appendices

Future Planning Committee

Town of Victoria Park

Future Planning Committee Meeting 18 April 2018

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8.1 Adoption of Victoria Park Activity Centres Strategy

ACTIVITY CENTRES STRATEGY

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CHAPTER 1 INTRODUCTION

1.1 Background

This report provides a review of the issues associated with the Town of Victoria Park's centres of activity. The primary purpose is to inform the Town's local planning strategy concerning the planning of its activity centres.

Previous reports prepared by Planwest in 2003 (Local Commercial Strategy) and 2013 (Activity Centres Strategy) have been built on and analysed, informed by up-to-date information and patterns of development within the Town and in the region. The changing policy background is particularly important in establishing the aims of the review and the manner in which the findings can be implemented through the local planning strategy and the Town's various statutory planning documents.

The report is in five chapters. Chapter two provides an overview of all relevant planning policies, chapter three analyses current land use data and explains the modeling results, chapter four outlines the strategies derived from the foregoing analysis and chapter five provides a summary and outline of the matters relevant for inclusion within the local planning strategy.

It is clear that the historical pattern of development is unlikely to change in the foreseeable future. The structure and format can be compared with most of the local authorities bounding the Perth CBD. The main arterial roads leading out of the CBD through these local authorities have mostly developed as strip shopping streets in which there has been very little change to the number and type of buildings. After a period of stagnation lasting until the late 1990's there has been a revitalisation of these buildings as uses have evolved from those based on commodity purchases to those offering lifestyle commerce such as cafes and restaurants.

In recent years the Town has seen its role as a centre for tourism dramatically expand primarily due to the development on the Burswood Peninsula. This is expected to continue to grow, specifically with the opening of the Stadium, this will have significant implications for employment and economic development elsewhere within the Town.

1.2 Activity Centres

Over the past decade activity centres have become a focus of strategic planning within the Metropolitan Region if not the State. Strategic planning documents such as Directions 2031 (2010) and Perth and Peel @ 3.5million (2015) made activity centres the focal point of the broad objective of providing a more efficient and sustainable urban form. The strategic approach was articulated in policy terms within the document Activity Centres for Perth and Peel which was published in the Government Gazette as Statement of Planning Policy (SPP) No. 4.2 in 2010.

In summary activity centres are intended to:

> *"play an increasingly crucial role in the development of Perth and Peel by providing greater housing and employment opportunities and creating a sense of place through social and business activities and services. Increasing residential development in and around activity centres linked by a robust movement network is key to delivering a connected and sustainable city that is well placed to accommodate a substantial future population increase." (Perth and Peel @ 3.5 million p43).*

1.3 Activation Areas

It has been decided to broaden the scope of "centres" from that strictly envisioned by SPP 4.2 to embrace wider areas that consider more than the commercial aspects of centres. This report has consistently used the term "Activation Areas" to refer to the identified areas of the Town of Victoria Park within which a broad range of intensification is considered possible and desirable.

1.4 Activity Centre Boundaries

There is no specific guide to the definition of activity centre boundaries in the State Government documents. The Department of Planning has however defined boundaries for Metropolitan Strategic Centres in the Perth Metropolitan Region Scheme. No boundaries have been defined for the Town of Victoria Park's centres within the State's policies apart from the diagrammatic Figure 7 displayed in the Central sub-regional planning framework element of Perth and Peel @ 3.5 million (**Figure 1.1** overleaf).

The Town's main retail concentration is along Albany Highway, from Canning Highway in the North to the local authority boundary in the South. This retail concentration has been designated as a Secondary Centre (Victoria Park) and a District Centre (East Victoria Park) – although there is little distinction between the two.

The Town of Victoria Park considers it appropriate to treat the whole of Albany Highway within the Town as a single Secondary Centre as:

- An excellent public transit public transit system interconnects all parts of the activity centres on Albany Highway through Victoria Park;
- The two retail centres at Victoria Park (based on Woolworths supermarket) and The Park shopping centre (based on a Coles supermarket) should be considered as nodes within the whole Albany Highway activity centre strip rather than as independent activity centres;
- Historically, the commercial area fronting Albany Highway developed as Perth's first transit oriented development and has a heritage worth protecting; and
- The total amount of existing and potential retail floorspace is equivalent to that of other Secondary Centres.

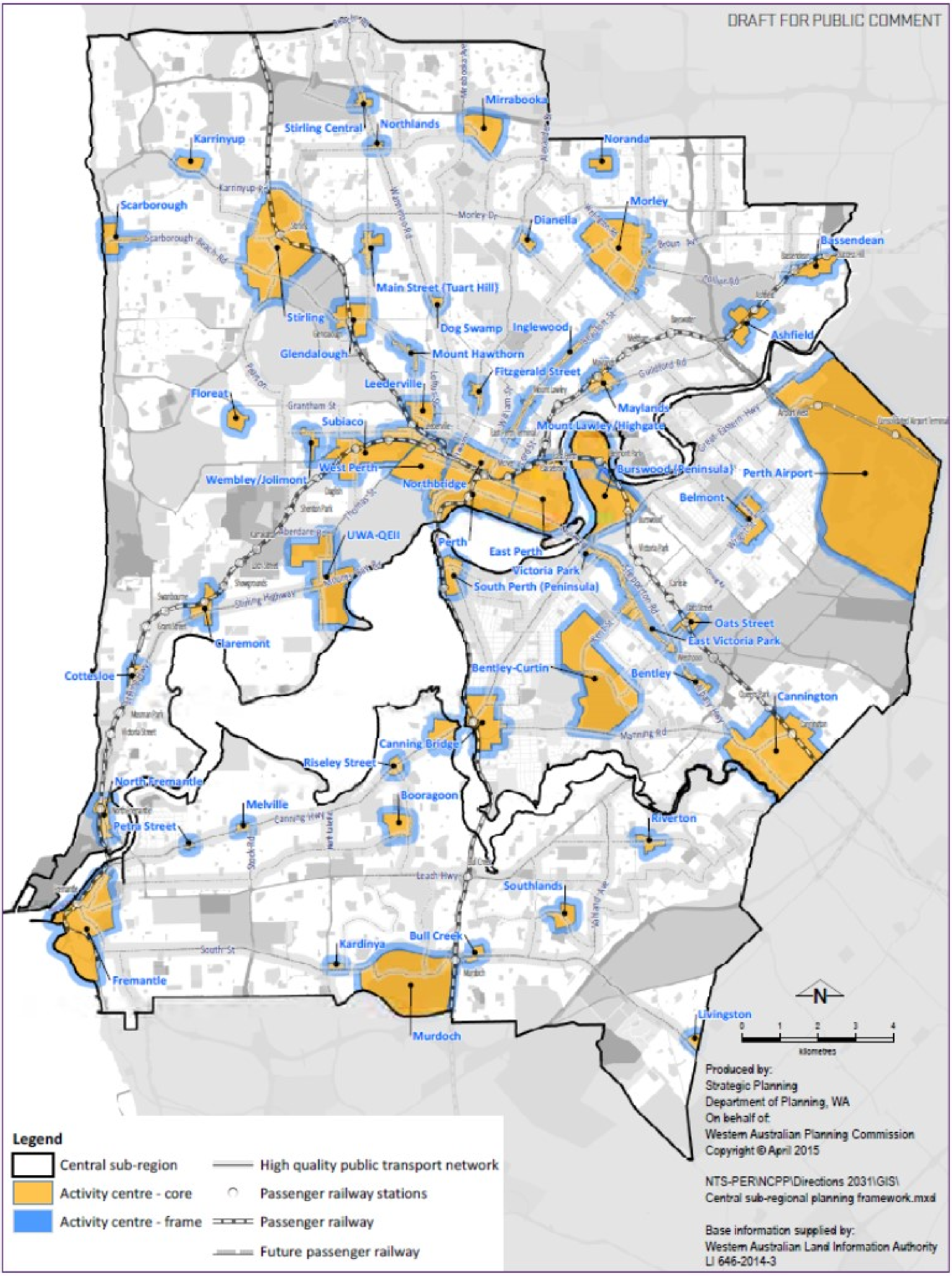
For the above reasons, it is considered appropriate that SPP 4.2 be amended to include the whole of the Albany Highway Centre as a Secondary Centre.

1.5 Evolution of the Victoria Park centre

The main historical milestones that have influenced the form and function of the Victoria Park activity centre include:

- The introduction of a tram service along Albany Highway from Perth to Rushton Street in 1905. This accelerated development and attracted the provision of convenience shops and service establishments such as banks and barbers.
- The extension of the tram system to the Welshpool industrial area and the intensification of commercial development along the road by the end of the Second World War.
- The attraction of many during the 1960s to access the area by car grew the strip centre into the region's third biggest with 260 retail shops.

Figure 1.1 Activity Centre Map – Central sub-regional planning framework



Source: Perth and Peel @ 3.5 million, DoP

- The Stephenson-Hepburn proposal in 1955 to relieve Albany Highway from arterial traffic flows by creating Shepperton Road as a bypass enabled two new shopping centres to be built providing off-street parking for customers.
- The shopping centre in Victoria Park comprising a Woolworths supermarket and 30 specialty shops (now called Victoria Park Central) and the larger and more dominant 'Park Centre' in East Victoria Park comprising a Target Discount Department Store, Coles Supermarket and 45 specialty shops were both completed in 1977. The Park Centre shifted the centre of gravity of retail shopping from Victoria Park to East Victoria Park.
- Rapid suburban growth in the South-East Corridor in the 1970s and 80s was accompanied by the building of new regional shopping centres, particularly at Belmont Forum and Carousel in Cannington, resulting in the relative decline of Victoria Park as a shopping centre.
- The development of the Burswood Peninsula for housing over the past twenty years has provided, and continues to provide, a major stimulus to economic activity, particularly at the north end of the Town. Burswood's population is expected to exceed 17,000 by 2036 and as such will account for the majority of the Town's future population growth.

1.6 Study Area

The Town of Victoria Park lies south-east of the Perth CBD at the northern end of an urban corridor stretching through the Cities of Canning, Gosnells and Armadale and the Shire of Serpentine-Jarrahdale. The dynamism and potential of Victoria Park's centres must be seen in the context of the whole of Perth in general but of the urban areas which surround it in particular.

In analysing the prospects for activity generation in Victoria Park, now and in the future, the population and land use characteristics of adjoining local authorities must also be analysed and their impact, positive or negative on Victoria Park must be assessed.

The core study area comprises the local government area of Victoria Park. It is one of the oldest settled inner city suburbs and still has a large legacy of old residential and commercial buildings.

The 'frame' area, or study area, as described in SPP 4.2 for purposes of 'catchment analysis' includes the Cities of South Perth, Belmont, and part of Canning, north of the Canning River as described on **Figure 1.2**. The activity centre strategies and structures of these local authorities will form an integral part of the analysis to assess the mutual interactions between Victoria Park and these adjacent local authorities. Cognisance will also be taken of the role that the Town of Victoria Park plays as a metropolitan wide service-tourist-entertainment-leisure shopping focus, within which there are a number of significant destination zones.

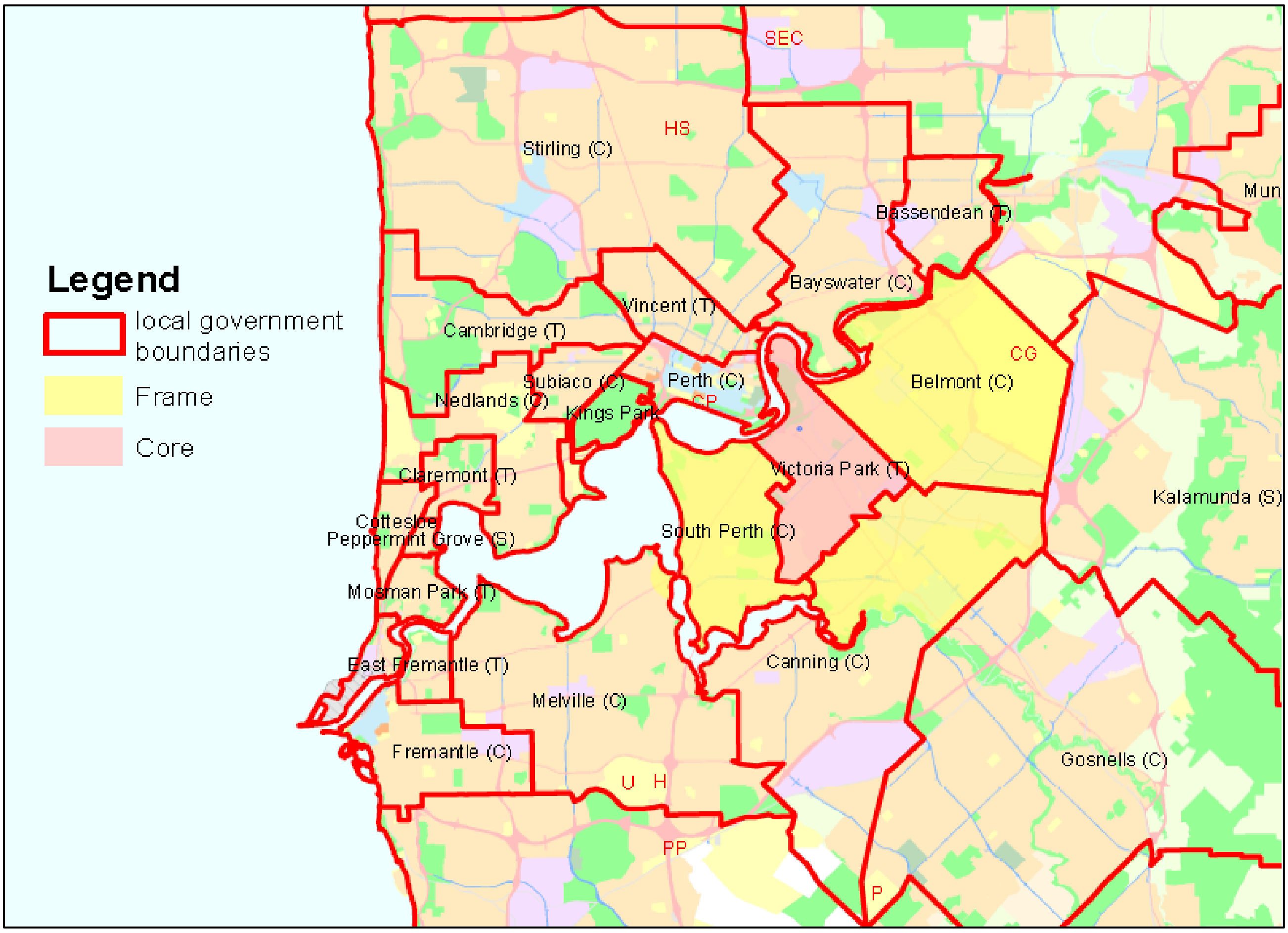
1.7 Purpose of the Strategy

The purpose of this activity centres strategy is to place the Town in its context taking account of the identifiable trends and the implications of demographic and lifestyle changes. The objective will be to forecast the ways in which land uses will continue to evolve and to suggest ways to accommodate this evolution to best serve the existing and future needs of the Victoria Park community.

While this project provides a review and update of the earlier reports, a particular focus is to respond to the requirements of the State Government's Activity Centres initiative and to guide the Town in its planning in that respect.

If the Town's centres are to embrace the concept of Activity Centres with all that they stand for, mechanisms need to be suggested to facilitate this. Accordingly, while the Strategy will be informed by a mathematical assessment of retail prospects, consideration will be given to actions required to achieve the broader scope of activity centres within what will pass for the more desirable and sustainable living environment of the future.

Figure 1.2 – Town of Victoria Park Core and Frame Areas



Source: Planwest, DoP 2013

CHAPTER 2 POLICY AND PLANNING CONTEXT

Since the last review the Western Australian Planning Commission has released the *Perth and Peel @ 3.5million* strategy and the more detailed regional frameworks. There are some subtle differences between these documents and their predecessors (*Directions 2031 and Beyond*).

The Town's local planning strategy, and resulting new local planning scheme, remain in draft although as a result of the gazettal of *Planning and Development (Local Planning Schemes) Regulations 2015*, significant editorial changes have been made to Scheme 1 to meet the new requirements – particularly in respect of the need to delete 'deemed provisions' from the scheme text.

2.1 Perth and Peel @ 3.5 million

The long-term growth strategy for land use and infrastructure for the Perth and Peel regions was released in 2015 offering an update of the *Directions 2031* documents. Of the three growth patterns considered, (the contained city, dispersed city and connected city), the connected city was preferred as the future growth pattern. This required a network of connected activity centres offering employment, higher density lifestyle choices and high quality public transport linkages.

The strategy expects the central sub-region to accommodate an additional 400,000 people by 2050, a growth in population of 49%. While the dominance of the central area in the Region's employment will lessen from its current 64% of all employment to 49% in 2050 this will still mean a growth of 285,838 Central area jobs.

2.2 Central sub-regional planning framework

The draft Central framework aims to manage urban growth and achieve urban consolidation through higher density residential development around activity centres, station precincts and along high-frequency public transport routes.

The framework indicates where development could be located to help achieve the target of 47 per cent infill and promote the connectivity and further development of activity centres, corridors, industrial nodes and station precincts to support the growth of diverse residential and employment opportunities beyond the central business district.

The framework also indicates the location of the sub-region's activity centres, suggesting that their core area (with a higher density designation of R-AC) be surrounded by a 200m frame area to allow expansion and support for the centre. Linking the activity centres would be activity corridors where higher density and even mixed uses may be appropriate along the high-quality transport routes.

The Town's centres designated in the framework remain as previously designated and include Victoria Park (Secondary Centre), East Victoria Park (District Centre), Burswood (District Centre) and Oats Street (District Centre). No redevelopment of the older residential and industrial land within the Oats Street centre has occurred. The framework also identifies Bentley/Curtin as a specialised centre.

Station precincts have been identified as having the potential to accommodate increased development, nominally 200m from each station on the Armadale line with a substantial precinct being suggested around the Victoria Park station.

The Town's activity centres, activity corridors, and station precincts are indicated on the framework plan (**Figure 2.1**).

The framework has specified additional housing targets for each Central area local government. The Town of Victoria Park has been allocated an additional dwelling target of 19,400 – the highest target per capita of all central area local governments apart from the City of Perth.

2.3 The Town's statutory framework

Local Planning Scheme No 1 remains the operational Scheme for the Town. The centres are zoned as District Centre, Local Centre or Residential/Commercial. As a Secondary Centre there would be an expectation that the scheme designation of 'Regional Centre' should be placed on the centre under Scheme No. 2.

The main controls governing the centres are not contained within the Scheme but within the Precinct and general policies.

The Town is divided into thirteen Precincts (**Figure 2.2**), each with a statement of objectives and land use tables and design standards. The most significant precinct for this Strategy is Precinct 11 – Albany Highway. However, important Activation Area supporting strategies are provided in P1 and P2 (Burswood), P3 (Causeway), P4 (McCallum) and P13 (Curtin).

Local Planning Policies have been prepared under the Scheme (and Planning and Development (Local Planning Schemes) Regulations) and cover a number of areas critical to the management and development of the Town's Activation Areas, particularly P11, Albany Highway.

2.4 SPP 4.2 – Activity Centres for Perth and Peel and the Town's response

SPP 4.2 Activity Centres for Perth and Peel was gazetted in 2010 and in terms of its impact on Victoria Park was analysed in some detail in the 2013 Strategy report.

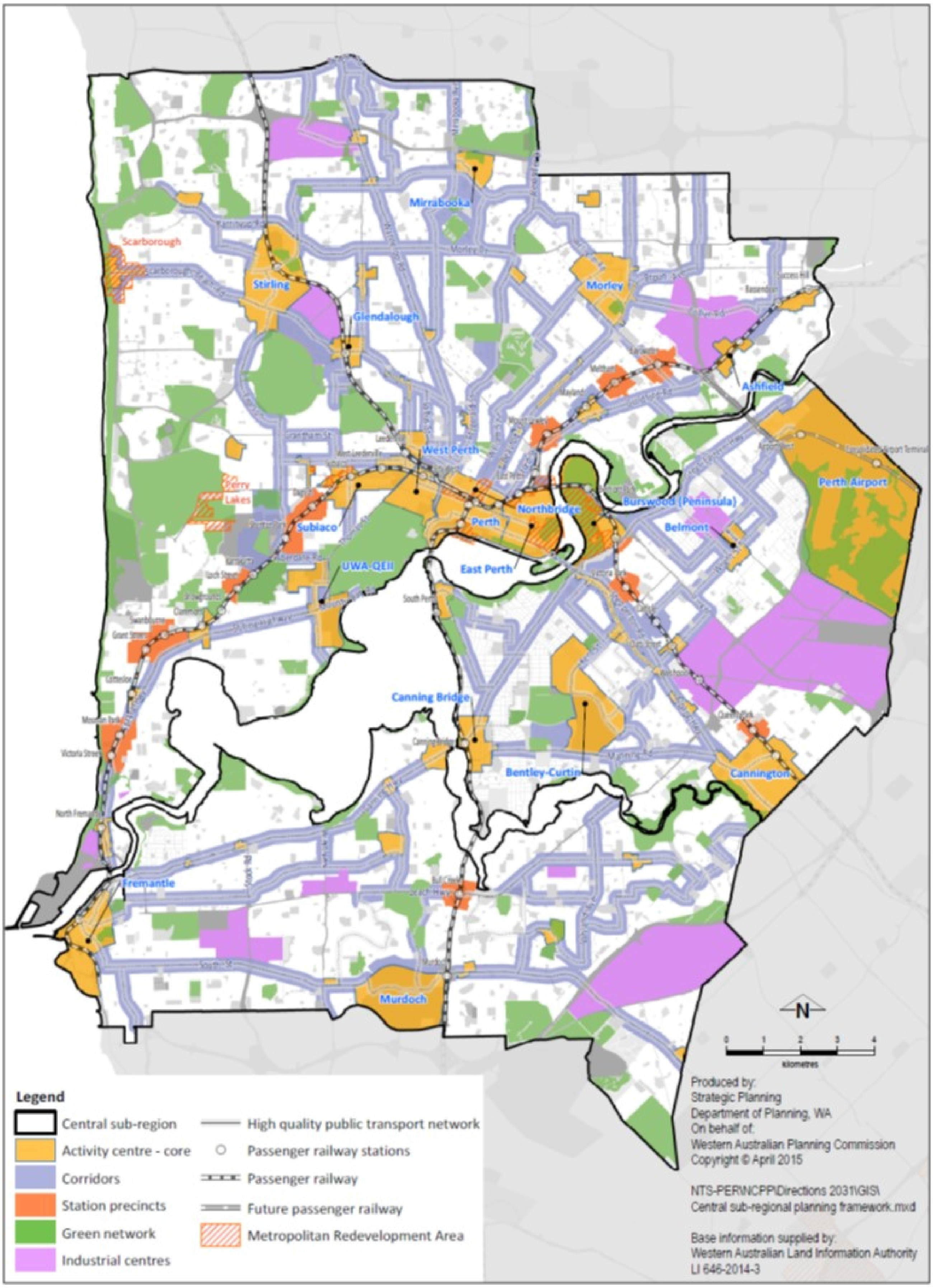
Since 2013 policies have been modified which further support the objectives of SPP 4.2. In addition, changes have occurred in the sub-region – these will be summarized at the end of the chapter. This section will firstly assess the extent to which the Town's planning framework reflects the policy.

SPP 4.2 specifies the planning requirements for the planning and development of new activity centres and the redevelopment of existing centres. Much of the policy is considered in terms of 'Activity', 'Movement', 'Urban Form' and 'Resource Conservation'. As it affects this local government the key aspects of the policy are, in summary:

Activity

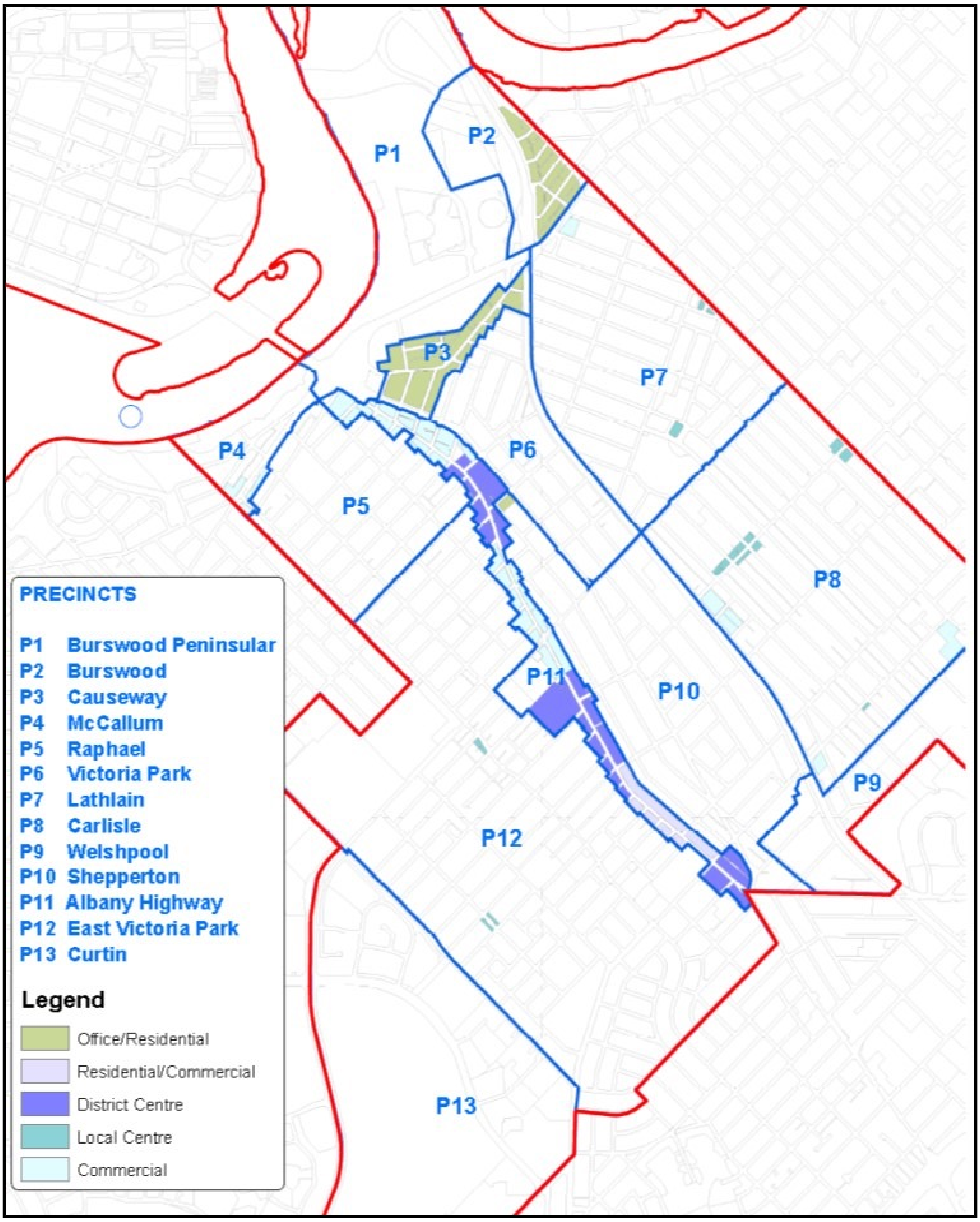
- Centres should be a focus for retail, commercial, health, education, entertainment, cultural, recreational and community facilities and higher density housing in a compact urban form. This promotes a more equitable distribution of services and a reduction in travel demand.

Figure 2.1 – Central sub-regional planning framework Figure 5



Source: Perth and Peel @ 3.5 million, DoP

Figure 2.2 - Zones & Precincts in Local Planning Scheme No. 1 (2013 Strategy report)



Source: Planwest, DoP 2013

- A mix of land uses should be encouraged – it is suggested that a Secondary centre of the size of Victoria Park should aim to have around 40% of its land uses as 'mixed' (ie non-shop/retail).
- Higher density housing should be provided within and adjacent to activity centres. Depending on the status of the centre in the hierarchy residential density targets

of between 25 (neighbourhood centre) and 35 (secondary centre) dwellings per gross hectares are considered desirable.
- Activity centres are priority locations for employment generating activities and should be facilitated by planning decision making.
- Offices should be located in higher order centres and not be located within industrial areas.

Town Response:
As illustrated in the Precinct statements highlighted in yellow in the box below, the focus of many of the precinct policies and local planning policies has been to promote activity as advocated in SPP 4.2.

Movement
- Activity centres should be planned in line with transit-oriented development principles to facilitate travel by public transport instead of private car.
- High trip generating activities should be located to maximise public transport usage, with the primary entrance being within 400m of a high-frequency transport service.
- Traffic should be managed to take account of current and planned road capacity without compromising regional traffic flows.
- The efficient supply of parking should be promoted with a suitable allocation of on-street, off-street, public and shared parking including cash-in-lieu and reciprocal arrangements.
- Greater emphasis should be given to the needs of pedestrians and cyclists.

Town Response:
As illustrated in the Precinct statements highlighted in blue in the box below, the focus of many of the precinct policies and local planning policies has been to reduce conflict with vehicles, introduce appropriate parking policies and promote pedestrian and cycle access as advocated in SPP 4.2.

Urban Form
- Small, walkable blocks should be promoted to improve accessibility within the centre.
- Buildings should address the streets and public spaces with fewer blank walls.
- A mix of uses should be provided along street frontages.
- Town squares and civic spaces that provide meeting places for the community should be promoted.

Town Response:
As illustrated in the Precinct statements highlighted in purple in the box below, the focus of many of the precinct policies and local planning policies has been to promote urban form as advocated in SPP 4.2.

Resource Conservation
- The planning of activity centres should contribute to the conservation of resources, in particular by reducing energy and water consumption.
- Building orientation should promote opportunities for passive solar and natural ventilation.

Town Response:
The Precinct statements and local planning policies do not specifically refer to resource conservation measures as advocated in SPP 4.2.

P11 – ALBANY HIGHWAY

Precinct P11 comprises all the shopping and commercial zoning along Albany Highway in Victoria Park. The overall objective for the Albany Highway precinct is that it is to be revitalised as a major urban/shopping commercial axis incorporating the 'strip' imagery that is part of its heritage.

The precinct is subdivided into six policy sub-areas each related to a segment of Zoning along the Highway.

Those provisions addressing SPP 4.2 objectives have been grouped in the following tables in accordance with the main objectives of Activity, Movement and Urban form.

From north to south –

a) Albany Highway North - Commercial Zone

Activity	Movement	Urban Form
Ultimately the area is intended as a high quality commercial area, predominantly for offices, banks, restaurants, local shops, cafes and lunch bars etc. Residential will be encouraged behind and above these uses.		The intent for this zone is to act as a 'Gateway' entry statement for both Perth and Victoria Park.

b) Victoria Park – District Centre Zone

Activity	Movement	Urban Form
The area is to retain a strong shopping character with a wide range of retail activities concentrated at the pedestrian (ground) level. Non-retail uses including residential are appropriate above and behind the retail uses. Existing non-retail uses at street level will be encouraged to relocate.	Car parking should be provided at the rear with pedestrian access through from the street where appropriate.	Emphasis is placed on developing continuous glass front displays facing malls and particularly Albany Highway.

c) Albany Highway Central – Commercial Zone

Activity	Movement	Urban Form
Redevelopment as a mixed-use area combining both residential and commercial uses will be promoted at medium to high densities.	Adequate on-site parking is required for both uses.	Commercial should be at ground level fronting Albany Highway with residential above or behind.

d) East Victoria Park Town Centre – District Centre Zone

Activity	Movement	Urban Form
This area is intended to be consolidated as a centre containing retail, community, civic and recreational		Nil setback and glass front will be promoted along Albany Highway frontage.

facilities. New development should be used to integrate and tie the elements into a cohesive centre. Residential development will be permitted above and behind street front shopping development.		

e) **Albany Highway - Residential Commercial Zone**

Activity	Movement	Urban Form
A combination of medium to high density residential development either separate or in combination with small scale commercial development which cannot exceed one third of the residential development.		Where combined development occurs, it should be the commercial (showroom type) at street level fronting Albany Highway with glass frontages. Buildings must be set back 3 metres with landscaping off-street parking, some of which may be shared between the commercial and residential uses.

f) **East Victoria Park Gateway Shopping Area – District Centre Zone**

Activity	Movement	Urban Form
The area is to be consolidated into a 'gateway' shopping node serving regional and local populations.		The existing strip form of development will be maintained and enhanced by encouraging continuous shop fronts and awnings or verandas – especially fronting Albany Highway. There is no set back fronting Albany Highway but buildings must be set back from Shepperton Road.

