

**HILLPDA CONSULTING**

CELEBRATING 30 YEARS

**HILLPDA**  
CONSULTING

**URBAN  
ECONOMICS  
CAPABILITY  
STATEMENT**

BRIDGING THE GAP BETWEEN  
PLANNING, ECONOMICS AND  
PROPERTY ADVISORY

## MARTIN HILL, DIRECTOR

The successful revitalisation of an area draws upon the complex interrelations between strategic planning, commercial intelligence and economic knowhow. HillPDA's knowledge and experience in synergising these factors allows us to create the valuable difference.

## ABOUT HILLPDA

Our focus is to provide our clients across all levels of the public and private sectors with value-adding and timely services. Our experience ranges from informing regional-wide level planning frameworks for Government through to detailed site-specific investigations for developers, landowners and investors.

Our collaboration of disciplines and breadth of industry experience, coupled with our passions for our work and reputation, see us as an industry leader that delivers creative and commercially viable outcomes for our clients, in harmony with community needs and expectations.

Over the past 30 years, we have built our reputation as trusted independent advisors with an ability to bridge the understanding gap between economics and planning. We have also repeatedly demonstrated our ability to be innovative and creative thinkers.

This is evidenced by our policy work developing innovative ways to encourage affordable housing and value capture for funding of community infrastructure. We have also been innovators in econometric modelling including retail expenditure and employment land demand modelling.

We stand proud of our contributions to bridging the gap between planning and economics and how we can bridge that gap of understanding.

Urban & Retail Economics  
Planning  
Valuation & Feasibility  
Investment & Development  
Advisory

## HILLPDA IS A LEADING PROVIDER OF INDEPENDENT STRATEGIC PLANNING, ECONOMIC, DEVELOPMENT ADVISORY AND VALUATION SERVICES.

### INDEPENDENT

We are an independent consultancy that provides unbiased and client focused advice in an ethical context. We remain independent from retainers and sales transactions, operating in an advisory role for both the government and private sector.

### MULTI-DISCIPLINARY

We offer the opportunity to draw upon the complex synergy between strategic planning, commercial intelligence and economic know-how. The HillPDA team comprises of social, urban and economic planners, property economists and property valuers thus providing the skills necessary to deliver realistic, practical and innovative solutions.

### COMMUNICATION

We know that the best planning and economic strategies are the ones that are clearly communicated. We pride ourselves on delivering the highest quality documents that are legible, easily interpreted and graphically appealing.

### MODELLING EXPERTS

We set the industry standard in bespoke modelling having developed methodologies and models that are recognised globally. Our models cross multiple disciplines and include EstateMaster (feasibility), the Affordable Housing Calculator, Housing Propensity Model and our Retail Expenditure Model.

### COMMERCIALLY REALISTIC

Our multi-disciplinary firm enables us to deliver commercially grounded planning and economic solutions. We use our understanding and appreciation of the interrelationships between economics and planning, to create strategies that are not only innovative but are grounded by a strong evidence base with ethical justification.

### COLLABORATION

We believe the best ideas emerge from working collaboratively with our clients and key stakeholders to leverage off local knowledge and build a partnership based on communication, trust and quality research. By forming strong relationships with our clients, we can combine our knowledge and work together towards more effective project outcomes.

### THOUGHT LEADERS

We are at the forefront of industry best practices; we don't just follow best practice, we strive to create the 'next practice' as thought leaders and problem solvers. We undertake regular stakeholder engagement including industry and government workshops, surveys and seminars, allowing us to provide the knowledge that supports our clients and provide innovative and realistic solutions.

AS A MULTIDISCIPLINARY FIRM WE ENCOURAGE  
COLLABORATION AND ADDING VALUE TO OUR CLIENTS  
PROJECTS BY BRINGING IN INSIGHTS FROM OTHER TEAMS.



## Economics

HillPDA's urban and retail economics team boasts a reputation as trusted, respected and independent economic advisors. Our robust, evidence-based advice provides our clientele with practical, commercially sound and real solutions. These are based on rigorous analysis, using up to date inputs at the macro and micro level, and our industry leading in-house bespoke models. Working closely with our planning team, we bridge the gap between economics and planning ensuring more comprehensive, sustainable and successful outcomes.

Our property economics team offer a large range of urban and retail economic services which are supported by considerable experience, industry accepted inhouse economic modelling tools and capabilities. Our comprehensive economic analysis and forecasts have helped our clients across the public and private sectors make better policy, strategy and property decisions.

Get in touch:

Adrian Hack - Principal  
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Nicholas Hill - Associate  
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## Planning

HillPDA's planning team integrate commercial realism, innovation and deliverability when developing solutions to complex planning problems. Our experts in statutory and strategic planning, urban economics, stakeholder engagement and social infrastructure have been assisting the public and private sectors for over 30 years and have collectively earned a reputation for providing high quality and value-added services.

