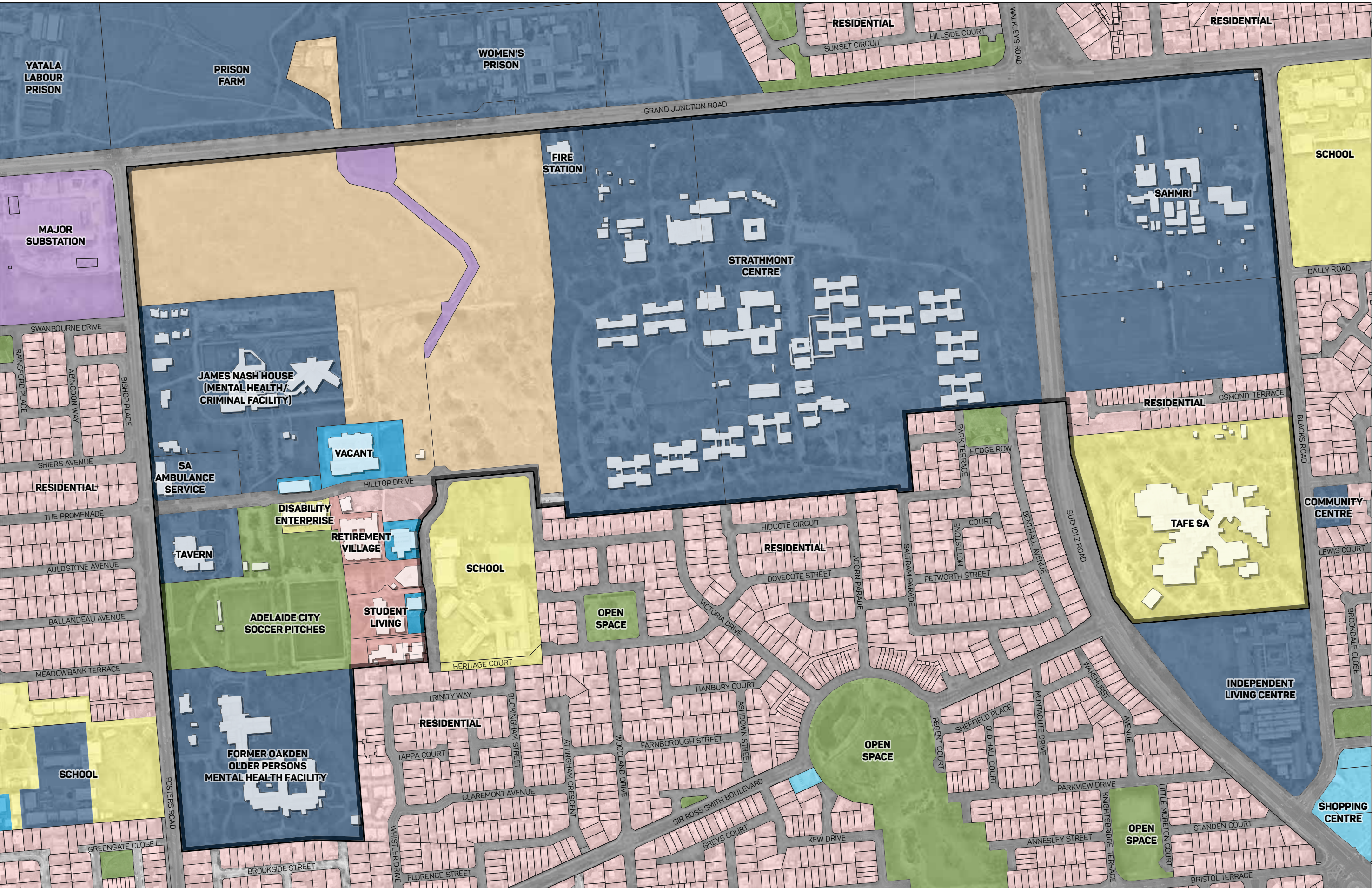


- STUDY AREA**
STUDY AREA
STRUCTURE PLAN AREA
- ZONES**
- COMMERCIAL
 - DISTRICT CENTRE
 - HOME INDUSTRY
 - INDUSTRY
 - LIGHT INDUSTRY
 - LOCAL CENTRE
 - METROPOLITAN OPEN SPACE SYSTEM
 - MIXED USE (OAKDEN)
 - NEIGHBOURHOOD CENTRE
 - OPEN SPACE
 - RESIDENTIAL
 - SUBURBAN NEIGHBOURHOOD



HOLMES DYER

Appendix 2. Existing Land Use



EXISTING LAND USES

OAKDEN & GILLES PLAINS STRUCTURE PLAN

<div>COMMERCIAL</div>	<div>NON-PRIVATE RESIDENTIAL</div>	<div>RETAIL COMMERCIAL</div>
<div>EDUCATION</div>	<div>PUBLIC INSTITUTION</div>	<div>UTILITIES / INDUSTRY</div>
<div>RESIDENTIAL</div>	<div>RECREATION / RESERVE</div>	<div>VACANT</div>

N

0

30

60

90

120

150

m

15,000 @ A3

HOLMES DYER