LPP 15 – East Victoria Park Shopping Area Design Guidelines

Activity	Movement	Urban Form
	This policy provides additional requirements relating to pedestrian and vehicle movement and parking.	Specific requirement are provided for streetscape, built form and landscaping directives for future development.

LPP 16 - Albany Highway – Residential/Commercial Design Guidelines

Activity	Movement	Urban Form
This policy has the intent of encouraging residential development fronting Albany Highway between Dane and		

Oats Street. Non-residential uses are only to be permitted in conjunction with a residential use.		

LPP 17 – Street Frontage Design Guidelines for District centres and commercial areas along Albany Highway.

Activity	Movement	Urban Form
	This Policy is to assist owners, occupiers and designers to carry out renovations or new developments for all uses in predominantly shopping areas, in order to provide appropriate building frontages of high quality design. Buildings should be built to the footpath, , 60% of the façade should be transparent, doors made visible, shops to be lit at night and other policies designed to activate the main street.	Parking to be kept to the rear.

LPP 23 – Parking Policy

Activity	Movement	Urban Form
	This policy sets out the parking standards for the Town. The standards require one space for every $10m^2$ of retail floorspace – which would generally be considered to be excessive. Reciprocal parking and the provision of cash in lieu of parking in specified instances may be considered. Cash in lieu is supposed to be calculated on the basis of the cost of land and construction and other incidental costs.	

LPP 30 – Car parking policy along Albany Highway

Activity	Movement	Urban Form
	This policy which applies to the Albany Highway precinct enables the modification of the rather excessive standards of LPP 23. Specifically, the rate for Shop is reduced to one bay	

	for every 20m^2 of floorspace and for restaurants to one bay for each 6m^2 of sit down dining area (compared with 4.5m^2 under LPP 23).	

LPP 33 – Concessions for mixed use/non-residential developments

Activity	Movement	Urban Form
The purpose of these guidelines is to outline the matters that will be considered by the Town in dealing with concessions to planning requirements for new: ● Mixed use developments; ● Multiple Dwelling developments; and ● Non-residential buildings. A concession may apply where a superior standard is achieved demonstrating clear evidence of best practice in terms of the development's function, appearance, and its contribution to its locality. Criteria are set out for developments to qualify for a planning concession.		

Implications for Strategy Review

The Town has responded proactively and designed its strategies and policies to align with the concept of activity centres and followed what is generally considered to be best practice in respect of street activation, mixed use, managed parking and transit oriented development.

2.5 Other Activity Centre Precincts

2.5.1 BURSWOOD

Burswood Peninsula is subject in part to the standard land use and development provisions of the Metropolitan Region Scheme (MRS) and the Town of Victoria Park Local Planning Scheme No.1, however, a large area of the Peninsula falls under the control of the *Casino (Burswood Island) Agreement Act 1985* (the Agreement Act). The Agreement Act confers on the Minister for Racing and Gaming the authority to determine planning and development proposals. Any proposed development outside the Agreement Act area will be assessed and determined under the provisions of the MRS and Scheme.

In the 2013 Strategy it was reported that discussions between officers of the Town of Victoria Park and the Department of Planning had determined that there was a compelling case to categorise the whole of the Burswood Peninsula as one Specialised Activity Centre given the regional nature of existing and proposed uses including the Belmont Park Racecourse, Major Sports Stadium and Burswood Entertainment Complex. However, no formal change to this situation was confirmed in *Perth and Peel @ 3.5million* or on the listings of the specialized centres within the *Central sub-regional Planning Framework*. Accordingly, Burswood remains a district centre.

P1 – Burswood Peninsula precinct statement
The precinct policy requires that the controls over development be established through the provisions of a structure plan which is required as a prerequisite of any development.

P2 – Burswood precinct statement
Part of Precinct P2, between the railway line and the Graham Farmer Freeway (Burswood Station East), is zoned Office/Residential. The policy for the historically industrial area is for it to develop into an area of mixed office and residential activities together with other uses to serve the immediate needs of the workforce and residents. While the plan relies on the R Codes, variations to plot ratio, height and density (R80) are prescribed. Plot ratio is not to exceed 2.0 for mixed use and 1.33 for office/commercial. Development and the maximum building height is set at 15m.

The land to the west of the railway (Burswood Station West) is designated a Special Use area but the permitted uses of the predominant residential area are set out in the policy. A detailed structure plan is required to be prepared which should allow for a maximum of 1,250 dwellings.

LPP 35 – Burswood Station East.
This policy simply requires the preparation of a Local Structure Plan prior to any development approval. The policy requires that until a local structure plan is approved, planning approval will only be supported where Council is satisfied that the approval of the development will not prejudice future planning for the Precinct.

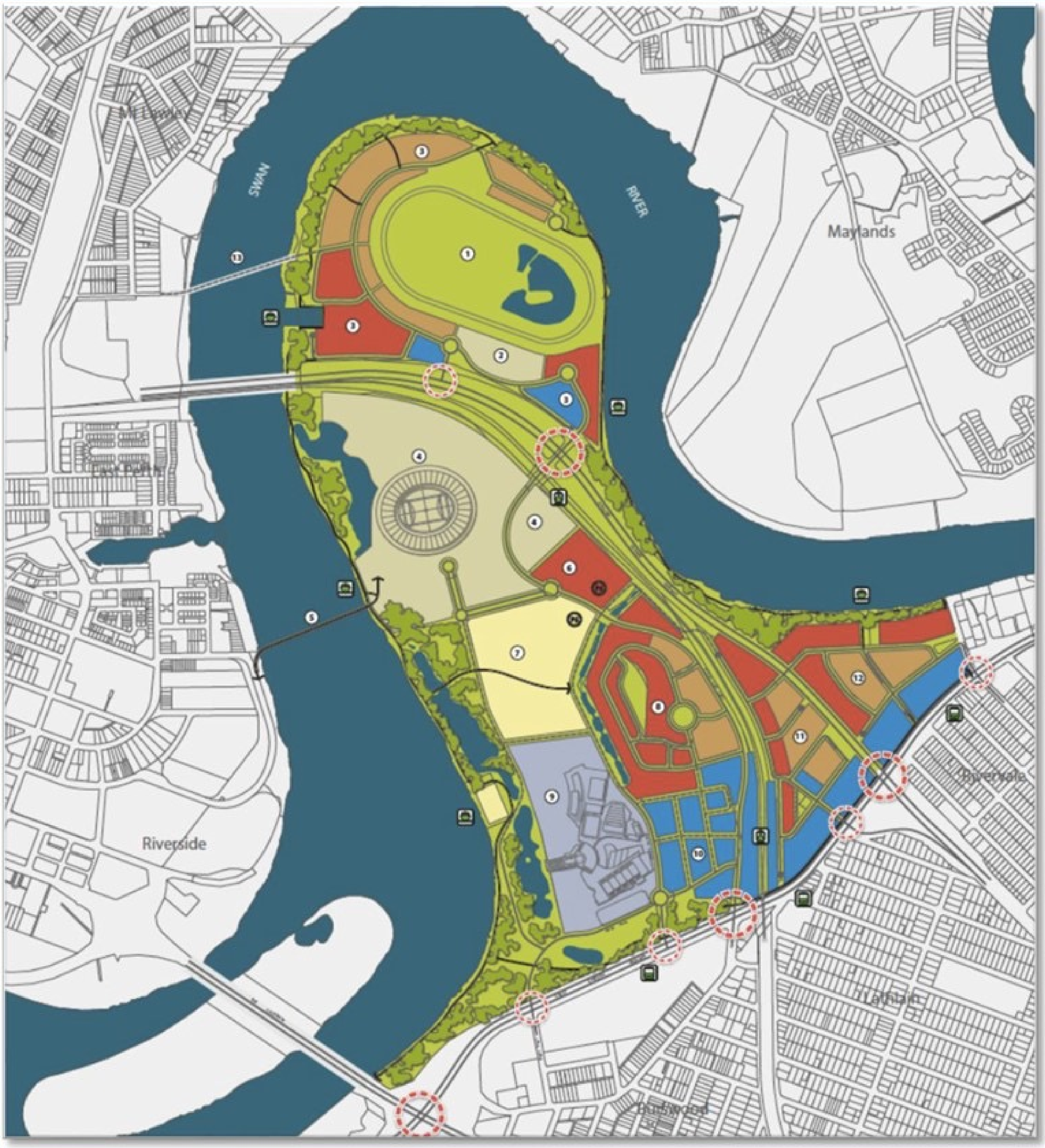
District Structure Plan
The 2015 Burswood District Structure Plan was adopted by the WAPC in February 2015.

The District Structure Plan includes nine precincts and proposed a range of community facilities (including a primary school) for the 20,000 new residents (in 12,500 dwellings) on the Burswood Peninsula. It was expected that for most facilities the future residents would look to existing facilities within the Town. The structure plan indicates that within the sub-precincts of Belmont Park, Burswood east and west and The Springs there would be potential for 63,000m^2 retail and 255,000m^2 of office space.

The Town of Victoria Park has generally supported the Burswood Structure Plan making the following comments in its submissions:

- Burswood should be classified as a Specialised Activity Centre.
- Belmont Park Station South Precinct needs to be clearly able to accommodate the primary school and the Stadium South area needs to accommodate a district level active open space as it is the only site suitable.
- It is doubted whether the 20% target of affordable dwellings (between 1880 and 2440 affordable housing units), will be delivered in view of the number of local structure plans that have already been approved without any affordable housing provision.
- There is a need to carefully manage parking across the Peninsula.
- The implementation of the plan needs a redevelopment authority in view of the infrastructure costs and complex land assembly.

Figure 2.3 Burswood District Structure Plan



Source: Burswood Peninsular District Structure Plan March 2015 (WAPC/DoP)

The capacity of the Burswood Peninsula to actually support the proposed large retail (62,000m^2) and office (255,000m^2) floorspace has only been partially assessed. The Town engaged Colliers International to provide advice on the Burswood East Master Plan in 2012. Colliers advised that retail premised on a neighbourhood Centre model could be supported. It was suggested that subject to a number of qualifications, a possible 45,000m^2 of commercial NLA could be considered. However, it is noted that similar types of developments have proved to be only marginally viable – such as The Springs.

Burswood is clearly a special centre of regional importance. Its designation as a District Centre under SPP 4.2 does not do justice to the strategic importance of the area as an employment, tourism and recreation destination. The appropriate designation under regional policy would be a Specialised Activity Centre.

The Town has engaged with the State Government on the need for a Redevelopment Authority to achieve the successful implementation of development on the Burswood Peninsula. The failure to establish such an authority may jeopardise timely implementation.

Implications for Strategy Review

- Most of the Town's future population and dwelling growth is likely to occur on the Burswood Peninsula. Given that most existing community facilities in Victoria Park, especially schools, are already at full capacity it raises questions regarding necessary services and facilities for the future population and where the future community at Burswood will find them.
- The very large predicted commercial space and significant retail space indicated on the plans has potential to adversely impact on the hierarchy of Activity Centres in the Town. What level of retail floorspace the Peninsula can support needs to be advised upon.
- Burswood Station East requires the preparation and adoption of a structure plan. Such a plan should include considerations of appropriate retail allocation and building form in view of the prominence but relative inaccessibility of the site.
- Initiatives to designate Burswood as a Specialised Activity Centre and to establish a redevelopment authority to manage the implementation of the development need to be pursue.

2.5.2 CAUSEWAY

P3 – Causeway precinct statement

Precinct P3 is zoned Office/Residential. The Policy for the Office/Residential Zone in this Precinct is for high quality office and residential activities together with between 1000m^2 and 1400m^2 of retail floorspace to serve the immediate needs of the workforce and residents, and which add vitality and attraction. Offices and residential uses may be developed independently.

LPP 22 – Development standards for Causeway Precinct

This policy provides a comprehensive series of requirements for developments within the Causeway precinct. Provisions are provided for parking, the design of balconies, provision of communal open space and affordable housing, and incentives for higher density residential development.

The precinct is divided into a number of areas with specific requirements relating to plot ratio, density and desired future character set out.

2.5.3 McCallum

P4 – McCallum precinct statement
This Precinct both sides of Canning Highway has some Commercial Zoning at its western end near Berwick Street and further commercial development (offices and showrooms) will be encouraged. Development should not impact on the adjacent residential development.

Implications for Strategy Review
The planning framework for both the Causeway and McCallum precincts appear appropriate subject to their support from infill medium-high density residential within each precinct.

2.5.4 Curtin

The Curtin-Bentley area was identified as a Specialised Activity Centre in Directions 2031. The area was considerably expanded in the 2015 publication *Perth and Peel @3.5 million* to include land outside of the University reserve.

The precinct straddles the City of South Perth boundary (west of Kent Street and Baron-Hay Court) and the Town of Victoria Park boundary (east of Kent Street). Past planning requirements did not encourage redevelopment, requiring low site coverage, low plot ratio and low buildings with large setbacks.

The land identified as the Bentley-Curtin Activity Centre is in large part reserved for University purposes, Technical School and Special Purposes under the MRS. However, the balance of the land is zoned Urban under the MRS and these areas are subject to the provisions of the Town of Victoria Park and City of South Perth local planning schemes. The land falling within the Town of Victoria Park TPS No. 1 is included in Curtin Precinct P13 where the permitted uses are set out within a Special Use zone for Residential and Special Facilities (largely aged persons' accommodation) and Technology Park (or research and development activities). Land north of Kent Street is reserved for Parks and Recreation (Harold Rossiter Park), Special Use (Education Facilities) and Public Purposes (Civic Use). The land falling within the City of South Perth is zoned 'Technology Park' with permitted uses prescribed under City of South Perth TPS No. 6 land use table.

In 2014 Curtin University, with a team of consultants, prepared the Greater Curtin Master Plan for the University land. The Plan foresaw a doubling of students and staff by 2031 to 44,000 and 6,700 respectively. Additional large growth was foreseen in other forms of employment areas from 3,500 to 13,600 persons by 2031. Projections of floorspace were provided. The number of housing units was projected to grow dramatically from 1,200 in 2014 to 10,200 units in 2031.

The implementation of the Master Plan will occur in stages with stage 1 (1,500 student beds and 60 short stay rooms) commencing by the end of 2017. Also in Stage 1 is the provision of 4,000m^2 of commercial development and 5,000m^2 of retail – which are in part to take up unfulfilled demand, and in the case of the retail, partially to provide fixed eating facilities to replace the large number of mobile food trucks.

The Universities Legislation Amendment Act 2016 (assented in October 2016) will loosen the legislative constraints on Curtin University with respect to the provision of residential accommodation for staff and students, and the ability to lease their land for commercial purposes. While this could raise the prospect of the land within the Activity Centre being developed for a range of uses beyond the scope of university-related activity, the University gives the assurance that its focus is entirely on implementing a plan that enables it to offer greater attractions to students, both here and overseas.

The DoP prepared 2016 Bentley-Curtin Specialised Activity Centre Plan was advertised for public comment up to February 2017. It is yet to be finalized.

The area subject to the structure plan included that subject to the University's own Master Plan (which was incorporated into the structure plan), with Technology Park, the Department of Agriculture site, Polytechnic West, aged accommodation, Karawara and Canning College. The area of land included in the Activity Centre is very large - roughly the size of Perth's CBD.

The plan indicated short, medium and long-term potential for retail (up to 5,000m^2), commercial (up to 50,000m^2) and residential (to house up to an additional 7200 people). In total, the plan envisaged that 9,000 residents and 20,000 employees would live and work in the area.

Structure planning is needed to create a more intensive urban activity centre with improved amenity and an increased mix of land uses. An objective of the proposed structure plan was to provide residential diversity close to employment and education, making Bentley-Curtin an attractive choice for education, employment and living.

The structure plan is included at **Figure 2.4**.

The Town of Victoria Park has not supported the Department of Planning structure plan as it was considered to be an inadequate guide for the redevelopment of the area. The Town argued that there was insufficient detail to be useful and the plan was inconsistent with SPP 4.2. There was also concern that the document largely ignored the University's Greater Curtin Master Plan. The City of South Perth voiced similar criticisms of the Department of Planning plan in its submission. It should be noted that the University was satisfied that the Structure Plan adequately incorporated their Master Plan.

Development of the land reserved under the MRS is subject to the approval of the Western Australian Planning Commission (WAPC). It would be expected that any development would only be approved if it was consistent with the reserve purpose. Accordingly, commercial development would have to relate to university activity – but this only applies to the land within the Public Purpose reserve. In the event of there being significant demand for the intensification of uses, the definition of what actually constitutes 'university related activity' would become critical.

Development within the Technology Park is subject to the Town's Precinct 13 provisions which require development to be related to research and development or incidental thereto. The spacious nature of development is alluded to in the guidelines. The Town's provisions may no longer be appropriate if it is considered desirable to make fuller use of the land for commercial or even student accommodation purposes.

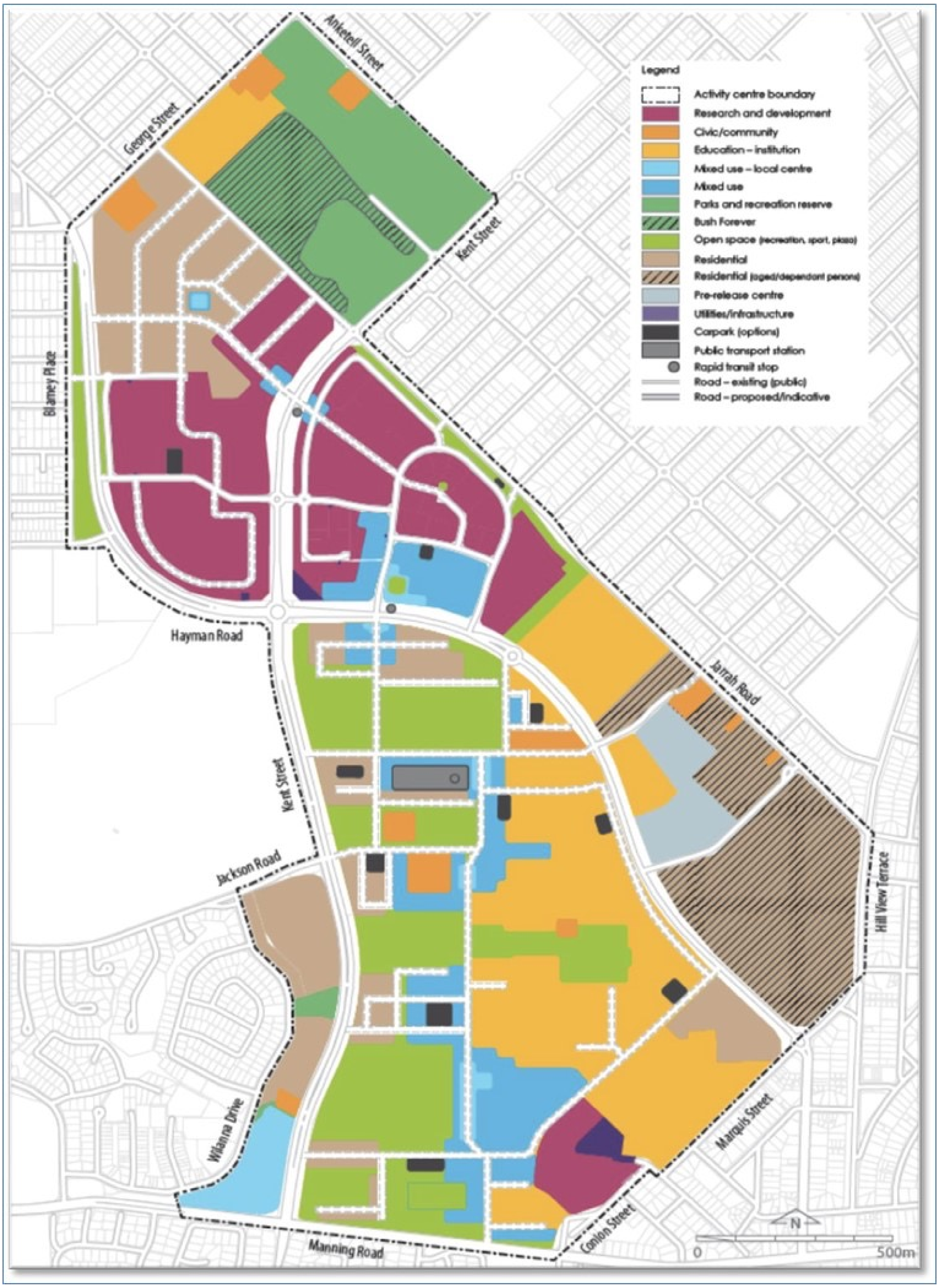
Implications for Strategy Review

- A substantial area of land is included in the Curtin/Bentley Specialised Activity Centre – much of which has little relationship with Curtin University.
- The strategic location of the land and its current low intensity development will create demand in the future suggesting that uses complementary to the activity centres hierarchy, rather than competitive with it, will need to be carefully managed.
- There is a potential risk of development being approved unrelated to the University function and contrary to the Town's planning framework. Recent legislation has freed the University to use its land for commercial activities in competition with other sites in the Town. It appears unlikely that it would be in the University's interest to act in this way, at least in the short term.
- The main potential for intensification lies in Technology Park where land is either developed at low density or is undeveloped. In the light of the very large floorspace proposals variously suggested in plans, it would be timely for the Town (in

conjunction with the City of South Perth) to consider whether its Precinct 13 planning controls are still appropriate for land within the Specialised Activity Centre.

- The provisions within the Local Planning Scheme require review to ensure that the Curtin Bentley Masterplan proposals are properly managed.

Figure 2.4: Bentley-Curtin Structure Plan



Source: Bentley-Curtin Specialised Activity Centre Draft Activity Centre Structure Plan (Nov 2016 DoP)

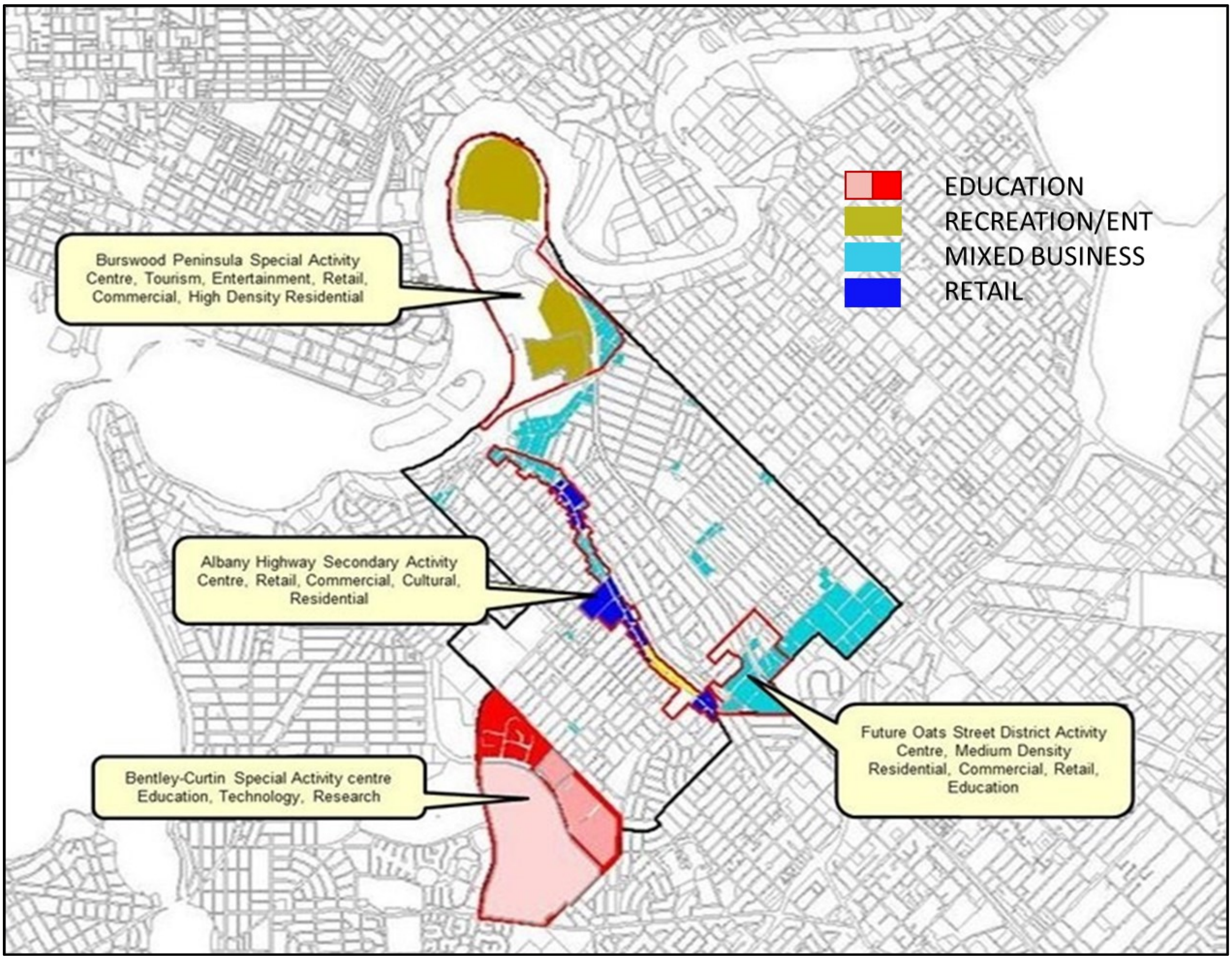
2.6 Other considerations relating to SPP 4.2

2.6.1 Activity Centre boundaries in Victoria Park

SPP 4.2 emphasized the importance of setting activity centre boundaries but suggested that they be 'indicative'. As was pointed out in the 2013 Strategy, boundaries within schemes cannot be indicative but need to be statutorily precise. Considerable attention was given in 2013 to setting appropriate boundaries that properly reflected all the functions to be displayed within the activity centres. This did raise the complex issue of how to retrofit an historic centre to a new paradigm.

The elongated form of an activity centre characteristic of Victoria Park is basically frowned upon by the Policy but is integral to the character of Victoria Park and the further widening of the strip to provide a more nodal series of centres is constrained by the degree of character housing abutting the strip which would be jeopardized. The conclusion reached in 2013 which the intervening period has given no reason to question was that the elongated activity centre boundary along Albany Highway was the only way that the activity centres could rationally be defined. This pattern is depicted on **Figure 2.5**:

Figure 2.5 - 2013 Strategy - Proposed Activity Centre Boundaries for the Main Centres in Victoria Park



Source: Planwest, DoP, ToVP

The activity centres described on **Figure 2.5** are analysed later in this report.

2.6.2 THE NEED FOR AN ACTIVITY CENTRE STRUCTURE PLAN (ACSP) IN VICTORIA PARK

Policy SPP 4.2 specifies the need to prepare activity centre structure plans for strategic metropolitan, secondary, district and specialised centres. ACSPs should be prepared prior to approval of any major development within an activity centre (a proposed shop/retail development of over 10,000m^2 or an extension of 5,000m^2). In the event of a structure plan not being prepared, in exceptional circumstances approval may be assessed against the application of the Policy's Model Centre Framework.

As was observed in the 2013 Strategy, SPP 4.2 has been developed largely with 'green fields' sites in mind. Some of the design principles are virtually impossible to retrofit into historically established de facto patterns of development, especially in inner areas where ribbon street-front development is almost universal. Pragmatism is therefore required to meld situations like Albany Highway into the context of the Activity Centres Policy. As was concluded in 2013, there is little benefit in reproducing much of what exists, and is unlikely to change, in the form of a structure plan.

While Victoria Park has been designated as a Secondary Centre for which a structure plan is expected, in the current situation there is little merit in committing to the expense and administrative effort of producing such a plan. While it is noted that the City of Subiaco has recently prepared an Activity Centres Structure Plan for its centre, other comparable centres in the City of Vincent (Leederville, North Perth and Mount Hawthorn) and the City of Stirling (Mount Lawley/Inglewood) have yet to produce such plans.

2.7 Local Employment Growth

Over the past decade local jobs have grown by 37%, which is a greater growth than the Town's 34% population growth 2006-2016 (Economy.id). There are nearly as many jobs within the Town (34,732) as there are residents (39,024), of all local residents who work, 18.9% work in the Town, but these only make up 11.8% of the total workers working in the Town (Economy .id data derived from 2016 Census). A key focus of the *Perth and Peel @3.5m* regional frameworks is to enhance employment self-sufficiency. Employment self-sufficiency relates to the proportion of jobs located in an area relative to the resident workforce in that same area. The Town's ratio of jobs to residents in 2015/16 was 1.63, much higher than most other districts. By comparison, the City of Canning's ratio was 1.42 (Canning), the City of Melville's was 0.74 and the City of South Perth's was 0.64. (National Institute of Economic and Industry Research 2016 quoted in Economy.id). This is a very positive feature of the Town and supports its sustainability as a living environment.

Of most interest to the current analysis is the fact that the greatest employment growth within the Town in the 2010/11-2015/16 period was in sectors generally related to activity centres. The two major areas of growth were in Accommodation and food services (+3,322 or 170%) and Retail (+817 or 34%), which together now make up 25% of the Town's workforce. Industry sectors which would normally be associated with offices have generally not increased their employment in recent years – the financial, professional, real estate and private and public administrative services, which account for 7,380 local jobs, fell in numbers over the 2010/11-2015/16 by 11%.