Get in touch:

Elizabeth Griffin - Principal  
Elizabeth.Griffin@hillpda.com

## Valuation and feasibility

HillPDA provide industry leading feasibility testing and advisory services. Our services are supported by a strong research-based approach, application of industry endorsed proprietary software, EstateMaster, a deep understanding of the intricacies of financial problems and the ability to communicate complex issues in simple terms.

Get in touch:

Martin Hill - Director  
Martin.Hill@hillpda.com

## Investment and development advisory

HillPDA's development advisory team brings together a cross-section of backgrounds to deliver integrated and innovative solutions to even the most complex development issues. Our team has the expertise and capability to provide you with the strategic support that you need at all stages of the development and operation lifecycle.

Get in touch:

Sam Taylor - Associate  
Sam.Taylor@hillpda.com

## OUR TEAM

URBAN AND RETAIL SPECIALISTS

WE ARE A MULTI-PROFESSIONAL TEAM OF ECONOMISTS,  
LAND ECONOMISTS, PLANNERS, GEOGRAPHERS  
AND PROPERTY DEVELOPMENT ANALYSTS.



**ADRIAN HACK**

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**MATT DE PASQUALE**

CONSULTANT

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**Adrian Hack** - Principal - M. Land Econ (Sydney), B. Town Planning (Hons) (UNSW)

Adrian is a Principal of the firm with over 25 years of service at HillPDA. Prior to HillPDA he worked for 10 years in both local and state government (Department of Housing and Darling Harbour Authority) in strategic planning, statutory planning and project management. Adrian is regarded as an industry expert for retail economics and is often called upon to provide expert evidence for retail, planning and feasibility matters. Along with Martin Hill, Adrian supported the development of the industry leading Estate Master Software.

**Nicholas Hill** - Associate -B. Science, M Human Geography, Macquarie University, M.A. Property Development, University of Technology

Nicholas is an Associate in HillPDA's property economics team where he leads on major projects for local and State Government. Nicholas has particular focus on the synergy between planning and economics with the link between these being of key importance to positive development. Nicholas works closely with the planning team on major employment, transport, housing and social infrastructure studies, undertaking the modelling and providing the robust evidence base that supports strategy development.

**Sam Taylor** - Associate - B. PropEco, Dip Sec & Risk Mgt

Sam has been with HillPDA since 2015. Sam has a reputation for quality work in investment modelling, transactions, due diligence, highest and best use assessments, asset divestment strategy, business case development, portfolio analysis, financial modelling, economic forecasting, property market studies, and property consultancy advice. He understands multiple property/ asset disciplines such as planning, valuations and economics and therefore can strike the perfect balance between planning and economics. This has been noted by multiple clients.

**Matthew De Pasquale** - Consultant - B. Commerce, M.Economics (Ongoing)

Matthew is a consultant in HillPDA's Melbourne team, currently undertaking a Master of Economics at the Melbourne Business School. His role at HillPDA spans the Melbourne and Sydney offices where he carries out economic and planning research, impact assessments, and demand studies.

IT IS RARE THAT OUR PROJECTS ONLY INVOLVE URBAN AND RETAIL TEAM. TO ENSURE A HOLISTIC APPROACH WE FREQUENTLY COLLABORATE WITH:



**MARTIN HILL**  
Feasibility and  
strategy



**VIRGINIA PHILLIPS**  
Valuation and  
Advisory



**ALEX HRELJA**  
Infrastructure  
contributions



**ELIZABETH GRIFFIN**  
Planning, social and  
engagement

ECONOMICS HAS BECOME AN INTEGRAL PART OF THE PLANNING PROCESS ENSURING THAT VIABLE AND ROBUST EVIDENCE-BASED POLICY, STRATEGY, INVESTMENT AND PROPERTY DECISIONS ARE MADE. THIS PROCESS ENHANCES THE LIVEABILITY, PRODUCTIVITY AND SUSTAINABILITY OF OUR URBAN AND RURAL COMMUNITIES.



# OUR SERVICES

EXPERIENCE & CAPABILITY

OUR FOCUS IS TO PROVIDE OUR CLIENTS ACROSS ALL LEVELS OF THE PUBLIC AND PRIVATE SECTORS WITH VALUE-ADDING AND TIMELY SERVICES.

## ECONOMIC APPRAISALS

- Cost benefit analysis
- Cost effectiveness analysis
- Net community benefit analysis
- Triple bottom line assessment

## ECONOMIC FORECASTS AND MODELLING

- Forecasting models
- Social infrastructure needs
- Land use modelling

## ECONOMIC STUDIES

- Economic analysis
- Economic impact assessments
- Hotel and tourism studies

## RETAIL ECONOMICS

- Centre performance appraisals
- Retail/trading impact assessment
- Retail demand modelling / trade area and gap analysis
- Retail expenditure and gravity modelling

## EXPERT WITNESS AND PEER REVIEW

- Statements of evidence
- Court hearings, panel hearings and Section 34 committees
- Class 1 Appeals – economic impact evidence
- Highest and best use assessment in compulsory acquisitions and land valuation cases
- Peer review of economic needs and impact assessments

## BUSINESS CASES

- Preliminary and final business cases
- Financial and economic appraisals
- Risk assessment and mitigation strategies

## LAND USE AUDITS

- Commercial centres
- Employment areas
- Residential

## RESEARCH AND ANALYSIS

- Demographic analysis
- Spatial analysis
- Shopper and visitor surveys
- Property market appraisal



## ECONOMIC APPRAISALS

Hillpda has prepared economic appraisals for a large number of public and privately funded projects including affordable housing, urban renewal initiatives, highway upgrades and major multi-use residential, retail and tourism projects. The appraisal includes the identification of benefits and costs and their quantification and cashflow modelling to derive an overall cost / benefit for a nominated standing. Our bespoke Cost Benefit Analysis (CBA) models have been widely recognised by State and local governments in the evaluation of project options and development proposals.

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### Cost Benefit Analysis (CBA)

A CBA includes the identification of benefits and costs and their monetarisation in a discounted cash flow model to derive an overall net present value and benefit/cost ratio. Our bespoke CBA models have been widely recognised by State and local governments in the evaluation of project options and development proposals.

### Cost Effective Analysis (CEA)

A CEA is similar to CBA except that it is used to evaluate options that achieve the same project objectives by quantifying only the costs in present value terms rather than both the costs and benefits.

### Net Community Benefit Test (NCBT)

A NCBT test is similar to a CBA except that only impacts on third parties (externalities) are quantified and impacts on producers and consumers are excluded. development proposals.

### Triple bottom line (TBL)

A TBL is a slightly different evaluation method where social and environmental costs are not monetarised



## BROKEN HILL LIBRARY AND VISITOR HUB ECONOMIC APPRAISAL

Broken Hill City Council

HillPDA assisted Council in undertaking the cost benefit analysis of options for a new library, archives and tourism office as part of the business plan. The preferred option was a new integrated building in the town centre. Costs and benefits were measured against the base case (upgrading existing premises) over a project life of 20 years. Quantified benefits included a new and enlarged library that could accommodate additional services thereby increasing use benefit (number of visits by time stay) and an increase in borrowings (cost savings by borrowing). Unquantified benefits included a more central location in the town centre, new archives to be fire-proof and a new iconic building which would replace the older mundane appearance of the existing library. location assessment (including planning opportunities), market research and subsequent feasibility modelling was undertaken in relation to required floor space demand to ensure a holistic and commercially realistic outcome.

## POKOLBIN ECONOMIC APPRAISAL OF PROPOSED GOLF COURSE HOTEL TOURISM ESTATE

HDB Town Planning and Design

HillPDA completed an economic and social appraisal including a Cost Benefit Analysis of a proposed Jack Nicklaus Golden Bear Golf Course estate including a PGA 18 hole Golf Course, Golf Academy, 250 room Hotel with conference facilities, wellness centre and integrated residential estate with 300 dwellings. The CBA included quantified benefits such as gross value added from additional tourism, the market values of residential homes, recreational use benefit and multiplier impacts from additional overnight tourists, residents and day visitors in the local area. While CBA has been used to evaluate public projects for several decades its use in evaluating privately funded projects is rare. It was quite pioneering at the time and demonstrated how the CBA could have a useful purpose in planning and development assessment.

## WYONG PACIFIC HIGHWAY UPGRADE SOCIOECONOMIC IMPACT ASSESSMENT AND CBA

NSW Roads and Maritime Services and SMEC Australia Pty Ltd

HillPDA completed several components in relation to the assessment of four different options for the widening and upgrade of the Pacific Highway through Wyong Town Centre including:

- The business impact assessment (which included the measurement of trading impacts due to loss of car parking spaces, acquisition/removal of local businesses and access changes/loss of convenience);
- The socio-economic impact assessment (identification of affected parties and levels of impact including property impacts, impacts on social infrastructure, heritage, accessibility and connectivity, amenity, health and safety, social cohesion, etc) and
- The cost benefit analysis (including capital costs and the quantification of externalities such travel time savings, safety (accident cost savings), vehicle operating costs, business and social impacts)



## ECONOMIC FORECASTS AND MODELLING

HillPDA has developed several in-house bespoke models to inform our clients decision making and position themselves to take advantage of a changing economic climate. These models use up to date government and other industry-standard sources to make sense of and project data trends across all segments of the industry, forecasting not only socio-demographic trends but land use patterns and floorspace needs.