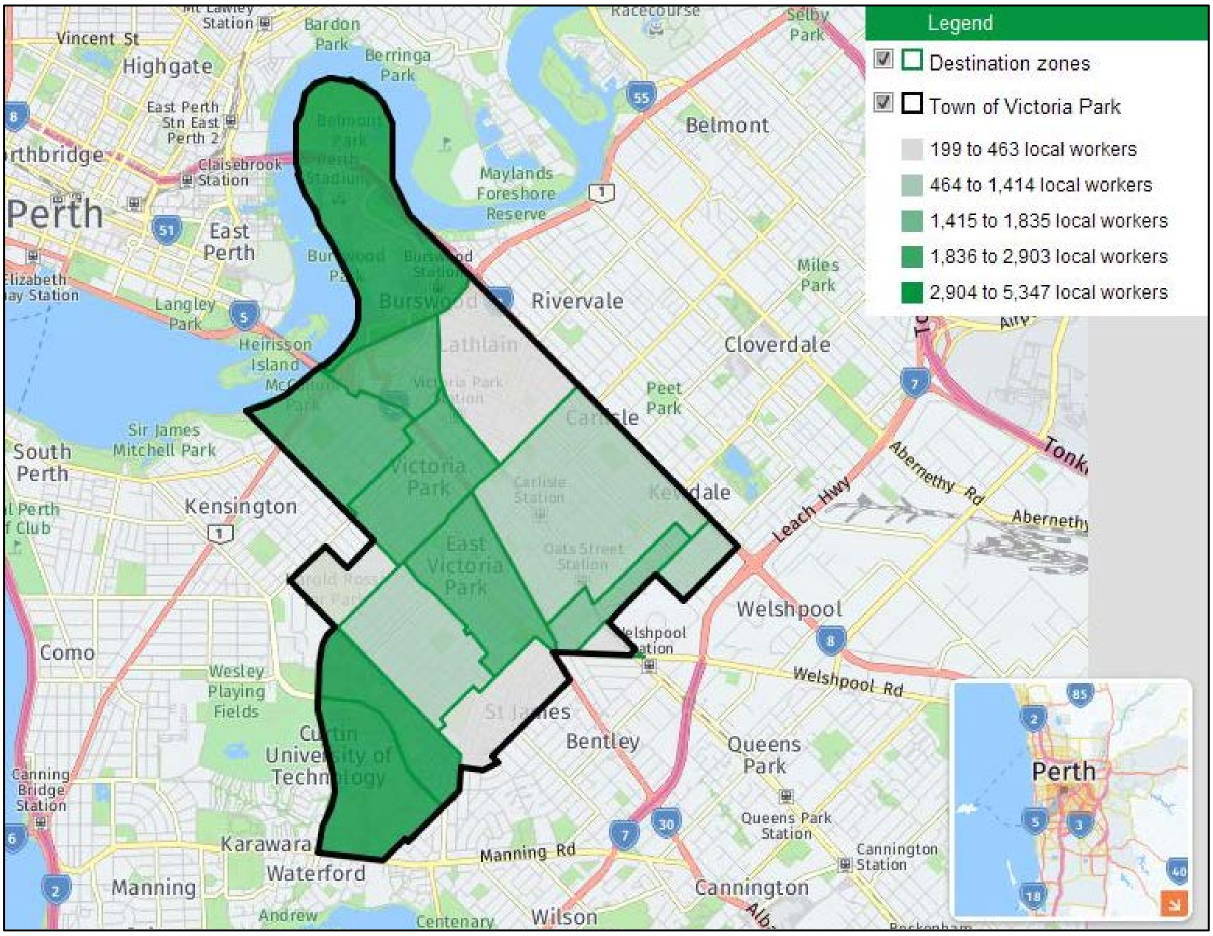
Much of the Town's employment clearly caters for local needs. However, there are some areas where the Town has a much higher number of jobs than would be expected from the Western Australian average. Notably 20.5% of the employment in the Town is in Education and training (WA = 8.7%), 8.1% are in Accommodation and food compared to 6.4% for WA as a whole and 11.2% are in Arts and recreation services compared with only 1.6% for WA (largely due to employment within Burswood's Crown complex). Employment is located throughout the Town although of the Town's total employment of 27,913, 47% is located within the Burswood (5,347) and Curtin (7,731) precincts (Economy .id 2016). See **Table 2.1** and **Figure 2.6**.

Table 2.1: Location of employment (2016)

Precinct	Local workers	%
Curtin	7731	27.7
Burswood	5347	19.2
East Vic. Park	3491	12.5
Welshpool	2649	9.5
McCallum/Raphael	2829	10.1
Causeway	2397	8.6
Victoria Park	1836	6.6
Carlisle/Shepperton	1260	4.5
Lathlain	373	1.3
TOTALS	**27913**	**100**

Source: 2016 Census/Economy.id

Figure 2.6: Employment locations – number of local workers – Town of Victoria Park 2016



Source: ABS, 2016 Census, compiled by .id in economy.id

2.8 Activity Centre planning in adjacent districts

As indicated on **Table 2.2** the rate of population growth projected to occur within the Town and the sub-region varies substantially. All local governments can expect considerable growth, but none as significant as the Town of Victoria Park in percentage growth terms.

Table 2.2 – Projected LGA Population growth

LGA	2011 Census	2016	2026	2036	2011-36 change	2011-36 % pa
Belmont	37,358	42,380	46,724	51,513	14,155	1.31
Canning	90,738	100,664	113,810	126,736	37,048	1.35
Melville	102,135	106,771	117,869	128,415	26,280	0.92
South Perth	43,694	46,218	52,250	62,376	23,926	1.46
Victoria Park	34,734	39024	47,179	56,625	21,891	1.97

Source: Forecast .id apart from Belmont 2026 and 2036 - estimates

The recently released 2016 Census indicates that in all the above local government areas there has been a significant fall in the numbers previously projected. This may be an aberration, but it is likely that projections when undertaken will modify the above figures. However directly comparable 2016 Estimated Resident Population (ERP) figures will not be available until the end of 2017 and it would be misleading to amend **Table 2.2** until these are available.

2.8.1 City of South Perth

The City of South Perth had a 2011 population of 43,694 and is projected to grow at 1.45%pa to 62,376 by 2036. Considerable development is scheduled to take place around the South Perth Peninsular and at Canning Bridge.

There are no higher order retail centres in the City. The two most significant centres, at Mends Street (South Perth) and Village Green (Karawara), in some respects serve as large neighbourhood centres. This does not mean that the City is under-serviced with shopping centres at a higher level. The City is adjoined by three District Centres, four Regional Centres and the Perth CBD. The Council believes that South Perth is adequately served by these surrounding larger centres and therefore has no need for major shopping centres within the City. All centres in South Perth therefore currently perform a local or neighbourhood centre function, in terms of the retail hierarchy in SPP4.2.

While Mends Street/South Perth was not classified as a district centre in 2010 it was so designated in 2015. The centre has tended to become more important as a centre than Karawara notwithstanding it has a more modest convenience retailing component.

South Perth is a more notable office than retail area and this is less related to the demographics of the City than regional growth.

2.8.2 City of Belmont

The population of the City of Belmont is projected to grow at 1.31%pa from 37,358 (2011) to 51,513 in 2036.

Belmont Forum is a Secondary Centre with 47,000m^2 floorspace – increased by 1000m^2 in a relatively minor extension which is currently under construction. No significant further expansion is anticipated.

The 2008 Local Commercial Strategy concluded that the trade area of the Belmont Town Centre extended well beyond the municipal boundary in all directions. Certainly, the Strategy placed particular emphasis on the Secondary centre and taking advantage of the State's policy's withdrawal from retail caps, advocated the continued expansion of retail space in the Town Centre zone subject to impact statements and development taking the form of main street development. No action in this respect has been taken.

The independently operating Westralia Airports Corporation presents an unknown factor which could impact on the City of Belmont's retail hierarchy. While the Corporation avows to respect the current regional and local planning principles proposals for commercial development have and will continue to be countenanced. The Airport has been designated as a Specialised Centre in SPP4.2 and *Perth and Peel @3.5million* and what this means exactly is uncertain.

The City is of the view that the most significant matter impacting on future employment creation will be the "Inland port" comprising the areas used for transport related activities on the land in an arc embracing Forrestfield, the Airport, Welshpool, Kewdale and the industrial land in East Victoria Park.

2.8.3 CITY OF CANNING

The population of the City of Canning is projected to grow at 1.35%pa from 90,738 (2011) to 126,736 in 2036.

The City of Canning Local commercial and Activity Centres Strategy was produced in 2015. This document produced by consultants Pracsys provided the principles by which the main centres should be developed within the City, backed by a range of actions. In most part the strategy provides a generalized set of objectives to be applied to future development.

The City of Canning Activity Centres Plan – 2016, provided specific use categories for each land parcel in the centre and established objectives for the main land uses within the Metropolitan Strategic centre. The specified parameters included:

- Future centre population – 25,000,
- Future retail floorspace – 176,736m^2
- Other retail – 68,081m^2,
- Office floorspace -142,944m^2.

The structure plan was prepared prior to the approval of the Carousel shopping centre extension although it had not been endorsed at the time of the approval. Residential density targets were set in accordance with the SPP 4.2 requirements.

In June 2016, the JDAP approved the expansion of the Strategic Metropolitan Centre at Carousel by 49,271m^2 to potentially 127,678m^2 GLA. This will result in additional specialty retail stores (including food retail and dining) and non-retail uses (such as commercial, office). The conditions imposed on the development seek to achieve a number of the SPP4.2 and City of Canning local scheme objectives – particularly in terms of activated frontages and public spaces. However, the centre remains a box form typology whereby the centre is inward facing, has a hard exterior and is cloaked by a large expanse of hard stand and/or car parking and no residential development was included in the proposal.

2.8.4 City of Melville

The population of the City of Melville is projected to grow relatively modestly at 0.92%pa from 102,135 (2011) to 126,736 in 2036.

The City of Melville produced a Local Commercial and Activity Centres Strategy 2013 as a framework which first set out the strategic intent for activity centres, then presented goals and assessment criteria to be used at the statutory planning level.

The City also provided more specific direction in the Melville City Centre Activity Centre Structure Plan 2013. This plan set out the statutory framework within which the main Secondary Centre, Garden City, would develop and be assessed. The existing retail floorspace of 62,622m^2 would be permitted to expand to a total retail maximum floorspace of 120,000m^2 and with non-retail floorspace would be permitted to expand from the current 27,000m^2 to a potential 55,000m^2. The plan established that two dwellings be provided for every 1000m^2 of retail space and that certain road infrastructure be provided for retail development. Various additional development guidelines were also set out in the plan to guide assessment of future applications in terms of built form, density and height. The expansion of the Garden City centre would also include the creation of High Street and surrounding built form.

An application to expand the Garden City shopping centre to 120,000m^2 was approved by the JDAP in December 2015, notwithstanding the failure to meet a number of SPP 4.2 policy requirements. Similar to Carousel, the expansion of a big box centre does not result in its conversion to a main street development and small associated residential developments will not create an active centre for longer than the limited shop opening hours.

2.9 Shopping Centre Expansions

While the policy change which dispensed with control over floorspace limits was not specifically mentioned in SPP 4.2 the absence of such controls immediately had significant consequences for centres throughout the middle areas of the metropolitan region. As shown on **Table 2.3**, over the past few years a number of Metropolitan Strategic and Secondary centres have sought and obtained approval for massive extensions of retail floorspace – amounting to a 78% increase in their combined retail floorspace.

Table 2.3: Recent Metropolitan Strategic (MSC) and Secondary Centre (SC) approvals/expansions

Centres	Current retail m^2	Approved retail m^2	Addition retail m^2	Value $m	Completion
Joondalup MSC	71,128	102,146	31,018 (44%)	300	Completed 2014
Carousel MSC	83,122	127,678	44,556 (54%)	350	Early 2019
Innaloo MSC	51,258	98,769	47,511 (93%)	450	Late 2019
Galleria MSC	64,500	160,172	95,672 (148%)	800	2019
Mandurah MSC	38,500	71,267	33,141 (86%)	350	Early 2018
Garden City SC	72,000	120,000	48,000 (66%)	750	2019
Karrinyup SC	53,292	90,417	37,125 (70%)	600	Early 2020.
Total	**433,800**	**770,449**	**336,649 (78%)**	**3,600**	

Source: JDAP agendas and minutes

A number of reasons could be put forward to explain the surge in shopping centre floorspace:

- There was the pent-up demand arising from the restrictive policy prior to 2010.
- Centres have a continual need to refresh the shopping offer to respond to changing consumer needs and to arm against the universal growth in online shopping. (While online shopping appears to only account for around 7% of sales now, it is predicted to reach 15% over the next decade and with the completely new model to be established by Amazon shortly, the traditional shopping centre is clearly under challenge.)
- There has been a trend throughout Australia for large centres to get larger with Sydney, Melbourne and Brisbane having a number of 'super regional' centres of over 75,000m^2 and even over 100,000m^2. As seen from **Table 2.3**, now Perth will match the Eastern States in its offer of 'super regionals'.

Certainly, the expansion of Carousel by over 50% will have an impact on the Town of Victoria Park. Being a Metropolitan Strategic Centre the development approval process for Carousel was not required to consider these impacts.

While SPP 4.2 required that a range of benefits be provided as a quid pro quo for floorspace extensions, in fact the centres listed in **Table 2.3** will generally not deliver on the policy's requirement for significant greater activity and improvements in urban form. They will not be accompanied by substantial residential development or main street development. The results of an analysis of the recent approvals against the SPP 4.2 requirements are summarized on **Table 2.4**.

Table 2.4: Summary of the achievement of SPP 4.2 requirements in recent Metropolitan Strategic and Secondary Centre developments.

Centre	Activity	Movement	Urban Form	Residential	Structure plan
Joondalup MSC	✓	✓	✓	✓	✗
Carousel MSC	✗	✗	✗	✗	✗*
Innaloo MSC	✓	✓	✗	✗	✗
Galleria MSC	✗	✗	✗	✗	✗*
Mandurah MSC	✗	✓	✗	✗	✗*
Garden City SC	✓	✗	✓	✗	✓
Karrinyup SC	✗	✗	✗	✗	✗*
Whitfords City SC	✗	✗	✗	✗	✗*

* The requirement to have a structure plan endorsed was waived under the 'exceptional circumstances' clause under 6.4 of SPP 4.2.
✗ - Proposals do not achieve the performance standards specified in the policy.
✓✗ - Proposals meet some of the performance standards specified in the policy.
Source: JDAP agenda and minutes

These results indicate that shopping centre owners are reluctant to provide the amenity improvements advocated through the policy in return for the greater retail floorspace. This is unfortunate for the patrons of the new and expanded centres as they will generally get more of the same with the possibility of additional congestion.

A number of reasons have been put forward for the failure of the large centres to meet the policy requirements, including:

- The shopping centre itself occupies a portion of the whole activity centre, so the development of the shopping centre without residential or mixed uses would not preclude the future achievement of the policy requirements elsewhere within the activity centre;
- The benefits arising from the investment, with its initial construction and long-term employment opportunities, justifies the waiving of aspects of the policy; and
- Shopping centre owners are experts in providing shopping centres, not other uses, indeed some are prevented from providing residential units under the terms of their trusts.

The failure of super regional centre expansions to be accompanied by greater variety in the range of uses and density housing development in proximity to the centres suggests a growing point of difference between the different types of centre. Patrons will be offered a starker choice between the experience of a visit to one of the super-regional centres compared with a traditional main street centre. While these developments present a threat to centres such as Victoria Park, it could also offer an opportunity where an alternative, more amenable, human scale, shopping experience can be promoted.

2.10 Conclusion: Implications of the policy context to the unfolding Strategy

The policy framework has little altered since the consultants prepared the 2013 Strategy. While a new strategic document to replace *Directions 2031* has been released (*Perth and Peel @ 3.5 million*) the strategies in this latest document are somewhat similar notwithstanding the longer-term horizon of 2050 when Perth's population may reach 3.5 million.

The Town's statutory framework is very much centred on the prescriptions of SPP 4.2 in terms of activity, movement and urban form at least.

The Town has achieved the high degree of employment self-sufficiency consistent with activity centre policy objectives, far in excess of other local governments in the sub-region. Local employment-specific strategies have been provided within the Causeway precinct to achieve local office employment. Future significant growth in the existing large employment centres at Burswood and Curtin have been flagged in respective structure plans. These areas will have a great impact on the Town. In respect of Curtin, the University can be encouraged in its endeavour to more fully develop its land for university related activities to make it more internationally competitive and attractive. With respect to Technology Park a review of the applicable planning controls may be timely in view of the expectation that the land will be more intensively used in the future.

The need to encourage residential development near and within activity centres will need to be addressed on a detailed basis. Infill development within an established urban fabric can be controversial, particularly where existing housing stock has a character that the local community considers worth preserving. While high density and high-rise housing has been successfully developed at Burswood, a less dramatic form of housing development may be more appropriate within established areas.

The main policy relating to activity centres remains SPP 4.2 which was released in 2010. While the policy framework remains the same, in the past few years a number of strategic and secondary centres have acted on the lack of control over retail floorspace in the policy and received approval for substantial expansions to create a number of 'super regional' centres.

These will significantly affect the competition experienced by retailers within the Town. However, it will further emphasize the difference between the stand-alone centres and the strip-shopping offer at Victoria Park.

The significant loosening of the retail/Activity Centres policy under SPP 4.2 and the reluctance of the relevant decision makers to impose the non-retail requirements of the policy could result in uncertainty concerning future Activity Centre planning and generally create an era of instability in investments in retail facilities in smaller centres. But probably an issue as great is the extent to which the public is switching to on-line shopping, a reality that appears to be incongruous to the actions of big shopping centre investors.

These developments reinforce the need to reconsider what natural attributes the Town's activity centres have on which to build in the absence of the artificial protection from the market forces previously provided by Metropolitan retail policy

The principles of SPP 4.2 still remain desirable to achieve although it does appear that only the traditional centres are aligning their planning policies to achieve them. Notwithstanding this it is doubted whether the preparation of an activity centre plan would further the Town's aims.

For a number of reasons, basing planning on the creation of activity centres delivers a range of planning outcomes worth pursuing. Accordingly, the emphasis of the strategy should continue to be on encouraging the development of a range of retail, office, eating and residential uses and policy should support this.

2.11 Recommendations

1. That the Burswood Peninsula be designated as a Specialised Activity Centre.

2. That the retail floorspace levels indicated in the Burswood District Structure Plan be reviewed to establish whether they are realistic, achievable and desirable.

3. That the issue of the establishment of a redevelopment authority for Burswood be pursued with State Government.

4. That the preparation of an Activity Centre Structure Plan for the Secondary Centre be not considered as a priority at this time.

5. That the Town build on and enhance the points of difference between the Albany Highway Secondary Centre and the expanding super regional centres.

CHAPTER 3 ANALYSIS

3.1 Background

In this Chapter, the factors influencing commercial development now and in the future are analysed. The data used in this analysis is taken from the 2015 and previous Department for Planning Commercial and Industrial surveys undertaken in 1990 and 2007. Where possible reference will be made to the previous Activity Centre Strategy referred to below as the 2013 Report.

As shown in **Table 3.1**, the uses normally associated with Activity Centres represent a relatively small portion of the total commercial floorspace within the Town. Shop/retail only accounts for 14.4% of the commercial floorspace with Offices occupying 14.2% and Other retail the most with 14.8%.

TABLE 3.1 - COMMERCIAL FLOORSPACE IN THE TOWN OF VICTORIA PARK*

Use Category	m^2 NLA	%
Shop/Retail	75,968	13.7
Other Retail	85,203	15.3
Service Industry	37,446	6.7
Entertainment	30,148	5.4
Office	106,091	19.1
Health Welfare	62,791	11.3
Storage/Transport	26,782	4.8
Manufacture	48,702	8.8
Utilities	12,480	2.2
Primary Industry	5,055	0.9
Vacant	65,453	11.8
TOTAL	**556,119**	**100**

Source: Department of Planning Commercial Activity Survey 2015
*Excludes Industrial areas, development on reserved land and land occupied by residential uses.

The focus of this report will be particularly upon the Secondary Centre abutting Albany Highway to understand what its key characteristics are, how it is changing and how it compares with other centres. The reader is referred to **Appendix 1** for more details regarding the precise location of different commercial uses.

3.2 Victoria Park Centre

3.2.1. Victoria Park Secondary Activity Centre

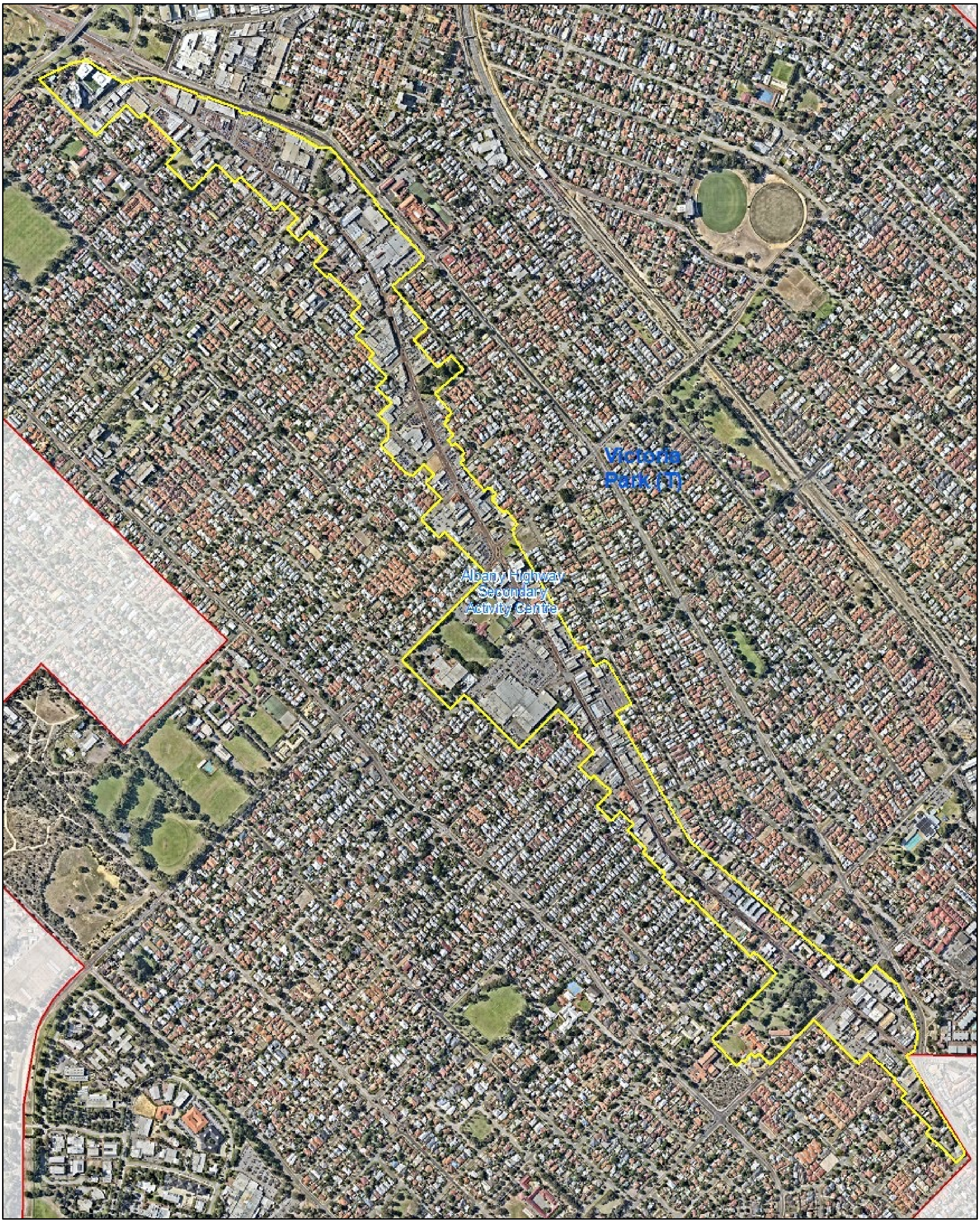
For those unfamiliar with the shopping centre classifications adopted by the Department of Planning, a secondary centre is what was previously regarded as a regional shopping centre, being a second tier below the largest shopping centres in the metropolitan area, namely strategic metropolitan centres. In some ways this classification can be confusing because some the secondary centres are in fact larger than strategic metropolitan centres. For example, Garden City shopping centre in Melville is classified as a secondary centre when it is as large or larger than most of the strategic regional shopping centres.

For purposes of this strategy the whole Albany Highway shopping/commercial complex in Victoria Park is regarded as one secondary centre. The total floor area as a secondary centre was 206,561m^2 in 2015 making it three times the present size of Garden City. Of that 56,129 m^2 was shop/retail floorspace, slightly larger than the Belmont Forum shopping centre which is classified as a secondary centre.

The Secondary Centre (the extent of which is described on **Figure 3.1**) has been analysed in terms of its land use as a whole, to facilitate comparisons with earlier years, and between six sub-precincts to enable more fine-grained analysis.

The Victoria Park Secondary Activity Centre (SAC) has a long history over which it has declined in regional importance from being the third most important shopping area in the metropolitan area after Perth and Fremantle to being of local and district importance today. Most of the shops and other buildings in the centre are old, with no significant new shopping development having occurred since 1977. The types of retailing and other land uses have been evolving largely within the existing building stock. Those observations were made in the 2013 report and still stand notwithstanding additional data for 2015.

FIGURE 3.1 – MAP OF ALBANY HIGHWAY SAC BOUNDARY



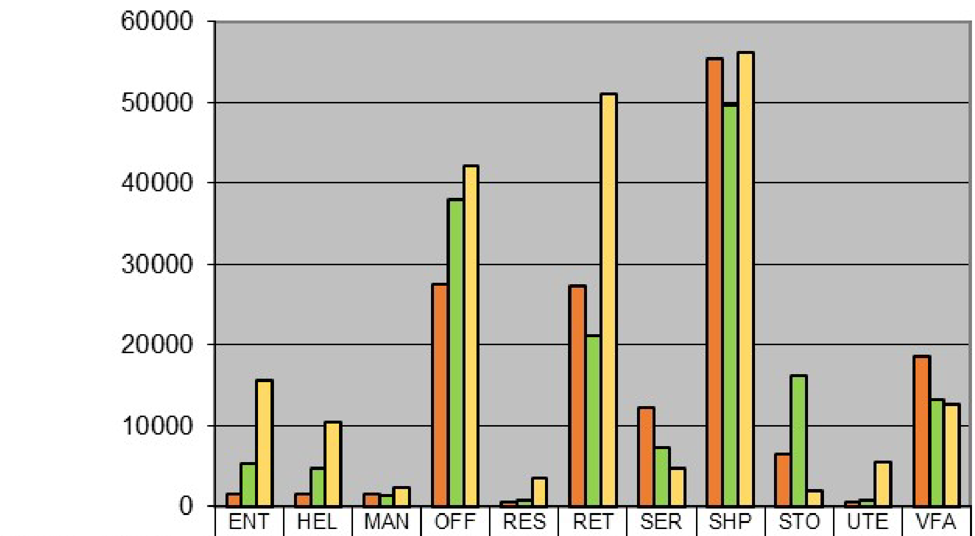
Source: Nearmap, Planwest

Figure 3.2 shows the changing land uses over the period 1990-2015. The total floor area grew by only 3.2% between 1990 and 2007, but expanded by 30.4% between 2007 and 2015.

FIGURE 3.2 – VICTORIA PARK SAC (ALBANY HIGHWAY) – FLOORSPACE CHANGE (m^2) 1990 - 2015

PLANNING LAND USE CATEGORIES

ENT	Entertainment/Recreation/Culture
HEL	Health/Welfare/Community services
MAN	Manufacturing/Processing/Fabrication
OFF	Office/Business
RES	Residential
RET	Other Retail
SER	Service Industry
SHP	Shop/Retail
STO	Storage/Distribution
UTE	Utilities/Communications
VFA	Vacant Floor Area



	ENT	HEL	MAN	OFF	RES	RET	SER	SHP	STO	UTE	VFA
1990 = 153,238 m2	1622	1545	1498	27505	530	27217	12323	55349	6545	568	18536
2007 = 158,463 m2	5261	4744	1307	38062	750	21092	7368	49693	16147	757	13282
2015 = 206,561m2	15666	10483	2375	42186	3554	51125	4774	56129	1995	5544	12730

Source: Department of Planning Commercial Activity Surveys 1990, 2007 and 2015

The most significant increase would appear to have been in the Other Retail category (RET). However, part of this is accounted for by changes in the coding of land uses used between the 2007 and 2015 surveys. In particular, in 2007 car dealership floorspace was broken down according to the actual activity carried on in different parts of the building such as storage, servicing and administration. In the 2015 land use survey all car dealership floorspace was included within 'Other Retail' (RET). This would in part explain the significant increase in floorspace allocated to RET and the parallel decline in storage (STO). However, this does not explain all the growth in the RET category.

According to the 2015 survey 94% of the RET classification was accounted for by uses associated with motor vehicle sale and servicing accounting for 25% of all land uses along Albany Highway. While it was noted in the 2013 Report that these uses appeared to be increasingly moving further out, clearly this has not resulted in a measurable decline in its importance within Victoria Park. Most of the motor vehicle related land use is located between the northern (15,070m^2) and Central (16,379m^2) sub-precincts.

The uses associated with entertainment/recreation and culture have more than doubled in recent years. While some of this may have been due to changes in definition between the surveys, it is worth remarking that 47% of the category is comprised of gyms and health clubs which combined occupy 7,400m^2. This reflects a recent appetite for such activity throughout the metropolitan region.

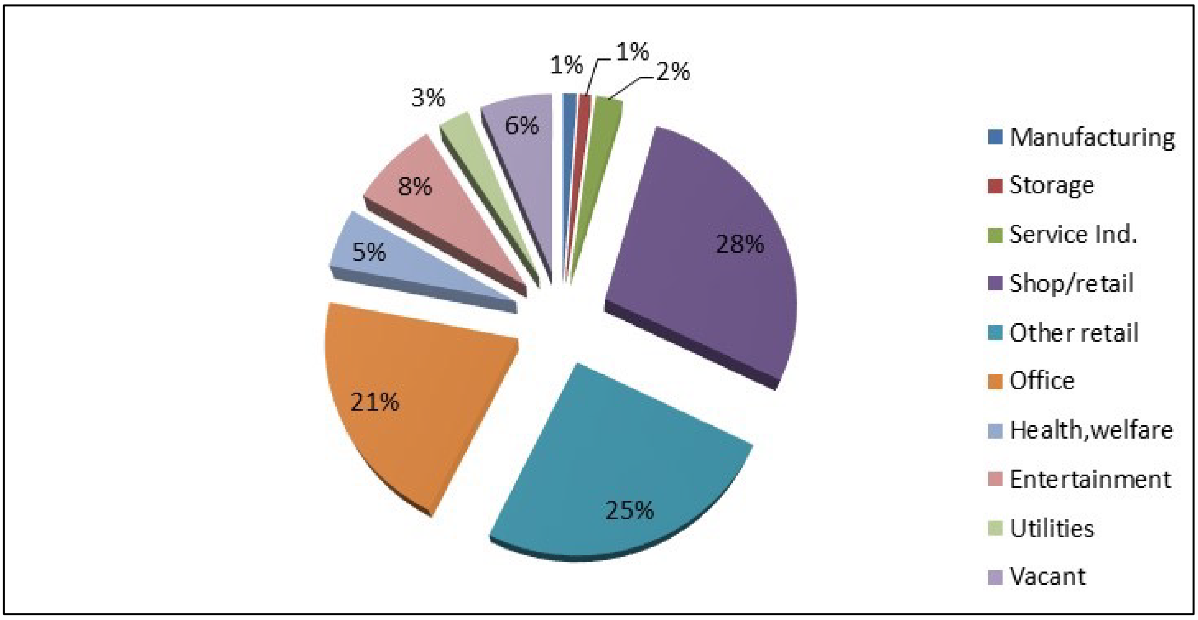
A similar dimension of growth has been experienced in the Health/welfare/community services area. Educational uses accounted for 54% of this category.

Shop/retail uses have recovered from the relative decline between 1990 and 2007 to now occupy 56,129m^2. While the Shop/retail area has grown in absolute terms and now represents 27% of the commercial area, it has had a proportional decline since 2007, due to the general expansion in other commercial uses. The observation was made in the 2013 Report that from the 2007 data the centre had a land use mix of which 32% (or 49,693m^2) was Shop/retail. "This amount could theoretically be increased to 60% and still comply with the Policy, although this could only realistically be achieved as part of the development of the Town Centre." With Shop/retail now occupying 27% of the mix (notwithstanding with a larger area) this statement still stands.

Table 3 of the Activity Centres Policy provides a 40% diversity performance target for Secondary Centres with 50,000 and 100,000m^2 of Shop/retail floorspace. Victoria Park's mix is 58% (ie the amount of OFF, HEL, ENT and RET categories as a proportion of the whole). This does illustrate a shortcoming of the Policy in that the definition is sufficiently wide to ensure that the target is reached without significant improvement of activity centre amenity. It is doubtful whether car yards and large showroom warehouses would deliver the type of activity sought.

Figure 3.3 illustrates the distribution of commercial uses as they stood in 2015.