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### Forecasting models

HillPDA has several accurate and detailed forecast models. These models are updated and informed on the latest available information, community consultation, our extensive database, specialist market research and advanced spatial models. Models and data is one thing. Our value add is in interpenetrating the data, making sense of any trends and conveying this to our clients to inform their decisions better and provide sound economic advice.

Sectors that can be forecaster include:

- Economic
- Employment
- Housing
- Population
- Student
- Tourism and visitor.

### Land use modelling

HillPDA's bespoke land use models forecast specific floorspace and land requirements for a range of industry sectors. These models are used to inform a wide range of studies and strategies. In tandem with detailed land use audits, these forecasts provide a clear understanding as to the need for additional floorspace/ land to either maintain supply in line with demand or avoid oversupplying a location.

Industry sectors that can be modelled include:

- Boat and marina storage
- Commercial
- Industrial / urban service
- Residential
- Retail
- Student accommodation
- Tourism and visitor accommodation.

### Social infrastructure needs

HillPDA's social infrastructure bespoke model uses a range of government and industry standard benchmarks to accurately forecast the amount and type of infrastructure required to support the local community. Types of infrastructure projected include aged care, community space, child care, education facilities, health facilities, open space, library space and recreation facilities.



## CENTRAL HOBART PRECINCT PLAN

Hobart City Council

In 2019, the City of Hobart and the Tasmanian Government agreed to work together to deliver a Central Hobart Precincts Plan to guide future development and public infrastructure provision in Central Hobart. A key component to developing a robust evidence-based Plan was an in-depth understanding as to the current supply, and future demand for a range of land uses within Central Hobart. These land uses include housing, office, retail, entertainment, visitor accommodation, social and education facilities. To understand the current supply and project the likely future demand for these various land uses, HillPDA was commissioned to undertake an economics, demographics and employment study (the study). The study provided a summary of relevant socio-economic trends and forecasted a range of land uses within Greater and Central Hobart to support the overall development of the Plan.

## GEORGES RIVER COMMERCIAL CENTRE STUDY

Georges River Council

The need to prepare a harmonised strategic vision and planning framework to guide and stimulate appropriate development within Georges River LGA was the catalyst for the development of a commercial centres strategy. To achieve this, HillPDA provided Council with a comprehensive strategy which identified the current status and future direction of Georges River's commercial centres. Specifically the strategy included an analysis of recent market trends and drivers, identification of capacity and supply blockages, and projected future floorspace and land requirements to accommodate additional growth.

## WOLLONDILLY EMPLOYMENT LANDS STRATEGY

Wollondilly Council

HillPDA undertook an employment land strategy for the ten employment precincts across Wollondilly LGA. The Study was a short turnaround of around four months. Within this timeline, HillPDA provided Council with a comprehensive strategy which included two phases. The first phase was a baseline report which provided a detailed land use survey; constraints mapping; forecast land use modelling; capacity assessment and the identification of new employment precincts to provide appropriately located additional land stocks. Phase two includes Council and industry stakeholder consultation and the development of the strategy. The strategy provided specific recommendations at the precinct and LGA level to support and encourage further growth. Over the course of the project, HillPDA presented to Council several times to inform them of our progress and provide an opportunity for their input. The outcome is a highly visual and concise document which provides a 20-year strategy for the LGA.

## CENTRAL COAST EMPLOYMENT LANDS STRATEGY

Central Coast Council

Central Coast Council engaged HillPDA to undertake an employment land strategy to review all 29 employment precincts across the LGA. The Strategy was undertaken in two phases as stipulated in the brief. These phases were:

1. A land use audit: this phase identified and catalogued all employment lands in the LGA. The Audit identified all employment lands' main planning attributes and land characteristics. The Audit is compatible with the NSW Government's 'Employment Lands Development Monitor' (ELDM) and provides an understanding of land that is highly constrained, and which is ready for further development
2. The Strategy: this phase applied at an LGA level with precinct specific actions and recommendations. Overall, the Strategy established a clear direction for future industrial and urban service development across the Central Coast over the next 20 years.





## ECONOMIC STUDIES

HillPDA provides a number of economic studies that can encompass and combine a number of our other services to provide our clientele with in-depth analysis to help inform the development, evaluation and viability of existing policies, strategies, developments and projects. Economic studies can highlight the economic benefits to the local and wider economy, analyses and encourage growth in targeted industries, identify any potential impacts that may eventuate and mitigation measures to reduce these adverse impacts. HillPDA's strength in this field comes from its economic and commercial know-how which allows our team to engage with and understand the community, government, developer, business and landowner interests to achieve realistic and practical outcomes.

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### Economic analysis

Targeted economic analysis can guide future development options and enhance business confidence. HillPDA can aid stakeholders to better understand the contribution industries provide to a local economy; identifying gaps in provision or support requirements. Economic appraisals are often combined with targeted engagement to identify demand for services, understand challenges or land use conflicts and gain future insights. Where appropriate, development options are specified and appraised for their economic contribution.

### Hotel and tourism studies

Unlike commercial and residential markets appraisal of the tourism market and its wide umbrella of sub-markets can be quite vexed. An understanding of the experiences that tourists are getting is important but so are the experiences that they're not getting. Latent demand is often harder to measure due to a lack of empirical data but it is imperative in feasibility testing and impact assessment. Extensive stakeholder consultation combined with econometric forecasting are techniques to overcome these challenges.

### Economic impact assessment

Increasingly the development assessment process requires an understanding of a project's potential economic impacts. Economic impact assessments always consider and evaluate two options, these being, a base case or business as usual and the proposal case.

HillPDA are experts in assessing net employment creation, construction multipliers, input-output modelling, economic impacts on businesses, impacts on changes to service delivery and changes in property values. Importantly HillPDA not only calculates potential impacts but proactively identifies mitigation strategies to minimise, and where possible avoid, negative impacts arising from any change.



## GO JINDABYNE

Transport for NSW C/- WSP

NSW Department of Planning Industry and Environment  
HillPDA undertook an Economic Development Study that informed the “Go Jindabyne 2036 Master Plan”, with specific focus on the Jindabyne economy and the relationship between Jindabyne and the wider Snowy Mountains Region. The study gained a detailed understanding of the local, state, national and international economic role and function of Jindabyne, benchmarked and evaluated against international trends and submarkets enabling us to determine the town’s ability to respond to macroeconomic, industry and tourism opportunities.

The study also included several strategies for change in Jindabyne particularly in relation to developing the town as an all year round destination for tourism.

## MOORE POINT ECONOMIC IMPACT ASSESSMENT

Private client

HillPDA undertook an economic impact assessment for the Moore Point Planning Proposal. The Planning Proposal was located in the suburb of Moorebank and would provide a mixture of land uses including commercial, community, entertainment, medical, retail, social and residential.

In total, around 1,601,058sqm mixed-use gross floor area (GFA) would be developed, this would be comprised of 344,499sqm of mixed-use employment GFA and 1,256,559sqm of residential GFA, equating to around 14,783 dwellings.

The study assessed the current economic contribution of the uses located on Planning Proposal’s subject site and compared to that under the proposed uses. Economic metrics assessed included employment, wage and Gross Value Added, construction multipliers, retail expenditure and floorspace demand, whole government revenue and other economic benefits.

## PITTWATER WATERWAY ECONOMIC STUDY

Former Pittwater Council and Transport For NSW

Pittwater’s marine industries contribute to the local economy by creating opportunities for employment, production of goods and services, while stimulating other sectors of the economy.

To assess this contribution and understand the future demand, HillPDA undertook an economic review of local marine industries and projected the demand for boat storage by category type (swing mooring, wet berth and dry storage) within the former Pittwater LGA waterway catchment.

The objective of the study was to aid Council and the local community to better understand the contribution marine industries provide to the local economy and provide commentary on the pressures marine industries may face in the future.

## CROWS NEST ECONOMIC IMPACT ASSESSMENT

Private client

HillPDA undertook an economic impact assessment of a Planning Proposal in Crows Nest. Development of the Planning Proposal would provide a mix of land uses, including commercial, community, retail, and residential. In total, around 37,500sqm of mixed-use gross floor area.

The study assessed the current economic contribution of the uses located on Planning Proposal’s subject site and compared to that under the proposed uses. Economic metrics assessed included employment, wage and Gross Value Added, construction multipliers, retail expenditure and floorspace demand, whole government revenue and other economic benefits.



## RETAIL ECONOMICS

HillPDA provides a range of services in the field of retail economics including retail demand forecasting, retail trends analysis, competition and spatial trade area analysis, market delineation and retail impact assessment. To deliver these services, HillPDA has developed a range of bespoke models, including forecast expenditure models and gravity impact models. These methods have been tried and tested in the NSW Land and Environment Court and recognised by Government policy.

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### Retail impact assessments

The main reason for the preparation of a retail impact assessment is to provide relevant information to assist in the determination of an application for planning permission for major retail development.

Retail impact assessment is also the means of assessing the potential impacts of a new proposed retail development on the vitality and viability of existing centres or retailers within a defined catchment area of the proposed development.

### Centre performance and competitive environment analysis

Successful centres are underpinned by the viability of businesses and the competitiveness of the retail environment. We undertake strategic reviews of the performance of centres and determine the economic factors and interventions to support revitalisation. This analysis considers the performance of centres against the broader economic environment and trade catchment. HillPDA has extensive experience in determining trade catchments for a range of retail services with their boundaries and surrounding competitors being provided in high-quality visual maps. A trade area is a geographic area from which a retail service generates the majority of its trade. The extent of a trade area depends on the type of service being provided, surrounding competitors and the existence of natural and artificial barriers.