FIGURE 3.3 – VICTORIA PARK SAC COMMERCIAL LAND USES – 2015



Source: Department of Planning Commercial Activity Survey 2015

There has been a steady growth in floorspace allocated to offices. The most common type of offices are those associated with engineering services (32% of the total) and real estate (12%).

It is interesting to compare the general distribution of uses within the Victoria Park Secondary Centre and the Cannington Strategic Metropolitan Centre and the Belmont Secondary Centre. At the time of the 2015 survey, the Cannington Centre had 55% more commercial floorspace than the Victoria Park Secondary Centre while Belmont was 27% smaller. As **Table 3.2** shows, both Cannington and Belmont are more dominated by Shop/retail than is the Victoria Park Secondary Centre which has a greater presence of Other Retail and Offices. A number of secondary schools are located within the Cannington and Belmont centres which account for 55% and 5% respectively of the Health/Welfare category.

TABLE 3.2 – COMPARISON OF VICTORIA PARK, CANNINGTON AND BELMONT (%)

Use Category	Victoria Park SC	Cannington SMC	Belmont SC
Shop/Retail	27.6	31.0	32.8
Other Retail	25.2	10.6	0.4
Service Industry	2.4	6.6	0.2
Entertainment	7.7	10.6	26.4
Office	20.8	14.5	11.6
Health Welfare	5.2	12.2	25.4
Storage/Transport	1.0	5.4	2.0
Manufacture	1.2	2.6	0.0
Utilities	2.7	2.5	0.6
Vacant	6.3	4.0	0.7
TOTAL	**100.1**	**100**	**100.1**

Source: Department of Planning Commercial Activity Survey 2015

The broad categories of land use can hide significant factors at play between centres. In analysing the Shop/retail category it is most evident that Victoria Park has relatively little space occupied by department stores, but significant amounts allocated to restaurants and cafes.

Analysis of the 2015 survey data for the Perth and Peel Region reveals that the Victoria Park Secondary Centre (Albany Highway) displays some significant differences with the metropolitan average and other nearby centres. As shown on **Table 3.3**, in the area of Shop/retail it is not surprising to see that the Town has less evidence of Department stores. Its reputation as a centre with a wide variety of restaurants and cafes is borne out by the fact that 33% of the floorspace is so allocated compared with 15% for the region as a whole.

Comparing the Victoria Park Secondary Centre (SC) with the Cannington Strategic Metropolitan Centre and the Belmont Secondary Centre is also revealing. As shown on **Table 3.3** the importance of department stores is even more striking with 35% of Cannington's and 33% of Belmont's Shop/retail space being so occupied compared with only 10% for the Victoria Park Secondary Centre. Even so, the Target store in East Victoria Park is a discount store rather than a full line department store. This is to be expected as full line department stores tend to locate in very large regional sized centres in upper income areas.

While the area allocated for food retailing, take away food stores and pharmacies is fairly similar between the centres, the analysis shows that Victoria Park SC provides in some respects a broader shopping offer and notably 33% of its shopping space is allocated to restaurants and cafes compared with less than 5% in both Cannington and Belmont and 7% to Hairdressing and beauty salons compared with 1% in Cannington and 4% in Belmont. Cannington provides a significant element of clothing and footwear shops (17% of the total), less evident in Belmont (10%) and far less evident in Victoria Park (3%).

From this analysis one could draw two inferences. Firstly, that the types of shopping in Victoria Park is convenience shopping serving a mainly local population. That being said, it is acknowledged that some of the restaurants in Victoria Park have a reputation which extends to a much wider area and draws clientele from beyond of the trade area normally associated with the shopping in Victoria Park. Secondly, given the wide range of uses along Albany Highway it would appear that the Victoria Park SC fulfils the objectives of the Activity Centres

SPP 4.2 to a greater extent than does the larger Cannington centre and the more similar sized Belmont centre, at least in respect of objective 3: *"Plan activity centres to support a wide range of retail and commercial premises and promote a competitive retail and commercial market."*

TABLE 3.3 – BREAKDOWN OF SHOP/RETAIL FLOORSPACE
Victoria Park SC compared with Carousel MRC and Belmont SC

Use Category	Victoria Park SC		Cannington SMC	Belmont SC	Perth/Peel Region
	m^2 NLA	%	%	%	%
Department store	5527	10	34.9	32.9	14.1
Supermarkets/grocery	7669	13.8	12.2	24.7	17.7
Food retailing	1570	2.8	1.8	1.3	4.2
Clothing/footwear	1812	3.3	17	9.5	8.6
Household goods	2147	3.9	4.7	0.4	5.4
Pharmacies	1102	2	2.3	2.8	3.1
Liquor	2029	3.7		0.6	3.1
Second-hand	1195	2.1	3.1	0.9	2.1
Newsagents/books	1029	1.9	0.1	1	2.1
Sports and hobbies	580	1	6	1.1	3.4
Computing	2773	5	0.1	0	1.1
Hairdressing/salons	3812	6.9	1.3	4.1	4.1
Restaurants/cafes	18460	33.3	4.4	4.3	14.7
Take away food	2156	3.9	2.4	4	6.1
Specialised/other retail	3693	6.7	9.6	12.3	10.2
TOTAL – % - NLAm^2	**55,554**	**100.3**	99.9 **97,749**	99.9 **44,158**	**100**

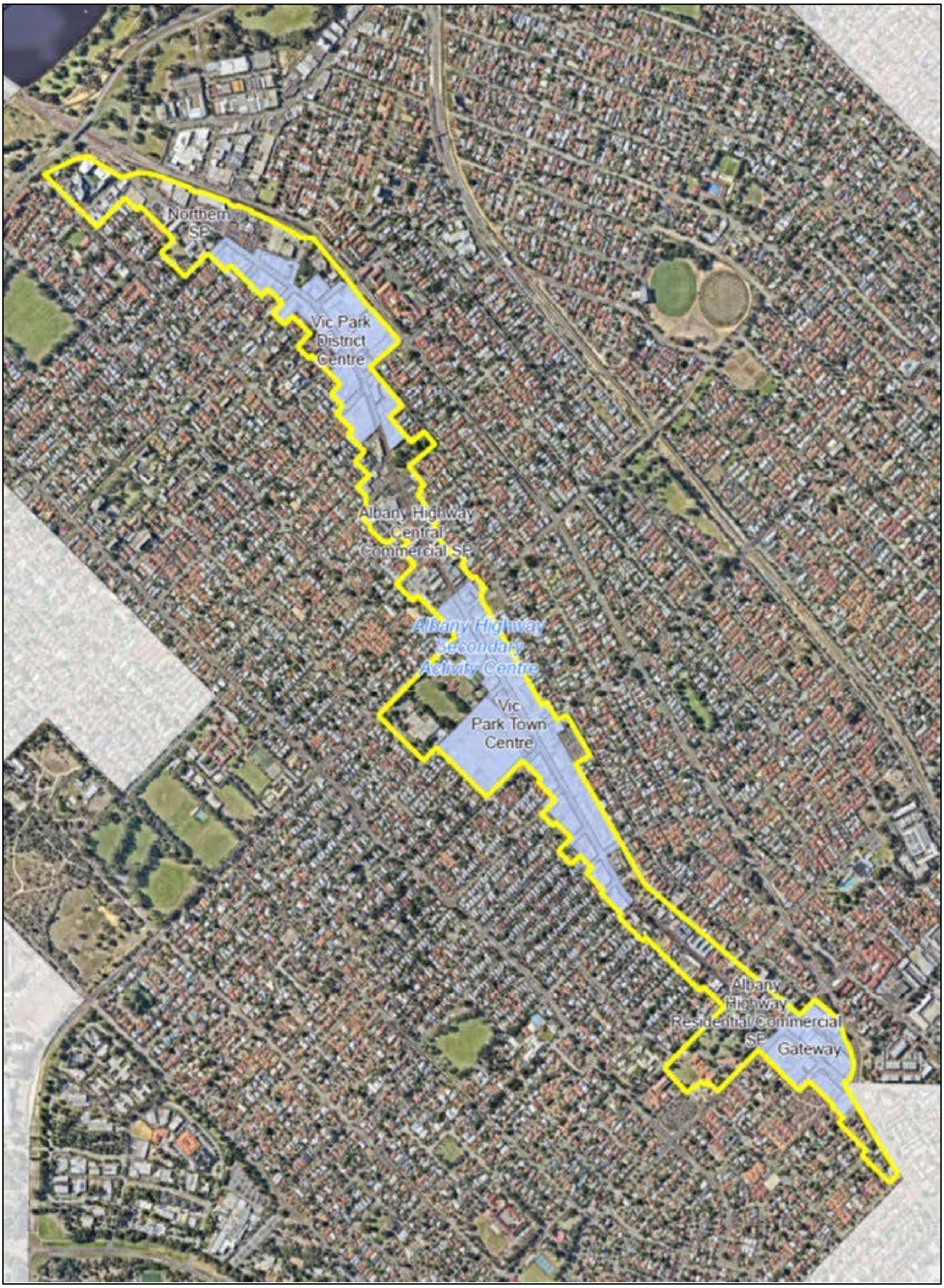
Source: Department of Planning Commercial Activity Survey 2015

3.2.2 Secondary Centre Sub-Precincts

For analytical purposes the Secondary Centre has been divided into six sub-precincts as illustrated on **Figure 3.4.** The boundaries reflect the zoning under the local planning scheme. Travelling north to south, the precincts are Northern (zoned Commercial from Canning Highway to Cargill and Harvey streets), Victoria Park (zoned District Centre to McMillan and Salford Streets), Central (zoned Commercial to Tuam Street), Town Centre (zoned District Centre to Dane and Balmoral streets), Residential/Commercial (zoned Residential/ Commercial to Hill View Terrace) and Gateway (zoned District Centre to the southern boundary). The boundaries are the same as those used in the 2013 analysis.

The uses vary considerably between the precincts, as illustrated on **Figure 3.5** and **Table 3.4** which show the main uses as distributed amongst the six sub-precincts. The large portion of commercial floorspace allocated to Offices, Health, Entertainment and Other retail confirms the extent of mixed use within the centre as a whole, required by SPP 4.2.

FIGURE 3.4 – SUB PRECINCT BOUNDARIES



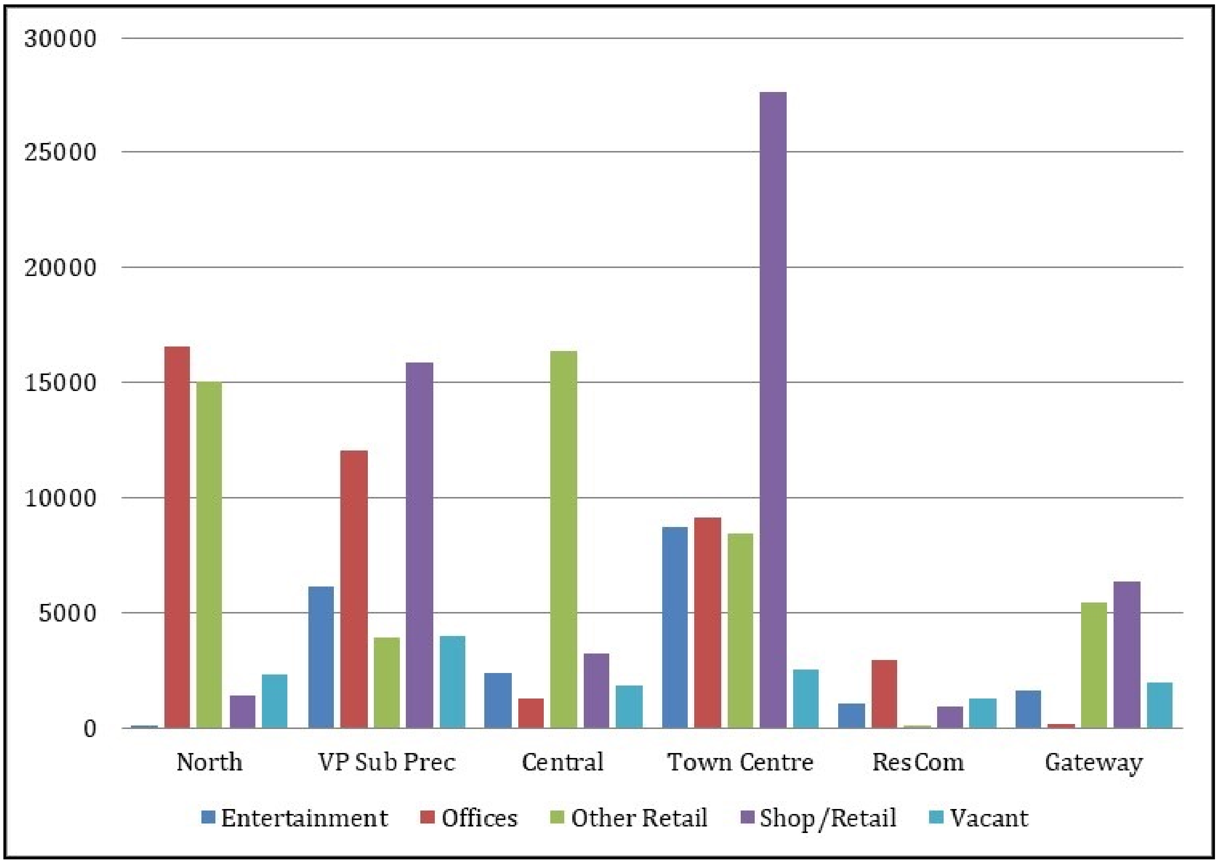
Source: Nearmap, VP ACS 2013, Planwest

TABLE 3.4 - USE CATEGORIES IN THE VICTORIA PARK SAC SIX SUB-PRECINCTS (m^2 NLA)

Use categories	North	VP sub-precinct	Central	Town Centre	Res/com	Gateway
Entertainment	100	1,699	2,424	8,743	1,100	1,600
Health, welfare, com serv.	2,900	4,421	286	2,403	340	133
Offices	16,600	12,080	1,283	9,146	2,917	160
Other retail	15,070	3,915	16,379	8,469	90	5,465
Service industry.	350	1,305	1,764	905	230	220
Shop/retail	1,445	15,917	3,241	27,648	940	6,348
Utilities	1,050	4,010		184	300	0
Other	1,862	2,896	1,590	730	230	0
VFA	2,325	2,736	1,816	2,547	1,306	2,000
Total (m^2)	**41,702**	**48,979**	**28,783**	**60,775**	**7,453**	**15,926**

Source: Department of Planning Commercial Landuse Survey 2015

FIGURE 3.5 – SECONDARY CENTRE SUB-PRECINCT FLOORSPACE CHANGE 1990 – 2015



Source: Department of Planning Commercial Activity Survey 2015

Some of the characteristics of commercial development within the sub-precincts has occurred over the past decade. As shown in **Table 3.5** between the 2007 and 2015 land use surveys there was a small increase in Shop/retail in all sub-precincts apart from the Gateway. However, there was a significant increase within the Town Centre of Entertainment uses (gymnasiums), a large increase in Office uses in the North precinct but an equally large fall in Office use in the Victoria Park and Town Centre sub-precincts. There has been a notable increase in Other retail generally between the two surveys, particularly in the North, Central and Town Centre sub-precincts. However, this may well have been due to the definitional changes between the surveys with more car yard floorspace being classed as Storage and Offices in the 2007 survey.

TABLE 3.5 - CHANGE IN FLOORSPACE (m^2) BETWEEN 2007 AND 2015 IN THE VICTORIA PARK SIX SUB-PRECINCTS

Use categories	North	VP sub-precinct	Central	Town Centre	Res/ com	Gateway
Entertainment	100	-349	1324	7653	-25	900
Health, welfare, com serv.	2900	4143	286	-1070	-90	133
Manufacturing	200	708	150	260	0	0
Offices	8928	-8165	-2383	-8008	2784	160
Other retail	7760	1281	12156	6830	-540	453
Service ind.	-1050	524	1764	905	-910	0
Shop/retail	1195	1557	1111	401	129	-3960
Storage	-7882	-777	0	-1417	100	0
Utilities	1050	3757	0	184	300	0
Vacant	1025	1179	1666	1760	567	2000

Source: Department of Planning Commercial Activity Survey 2007 and 2015

a) Northern Sub-precinct

As shown on **Figure 3.5** and **Table 3.4**, other retail (RET) predominates in the Northern precinct. This reflects the location of many of the Town's automotive businesses.

The Northern Precinct has retained, and possibly strengthened, its importance as one of the State's most important centres for the motor trade. All of the 15,070m^2 within the RET classification is occupied by uses related to the motor trade.

The area is the location of a nascent office sector, characterised by a relatively small number of large offices of over 1000m^2 floor area. Altogether engineering firms occupy 76% of the office floorspace.

b) Victoria Park Sub-precinct

While offices are of lesser importance within this precinct in terms of total floor area, the precinct includes many small offices (98 individual offices occupying 12,080m^2). A wide range of professional firms, real estate services and local government are located within a hundred offices established in the precinct.

The precinct is characterised by a wide variety of small shops and restaurants making it the second shopping node of the overall Secondary Centre. The relatively large Victoria Park Central shopping centre (with its large Woolworths store) is located within the precinct.

In the 2013 Report a high vacancy rate (16% in 2007) within this precinct was commented upon as a sign of an oversupply of floorspace. However, this has fallen substantially to 2,736m^2 or 5.6%.

c) Central Sub precinct

This precinct is dominated by its Other retail floorspace which occupies 57% of all floorspace. All this floorspace (16,379m^2) is taken up by uses related to the motor trade (particularly second-hand car dealers) – surprisingly exceeding the more visible RET floorspace in the Northern precinct.

Again, the vacancy rate commented upon in the 2007 report has been reduced in the 2015 figures (from 11% to 6%) indicating that the mooted floorspace oversupply is no longer in evidence.

d) Town Centre

The Town Centre sub-precinct features 50% of the centre's total Shop/retail space and the Town's only department store (Target) at the Park Shopping Centre. There is also a large Coles supermarket. It was observed in 2013 that there was evidence of a transition of Shop/retail away from comparison retailing to restaurants, food and beverage. This has certainly occurred with over a third (34.7%) of the Shop/retail space being occupied by restaurants/cafes and function centres. The precinct is also characterised by having significant areas defined as Entertainment – 60% of which are used for gyms and health clubs. The growth in this category of floorspace has nearly all occurred in the past decade – floorspace categorized as ENT growing from 1090m2 to 8743m2 between the 2007 and 2015 surveys.

The precinct is also characterised by having significant areas defined as Entertainment – 60% of which are used for gyms and health clubs.

While only 4.2% of the commercial land is vacant there has been no significant upgrading of the shopping centre for many years despite the very significant recent projects to upgrade a number of other metropolitan strategic and secondary centres. The conclusion drawn in the 2013 report, "*The ratio of old shops to attractor stores such as Target and Coles is well above modern shopping centre standards and indicates that the sub precinct does not trade as powerfully as it would if it were to be in a planned and integrated centre with more major attractor stores,*" would still appear to be relevant.

e) Residential and Commercial

This area between Dane Street and Hill View Terrace retains a significant residential component. The 2015 survey identified 195 individual residencies on commercial zoned land within the precinct. 87% of the dwellings are multiple dwellings.

More than any other sub-precinct, there are signs of transition seen from the disjointed streetscape and the high level of vacant floorspace (17.5%) which is the highest within the overall secondary centre.

f) The Gateway

From Hill View Terrace to the boundary with the City of Canning this sub-precinct provides a small commercial node (only 15,926m^2 floorspace) specialising in medium sized retail and other retail uses.

Bunnings hardware and a range of motor vehicle parts and accessories stores together account for 91% of the Other Retail uses. Homecraft textiles and Office Works account for 54% of the Shop/retail uses and restaurants and take away food outlets make up most of the balance. It is noted that an Aldi store has been approved on the corner of Hill View Terrace (previously occupied by one of the motor vehicle accessory stores), which is likely to redress the recorded 3,961m2 fall in Shop/retail floorspace between the 2007 and 2015 surveys.

A relatively large portion (12.5%) of the available floorspace is vacant, although with the development of the Aldi store this is likely to decline due to the resulting expected synergies.

3.3 The Other Centres

3.3.1 Burswood Specialised Activity Centre

While the 2013 Report noted that discussions between the Town of Victoria Park and the Department of Planning had concluded that the Burswood Peninsula should be classified as a Specialised Activity Centre, this has not occurred. Neither *Perth and Peel @3.5Million* (May 2015), the *Draft Central Sub-regional Planning Framework* (May 2015) or the *Burswood Peninsula District Structure Plan* (March 2015) referred to Burswood as a specialised centre. Notwithstanding this designation, or the lack of it, the whole Peninsula is designated as an activity centre in this Report (**Figure 3.6**).

In view of the lack of commercial zoned land at the time of previous surveys, the Peninsula was not included in the 1990 or 2007 surveys. However, estimates were made from aerial photography in the 2013 Report. The 2015 survey did include the Peninsula although comparisons with previous years need to be drawn with caution.

Figure 3.7 shows the importance of the Entertainment category with 52,350m^2 in 2015. Of this, 18,000m^2 (35%) is accounted for by facilities for horse racing and other sporting activities on the Peninsula. The balance of surveyed entertainment related uses are associated with the Burswood resort (gambling 15,500m^2 and function centres and theatres 14,000m^2).

Over 70,000m^2 of floorspace has been surveyed as hotels. 691 rooms are provided in the Crown Metropol and Crown Promenade hotels. A further 500 are provided in the Crown Towers hotel, although this only opened in 2016.

The large area allocated to utilities in **Figures 3.7 and 3.8** is nearly all accounted for by parking.

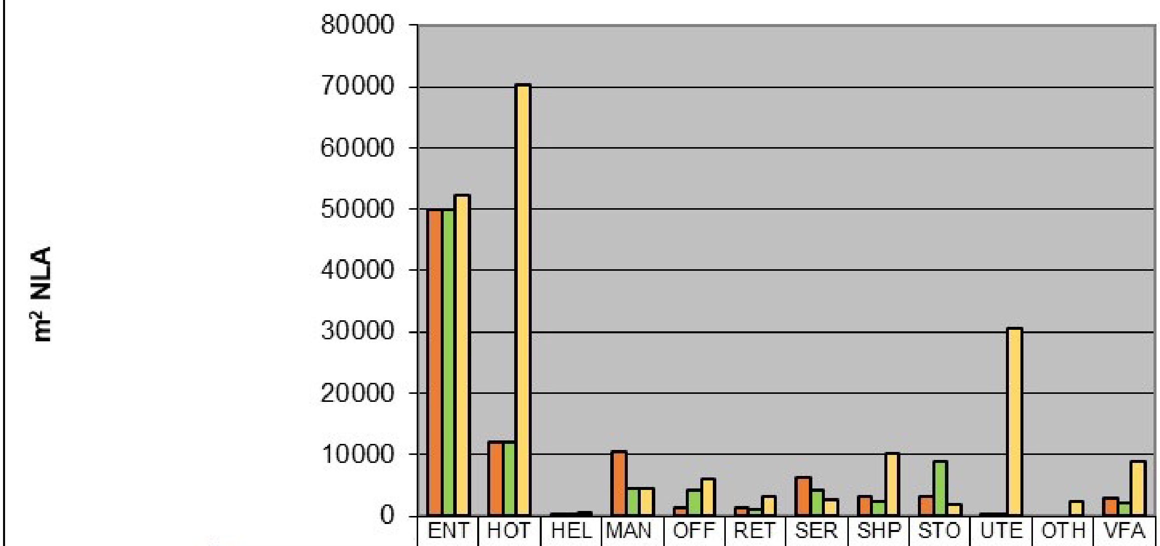
Belmont Park Sub Precinct

This area has been subject to structure planning culminating in the Belmont Park Racecourse Redevelopment Structure Plan (DPS 2013 – approved April 2013), the results of which were reflected in the relevant sections of the Burswood Peninsula District Structure Plan (2015). The conclusions drawn from the analysis undertaken by MacroPlan was that there was potential for approximately 31,000m^2 of retail and 60,000m^2 of commercial/office over the site.

FIGURE 3.6 - BURSWOOD BOUNDARY AND AERIAL PHOTO

Source: Nearmap, Burswood Peninsular SP, Planwest

FIGURE 3.7 - BURSWOOD PENINSULA SAC FLOORSPACE CHANGE 1990 – 2015



	ENT	HOT	HEL	MAN	OFF	RET	SER	SHP	STO	UTE	OTH	VFA
1990 = 90,912M2	50000	12000	190	10379	1308	1359	6311	3031	3197	340		2797
2007 = 89,742M2	50000	12000	389	4334	4221	1069	4225	2286	8880	250		2088
2015 = 193,437M2	52350	70156	650	4542	5995	3104	2538	10274	1920	30450	2465	8993

Source: Department of Planning Commercial Activity Surveys 1990, 2007 and 2015

Burswood Station East Sub Precinct

The area bounded by the Graham Farmer Freeway, the railway and the Great Eastern Highway is an historic industrial area which is now zoned Office/residential under the district local planning scheme.

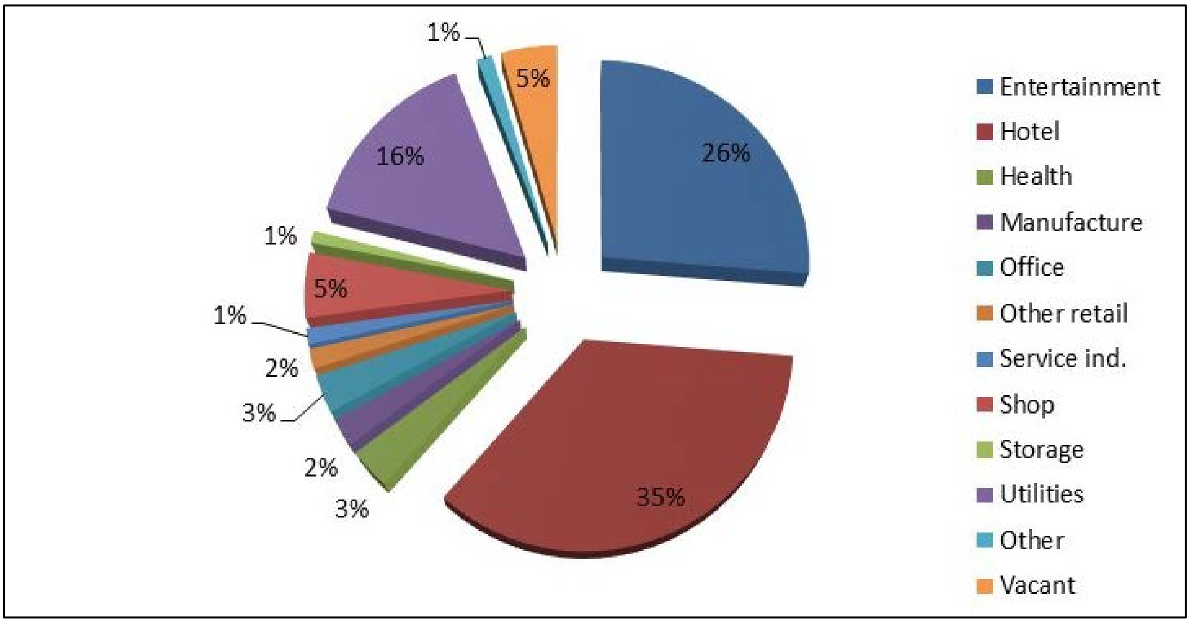
The Burswood Peninsula District Structure Plan sees the area developing into a new residential and mixed-use neighbourhood with an anticipated future employment generated from 40,000m^2 of office and commercial space and 8,000m^2 of retail space. It does seem reasonable to expect that a range of uses could be attracted to the site in time achieving the predicted office and commercial floorspace. Some retail space could be envisaged abutting Great Eastern Highway, although it would appear that 8,000m^2 would be over optimistic.

The area is undergoing transition complicated by access constraints and the range of entrenched industrial uses. While it still retains 4,542m^2 of manufacturing activity, the sub-precinct in 2015 had 5,995m^2 of office space and 57 residential units. There has been the recent development of two multi-storey residential apartment blocks which may be a prelude to others.

The sub-precinct was surveyed in 2015 as having 8,995m^2 of VFA, representing 30% of the non-residential floorspace. 18 sites within this locality were identified as being vacant (as opposed to vacant floorspace 'VFA'), some of these were being redeveloped. This was the largest concentration within the Town of sites classified as 'VLA', although it has not been included in **Figure 3.8** because there was no floorspace to survey.

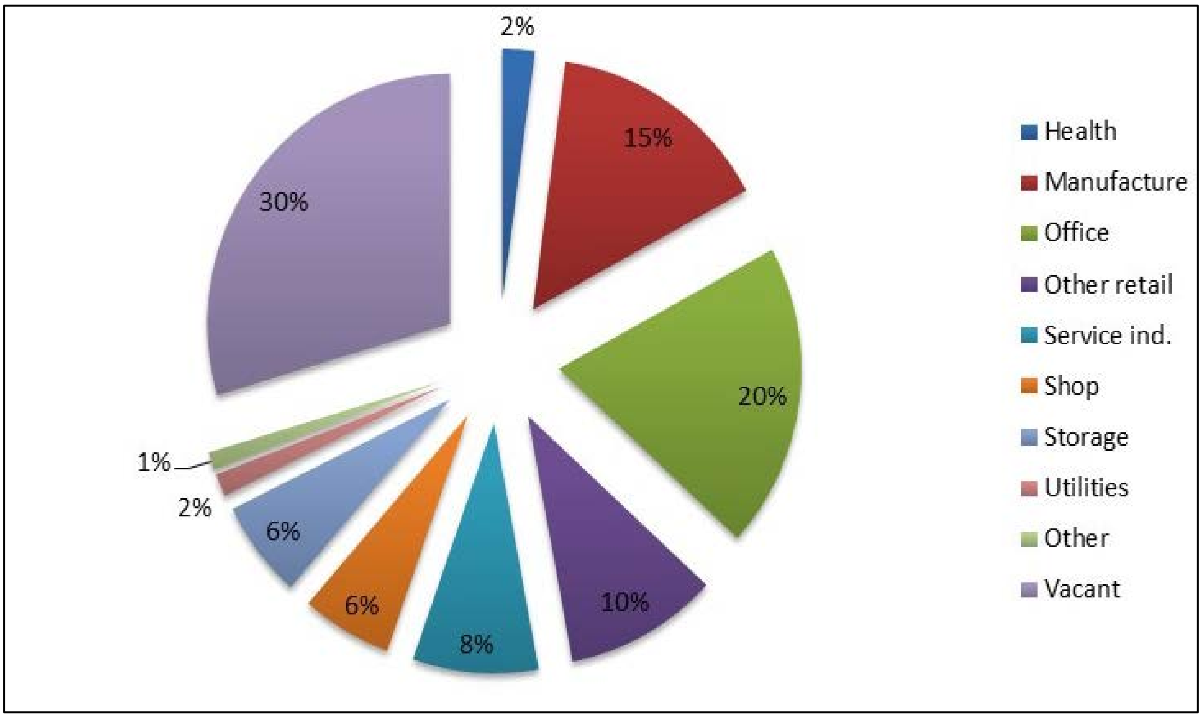
Burswood Station East is ready to transition from an industrial to a relatively intense mixed use area. The Burswood Peninsula District Structure Plan has earmarked in respect of the combined Burswood Station East and West areas considerable retail (30,000m^2) and office/commercial (160,000m^2) floorspace as well as 4,500 additional dwellings. The required local structure plan for the area should identify the future realistic retail function and building form and capacity in view of the site's relative inaccessibility and limited extent notwithstanding its locational advantages.