### Retail expenditure and gravity modelling

In order to quantify the redirection of trade from competing centres HillPDA developed a bespoke gravity impact model.

The gravity model was designed on the premise that the level of redirected expenditure from a competing centre is directly proportional to the turnover of that centre and indirectly proportional to the distance from a new centre. The results measure the impact that a new centre or particular use would have upon surrounding retailers and retail network.

### Retail demand modelling

HillPDA's bespoke retail demand model uses historical and present data to estimate residential, retail expenditure and subsequent demand for retail floorspace by specific categories within a defined locality.

The outcomes inform the development and recommendations in numerous assessments, studies, policies and strategies undertaken by HillPDA.





## MOSS VALE ROAD RETAIL DEMAND ASSESSMENT

Shoalhaven City Council

The Nowra-Bomaderry Structure Plan 2006 identified several new urban areas across the Nowra-Bomaderry area with the capacity to contribute to the supply of new homes. Several landowners in the northern release area approached Council with a revised dwelling yield and a reduction in the land area identified for the local centre. The revised dwelling yield had the potential to increase the overall population to around 10,270 persons. To properly plan for the needs of the future Moss Vale Road community, Council commissioned HillPDA to:

1. Identify the amount and type of retail floorspace required to service the future community of the Moss Vale Road Urban Release Areas.
2. Identify the optimal location(s) for a retail centre or centres across six possible sites.

The study provided Council with a clear understanding as to the retail needs of the community of the future release area and wider North Nowra/Bomaderry locality. Two locations were identified to appropriately service the locality with one centre servicing a walkable catchment of the release areas.

## AVALON TOWN CENTRE RETAIL ANALYSIS

Northern Beaches Council

HillPDA During community consultation several concerns about Avalon Town centre were raised. One of the key areas of concern related to the economic vitality and vibrancy of the local retail centre. Particularly, many locals were concerned about the amount of vacant retail space, perceived high retail rents, seasonal fluctuations and associated impact upon business outside of peak periods, and the lack of night/evening life.

In response to these concerns, HillPDA undertook a retail analysis for Avalon Town Centre. To inform the study a detailed land use audit of the centre was conducted; trade area and demographic analysis; discussion on “what is a healthy vacancy rate”; community consultation; analysis of surrounding centres and a concise review of 15 key factors that contribute to a successful retail centre with 9 best practice measures that Council could use to revitalise the centre being provided with real world examples provided for each.

## PARRAMATTA LOCAL CENTRES STUDY

City of Parramatta Council

HillPDA was engaged to provide Council and the local community with an understanding of the current economic performance and future growth of the eight identified local centres across the LGA.

The Strategy also provided an implementation plan to appropriately encourage and measures the economic performance, plan for the projected growth, provide for an appropriate retail mixture and assisted in the determination of current/future planning proposals.

In undertaking the strategy, we:

- Undertook land use surveys
- Provided a socio-economic snapshot of each centre
- Quantified their employment and economic contribution
- Mapped their trade area and surrounding competitive environment
- Forecasted commercial and retail floor space requirements for each centre
- Quantified if additional land (expansion) or planning control amendments were required in order for the centre to accommodate its projected demand
- Provided recommendations, implementation plan and performance indicators/measure to track and encourage the intended outcomes for each centre.

## SHOWGROUND RETAIL DEMAND ASSESSMENT

Private client

HillPDA was engaged to undertake a retail demand assessment pertaining to a proposed transit orientated development located within the Showground Precinct in Castle Hill. Specifically, the study provided advice on the amount and type of retail space that could be accommodated in the development, ensuring that the area is activated and the local community is appropriately serviced



## EXPERT WITNESS AND PEER REVIEW

HillPDA's planners, property economists and valuers have extensive experience in acting as expert witnesses. Our experienced team can provide expert evidence at hearings and litigation trials on property economics, strategic land use and social, economic and retail impacts of proposals.

The persuasive cases we deliver on behalf of our clients are underpinned by evidence that is well researched, commercially astute and of the highest standard. We are also able to provide peer review services, that deliver a balanced and objective review of an assessment, considering, scope, quantification and evidence considered for accuracy.

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### Statements of evidence

Statements of expert evidence are technical reports which Courts rely upon in determinations or judgements. The same rules of rigour apply in relation to providing evidence based assessment. Sources of data and information is thoroughly cross-checked and referenced. Where evidence is lacking then assumptions must be clearly stated and must be reasonable. In some cases joint statements between two parties are prepared requiring the experts to make attempts to reach agreement on contentious issues prior to hearing.

### Highest and best use assessment in compulsory acquisitions and land valuation cases

Some of personnel in HillPDA have considerable experience in preparing evidence that identifies the highest and best use or most probable use of land. This is essential in determining unimproved land value but it is also important in compulsory acquisition cases in understanding the value of land being acquired as well as the betterment or injurious affection that a project is likely to have on the balance of the subject site.

### Court hearings, panel hearings and Section 34 committees

Several staff in HillPDA have experience in providing expert evidence in various courts, panel hearings and Section 34 committees (NSW Land and Environment Court). In many cases HillPDA's expertise in the panel hearings and committees have enabled parties to resolve contentious issues prior to going to court hearing saving both parties considerable time and expense.

### Peer review of economic needs and impact assessments

In many cases councils and other consent authorities will have difficulty in assessing technical economic need and/or impact assessment reports due to the economic language, data sources and assumptions adopted. HillPDA has a long experience working with authorities in de-mystifying these likely impacts, ensuring that applicants have considered all relevant issues and adopted proper methods and verify sources of data and assumptions. We are then able to make conclusions and recommendations that are robust and can withstand scrutiny.



## BRONTE SUPERMARKET PEER REVIEW

Waverley Council

Council was approached by a national supermarket provider to provide a store within Bronte village. Council received a number of public submissions on the development application concerned about the potential impacts upon surrounding retailers.

To address these concerns, HillPDA undertook a peer review of the social and economic assessment that accompanied the application.

## GLENMORE PARK RETAIL ADVICE PEER REVIEW

Penrith City Council

HillPDA undertook a peer review of a report which provided advice on the need and size of a retail centre to support the future residents within the Glenmore Park 3 release area.

The reports findings indicated that there was a need for a major supermarket within the release areas which could anchor a neighbourhood shopping centre of 6,500sqm to 7,500sqm gross leasable area (GLA).

Our peer review assessed the methodology, assumptions and key findings as described in the report with our findings being provided to Council.

## ORAN PARK RETAIL ADVICE PEER REVIEW

Penrith City Council

A Planning Proposal was submitted to Council for the rezoning of the 146.1 hectare (ha) parcel of land referred to as Orchard Hills North. A retail assessment identified that the catchment could support a neighbourhood Centre of around 6-8,000sqm. Our peer review assesses the methodology, assumptions and key findings as described in the report with our findings being provided to Council.

## Expert witness in court

Our experience in providing expert evidence in courts include, but is not limited to, the following:

- Chamwell Pty Ltd v Strathfield Municipal Council (2008) NSWLEC 4
- AMP Capital Investors Ltd v Transport Infrastructure Dev. Corp. (2007) NSWLEC 397
- Cartier Holdings P/L v Newcastle City Council and Anor (2001) NSWLEC 170
- Ex Gratia Pty Limited v Dungog Shire Council (2005) NSWLEC 148
- Terrace Tower Holdings Pty Ltd v Sutherland Shire Council (2002) NSWLEC 150
- Newtown Erskineville Artro Management v Sydney City Council (2009)
- Jaimee Pty Ltd v Council of the City of Sydney (2011) NSWLEC 7
- Martin Morris & Jones P/L v Shoalhaven City Council (2012) NSWLEC 1280
- Almona Pty Ltd v Roads and Traffic Authority of New South Wales (2008) NSWLEC 112
- Stockland and onr v Manly Council (2009) NSWLEC 1145
- Trivest Pty Ltd v The Council of the City of Sydney (2010) NSWLEC 1273
- Hillsong Church Ltd v Sydney City Council (2012) NSWLEC
- CPT Custodian P/L and GT Management P/L v Valuer-General (2009) NSWLEC 1426
- De Angelis v Wingecarribee Shire Council (2012) NSWLEC 11235
- D-Studio Architects Pty Limited v City of Sydney Council (2013) NSWLEC 1175
- North Sydney Leagues Club Limited v Tweed Shire Council (2014) NSWLEC 1142
- No 1 Victoria Dragons Pty Limited v Georges River Council (2018) NSWLEC 217118
- Palmerston Dragon No 1 Pty Ltd v Georges River Council (2018) NSWLEC 21710.

## BUSINESS CASES

Any significant project whether it be public, private or a joint venture requires a business case. Business cases encompass a wide range of services all binded into a single document. The tasks and services include setting project objectives and justification, market appraisal, financial appraisal, economic appraisal, risk assessment, stakeholder engagement, governance and implementation. There are Commonwealth and State government guidelines in the preparation of business cases, methodology, relevant matters for consideration, inclusions and exclusion.

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### Preliminary and final business cases

Preliminary business cases play a critical role in decision making. They support the strategic assessment of the service need and a high-level financial, economic and risk appraisal of alternative service delivery options.

The final business case requires the case for change to be revisited and updated and a more detailed level of analysis of the preferred option or range of shortlisted options. Its aim is to demonstrate value for money and assess if the agency has the capability and capacity to implement all the components of the preferred option.