FIGURE 3.8 - BURSWOOD PENINSULA SAC COMMERCIAL LAND USES – 2015



Source: Department of Planning Commercial Activity Survey 2015

FIGURE 3.9 - BURSWOOD STATION EAST SUB-PRECINCT COMMERCIAL LAND USES - 2015



Source: Department of Planning Commercial Activity Survey 2015

3.3.2 CAUSEWAY ACTIVATION AREA

While not specifically identified as an activity centre by the Department of Planning (2015), as observed in the 2013 Report, its size in terms of commercial floorspace suggests consideration **(Figure 3.10**). Total floorspace has, however, fallen by 23% since 2007. Similar to Burswood Station East the land is zoned Office/Residential under the local planning scheme.

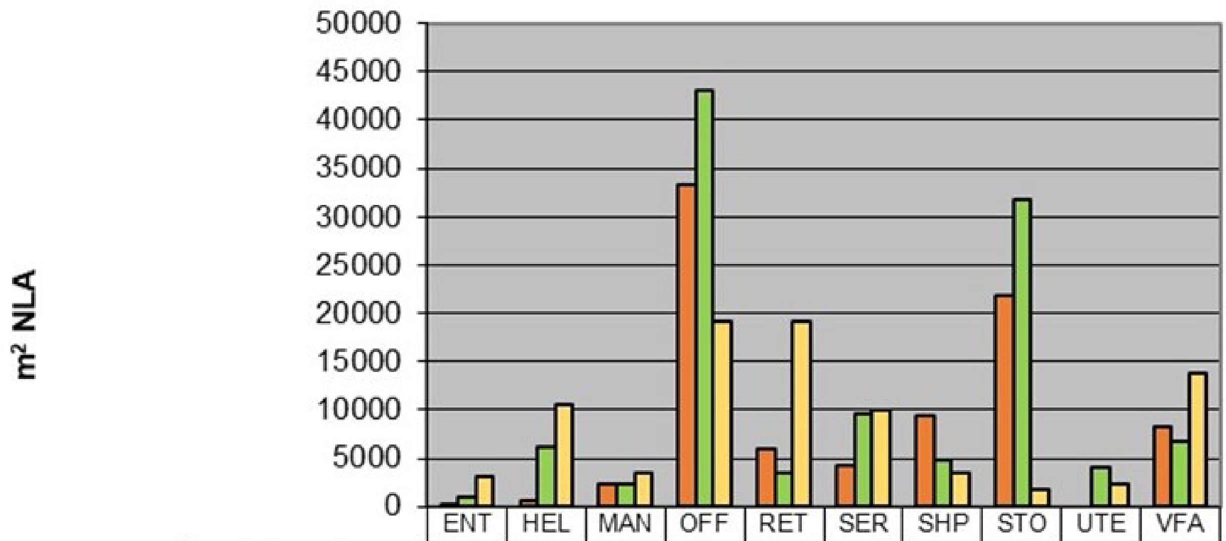
The argument presented in 2013 was that there were clear signs of emerging office, commercial and high density residential uses within the activity centre which could support the string of centres developing through the Town linking the Secondary Centre with Burswood. However, it was noted that this pattern did not fit with the concept of activity centre separation in the Activity Centres Policy. Certainly, the Causeway Activation Area has a fairly narrow band of uses with a focus on offices (47% of which are finance or business related) and Other retail (94% of which relate to the motor vehicle trade). Some of the relative fall in offices and rise in other retail may be explained by changing definitions between the 2015 and previous surveys, as noted above.

It is noted that there has been an increase in the Health, welfare and community services category partly due to the location of two large churches in the Activation Area and a range of schools and child-care facilities. There is very little Shop/retail space within the Activation Area. The other point of interest to note from **Figures 3.11** and **3.12** is the relatively large area of vacant floorspace (15.8% of total floorspace) having doubled from 2007.

FIGURE 3.10 - CAUSEWAY BOUNDARIES AND AERIAL PHOTO

Source: Nearmap, VP ACS 2013, Planwest

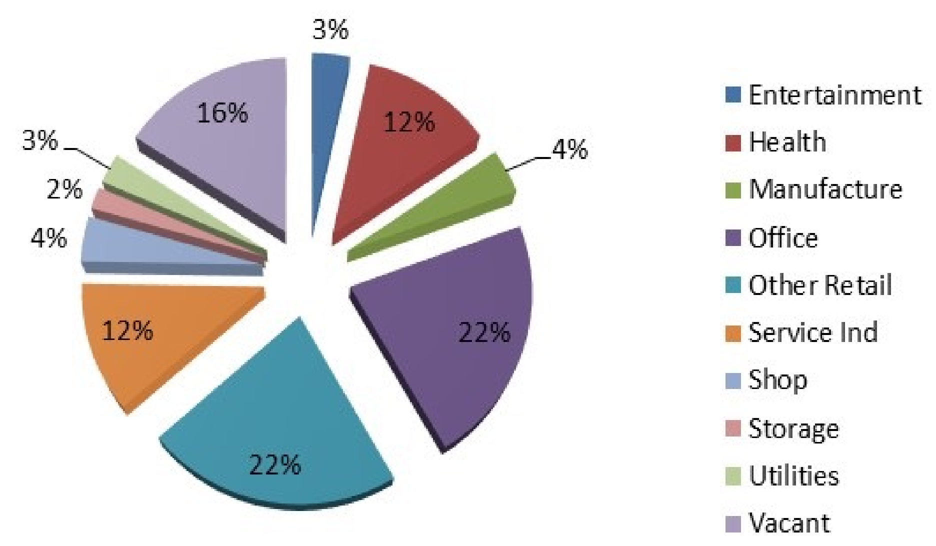
FIGURE 3.11 - CAUSEWAY AA FLOORSPACE CHANGE 1990 – 2015



	ENT	HEL	MAN	OFF	RET	SER	SHP	STO	UTE	VFA
1990 = 86,220M2	200	626	2254	33352	5998	4279	9420	21833	0	8258
2007 = 112,786M2	1018	6078	2344	42985	3385	9584	4837	31804	4015	6736
2015 = 86,775M2	3007	10489	3458	19120	19184	10062	3536	1710	2350	13859

Source: Department of Planning Commercial Activity Surveys 1990, 2007 and 2015

FIGURE 3.12 - CAUSEWAY AA COMMERCIAL LAND USES – 2015



Source: Department of Planning Commercial Activity Surveys 2015

The Causeway Precinct supports the Town's largest single concentration of offices (19,120m^2), Other Retail (19,184m^2) and a range of other commercial uses, yet it is not recognized within SPP 4.2. Accordingly, consideration to designate the Causeway Precinct as a District centre would be appropriate.

As noted in the 2013 Report, the Activation Area has some enviable assets, notably its location adjacent to attractive parks and views across the Swan River to the CBD. Such advantages could be capitalized upon for more intensive residential and office development. This view is supported by the relevant precinct plan of the Local Planning Scheme for which the Statement of Intent reads, in part:

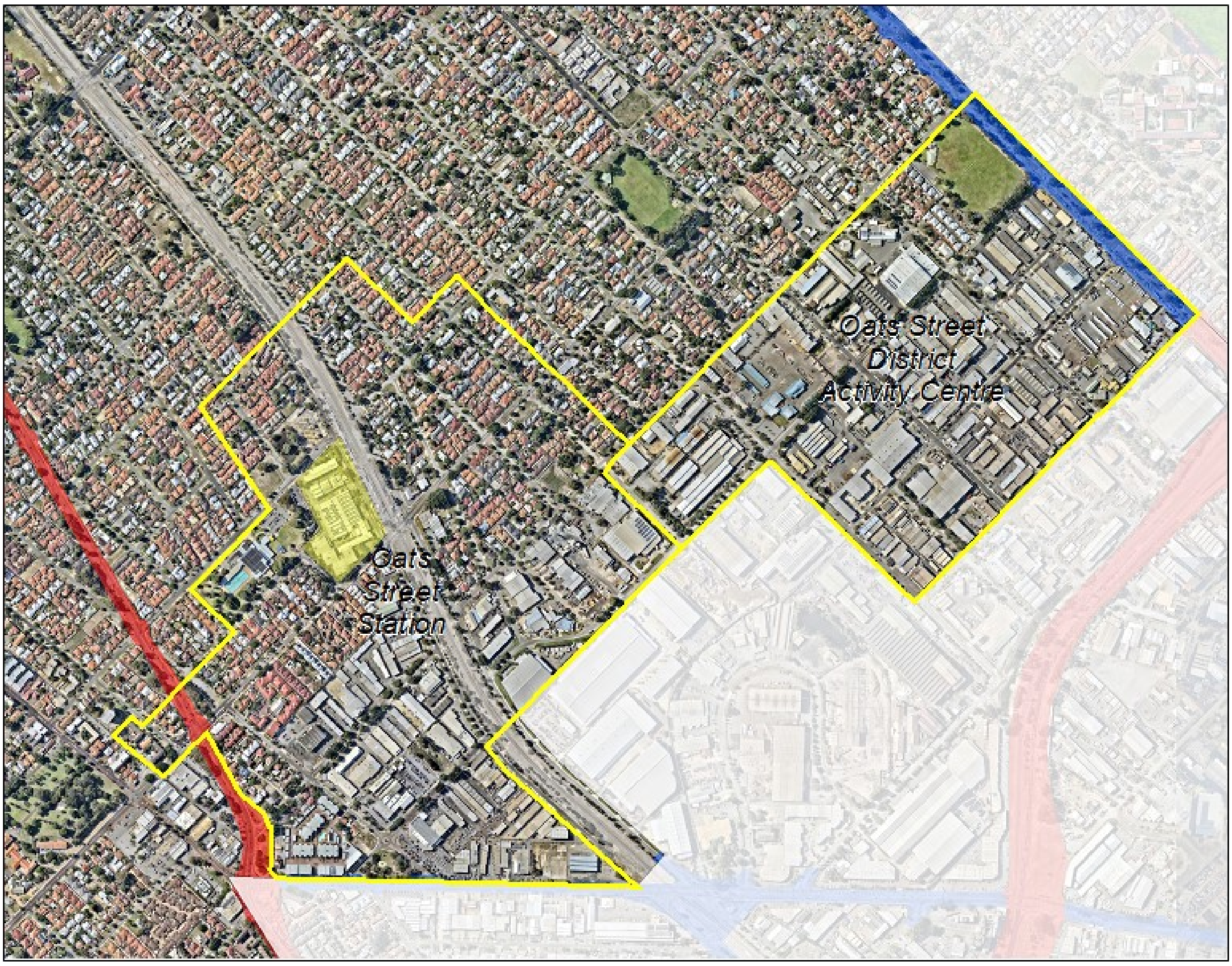
> *The Causeway Precinct presents a rare opportunity to achieve a sustainable mixed use urban environment with its own distinctive identity on the city doorstep. Providing significant employment and housing, the Precinct offers opportunities for people to live and work locally, with many services and facilities within easy walk. Workplaces, local retail and the Albany Highway shopping strip, two train stations and the Bus Port, the river and parks and Burswood Peninsula leisure activities are all close by.*

3.3.3 OATS STREET STATION ACTIVATION AREA (FUTURE)

The 2013 Report noted that while Oats Street had been identified as a district centre in the Activity Centres Policy no clear boundary was indicated other than the general location of east of Shepperton Road and north of Welshpool Road. The 2015 *Perth and Peel @ 3.5 million* gave more precise definition to the boundaries however. Under this definition the centre is bounded by Mercury, Raleigh and Cohn Street and the railway to the east and a narrow strip containing the TAFE and the Somerset Pool to the west.

In the 2013 Report the Oats Street future District centre covered a wider area between Briggs, Bishopsgate and Lion Streets to the east of the railway and including an area to Shepperton Road to the west, thus including Industrial zoned land but picking up the only local centre zoned land on the corner of Bishopsgate and Oats streets. A similar area has been retained as the potential future Activation Area in this review (**Figure 3.13**).

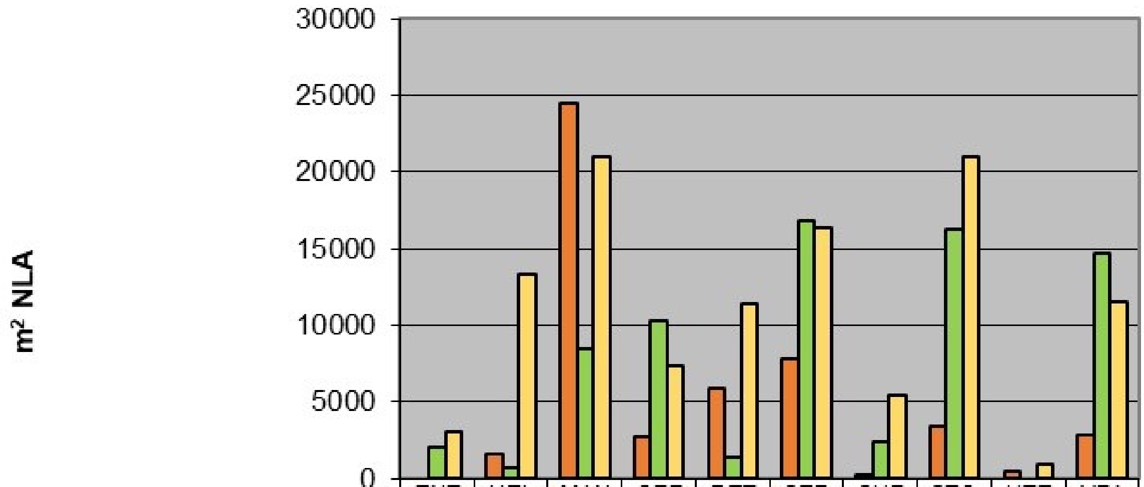
FIGURE 3.13 - OATS STREET BOUNDARIES AND AERIAL PHOTO



Source: Nearmap, VP ACS 2013, Planwest

The land uses within the future centre are varied and because industrial land is included it is not surprising to note that Manufacturing and Storage are the most common uses, as illustrated on **Figure 3.15**. These uses appear to have increased since 2007. It would appear that the vacancy rate has fallen from 20% to 10%, but this may be less a consequence of an appetite for Activation Area type uses than for industrial (MAN and STO), motor trade (RET) and educational (HEL) uses.

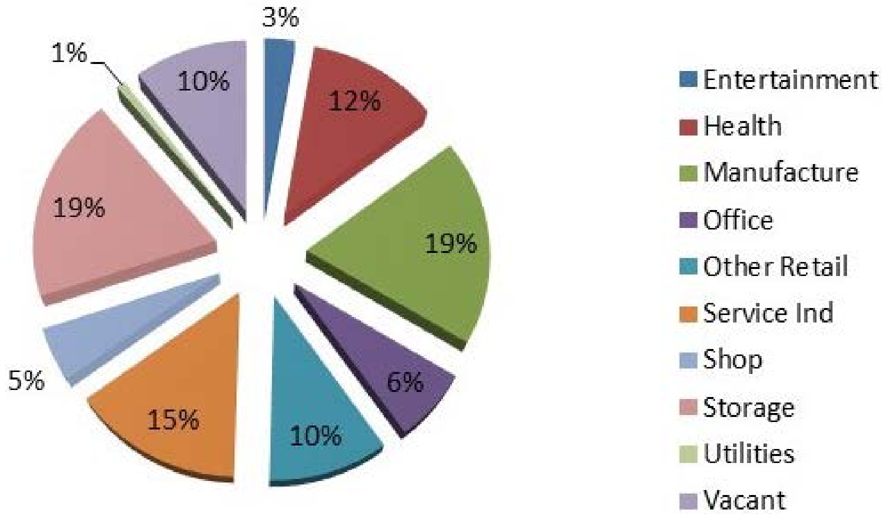
FIGURE 3.14 - OATS STREET STATION AA FLOORSPACE CHANGE 1990 – 2015



	ENT	HEL	MAN	OFF	RET	SER	SHP	STO	UTE	VFA
Floorspace 1990 = 49,489	0	1626	24488	2722	5948	7777	233	3374	480	2841
Floorspace 2007 = 73,051	2064	700	8464	10286	1418	16845	2350	16238	0	14686
Floorspace 2015 = 111,577	3057	13354	21035	7350	11460	16340	5469	21057	900	11555

Source: Department of Planning Commercial Activity Surveys 1990, 2007 and 2015

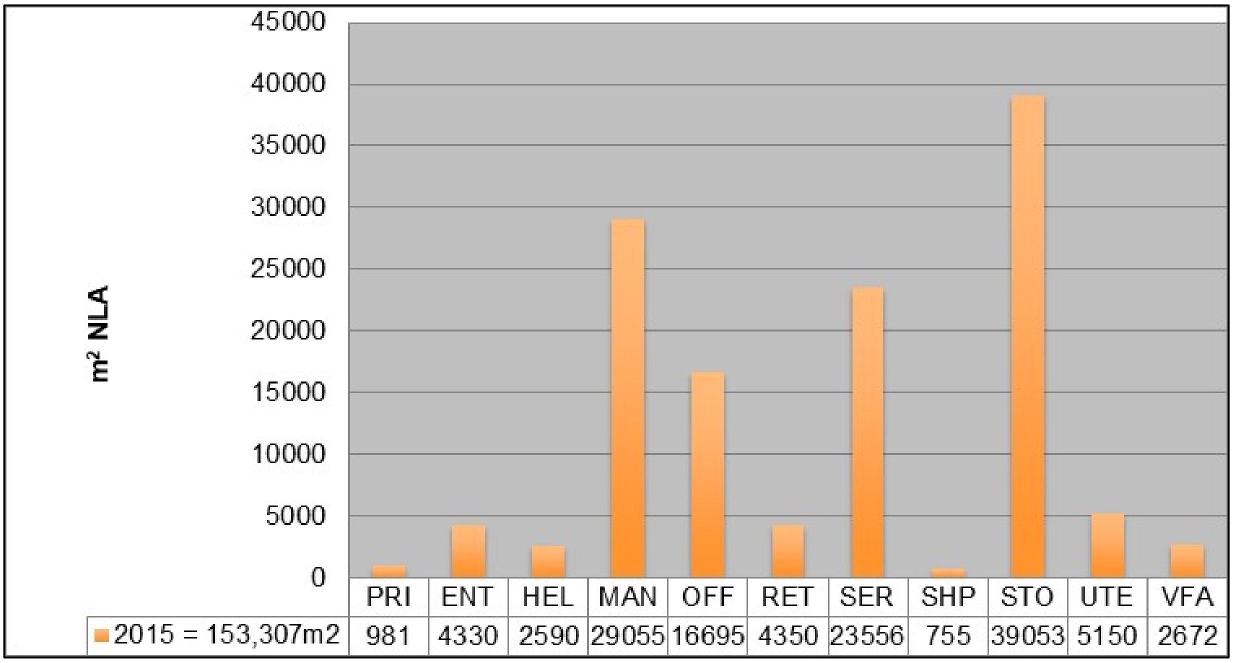
FIGURE 3.15 - OATS STREET STATION AA COMMERCIAL LAND USES – 2015



Source: Department of Planning Commercial Activity Survey 2015

The current statutory arrangements are such that there are very few opportunities to develop land within the precinct in a manner to promote the Activation Area. The land is nearly all zoned Residential R30 (within which most uses are circumscribed) with a very small local centre zone on the corner of Beaconsfield and Oats streets and a small Commercial zone near the Oats Street station. Industrial zoned land is also included in the precinct within which residential use is prohibited. The Industrial land is zoned Urban under the Metropolitan Region Scheme suggesting uses peripheral to the industrial land needs of the region.

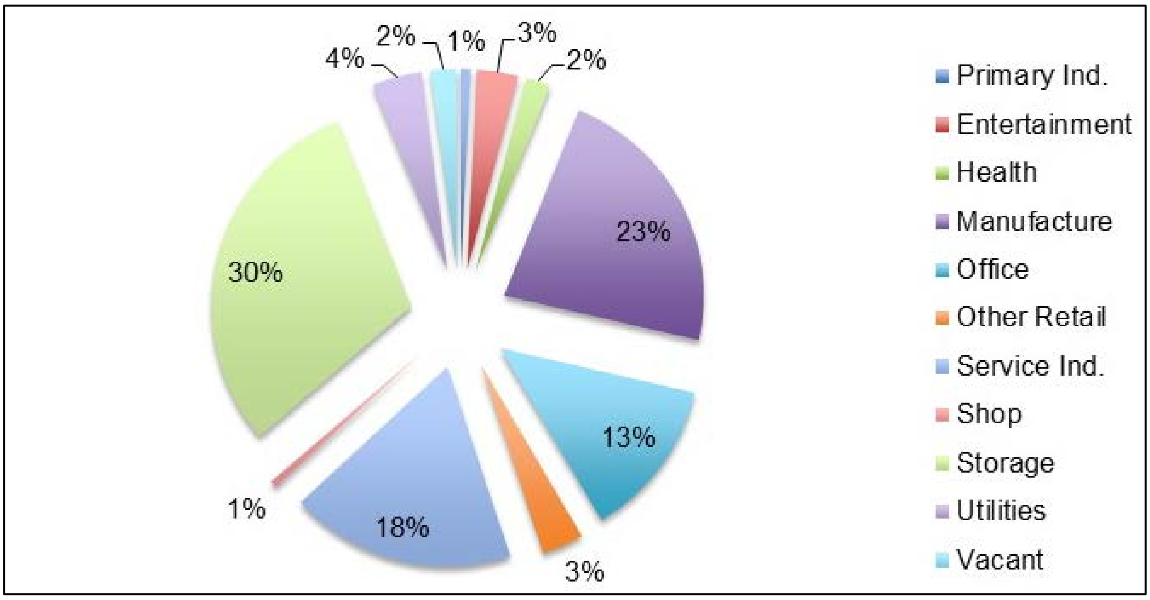
FIGURE 3.16 - OATS STREET (INDUSTRIAL) ACTIVATION AREA (m^2)



Source: Department of Planning Commercial Activity Surveys 1990, 2007 and 2015

A new area has been identified as a future Activation Area comprised of industrial zoned land in Welshpool. This land is located on the Town's south-eastern boundary. Again, residential use is prohibited, but showrooms, offices, restaurants and some other uses are permitted. As would be expected within such a zone, the manufacturing, storage and service industry uses predominate. Although this area falls into Victoria Park, as an industrial area it is part of the overall Welshpool industrial area which predominantly falls within the City of Canning. Future planning of this area should therefore take cognizance of Canning's future strategic intentions for this industrial area.

FIGURE 3.17 - OATS STREET INDUSTRY AREA COMMERCIAL LAND USES – 2015



Source: Department of Planning Commercial Activity Survey 2015

The boundaries of the Oats Street Station Activation Area have been extended since the 2013 Report. The extended boundaries result in additional areas zoned Residential R30 in the Carlisle Precinct and R40 areas within the Shepperton Precinct have been included within the Activation Area. These areas have largely already been developed with grouped dwellings.

This land is used for a range of manufacturing, office, service industry and storage uses. A relatively high 19% of the floorspace is vacant.

The conversion of the land to become an Activation area would take many years and in view of the MRS zoning, may not be achievable. Its role as an industrial area, increasingly moving towards lighter and service industry should be supported and intensified.

3.3.4 Berwick Activation Area

This centre at the intersection of Berwick Street and Canning Highway is more characteristic of highway commercial than an Activation Area. It is zoned for commercial use under the local planning scheme, **Figure 3.18**).

FIGURE 3.18 - BERWICK STREET ACTIVATION AREA BOUNDARY AND AERIAL

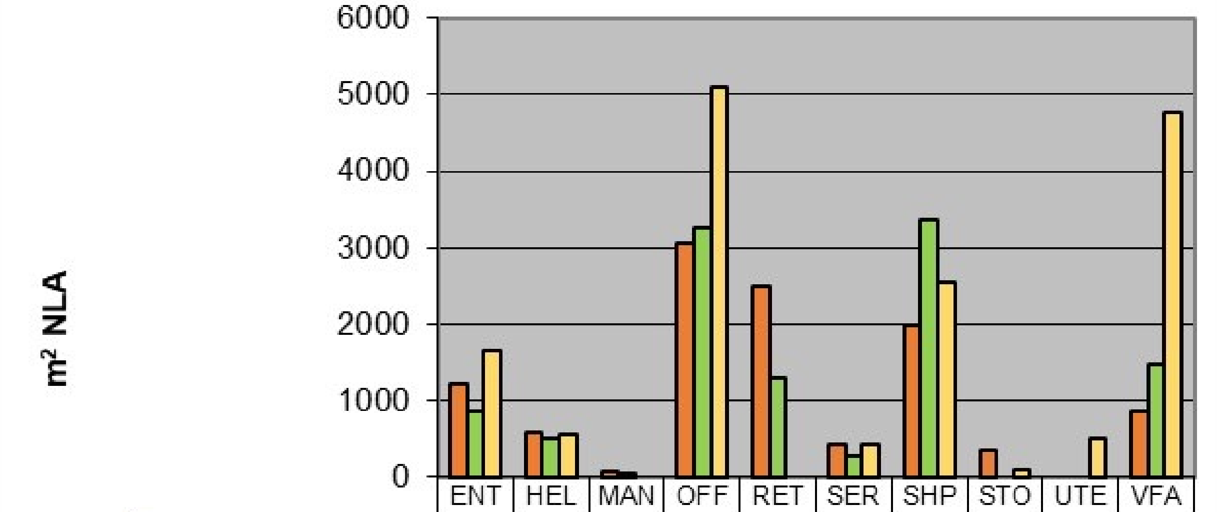
Source: Nearmap, VP ACS 2013, Planwest

The Berwick Activation Area has seen some growth due to the expansion of offices (over a third of which are for health services) and growth in the Entertainment category due to the establishment of a number of gymnasiums/health clubs (**Figure 3.19**).

There has been contraction in the Shop/retail and Other Retail categories with the closure of a furniture store. The contraction shows up in the large vacancy rate (31% of total floor area) identified in the 2015 survey and still evident in 2017 (**Figure 3.20**).

The 2013 Report noted that the centre was unusual as a neighbourhood centre having atypical uses. It was recommended that the centre be removed as an activity centre, an idea which is even clearer from developments in the 2007-2015 period.

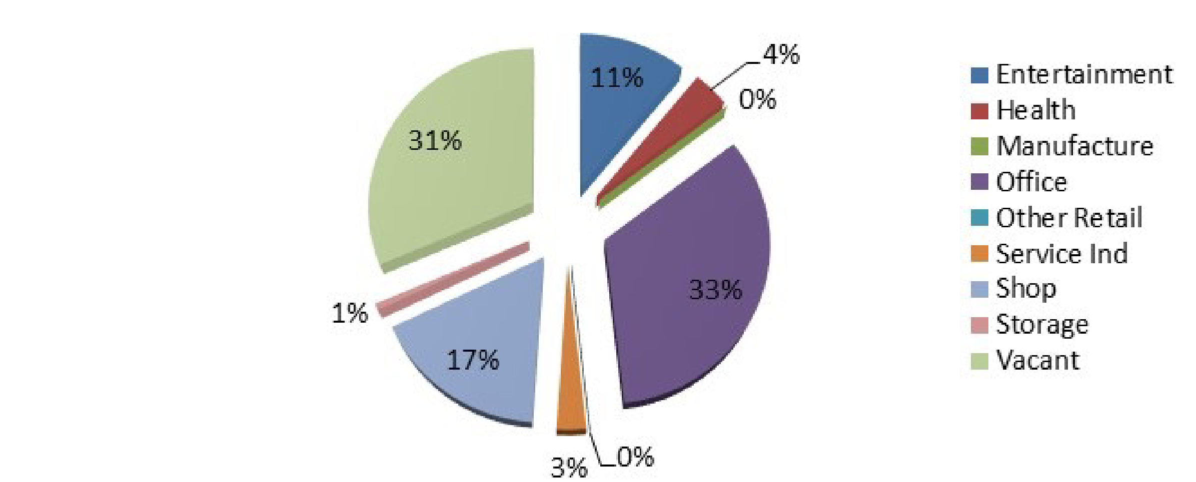
FIGURE 3.19 - BERWICK ACTIVATION AREA FLOORSPACE CHANGE 1990 – 2015



	ENT	HEL	MAN	OFF	RET	SER	SHP	STO	UTE	VFA
Total 1990 = 11,061m2	1230	577	75	3050	2503	425	1996	350		853
Total 2007 =11,095m2	870	500	50	3258	1296	290	3365	0		1466
Total 2015 = 15,546	1651	560	0	5094		424	2554	100	506	4757

Source: Department of Planning Commercial Activity Surveys 1990, 2007 and 2015

FIGURE 3.20 - BERWICK NEIGHBOURHOOD AA COMMERCIAL LAND USES – 2015



Source: Department of Planning Commercial Activity Survey 2015

3.3.5 ARCHER STREET ACTIVATION AREA

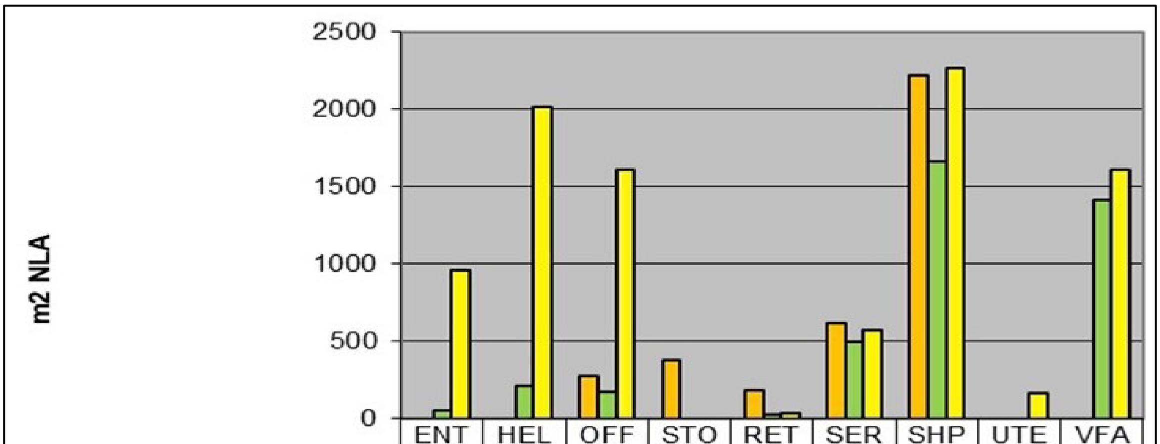
Located mid-way between the Railway and Orrong Road, this Activation Area straddles a length of a fairly busy road (**Figure 3.21).** However, a relatively wide range of convenience shops and restaurants are provided in the centre.

FIGURE 3.21 - ARCHER STREET NAC AND AERIAL PHOTO

Source: Nearmap, VP ACS 2013, Planwest

As illustrated on **Figure 3.22** there would appear to have been a considerable increase in the range of uses developed in the centre. The expansion in Health/welfare and Office uses would appear to have been dramatic and accounted for by boundary changes of the centres between 2007 and 2015 by the inclusion in the 2015 survey of child care facilities, a church, tavern, a primary school and community organisations not surveyed in 2007.