### Financial and economic appraisals

Financial appraisal uses discounted cash flow modelling incorporating all the marginal agency's costs and revenues relating to the alternative service delivery options and measuring the key performance indicators against required financial returns. Economic appraisal adopts much the same method but includes the costs and benefits in the whole economy so impacts on third parties are included and not just impacts on producers and consumers.

HillPDA has prepared economic appraisals for a large number of public and privately funded projects including affordable housing, urban renewal initiatives, highway upgrades and major multi-use residential, retail and tourism projects. The appraisal includes the identification of benefits and costs and their quantification and cashflow modelling to derive an overall cost / benefit for a nominated standing.

### Risk assessment and mitigation strategies

Risk assessment is an essential component of appraising options. Higher rates of return should be applied to compensate for risk. Alternatively mitigation measures should be identified and incorporated in the assessment. HillPDA employs a number of varying techniques and in-house tools including scenario and sensitivity testing and probability assessment and uses stakeholder consultation to identify and cost mitigation strategies.

## BLUE MOUNTAINS WORKPLACE STRATEGIC BUSINESS CASE

Blue Mountains City Council

Blue Mountains City Council engaged HillPDA to assist in the preparation of the future workplace strategy and develop an initial business case that identifies a range of workplace options to position Council's facilities and workspaces into the future. A background report was prepared that determined that Council's existing administrative and operational facilities were at the end of their economic use and no longer fit for purpose. Twelve sites were assessed on how to best accommodate Council employees and the associated administrative services to enhance the efficiency of workplace operations and maximise the utilisation of Council facilities. The analysis also looked at the potential divestment of surplus Council owned assets to fund a workplace option. HillPDA considered the factors which influence the economics of property development in each of the Town Centres. Site location assessment (including planning opportunities), market research and subsequent feasibility modelling was undertaken in relation to required floor space demand to ensure a holistic and commercially realistic outcome.

## CHESTER HILL AND VILLAWOOD EAST SOCIAL HOUSING URBAN RENEWAL PROJECT

NSW Land and Housing Corporation

HillPDA completed two business cases for the urban renewal of Chester Hill and Villawood East precincts. This included a comprehensive review of the residential, retail and commercial property market sectors, financial and economic appraisal and implementation strategy. As part of the project HillPDA consulted with Community Housing Providers to inform an assessment of the right model for the delivery of affordable housing and seniors living accommodation that meets the future needs of the community.

We were also able to quantify some of the social benefits of social housing renewal and mixed tenure estates including improvements in transport sustainability, reduced stigmatisation (improvement in land values) and other impacts. At the time the market was insufficiently strong enough to meet the costs of urban renewal. The sites were later included in the Communities Plus program following some strengthening in the market.



## LAND USE AUDITS

Land use audits An important component of many assessments, studies and strategies is a clear understanding on the current land use mixture and floorspace with a define location. HillPDA has extensive experience in undertaking detailed land use audits over the last three decades. This has contributed to HillPDA having a broad database which allows us to examine trends and structural changes in floorspace provision and composition across NSW.

HillPDA undertakes two types of land use surveys. One is a detailed method with HillPDA personnel visiting each and every business to confirm its size, type and level. The other method, widely used by the industry, uses a combination of remote industry sources these being google street view and business information, ABS, GIS floorplate, ABR, street view and aerial measuring. Combined, these sources are used to estimate floorspace and the type of uses.

Each method has its pro and cons. However, the outcomes of each can are able to be visually mapped to highlighting industry clusters, vacancy locations, underutilised sites and estimate additional capacity.

## RESEARCH AND ANALYSIS

HillPDA provides a wide range of reach capabilities to our clients informed from direct consultation with stakeholders, analysis of Government and industry sources, in-house spatial analysis systems and our extensive database/research library.

Our value add to clients is in interpreting trends and characteristics, providing a “so what does it mean” analysis of an area and not just reporting on high-level data and changes in numbers.

### Demographic analysis

HillPDA provides detailed demographic analyses of defined locations across Australia. This analysis involves detailed cross-tabulation and benchmarking of ABS and other data to further identify unique characteristics and trends that increase the robustness of our evidence-based findings.

### Property market appraisal

HillPDA's undertakes direct consultation with various stakeholders and analysis of industry sources to provide accurate analysis on market trends and cycles. This informs many of our services .

### Spatial analysis

HillPDA's Geographical Information Systems (GIS) provide our clients with highly visual outputs to better convey complex information and outcomes easily and effectively. Our GIS can spatially analyse a wide range of data and information to better examine, discover, highlight and explain patterns of a wide range of property, transport and human behaviour.

### Shopper and business surveys

To support retail studies, HillPDA prepare and undertake shopper and business surveys to understand customer and business buying and trade patterns. They are useful tools for determining trade catchments and interventions to support centre performance.





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