FIGURE 3.22 - ARCHER STREET AA FLOORSPACE CHANGE 1990 – 2015

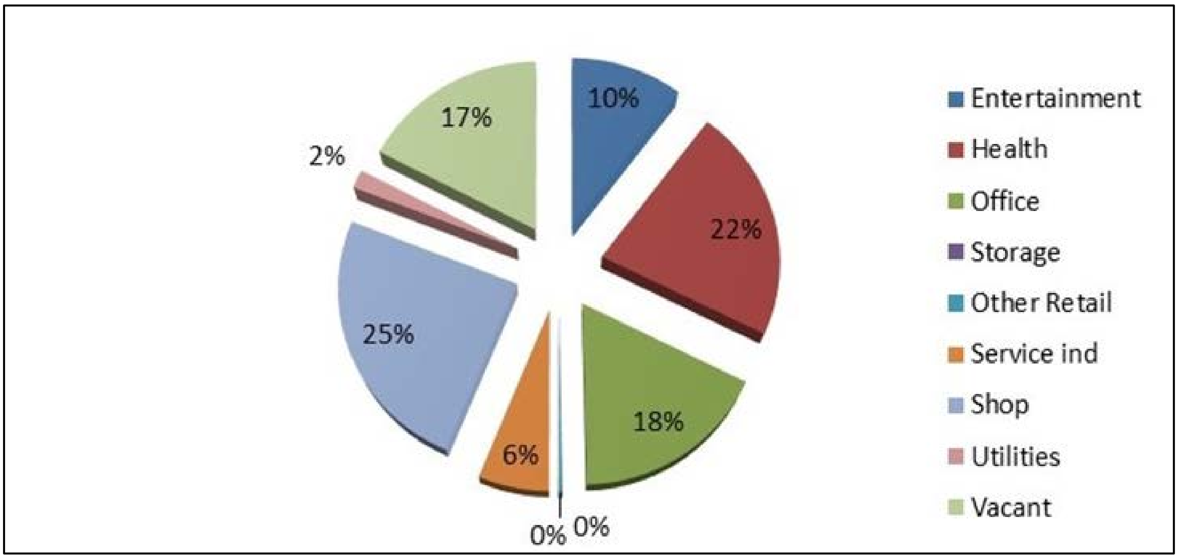


	ENT	HEL	OFF	STO	RET	SER	SHP	UTE	VFA
1990 NLA = 3,654 m2	0	0	270	372	179	615	2218		0
2007 NLA = 4,033m m2	50	205	174	0	25	500	1663		1416
2015 NLA = 9231	963	2014	1611	0	30	575	2268	160	1610

Source: Department of Planning Commercial Activity Surveys 1990, 2007 and 2015

There has also been a substantial growth in offices (particularly those offering health and engineering services). The area allocated for Shop/retail has grown by a third since 2007, to return to the figure close to that recorded in 1990.

FIGURE 3.23 - ARCHER STREET AA COMMERCIAL LAND USES – 2015



Source: Department of Planning Commercial Activity Survey 2015

A fairly wide range of convenience shopping and restaurants are offered in the centre.

The centre is interspersed with residential development, including a large aged persons facility and the gradual conversion of some of these properties may explain the growth in some of the use categories within the centre and the large vacancy rate (17.4%) as the centre transitions. It should be noted that the vacancy rate has halved since 2007.

The centre's boundary has been extended from that identified in the 2013 Report to run further south to the Secondary Centre and further north to Apollo Way and to extend along the Railway, either side, north and south. The land abutting Archer Street between Raleigh and between Mars and Planet Streets is zoned local centre while other land within the Activation Area north of the railway is zoned R30 while south of the railway land is zoned R40 (no multiple dwellings) to Shepperton Road and R30 thereafter apart from a small commercial zone on the corner of Shepperton Road and Mint Street. Land adjacent to the Railway is zoned Commercial while the East Victoria Park Primary School is included south of the Railway. Much of the land within the extended area has already been developed with grouped dwellings – possibly the main opportunity for future intensification lies north of the local centre along Archer Street and between Shepperton Road and the Secondary Centre.

3.3.6 VICTORIA PARK STATION ACTIVATION AREA

The Victoria Park Station Activation Area was not previously identified as an activity centre. It is now included because of the opportunities for increased activity and increased residential density around the station precinct. It is surrounded by low density housing to the north (lots ranging from 500m^2 to 1011m^2 – the old quarter acre) and some medium density housing to the south. The R Coding of the land is generally R20 to the north (with a small area coded R40/60 immediately adjacent to the station wherein Residential R60 is only permitted where two or more of the lots are amalgamated) and predominantly R40 to the south, with land west of the station coded R60. The boundaries of the Activation Area are shown on **Figure 3.24**.

FIGURE 3.24 - VICTORIA PARK/LATHLAIN AA BOUNDARY AND AERIAL PHOTO

Source: Nearmap, VP ACS 2013, Planwest

While orthodox planning theories suggest that this could be a good place for a local centre, it will be difficult to create a local shopping/commercial core typical of a traditional local activity centre in view of the general decline in such centres and the fact that there is not one in embryo to build on. Certainly, there would be logic in increasing the R Coding immediately to the north and east of the station to R60, possibly with a further band being zoned R30. Marginally extending the R40/60 split coding would have merit perhaps with additional design criteria other than the requirement to amalgamate two lots currently prevailing. However, there are risks associated with extending the coding change too far. The further from the station the weaker the argument becomes against those who may see such change as disruptive.

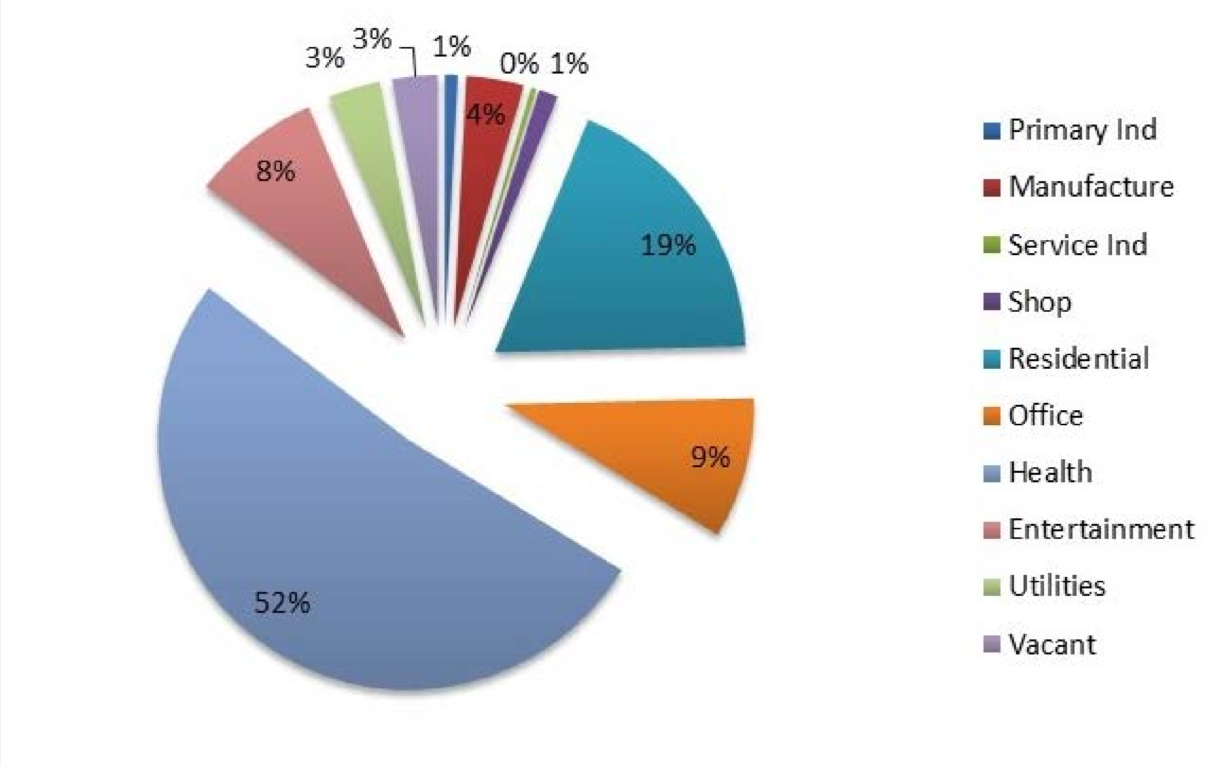
South of the railway, a high density residential corridor between the station and the Secondary Centre could be promoted. However, this would be complicated by the current controls which code the areas R40 with a proscription against multiple dwellings.

It should be recognized that increasing R Coding over broad areas based on the rationale that they are within walking distance of a station is not to be proposed lightly. A modest blanket increase in coding (say to R30 and R40) would be likely to result in very slow and incremental development of single and grouped dwellings on small lots. More selective coding of R60 – R100 would be more likely to result in significant change provided the Scheme did not separately prohibit multiple dwellings (as has occurred in some parts of the Town).

3.3.7 CURTIN/BENTLEY SPECIALISED ACTIVITY CENTRE

The Curtin/Bentley Specialised Activity Centre (**Figure 3.26)** was not analysed in the 2013 Report as the 2007 survey did not include it. However, the 2015 survey included the centre and as illustrated on **Figure 3.25**, the dominance of the Health, welfare and community services category – in which education facilities sit – was recorded.

FIGURE 3.25 - CURTIN/BENTLEY LAND USES – 2015



Source: Department of Planning Commercial Activity Survey 2015

It is possible to divide the Curtin/Bentley Specialised Activity Centre into four precincts – the University south of Hayman Road, the Technology Park north of Hayman road, the Southern TAFE between Jarrah and Hayman roads and the area developed predominantly for aged care between Jarrah and Hayman roads and Hill View Terrace.

Clearly the land surveyed as used for education purposes dominates the land use figures, particularly in the University precinct.

The centre provides for considerable residential accommodation, particularly the precinct abutting Hill View Terrace where a number of aged care providers are located, along with the Corrective Services Academy and a Women's Centre. Altogether the precinct provides 503 accommodation units. 111 accommodation units are provided within the University precinct – surveyed as school hostels.

The Technology Park site deserves further analysis because it was considered in the commercial survey. It is interesting to note that the Technology Park precinct is important as a location for offices (with a wide range of government, utilities, computing and management offices), with manufacturing (dominated by a large pharmaceutical production company) being important but secondary. The Technology Park was established to facilitate the development of new industries and the like. While this would apply to the majority of uses, there are signs of uses of a more general nature.

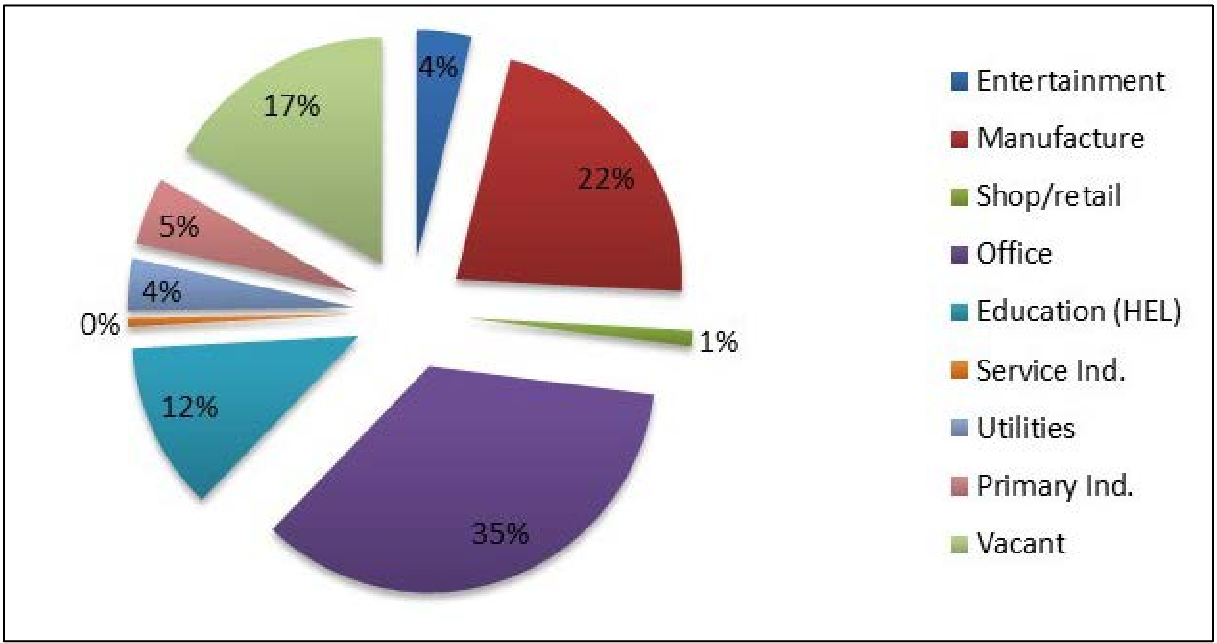
The University is currently engaged in implementing Stage one of its Master Plan. This will entail 15,000m^2 of commercial floorspace for satellite offices and research and development and a new bus interchange. The objective remains to develop uses related to university activities, to serve the student population and create activity outside of the semesters. It is also expected that student accommodation will double with the construction of buildings to house an additional 1000 beds being completed by 2021.

The Specialised Centre has much potential because of the large land bank, favourable location and synergies with the University.

FIGURE 3.26 - CURTIN/BENTLEY SAC BOUNDARY AND AERIAL PHOTO

Source: Nearmap, VP ACS 2013, Planwest

FIGURE 3.27 - TECHNOLOGY PARK LAND USES – 2015



Source: Department of Planning Commercial Activity Survey 2015

3.3.8 LOCAL ACTIVATION AREAS

The Town has five small local centres that are zoned as such in the local planning scheme. The five small centres within the Town have little changed over the recent past. The centre on Orrong Road at the intersection with Archer Street has seen the development of an IGA within a property that was presumably vacant in 2007 but up and running in 1990.

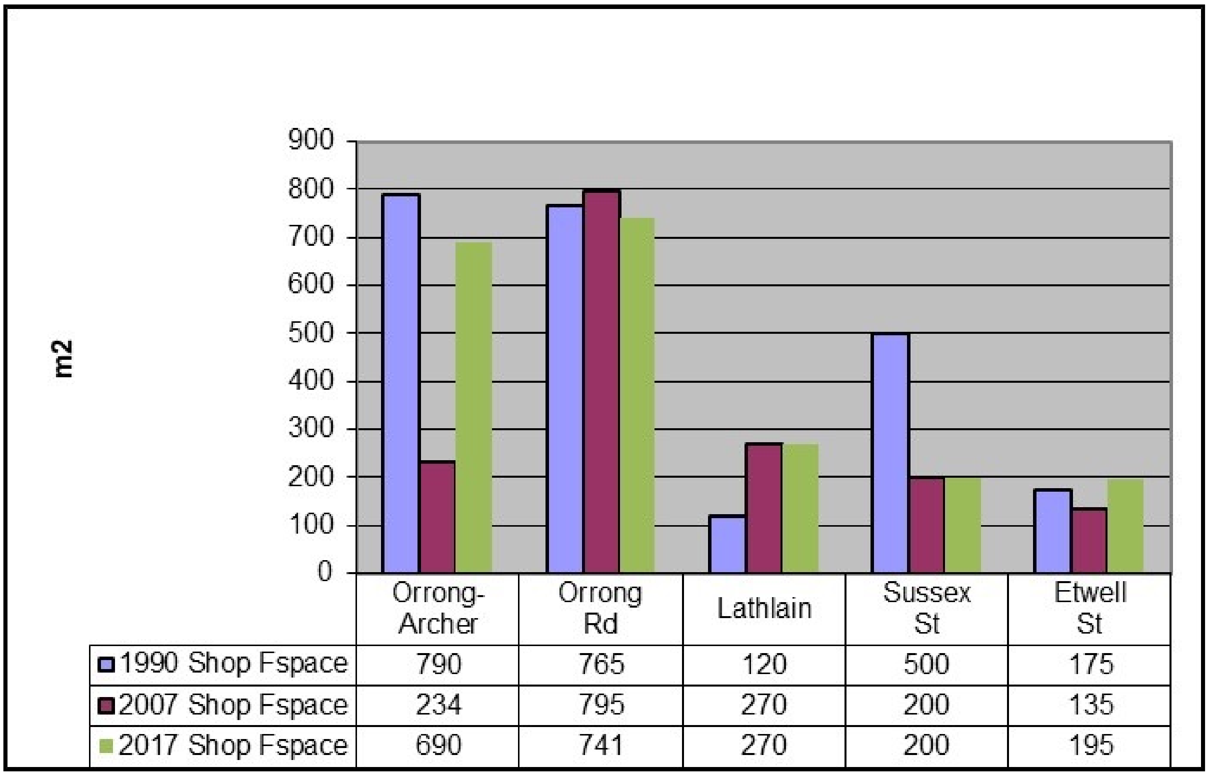
The observation made in the 2013 Report was that the future for all local shops in Victoria Park (and in other inner suburbs of Perth for that matter) was declining. It would appear from **Figure 3.28** that while no new local centres have opened, existing ones remained stable between 2007 and 2015. However recent observation is that the Lathlain centre has become more vibrant, with some beautification within the road reserve. Possibly this has been stimulated by the works on the adjacent Lathlain Oval to accommodate the West Coast Eagles, or due to its fortunate location between Primary school and oval. On the other hand the 390m^2 supermarket at the Orrong Road centre has closed.

In addition, the small centre on the corner of Cohn and Harris Streets in Carlisle has been identified as having some potential as a centre. However, it is currently almost entirely used for manufacturing and service industry with only 84m^2 of Shop/retail – a restaurant.

3.4 Vacancy Trends 1990 – 2015

Table 3.6 shows the changing floorspace and vacancy rate over time. The data should be interpreted with caution due to some changes to complex boundaries between surveys. It does appear that overall the vacancy rate increased between the 2007 and 2015 surveys. However, in looking at earlier years it may appear that recent figures reflect the longer-term pattern and that perhaps it was 2007 that was the anomaly.

FIGURE 3.28 - LOCAL ACTIVATION AREAS SHOP/RETAIL FLOORSPACE CHANGE 1990 – 2015



Source: Department of Planning Commercial Activity Surveys 1990, 2007 and 2015

TABLE 3.6 - FLOORSPACE VACANCY IN COMMERCIAL COMPLEXES IN VICTORIA PARK 1990-2015*

Year of Survey	Occupied Floor Area (m^2)	Vacant Floor Area (m^2)	Total Floor Area (m^2)	% Vacant
1990	274,729	36,341	311,070	11.7%
1993	276,835	39,223	316,058	12.4%
1997	280,160	52,305	332,465	15.7%
2002	289,612	55,842	345,454	16.2%
2007	355,436	32,267	387,703	8.3%
2015	490,666	65,453	556,119	11.8%

Source: Department of Planning Commercial Surveys for Victoria Park 1990, 1993, 1997, 2002, 2007 and 2015.
*Excludes Industrial areas, reserved land and land occupied by residential uses.
Totals between years may have varied due to activity centre boundary changes.

As was observed in the analysis above, and summarized in **Table 3.7,** the vacancy rates in the main commercial sub-precincts of the Secondary Centre are relatively low and have fallen since the 2007 survey. Rates are significantly higher in the Causeway, Burswood East and Berwick precincts as transition to other uses is occurring.

TABLE 3.7 – VACANCY RATES WITHIN THE ACTIVATION AREAS & SUB-PRECINCTS.

Complex	VFA (m^2)	%	Total floorspace (m^2)
Albany Hwy total	12,730	6.3	203,436
· **Northern Precinct**	2,325	5.6	41,702
· **VP Precinct**	2,736	5.6	50,190
· **Central Precinct**	1,816	6.0	27,343
· **Town Centre Precinct**	2,547	4.2	60,895
· **Res/Comm Precinct**	1,306	17.8	7,323
· **Gateway Precinct**	2,000	12.5	15,926
Burswood Station East	8,995	29.4	30,573
Causeway AA	13,859	15.8	87,901
Tech. Park Bentley	11,583	16.7	69,365
Berwick Commercial	4,757	30.4	15,646
Oats Street Station AA	11,555	10.3	111,577
Archer Street AA	1,610	17.4	9,231
Other	364	1.3	28,447
Total	**65,453**	**11.8**	**556,119**

Source: Department of Planning Commercial Survey for Victoria Park 2015.
*Excludes Industrial areas and land occupied by residential uses.

Although the vacancy rate within the Town's total commercial area has risen since 2007 it would appear that the Town's main Activation Areas are healthy. However, the areas undergoing transformation, or awaiting for it to occur, experience high vacancy rates – notably the Residential/Commercial precinct along Albany Highway, Burswood Station East, the Causeway, Technology Park and Berwick precincts.

3.5 Conclusions

3.5.1 Victoria Park Secondary Centre

Results of the 2015 commercial land use survey indicate that the Secondary Centre is performing remarkably well if judged by the relatively low vacancy rates compared with previous years. The uses found along the nearly four-kilometre strip vary between the sub-precincts but are relatively consistent within each sub-precinct.

The claim for Secondary Centre status derives primarily from the sub-precincts described as the Victoria Park and Town Centre and to a lesser extent, Gateway, sub-precincts. The Northern, Central and Residential/Commercial sub-precincts serve to separate the main Activation Areas.

While in previous reports it may have been expected in the past that the motor vehicle trades would vacate from the Northern and Central sub-precincts to outer areas, this has not happened, and they appear somewhat entrenched and should be considered likely to remain for the plan period. This does create an opportunity to better define the centre. Moreover, the retention of car dealers in the interim in such well-located land in large parcels may be a blessing in disguise as it will facilitate more inspirational redevelopment when it does occur.

The uses within the two main sub-centres could generally be described as small scale, offering a broad range of uses spread within the Shop/retail sector balanced with uses from all other commercial categories. Again, this could be seen as a future strength for the centres. In an era of uncertainty regarding the impact of on-line shopping and changing patterns of work and leisure, centres with a myriad of uses accessed from a myriad of car parks and bus stops offers the greatest flexibility to respond to all circumstances.

While the building stock is relatively old and on small parcels of land, it is easier to adapt and benefit from competition due to the large number of landowners. A small litmus test of this could be seen in the recent fad of joining gyms to get fit with the resultant upswing in floorspace occupied by gymnasiums and the like. It is noted that the Victoria Park Secondary Centre (at the 2015 survey) had 27% more space used for gyms compared with the 50% larger Cannington. Of course, much of the growth has been in 24-hour gyms which lend themselves to the Albany Highway location rather than within a big box shopping centre which may close in the evening.

A word about the abundance of restaurants and cafes. As pointed out during the analysis, 33% of the area allocated to Shop/retail is occupied by restaurants, cafes and function centres compared with less than 5% in nearby regional centres. This should be considered beneficial for the centre, and indeed much of Victoria Park's attraction rests on its highly regarded restaurant offer. Victoria Park's varied and bountiful restaurant offer is probably the main reason for people travelling long distances to the Town for – this makes a strong argument for their encouragement. The other argument relates to the large and growing spend on restaurants arising from Australians eating out between two and three times a week and spending $45 billion yearly, the equivalent of $100 per household per week *(http://futurefood.com.au/blog/2017/1/18/eating-out-in-australia-2016-in-review).*

However, for cafes and restaurants presentation and ambience is everything. When compared with some of the other strip shopping centres around the metropolitan region (Beaufort Street, Oxford Street, Rokeby Road for instance) the quality of the Albany Highway streetscape is decidedly lacking. The only evident attempt to inject landscaping is limited to small patches within the median in the Town Centre. There are some parts of the main shopping precincts that are completely bereft of trees, presumably because the shop verandahs inhibit their growth. There needs to be a greater focus on improving the amenity through landscaping and small park development within the public domains of the Victoria Park and Town Centre sub-precincts.

3.5.2 OTHER CENTRES, CONCLUSIONS

In respect of the Town's other centres the following conclusions are drawn:

- The Burswood Station East is only slowly being developed for office and residential uses. A number of manufacturing enterprises remain and there is a high vacancy rate and a large number of undeveloped tracts of land.
- The Causeway remains a centre of much potential for residential/office development, but this is not occurring, indeed there has been a substantial fall in office space and residential is not in much evidence. Here there is a high vacancy rate. Recognition of this centre as a District Centre within the hierarchy is warranted.
- Berwick Centre lacks character and also experienced high vacancy rates.
- The Archer Street centre has a relatively wide range of uses for its size and appears to function well as a neighbourhood centre. However, it also has a high vacancy rate.
- Oats Street – to date there has been little sign that the predominant uses are switching to those likely to create a thriving Activation Area. The predominant commercial uses are still storage, manufacture and service industry.

- The local centres are at best static, with the exception of the Lathlain centre which, although small, has a pleasant ambience partly due to the thoughtful landscaping and partly due to its range of uses and lack of burdensome traffic.
- Curtin/Bentley. The survey identified an interesting mix of uses within the Technology Park. Most would appear to meet with the criteria for establishing in the Park.

3.6 Retail Needs Assessment

A more detailed explanation and analysis of the modelling results can be found at **Appendix Two**. The following is a summary of the main findings.

Virtually the whole of Victoria Park falls within the primary trade area of the Carousel shopping centre from which 50% of Carousel's trade is drawn. The Carousel shopping centre is currently in the process of a major expansion which is likely to siphon off most, if not all, of any expansion in trade potential within its trade area.

The Bentley shopping centre does not, despite its proximity, have a major impact on the shopping along Albany Highway.

Bounded as it is by large shopping centres to the west and south, commercial development in Victoria Park will continue to have a truncated core trading area which does not extend beyond the local authority boundary to an extent that would enhance the trading potential of commercial development within Victoria Park including that along Albany Highway. Hence it is the socio-economic characteristics of the Victoria Park community which will continue to be the determinant of the existing and future potential of commercial development in the Town.

The inference to be drawn from Victoria Park's demographic characteristics is that there will be increasing demand for niche comparison specialty shopping providing opportunities for redevelopment and refurbishment of the existing retail stock rather than the development of additional shops. Bulk shopping represented by weekly grocery shopping will remain constant relative to the population.

From a commercial perspective it can be inferred that there will be a relatively low demand for bulk, high retailing establishments, chain supermarkets, Discount Department Stores and the like. However, increased population density, especially in high and medium density, brings with it demand for niche retailing, retail services and recreational retail such as restaurants.

There is, on the other hand, likely to be slowly growing demand for small office space from the large and growing professional class, to meet the escalating trends in self-employment.

Over preceding years it has been found that for the metropolitan region as a whole the floorspace per capita has been estimated to be 1.74m^2 for suburban retail shopping floorspace. However, in general outer suburbs are well below this figure while inner suburbs such as Victoria Park are well above. The reason for the inner suburbs having a higher per capita ratio is that they have inherited a large legacy of old shops, many of which are used for marginal retailing purposes, that are under performing in terms of turnover generated compared to newer shops in the outer suburbs.

Over the 1991 – 2015 period the per capita floor area ratio in shopping centres has been falling on average at 2.23% per annum. This is apparent because while the population in Victoria Park has been increasing steadily over the period the shopping floorspace declined between 1991 and 2007 and thereafter has remained relatively constant between 2007 and 2015 while, over the same period the population of Victoria Park has been increasing. It is believed that the per capita floor area ratio will continue to fall in the future. As the population continues to grow and until the average of about 1.74m^2 per capita is reached, turnover levels per square metre will reach a level that will support refurbishment and minor increases in new shop floor area. This process has already begun and will accelerate and will accelerate towards 2021 and beyond.

It is doubted whether the locality selected at Belmont Park would have sufficient special merit to attract a unique retail attractor. It is unlikely to be like the Hillary's Marina which has a metropolitan wide attraction and could therefore be regarded as "iconic". Accordingly, it is believed that Belmont Park will be similar in size and composition to other district size shopping centres throughout the metropolitan region. Consequently, it is an assumption in the models for Victoria Park that the proposed Belmont Park District shopping centre would directly compete with the shopping infrastructure of Victoria Park at 2036.

In respect of Curtin/Bentley, the location of the numerous food and catering outlets classified as restaurants, cafes or function centres are so located within the campus that they are unlikely to attract a public clientele and therefore they will have no competitive impact on the other shopping structure in Victoria Park.

However, it is assumed that a proportion of the additional shop floorspace contemplated in the Master Plan will rely on drawing trade potential from outside of the University. This would have a competitive impact on the other shop floorspace in Victoria Park and in South Perth. In particular as impact would be felt on the small Karawara District shopping centre located about 1 km away from the likely site of any shopping centre to be developed on the University site. It has therefore been included in the model.

The model has run four scenarios, the results of which are summarized on **Table 3.8**. Scenario 1 is for 2026 and Scenario 2 for 2036 at which time a small neighbourhood centre is assumed to have been developed at Burswood. Scenario 3 assumes that at 2036 there would be substantial retail development at both Burswood and Curtin, but less than indicated on structure plans. Scenario 4 assumes that the structure plan proposals are achieved irrespective of their viability for the hypothetical demonstration of their impact on other centres.

Scenario 1: By 2026 the increased trade potential in Victoria Park should be able to support an additional 14,600 m² of shop floorspace. A neighbourhood shopping centre of 5,000 m² in a location just west of Burswood Station would be viable. In the absence of any other new competition in Victoria Park, the two main shopping precincts of Victoria Park and East Victoria Park are undersupplied with shopping and would be trading very well. This particularly applies to Victoria Park which is the least affected by the assumptions of expansion for Bentley Park Plaza and Carousel. It also benefits directly from trade coming from South Perth along Canning Highway.

However, it is also noticeable that the smaller shopping centres do not reflect much growth potential. It is also noticeable that the Gateway precinct at the southern end of Albany Highway, being closer to the competition posed by Bentley Plaza and Carousel shopping centre, will not gain the same benefits from the expanded population at 2026.

Scenario 2: In this scenario the assumption is that at 2036 aside from the new Burswood neighbourhood shopping centre, there has been no other new shopping development in Victoria Park. On these assumptions Victoria Park should be able to support an additional 27,500m² of shop floorspace. Under this scenario trading conditions in Victoria Park would be booming and it would be fair to say that land values would have risen to a level that the numerous car yards in Victoria Park would have been displaced by a higher order land uses.

Table 3.8: Retail Model Input-Output (m^2) Table 2015-2036 Based on the Continuation of Current Trends

Centre	2015 Data Input	2015 Model Calibration	2015 Correlation	Model Output 2016	Scenario 1 Model Output 2026 with only one new neighbourhood centre	Scenario 2 Model Output 2036 Without Burswood and Curtin structure plan proposals	Scenario 3 Model Output 2036 With Burswood and Curtin structure plan proposals	Scenario 4 Model Output 2036 With Burswood and Curtin structure plan proposals enforced
Vic Park East (Res/Comm)	736	717	-2.6%	718	**706**	703	655	580
Belmont Park	0	0	na	0	**0**	0	11,375	31,070
Victoria Park	20,833	20,634	-1.0%	20,738	**27,812**	39,790	31,102	23,179
East Victoria Park	28,358	28,291	-0.2%	28,373	**30,384**	31,810	30,508	25,801
Alday St "Gateway"	6,938	6,868	-1.0%	6,879	**6,726**	6,789	6,521	5,784
Canning Hwy/Berwick	2,554	2,545	-0.4%	2,028	**2,148**	1,794	1,734	1,387
Archer St	2,268	2,258	-0.4%	2,262	**2,125**	2,593	2,118	1,786
Orrong Rd/Archer St	690	656	-4.9%	657	**597**	1,413	549	463
Lathlain	270	262	-3.1%	262	**279**	288	282	218
Burswood Nhbd. Centre	0	0	na	0	**6,533**	4,855	0	0
Burswood Stn West	0	0	na	0	**0**	0	6,488	20,030
Burswood Stn East	0	0	na	0	**0**	0	4,325	8,000
Etwell St	195	208	6.7%	209	**228**	232	230	201
Orrong Rd	741	751	1.4%	753	**854**	950	845	647
Curtin University	0	0	na	0	**0**	0	9,162	14,971
Sussex	200	205	2.4%	206	**230**	229	240	202
Oats St	485	472	-2.7%	472	**414**	466	391	343
Oats Street D. Centre	755	737	-2.3%	739	**679**	587	649	569
Cohn St	84	81	-4.1%	81	**69**	84	63	55
Carlisle	470	446	-5.1%	446	**397**	438	369	315
Totals	**65,577**	**65,130**		**64,821**	**80,181**	**93,023**	**107,604**	**135,600**

Source: Retail Model & Department for Planning and Infrastructure Commercial Survey 2015.
* The 2015 Output is the calibration of the model.

Scenario 3: The assumptions in this scenario are that all the proposals for additional shopping on the Burswood Peninsula and the Bentley Curtin complex are operational. The model reflects that in this situation the existing shopping structure in Victoria Park especially Victoria Park at Victoria Park East would be trading within acceptable levels. However, this is because the proposed centres in the Burswood Peninsula would fail to perform anywhere near a viable level and therefore the impact would be greatly reduced. With regard to Belmont Park while the retail floorspace input was 31,000m² (as reflected in the District Structure Plan), the model output is only 11,375m². The model shows that Belmont Park at 31,000m² can only draw a third of the customers it needs to be viable. It is doubtful that a centre of 11,375m², reflected by the model, would be viable because the Belmont Park location with respect to its trade area is poor and is unlikely to attract sufficient trade. The same can be said for Burswood Station West and Burswood Station East. Burswood Station West only attracts a third of the trade potential it requires while Burswood Station East attracts about half of its trade requirement. What the modelling has indicated is that these three proposals are not likely to be viable in the context of their locations, their trade area potential and the competition.

Scenario 4: Scenario 4 is a hypothetical scenario based on the improbable event that the proposals for Burswood Peninsula and the Bentley–Curtin would somehow be viable at their planned sizes. To do this the parameters in the model were altered to increase the attractiveness (drawing power) of the three proposals such that the model reflected viability commensurate with their proposed sizes. The purpose of this exercise is to demonstrate that were this to be achieved, the impact on the future potential for the shopping along Albany Highway relative to what it could have been (Scenario 2) would be severe. For example, Victoria Park shows only a marginal improvement over its 2016 situation. All other centres along Albany Highway including East Victoria Park would be trading below their 2016 levels. Such an outcome in the unlikely event it was to occur would be seriously disadvantageous for the existing retail structure of the Town.

The model results do not mean there will be no new shopping development (or very little) for the next 20 years. If the proposals for the Burswood Peninsula are moderated to about 20,000 m^2 of shop floorspace (including the 5,000m^2 neighbourhood centre) by 2036, the prospects for refurbishment and redevelopment along Albany Highway would remain positive.

It has been concluded that in addition to the assumptions run in the model, the impact of ‘e’ trade could reduce retail floorspace demand by 8% at 2026 and 17% at 2036. These factors should be applied to Table 3.7 to further constrain future prospects for shopping centre growth. However, even the worst-case scenario for Albany Highway is that that there will be improving trading conditions but they will be slow and uneven. It appears that the Victoria Park precinct by virtue of its close proximity to South Perth via Canning Highway will be in a stronger position for expansion and refurbishment than East Victoria Park which is closer to the Carousel strategic metropolitan Centre and more constrained from South Perth.

The overall conclusion to be drawn from this analysis is that the future prosperity for the existing shopping structure in Victoria Park, especially Albany Highway, will depend on how the proposals envisaged for the Burswood Peninsula develop. So far the proposed expansion of the major shopping centres south of the river, namely Carousel and Garden City, will not have an undue impact on the future shopping prospects in Victoria Park. The impact of future “e” trade on future shop floorspace requirements in Victoria Park are difficult to foresee but the best guess would be an 8% impact by 2026 and a 17% impact by 2036.

The main conclusions to be drawn from the analysis are that:

- The retail structure of Albany Highway is in the process of evolution and improvement. Specialty shops are giving way to personal service and lifestyle premises such as cafes and restaurants. The vacancy rate of the Albany Highway Secondary Centre has fallen from 9% in 2007 (excluding open car yards) to 6.3% in 2015. Notwithstanding this, retail floorspace represents only 28% of the overall floorspace of the Secondary Centre.
- At this time Victoria Park is still slightly overprovided with shop floorspace relative to its trade potential. By 2026 Victoria Park will begin to see an increase in shop floorspace along Albany Highway especially around the Victoria Park sub-centre and to a lesser extent around East Victoria Park. The exact process is hard to foresee. For a while the economics of redevelopment may not produce new

buildings but instead lead to the refurbishment and conversion of premises not currently used shopping purposes.

- Many of its commercial functions, in particular the automotive trade, but also regionally oriented offices and many of the restaurants along Albany Highway, serve a district or regional area outside of Victoria Park, particularly the residents of South Perth. Because car yards occupy significant areas of land they should be regarded as sustainable land banks until economic conditions justify their conversion to higher order uses.
- Victoria Park is relatively well served with the daily ‘milk and bread’ walking convenience level facilities.
- The only area with potential for new shopping development in the next 20 years is on the Burswood Peninsula. However, the current proposals for an additional 59,000m² of shopping floorspace appear to be grossly excessive. Although 15,000 – 20,000m² of shopping could be located on the Burswood Peninsula, it is believed that Belmont Park in particular is not a good location for a ‘run of the mill’ competitive shopping centre. It is too isolated from the wider residential areas. The potential for shopping on the Peninsula as limited to serving local needs. For a large centre, such as that contemplated in the Burswood Peninsula District Structure Plan, to be viable it would need to offer something special or unique, and thereby provide a very strong and wide attraction. Such a centre is difficult to foresee in the context of the existing metropolitan shopping structure.
- Until the aspirations of the Bentley – Curtin structure plan are more certain, the proposals for up to 10,000m² of additional retailing in Curtin University appear to be excessive. The indications are that a new centre of 10,000m² would not be viable at least until the other residential and employment components of the structure plan are substantially realised. Based on past trends this could be beyond 2036.

3.7 The impact of on-line shopping

The 2013 Report concluded that, “*at this time there does not appear to be any new centre form or new developments in retailing which will affect Victoria Park one way or the other. There could be the introduction of one or two bulk retailers or ‘Category Killers’ where space becomes available, say with the closure of a large car sales yard. The most promising trends emerging in Victoria Park at nodes along Albany Highway are the increase in cafes and restaurants and the refurbishment of hotels and pubs. If this trend continues it has the most promise for rising standards of living and shopping*”.

These conclusions remain valid; indeed the spread of restaurants and cafes has been more significant than anticipated, now taking up 33% of shop/retail floorspace within the Secondary Centre. Increasingly people are staying home to shop and going out to eat while in the past it was the complete opposite.

According to the NAB online retail sales index (January 2015 - June 2017) on-line shopping has captured 7.4% of the market to date and is expected to reach an overall figure of 15% within ten years. On this basis, it is reasonable for modeling purposes to assume that 20% of retail expenditure will be on-line by 2036. But this belies the differences between sectors. Some sectors have seen the majority of sales shifting to on-line. For instance, two thirds of the books, films and music and two fifths of office supplies and toys sold in the USA are sold on-line according to a recent survey reported in The Economist on 13th May 2017.

The NAB monthly index divides the total online spending into categories to provide an assessment of where the total Australian online spending is going. This indicates a preference for homeware, media, groceries and fashion to be purchased online – as detailed in **Table 3.8.**

TABLE 3.8 - SHARE OF SPENDING IN ONLINE SHOPPING CATEGORIES

Category	% Share of Total Spending
Fashion	15.5
Daily Deals	2.3
Department	8.2
Homeware	20.1
Media	17.2
Personal	9.6
Groceries	16.6
Toys	3.8
Food	6.7
Total	**100**

Source: NAB Online Retail Sales Index June 2017
Note: Daily deal sites release for sale a single product or range of products each day. Media comprises movies, books and music.

It is expected that the trend towards small inventories and just-in-time delivery will continue. This could particularly affect the land hungry car yards, already there are signs of these businesses stocking less on show and more in the catalogue.

From international evidence it would appear that many retailers rather than trying to compete with online stores large catalogue and endless aisles, are taking an inverse approach: survive by becoming small and nimble. Some of the large operators are keeping their big stores but adding smaller stores to their mix. They tend to not have everything, but have a bit of everything. (The Future of Retail, World Retail Congress April 2017).

Certainly, it would appear that the main investors in Perth's shopping centres are confident that further investment is warranted despite dire predictions of shopping centre closures from the US. $4.5 billion is currently being expended in expanding most of the Region's large stand-alone centres which will result in eight centres being classified within the 'super regionals' category of over 75,000m^2 retail floor area in the near future.

There will also be implications arising from the spread of driverless vehicles. While it does not appear likely that such vehicles will be in common use within the next decade, gradually they will be introduced, and this may influence the propensity to own any vehicle at all and result in a fall in the cost of taxi usage. Such outcomes would have a significant impact on the demand for parking and enable the safe reduction in standards and the conversion of car parks into other uses. At this stage it is speculative as to whether driverless vehicles would increase the attraction of Activation Areas or enable more to live without them, but it is certainly a factor to consider amongst others that could dramatically challenge traditional concepts of shopping centres.

CHAPTER 4 THE STRATEGY

The Activity Centres Strategy builds on and modifies the Strategy adopted in 2013.

4.1 Vision Statement

The historical and heritage heart of Victoria Park is its commercial development along Albany Highway that gives the Town its unique character. The East Victoria Park Town Centre and the more northerly Victoria Park will develop distinct identities which will clearly differentiate them from the other larger centres such as Carousel.

The Albany Highway Secondary Activity Centre will experience refurbishment and redevelopment of existing buildings along with improvements to its streetscape and enhancement of its heritage character. Greater commercial activity will provide close-to-home opportunities to provide most needs. Improvements within the public domain will enable the population to take pleasure in public life particularly for those living in nearby apartments.

In the residential districts, the neighbourhood and local centres serving the community will gradually increase in prosperity, as inner-city housing becomes more popular and population numbers and the wealth of the new *lifestyle* residents in Victoria Park increases. Incompatible industrial and other commercial uses that detract from residential amenity will be phased out, while good urban design and landscaping will ensure a harmonious interface between commercial and residential areas.

Victoria Park will become an even better place to live, recreate and do business.

4.2 Key findings for which a strategy is required.

Over the past decade the Victoria Park Secondary Centre has achieved some success in terms of continuing to offer a range of commercial facilities and adjust to changing demand. The area allocated for commercial uses has expanded, new uses have replaced outdated ones and vacancies have remained low. Notably the number of cafes, restaurants and gyms have grown significantly.

Outside of the Secondary Centre, centres have continued to offer services close to the population, but in these there is generally a higher vacancy rate and a lesser demand for commercial space. Identified significant future centres in past strategies have failed to develop.

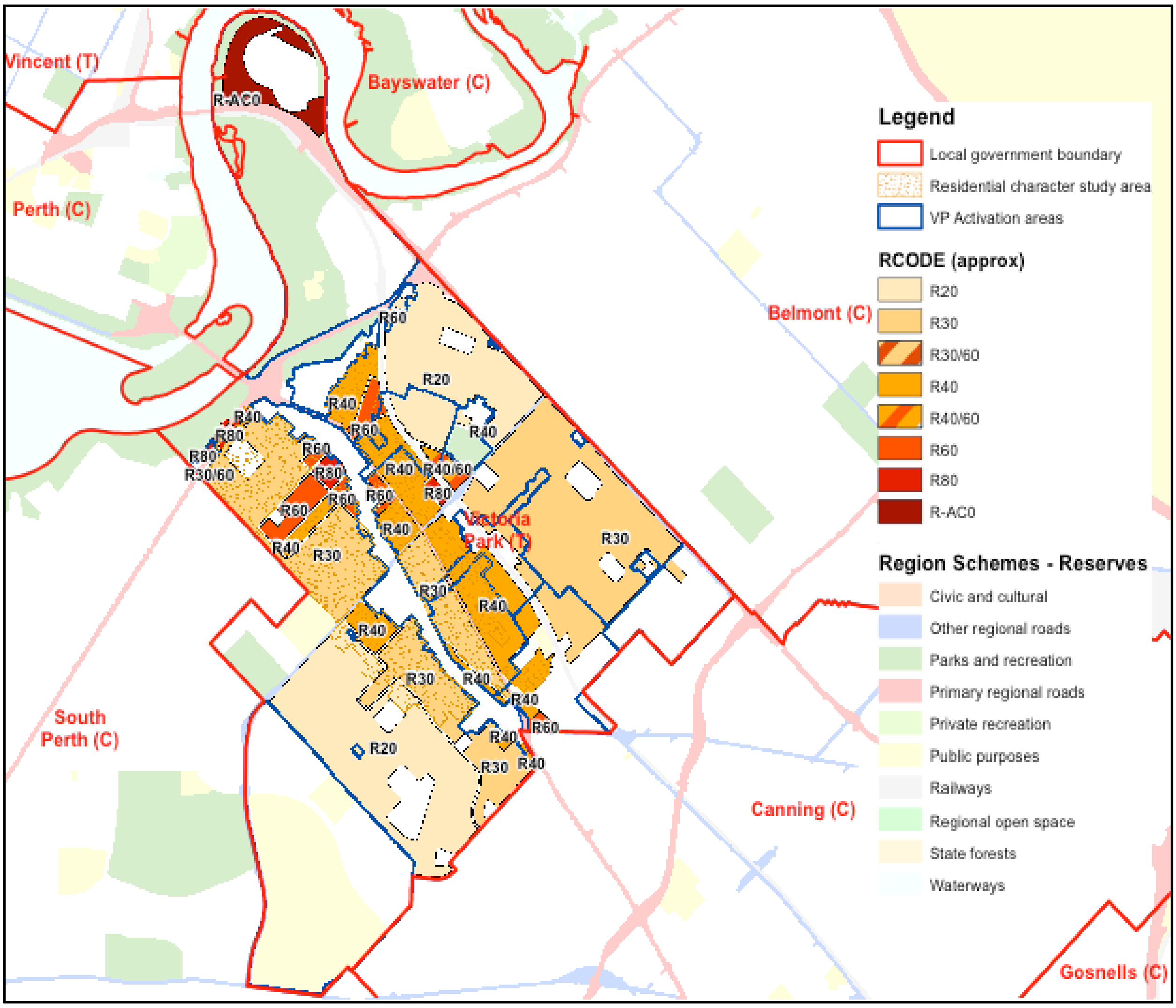
There are some clear threats that have been identified and factored into the modeling. Firstly, the expansion of the Carousel Strategic Metropolitan Centre by over 50% will have a significant, but manageable, impact. Victoria Park provides a different ‘offer’ to Carousel and this should be built on. Secondly, on-line shopping is becoming a reality and it is reasonable to assume that within 20 years it will account for up to 20% of all shopping expenditure. This also has been factored into the modeling.

The Town’s future population growth will continue to be dominated by Burswood. Here optimistic plans for retail development should be tempered in view of the results of the modeling which find that significant retail development would have a direct impact on the ability of the Secondary Centre to continue at its current level let alone grow.

The concept of Activation Areas has been developed to promote a broad range of activities around the extended centres. The location of these Activation Areas should play an important part in determining future development strategies in view of the fundamental importance of having people living close to centres to secure their mutual benefit. As shown in **Figure 4.1**, the areas coded for higher density within the established parts of the Town are generally proximate to the Activation Areas. While it is not the purpose of the Activity Centres

Strategy to make detailed recommendations regarding housing density it is important that parallel strategies, such as the preparation of the Town's Housing Strategy and its intent to develop Form Based Codes, be aligned to support the development of the Activation Areas.

Figure 4.1: Residential Coding – Town of Victoria Park.



Source: Town of Victoria Park Town Planning Scheme No.1, Planwest

The preparation of the Town's Local Housing Strategy and Form Based Codes should take full account of the need to provide opportunities for people to live near centres by the provision of more housing within and adjacent to Activation Areas.

4.3 General Principles to Guide planning decisions relating to the Victoria Park Secondary Centre.

The ability of the Victoria Park Secondary Centre to prosper will depend on its ability to survive in the face of a more comprehensive retail offer from larger centres such as Carousel and the attractions of on-line shopping. The centre needs to provide a point of difference and offer experiences that appeal to social as well as physical needs. Much that can be done lies within the realm of the public domain the purview of local government.

In order to meet these challenges, the following guiding principles are proposed for the Secondary Centre:

- Treat the centre as a number of distinct parts within the overall Secondary Centre – with their own name and identity.
- Provide a more comprehensive landscape strategy with entry statements, shade trees in summer and north facing sunny areas in winter and the development of parklets within the road reserve.
- Permit activities that enliven the street environment such as al fresco, busking and occasional entertainments.
- Maximise the opportunities for density development within walking distance of the centres.
- Actively promote uses that enliven the street environment and are likely to successfully compete with on-line and big centre shopping.
- Promote continuous glass shopfronts along facing streets within shopping areas or other public spaces such as squares and malls.
- Relax parking standards from present standards. Parking should generally be behind the main street frontage.

4.4 Strategies for Activation Areas in Victoria Park

The following strategy is Activation Area and precinct based – but focuses on commercial zones and commercial uses in the respective activity centres. **Figure 4.2** shows the centres included in the modeling.

4.4.1 ALBANY HIGHWAY SECONDARY CENTRE

The Albany Highway Secondary Activity Centre comprises three retail nodes, namely Victoria Park, East Victoria Park and the southernmost centre at Welshpool Road, referred to in this report as 'Victoria Park', 'Town Centre' and 'Gateway' respectively (**Figure 4.3**).

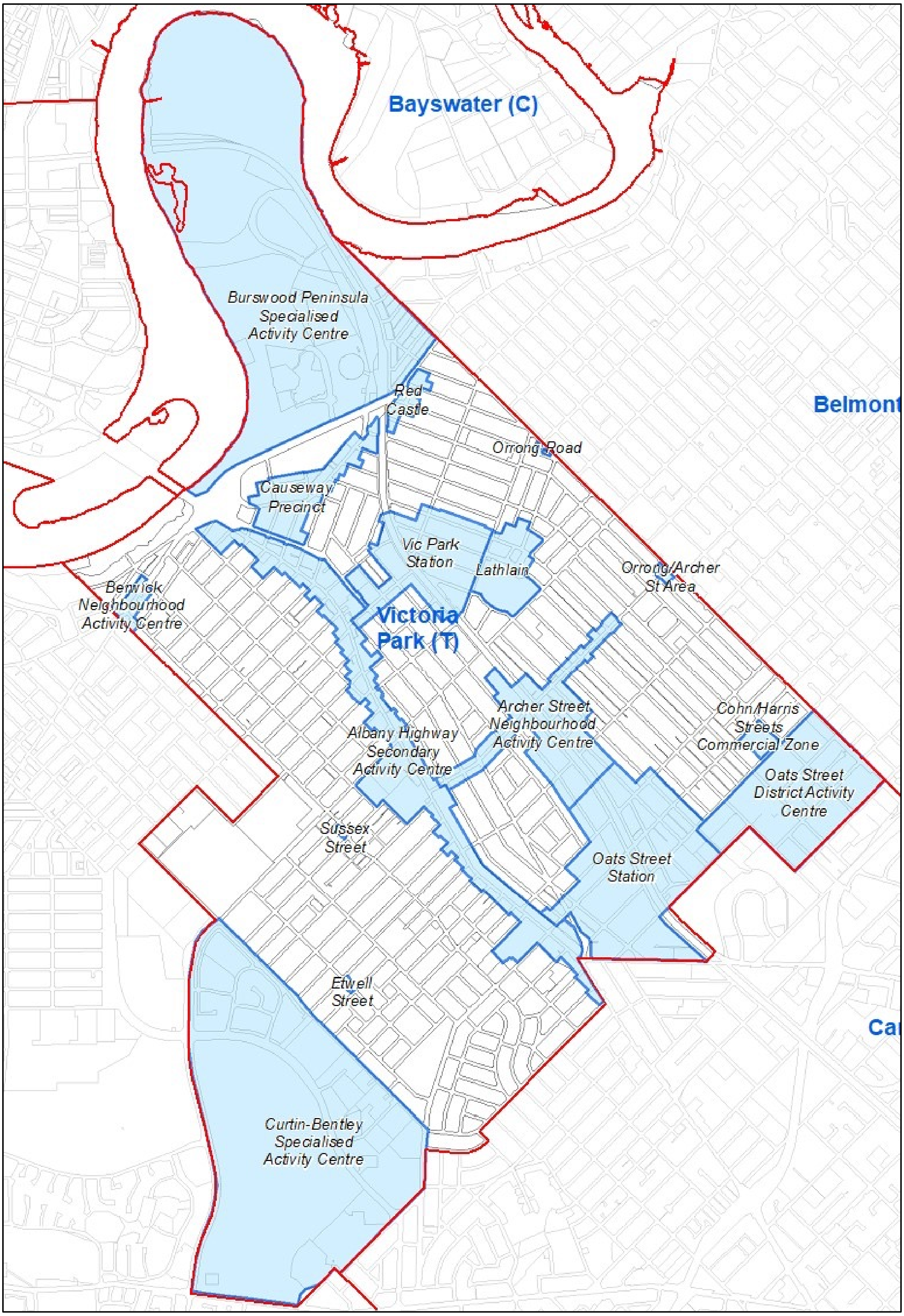
These three nodes account for the majority of the shopping floorspace, with the parts between these nodes contributing to the 'strip' development of commercial and other shopping and non-shopping floorspace.

The strip imagery of Albany Highway is to be retained through design provisions while ensuring that zoning and development provisions consolidate shopping, recreation, leisure and community uses into the three retail nodes. The sections of Albany Highway between these nodes are to accommodate uses which include non-retail commercial, affordable housing and high density residential.

Retail activity should be consolidated into the three nodes, recognising that the Town is currently over-provided with retail floor space, with limited scope for major expansion. Future development will build on the diverse shopping experience provided by the combination of enclosed shopping centres and strip shopping and the ongoing trend of hospitality uses such as restaurants and bars along Albany Highway.

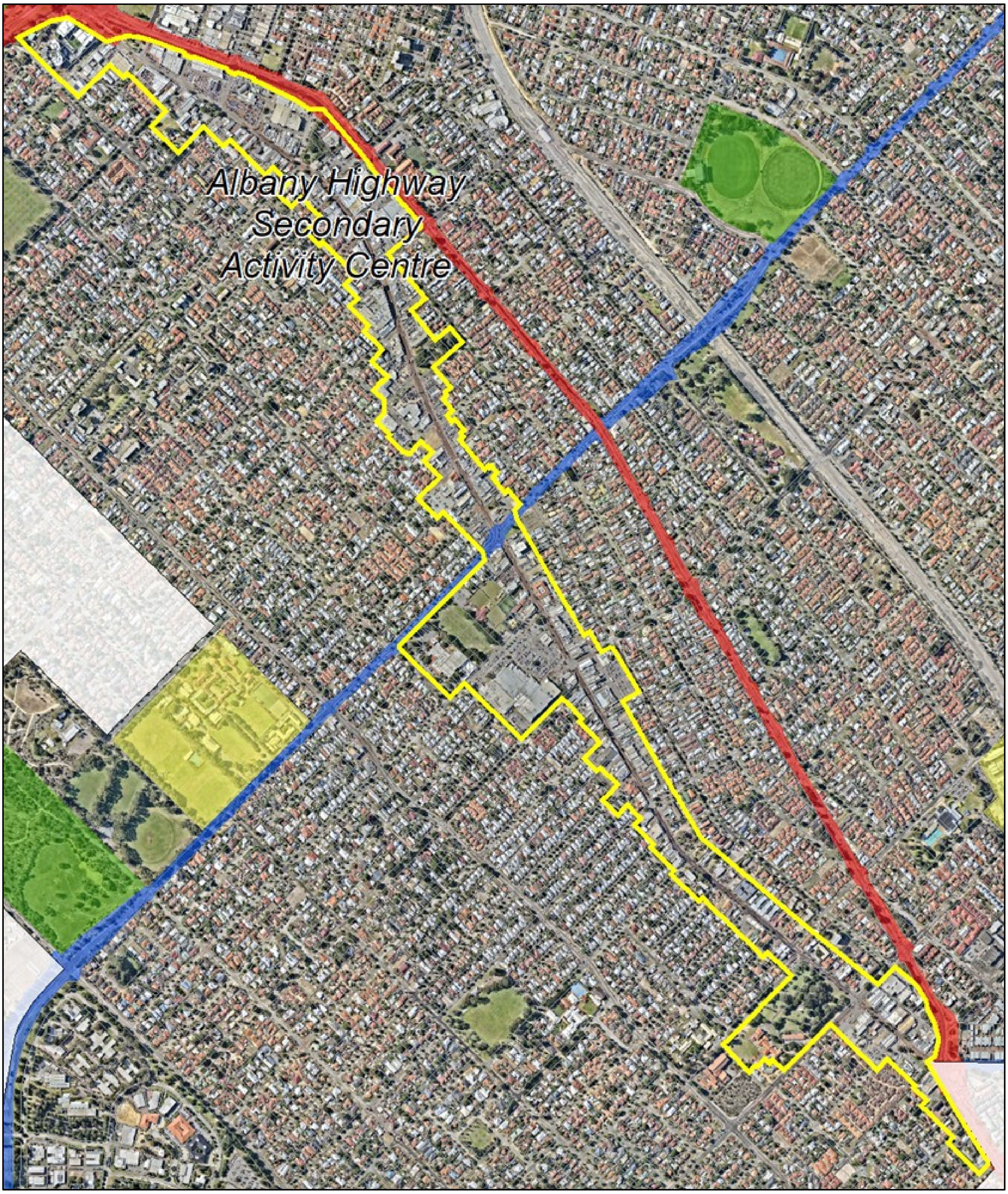
The strip imagery of Albany Highway is to be retained through design provisions while ensuring that zoning and development provisions consolidate shopping, recreation, leisure and community uses into the three retail nodes. The sections of Albany Highway between these nodes are to accommodate uses which include non-retail commercial, affordable housing and high density residential.

FIGURE 4.2 – ALL ACTIVATION AREAS



Source: Nearmap, Planwest

FIGURE 4.3 – ALBANY HIGHWAY SECONDARY CENTRE



Source: Nearmap, Planwest

While formal parkland does exist within the centre (Memorial Gardens, Read Park, John McMillan Park and Edward Millen Reserve) to make the centre into a more desirable place to visit more opportunities to rest and recreate should be provided as well as general landscaping and entry statements. The implementation of the 2000 Masterplan for the Town Centre would be most desirable, but this may be a long-term goal. In the interim it is important to have short-term goals. There are some signs of small improvements made over the years, however, a more comprehensive design study should be undertaken with the aim of providing a unifying theme for each sub-precinct.

The strategies for the Victoria Park and Town Centre precincts provide some locations where small parklets within the wide road reserves of streets that intersect with Albany Highway could be provided. It is noted that the Town intends to undertake a 'Public Realm" strategy in recognition of the unique positioning of Activation Areas within the Town (on the rail line and on Albany Hwy) and the numerous opportunities to create 'places' and/or 'destinations' along that route. Any Public Realm strategy will do more than simply recommend improving the standard of streetscape and will be linked to proposed marketing and events/entertainment strategies being considered by the Town.

General Strategies for the Activation Area:

- Raise the standard of the streetscape in both the public and private domains with some specific targeted initiatives offering shade and seating;
- Expand LPP 17, (Street frontage design Guidelines for District Centres and Commercial Areas Along Albany Highway) to enunciate entry statement, landscaping and parklet objectives;
- Provide a point of difference between the Victoria Park Secondary Centre and the rival Carousel and Belmont Forum "big box" format centres;
- Attract a stimulating variety of architecture and design, within an overall streetscape policy that ensures scale appropriate to the context without disrupting the character and amenity of adjoining residential areas;
- Encourage a variety of activities and uses that will add to the vibrancy and vitality (especially beyond normal trading hours);
- Design guidelines for Albany Highway should seek to ensure that the historic and traditional form of development along the Highway is maintained and the streetscape is reinforced where new development occurs in accordance with LPP 15, 16 and 17;
- Promote high residential densities to optimise the benefits of the proximity to facilities and services, potential views, and accessibility through existing and proposed public transport services;
- Commission a public realm strategy to create 'places' for the Activation Areas and achieve a unifying approach to landscaping, entry statements, public art and small parks for each of the centre's sub-precincts; and
- Ensure the public realm strategy identifies the main destinations on the rail line and Albany Highway at which a range of activities are promoted.

More detailed strategies are provided for the Secondary Activity Centre's six sub-precincts.

4.4.1.1 Northern Sub-Precinct

The Albany Highway Northern sub-precinct is shown on **Figure 4.4**. It is currently characterized by well-established car sales uses in relatively large land parcels. These car sales uses are a major regional attractor which have continued to strongly trade.

Strategies

- Promote high intensity development of the sub-precinct to maximise the benefits of its proximity to the CBD, views, accessibility, and existing and proposed public transport services.
- Adopt building form and design parameters consistent with the importance of the locality as an entry statement to the Town, particularly for the area between Albany Highway and Shepperton Road.
- Consider development of offices with ground floor vehicle trade operations subject to amenity conditions.
- Promote the advantages of the sub-precinct offering a land bank of large land parcels for future comprehensive development.

- Resist any fragmentation to the generally large lots within the sub-precinct.

FIGURE 4.4 – SUB-PRECINCTS NORTH AND VICTORIA PARK

Source: Nearmap, Planwest

4.4.1.2 Victoria Park Sub-Precinct

The Victoria Park sub-precinct is shown on **Figure 4.4**. The sub-precinct has fragmented ownership offering a wide variety of retail outlets.

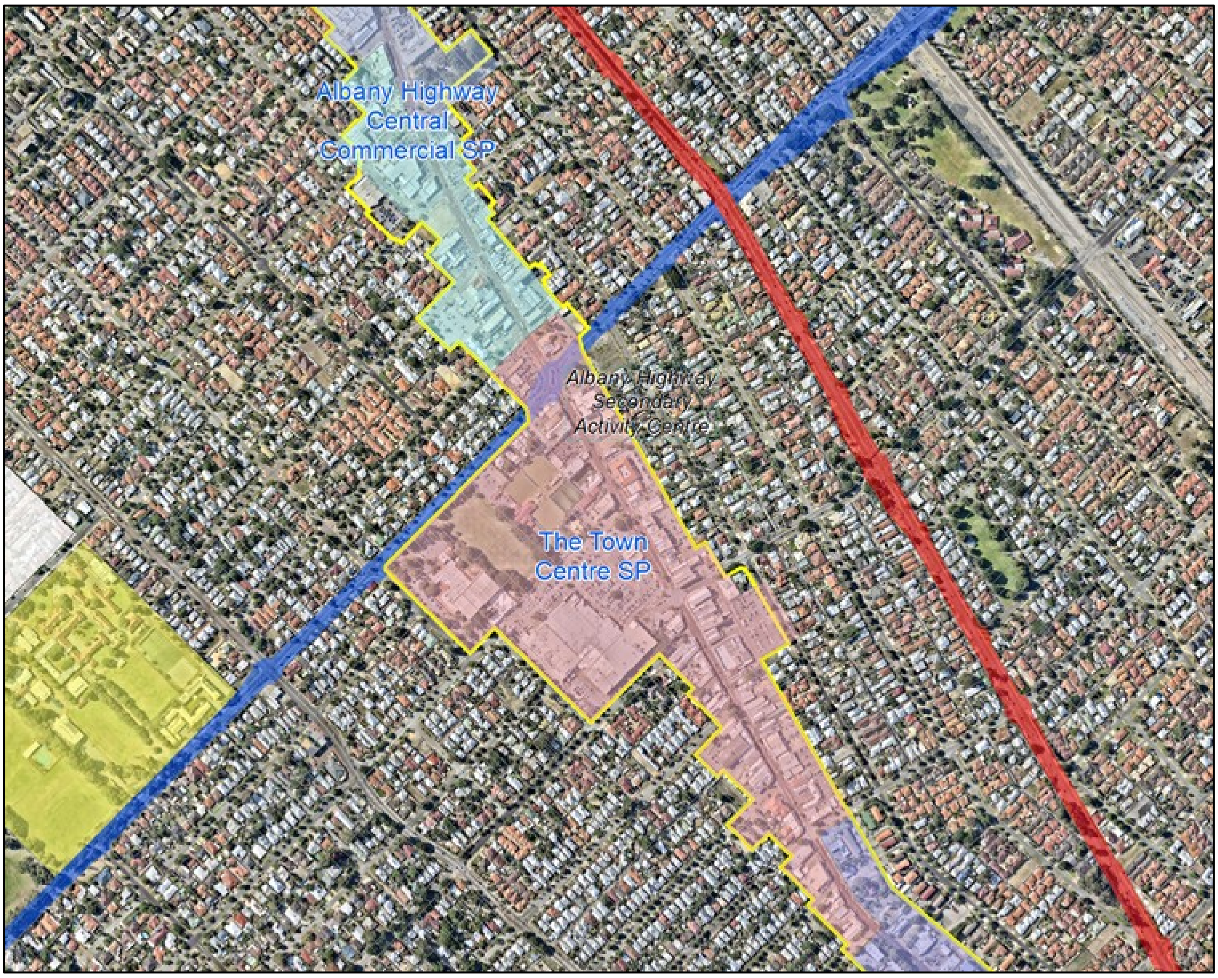
Strategies

- Adopt a comprehensive street-level design theme, or character, to improve the existing sense of place.
- Install public art, street furniture, paving, planting and lighting to raise the profile and provide a central meeting place as a focus.
- Maintain continuous glass frontage along Albany Highway with emphasis on cafes, restaurants and uses that provide activation at street front locations.
- That the sub-precinct be provided with a unique identity and renamed to "The Vic".
- Encourage improvement of public domain areas including landscaped entry statements and median landscaping.
- Continue to waive all fees associated with al fresco dining on properties abutting Albany Highway.
- Encourage greater street activity and promote greater use of al fresco dining on properties abutting Albany Highway.
- Within a comprehensive centre design study, locations adjacent to Albany Highway within the road reserves of appropriate wide connecting streets be considered for the provision of small street parks.

4.4.1.3 Central Sub-Precinct

The Albany Highway Central Commercial sub precinct is shown on **Figure 4.5** and is characterised by car yards in relatively large land parcels between the Town's two main shopping precincts

FIGURE 4.5 – CENTRAL AND TOWN CENTRE SUB-PRECINCT



Source: Nearmap, Planwest

Strategies

- Promote the redevelopment of car yard sites for more intensive residential and mixed-use development.
- Promote residential densities which will optimise the benefits of the proximity to facilities and services and accessibility through existing and proposed public transport services.
- Resist any fragmentation to the generally large lots within the sub-precinct.
- Adopt a comprehensive street-level design theme, or character, to promote this sub-precinct, particularly through tree planting in the road reserve.

4.4.1.4 Town Centre Sub-Precinct

The Victoria Park Town Centre sub-precinct is shown on **Figure 4.5**. Small ownerships offering a variety of retail outlets and restaurants apart from the large land holding of the Park Centre and the strategically located John McMillan Park.

Strategies

- Support the Council's role in financing and partnering the development of the Town Centre.
- Support the Town's proposed Public Realm strategy to address streetscape, local activities and their promotion.
- Prepare a structure plan as the basis for development and design provisions for the Town Centre sub-precinct based on:
- Accommodating a mix of civic/cultural and commercial/residential uses and a range of facilities and services; and
- Creating a sense of place for the Town community and being a regional attractor for the wider community.
- Promote high intensity development of the sub-precinct to maximise the benefits of its accessibility, and existing and proposed public transport services.
- Adopt a comprehensive street-level design theme, or character, to improve the existing sense of place.
- Install public art, street furniture, paving, planting and lighting to define the public places and provide a central meeting place as a focus.
- Continue to waive all fees associated with al fresco dining on properties abutting Albany Highway.
- That the sub-precinct be provided with a unique identity and renamed to 'The Park'.
- Encourage improvement of public domain areas including landscaped entry statements and median landscaping
- Establish continuous built form along Albany Highway and glass frontage along Albany Highway with emphasis on cafes and restaurants on the street front locations.
- Optimise the use of parking through provision of shared public parking.
- Encourage greater street activity and promote greater use of al fresco dining on properties abutting Albany Highway.
- Within a comprehensive centre design study, locations within the road reserves of appropriate wide connecting streets to Albany Highway be considered for the provision of small street parks. For instance, treatments could modify land width, parking and landscaping to provide attractive small parks within the road reserves of Westminster, Canterbury and Balmoral streets.
- In light of reduced parking requirements, consider converting parking spaces adjacent to Albany Highway in front of the Park Centre to a linear park within the Town's Public Open Space Strategy.
- All, or a portion, of the drainage sump on Westminster Street be considered for modification and conversion into a park within the Town's Public Open Space Strategy.

4.4.1.5 Residential/Commercial Sub-Precinct

The Albany Highway Residential/ Commercial sub-precinct is shown on **Figure 4.6**. Offering a visual and land use break between commercial areas this area offers future high density living with mixed uses.

Strategies

- Facilitate a predominantly residential precinct with limited provision for commercial uses at street level.
- Support residential densities which optimise the benefits of the proximity to facilities and services and accessibility.
- Ensure that building design and scale is appropriate to the Albany Highway and individual site context.
- Maintain and enhance rear laneways to provide vehicular access to sites as part of redevelopment.
- Develop a streetscape design theme consistent with the character of a predominantly residential precinct.

- Development fronting Albany Highway should be subject to conditions requiring landscaping to be installed and maintained to the satisfaction of the Town of Victoria Park for both residential and commercial development (by amendment to LPP 16, clause 5.1, Landscaping).

FIGURE 4.6 – RESIDENTIAL/COMMERCIAL AND GATEWAY SUB-PRECINCT

Source: Nearmap, Planwest

4.4.1.6 Gateway Sub-Precinct

The Albany Highway Gateway sub-precinct is shown on **Figure 4.6**. As its name implies, this is the part of the centre that offers best exposure and entrance to the Town.

Strategies

- Promote the development of a landmark building/s to punctuate the entry to the Albany Highway Secondary Centre.
- Promote commercial uses at street level with glass fronts facing Albany Highway to promote the user-friendly interface for pedestrians.
- Ensure that building design and scale is appropriate to the Albany Highway and individual site context.
- Maintain and enhance rear laneways to provide vehicular access to sites as part of redevelopment.
- Provide landscaped entry statements and median plantings.

4.4.2 BURSWOOD SPECIALISED ACTIVITY CENTRE

The Burswood Activity Centre comprises a number of areas identified in the *Burswood Peninsula District Structure Plan* (March 2015). The areas subject to the Town's planning control are those zoned Urban under the MRS – which include the Belmont Park, the Burswood Peninsula residential precinct, the Burswood Station West and Burswood Station East sub-precincts. Of these, the Burswood Peninsula residential precinct, which is largely developed, does not include commercial activities and therefore is not subject to commentary here.

Strategies:
Support the designation of the Burswood Peninsula as a Specialised Activity Centre.

4.4.2.1 Belmont Park

The District Structure Plan identifies the Belmont Park Redevelopment precinct as one which will see the transformation of the northern area of the Peninsula with development that will provide a range of facilities and activities that complement the existing sporting and entertainment uses. According to the structure plan the development may include:

- approximately 4500 dwellings;
- up to 31,000m^2 of retail floor space;
- up to 60,000m^2 of office floor space; and
- approximately 5,500 jobs.

Strategies:

- Support the development of a neighbourhood centre to serve local needs.
- Notwithstanding the provisions of the District Structure Plan, critically assess any large retail proposals, noting that they would be most likely to detrimentally impact on the established centres, particularly the Victoria Park Secondary Centre. Large retail development could also jeopardize the residential amenity.
- Require any retail proposal for more than 5,000m^2 be accompanied by a retail sustainability assessment from an independent consultant to identify impacts on other centres.

4.4.2.2 Burswood Station West Precinct

The District Structure Plan identifies this area (which is currently predominantly used for open car parking) as a mixed-use precinct offering a proposed 120,000m^2 of office and commercial space and 20,000m^2 of retail and hospitality uses with a mix of residential uses. 4,500 residential dwellings are anticipated to be provided within the east and west precinct combined. However, according to the Precinct Plan retail is limited to 2,000m^2.

It is noted that the State Government has accepted responsibility for preparing a structure plan for this sub-precinct.

The review has concluded that the retail proposals of the District Structure Plan are unrealistic and while modest boutique retailing in association with the Crown complex is supported with some convenience shopping, this would occupy less than 5,000m^2 NLA.

Strategies

- Support a small neighbourhood centre in proximity to the Burswood station.
- Support Other Retail development on the Great Eastern Highway frontage.
- Require that any retail proposal for more than 5,000m^2 be accompanied by a retail sustainability assessment from an independent consultant to identify impacts on other centres.

FIGURE 4.7 – BURSWOOD SPECIALISED ACTIVITY CENTRE

Source: Nearmap, Planwest

4.4.2.3 Burswood Station East Precinct

According to the District Structure Plan this precinct is envisaged to provide employment activity fronting Great Eastern Highway offering an estimated 40,000m^2 of office and commercial space and 8,000m^2 of retail space.

The land is zoned Office/Residential under the Town's Local Planning Scheme and is subject to specific plot ratio, R Code (R80), height (not to exceed 15m) and landscaping (25% of site to be landscaped) requirements. Development is likely to be intensive offering relatively little amenity and accordingly the Precinct Plan's provisions regarding landscaping are seen as critical in delivering a pleasant livable environment.

The review has concluded that future retail demand within the sub-precinct is unlikely to justify the level of supply suggested in the District Structure Plan. Moreover, a facility in the locality would probably service the needs of both the East and West station sub-precinct.

Strategies

- Promote high density residential in a parkland setting.
- Provide a common linked landscape theme between development sites and along Griffiths Street (incorporating the park on Stiles Avenue) and Goodwood Parade.
- Support Other Retail on the Great Eastern Highway frontage.
- Retail development should focus on convenience shopping to cater for local needs.
- Support office development within the sub-precinct.
- Improve links with the Red Castle locality, supporting its residential intensification.
- Prepare a structure plan which reviews the current Precinct Plan provisions (particularly in respect of building height), allows for Other Retail on the Great Eastern Highway frontage, a neighbourhood shopping centre, mixed uses and residential high-density development.

4.4.3 CURTIN/BENTLEY SPECIALISED ACTIVITY CENTRE

This Specialised Activity Centre is composed of several significant components – all of which are now well established. These components include the Curtin University, Bentley Tech Park, TAFE campus, local public and private social services, aged care accommodation, and ancillary uses.

Curtin is part of the Curtin/Bentley Specialised Activity Centre in the Activity Centres Policy. Clause 5.1.1 (Sub-clause 2) of the Activity Centres Policy - Specialised Centres states:

> *"(2) Specialised centres provide opportunities for the development of complementary activities, particularly knowledge-based businesses. A range of land uses that complement the primary function of these centres will be encouraged on a scale that will not detract from other centres in the hierarchy….."*

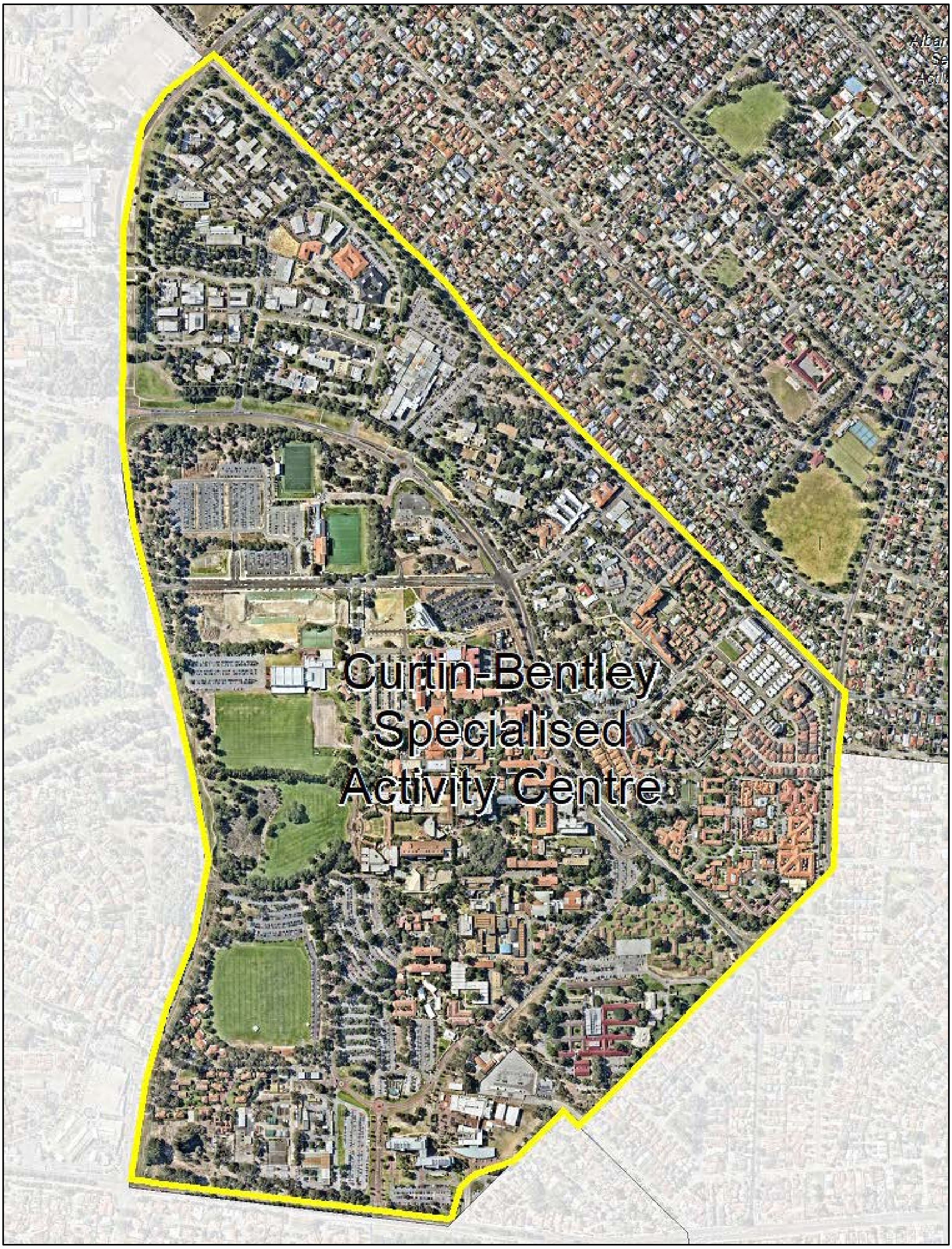
This over-arching state policy provision needs to be used to guide responses to proposals within the Curtin/Bentley precinct. It is understood that the ambitious proposals within the Greater Curtin Master Plan are entirely aimed at furthering the needs of the university, which is supported, rather than establishing commercial competition with other centres.

However, the strategic location of the land and its current low intensity development will create demand in the future suggesting that uses complementary to the activity centres hierarchy rather than competitive with it will need to be carefully managed.

There is a risk of development being approved unrelated to University function and contrary to the Town's planning framework. It is possible that recent legislation will free the university to use its land for commercial activities in competition with other sites in the Town.

The main initiatives of the Town with respect to the precinct concern land zoned under the local planning scheme over which there is local government control.

FIGURE 4.8 – CURTIN/BENTLEY SPECIALISED ACTIVITY CENTRE



Source: Nearmap, Planwest

Strategies

- Advocate that the WAPC, in the event of it considering development applications on land reserved for university purposes, only grant approval for uses consistent with the reserve purpose.
- Require any retail proposal for more than 5,000m^2 be accompanied with a retail sustainability assessment to identify impacts on other centres.
- Support development within the University reserved land for uses related to university activities, designed to serve the student population and create activity outside of the semesters.
- The Town (in conjunction with the City of South Perth) undertake a review of the planning provisions associated with Technology Park.
- Undertake a review of Precinct 13 planning controls relating to the Special Use zone to establish whether they are still appropriate for land within the Specialised Activity Centre.
- Support structure planning and development that complies with the primary intent of this Specialised Activity Centre set out in State Planning Policy 4.2.

4.4.4 CAUSEWAY ACTIVATION AREA

The Causeway Activation Area is shown on **Figure 4.9** While this area is not a designated Activity Centre under SPP 4.2 it is nevertheless an important activity generating area with high intensity land uses.

The recommendations of previous studies have been incorporated into the current Local Planning Scheme through a scheme amendment. The land is now zoned Office/Residential.

FIGURE 4.9 – CAUSEWAY ACTIVATION AREA PRECINCT

Source: Nearmap, Planwest

Strategies

- Progress the redevelopment of the Precinct in accordance with the Causeway Precinct Plan pursuant to Local Planning Scheme No. 1.
- Target high density residential development between GO Edwards Park and Burswood Road.
- Review the extent to which vehicle sales may be permitted in some areas within the Causeway precinct where specified urban form standards are met.
- Support the implementation of the development standards contained within LPP 22.
- Seek the formal inclusion of the Causeway in the retail hierarchy as a District Centre.

4.4.5 Oats Street Station Activation Area

Oats Street was identified as a district centre in the Activity Centres Policy (SPP 4.2). Its draft boundaries were indicated in the 2015 *Perth and Peel @ 3.5 million* report. A broader area definition was used in the 2013 report and this has been further refined in the boundaries shown on **Figure 4.10**.

As was noted in the 2013 report, "the future for an Oats Street district centre is conjectural. There is no identifiable centre in the demarcated area. It is based on the prospect of moving the Oats Street station about 300 metres further south as part of an overall rationalisation of station spacing on the Perth – Armadale line. The idea is that the existing industry zone will change to commercial and residential uses around the new station and that there should be shopping facilities to serve the locality". This statement remains true today.

FIGURE 4.10 – OATS STREET ACTIVATION AREA

Source: Nearmap, Planwest

The 2013 report also found that the model results "show that while being designated as a district centre it will be based on uses other than retailing, predominantly mixed commercial and residential uses. The modelled retail floorspace potential for 2031 is shown as approximately 2,100m^2 which represents a small neighbourhood centre". This remains the case.

The Welshpool Industrial area is an important employment centre which should be retained. Some adjustments to the extent of the industrial zoning would have merit where located within the Activation Area, to facilitate a greater range of potential uses.

Strategies

- Include within the Local Planning Scheme, the land currently zoned Industrial within the Oats Street Station precinct south of the railway line, as Residential/Commercial.
- Commence negotiations with the Department of Planning regarding the future rezoning of land within the precinct between the boundary of the City of Canning and Cohn Street from General Industry to Urban under the MRS.
- Review the residential coding of land within the precinct with a view to introducing R30/60 with the higher code being subject to the achievement of design criteria and provision of ground floor mixed use.

4.4.6 BERWICK ACTIVATION AREA

This Activation Area has no convenience shops and substantially operates as a highway commercial area. However, part of this commercial area falls into adjacent South Perth where a Coles Express provides some convenience goods. The strategies set out in the 2013 report remain relevant.

FIGURE 4.11 – BERWICK ACTIVATION AREA

Source: Nearmap, Planwest

Strategies

- Upgrade this Activation Area as a highway commercial centre.
- Phase out retail shopping in favour of offices, showrooms etc.
- Encourage redevelopment with residential or office on upper floor levels.
- Coordinate local access and parking arrangements having regard to limited access to Canning Highway.

4.4.7 ARCHER STREET ACTIVATION AREA

The Archer Street Activation Area is an old largely developed centre located central to a residential neighbourhood (**Figure 4.12**).

The Area's boundary has been extended from that identified in the 2013 report to run further south to the Secondary Centre and further north to Apollo Way and to extend along the Railway, either side, north and south and includes the small Carlisle commercial area.

FIGURE 4.12 – ARCHER STREET ACTIVATION AREA

Source: Nearmap, Planwest

Strategies

- Encourage the retention of the centre's shops.
- Review the restriction of multiple dwellings within the Activation Area south of the Railway.
- Introduce split coding R30/60 for land within the Activation Area between Shepperton Road and the Secondary Centre and north of the Railway. Eligibility for the R60 should be subject to criteria relating to ground floor mixed use, reduced front setbacks and maximum height of four storeys.

4.4.8 VICTORIA PARK STATION ACTIVATION AREA

This new Activation Area has been identified within *Perth and Peel @ 3.5 million* however the area has no existing commercial centres within its boundaries (see **Figure 4.13**).

Strategies

- Consider extending the R40/60 coding to incorporate an additional two street blocks north of the existing R40/60 area north of the station.
- Review the proscription against multiple dwellings within the corridor either side of Duncan Street between Victoria Park Station and the Secondary Centre – particularly where laneway access is available.

FIGURE 4.13 - VICTORIA PARK STATION ACTIVATION AREA

Source: Nearmap, Planwest

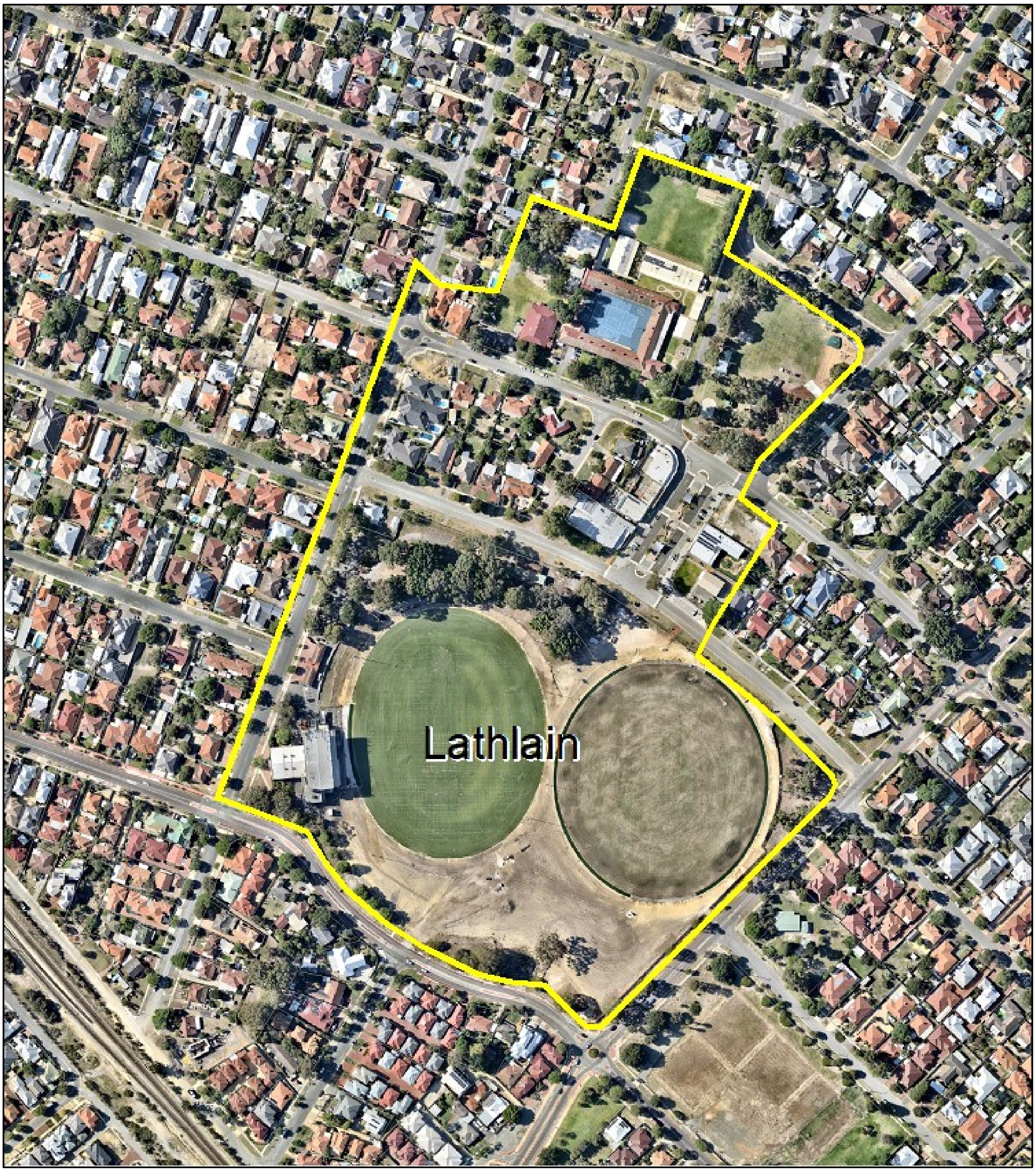
4.4.9 LATHLAIN ACTIVATION AREA

While Lathlain was considered to be a local centre in the 2013 report, its boundaries have been extended to embrace supporting residential areas in view of the greater potential seen for the area. Its small centre thrives after a landscaping upgrade and has become a model for small centres to emulate.

Strategies

- Consider extending the R40/60 coding within the street blocks fronting Lathlain Park (on Goddard Street and McCartney Crescent).
- Consider extending the Lathlain Activation area south of the Lathlain Oval to the Railway to include the two street bocks already code R40/60.

FIGURE 4.14 – LATHLAIN ACTIVATION AREA



Source: Nearmap, Planwest

4.4.10 LOCAL ACTIVATION AREAS

4.4.10.1 Orrong Road
The Centre is particularly unkempt, and the supermarket has closed.

Strategies
- Maintain the present status of the centre.

4.4.10.2 Sussex Street
The 2013 report found that Sussex Street did not function as a local centre.

Strategies:
- Maintain the present status of the centre.

4.4.10.3 Orrong/Archer

Strategies
- Maintain the present status of the centre.
- Promote highway commercial uses.

4.4.10.4 Etwell

Strategies
- Encourage diversification of activities.
- Initiate discussions with the landowner of the undeveloped lot adjacent to the centre to investigate the possibility of assisting with landscape improvements to develop a temporary park to improve the amenity of the local centre.

4.4.11 OTHER COMMERCIAL AREAS

The Town's other commercial areas have largely been incorporated into the enlarged Activation Areas. These include commercial centres in Carlisle (incorporated into Archer Street), and Tuckett Street Commercial Zone (incorporated into Oats Street).

The Cohn/Harris area is adjacent to but separate from the Welshpool industrial area. In time the locality could transition to mixed use, however the industrial uses are well established and unlikely to move in the short term.

Strategies
- Encourage replacement of industrial uses with residential.
- Maintain/upgrade local streetscapes to promote residential amenity.
- Promote redevelopment for medium density for residential in the longer term.

CHAPTER 5 - CONCLUSIONS AND LOCAL PLANNING STRATEGY

The need to prepare an Activity Centres Strategy is derived from, but is not a requirement of, SPP No. 4.2. However, the main reason to prepare such a Strategy is to provide a rationale for the section of the Local Planning Strategy dealing with the manner in which the local government intends to make provision for its centres within its Scheme. This chapter contains the main elements to be included as part of the Town's Local Planning Strategy. However, the complete strategy is contained in chapter four.

5.1 Strategic considerations

Since the adoption in 2010 of SPP 4.2, approval has been granted for the expansion of retail floorspace by over 75% of the Activity Centres located in an arc equidistant from the Perth CBD. This is potentially transformational. Moreover, it is occurring at a time of potential retail contraction due to growing on-line sales. The retail spending to support these super regional centres it likely to result in less retail spending available to other centres, such as those within the Town of Victoria Park.

By 2019 Carousel, to the immediate south of the Victoria Park Secondary Centre, will have expanded its shop/retail floorspace by 54%, or a little short of the total shop/retail floorspace within the Victoria Park Secondary Centre. Being a Metropolitan Strategic Centre the development approval process for Carousel did not require the consideration of any impacts on lower order centres such as Victoria Park yet virtually the whole of Victoria Park falls within the primary trade area of the Carousel shopping centre from which 50% of Carousel's trade is drawn.

Carousel has been permitted to expand substantially without the imposition of conditions requiring improvement of the quality of the urban environment. There will be a growing point of difference between the different types of centre. Patrons will be offered a starker choice between the experiences of a visit to one of the super-regional centres compared with a traditional main street centre. While these developments present a threat to centres such as Victoria Park, it does offer an opportunity where an alternative, more amenable, human scale, shopping experience can be provided.

5.2 State Policy Requirements

According to SPP 4.2 the Town of Victoria Park's Retail Hierarchy includes:

- One Secondary Centre – Victoria Park;
- Three District Centres – East Victoria Park, Burswood and Oats Street;
- One Specialised Centre – Bentley/Curtin;

In addition, the 2013 Strategy identified two Neighbourhood Centres (Archer Street and Berwick Street) and five Local Centres (Orrong-Archer, Orrong Road, Lathlain, Sussex Street and Etwell Street).

The Town seeks to modify these definitions as outlined in the Activity Centres Strategy to include East Victoria Park within the Secondary Centre, include the Causeway Precinct as a District Centre and re-classify Burswood as a Specialised Activity Centre.

To better address the need to broaden the functions of centres the concept of "Activation Areas" has been embraced. Activation Areas may have a wider area associated with them including significant residential areas where they can, through a conscious density strategy, lend support to the centres.

It is proposed that previously unclassified precincts (including the Causeway and Victoria Park Station), be included in the Strategy as Activation Areas.

The Secondary Centre should be designated a 'Regional Centre' under the Local Planning Scheme in accordance with Table 5 of SPP 4.2.

The Draft Central Sub-regional Planning Framework (*Towards Perth and Peel@3.5million May 2015*) indicates that the core areas of activity centres (with a higher density designation of R-AC) should be surrounded by a frame area of at least 200m to allow expansion and support for the centre with linking higher density corridors along the high-quality transport routes. The long linear Secondary Centre with its abutting character areas presents some challenges to these general policies requiring a modification of any blanket approach.

In recent years the Town has responded proactively and designed its strategies and policies to align with the concept of activity centres and followed what is generally considered to be best practice in respect of street activation, mixed use, managed parking and transit oriented development. This in particular refers to the suite of policies contained within the Precinct Plans and to the commercial area design guidelines (LPP 15, 16 and 17) as itemized in Chapter Two of the Activity Centres Strategy.

It may be desirable to prepare structure plans for specific areas as the need arises. However, notwithstanding the fact that Victoria Park as a designated Secondary Centre theoretically requires an activity centre structure plan, in the current situation there is little merit in committing to the expense and administrative effort of producing such a plan as there appears to be little prospect of significant additional development within the centre.

5.3 Residential support for centres

While the Town does attract employees, shoppers and recreation seekers from beyond the Town boundaries, the primary planning consideration is the likely future population within the Town. In the long term it could be expected that in view of its inner city location that medium and high density housing will predominate throughout the district. However, in the short to medium term the overwhelming source of future housing supply (93%) is expected to be located within the Town's activity centres, and most of this located in the Burswood Peninsula Precinct.

Certainly, there are social and physical infrastructure implications arising from the State Government's target for the Town of providing for an additional 19,400 dwellings over the next 30 years or so. However, the significant residential populations within walking distance of its activity centres will potentially stimulate the character of the centres.

The Town has a high employment self-sufficiency ratio of 1.63 (ratio of local jobs to resident workforce), and the greatest recent employment growth has been in sectors generally associated with activity centres (accommodation and food services, retail).

In order to promote the concept of Activation Areas there will be a greater need to ensure that opportunities to provide dwellings within easy walking distance of the centres are maximized. This will draw some opposition from those seeking to quarantine all character areas from development pressures. However, it is considered that some targeted density housing within identified Activation Areas and along linking corridors, particularly where laneways are available to reduce streetscape impacts, would have merit. As a guide, areas central to the Activation Areas should be considered for the R-AC Code and land within walking distance of a centre be coded R40/60. Alternatively, the development of form based codes for designated Activation Areas could address the need for more intense urban form with greater sensitivity to individual sites.

5.4 Secondary Centre

The commercial area abutting Albany Highway within the Town of Victoria Park is one activity centre. However, the two retail centres (based on Victoria Park Central and The Park shopping centre) should be considered as nodes within the whole Albany Highway activity centre strip and Town should develop a strategy to create certain points of difference between the two nodes.

The centre has seen a significant increase in commercial floorspace (30%) since the 2007 survey. The Secondary Centre includes a balance of shop, other retail and office space – all with over 40,000m^2 of floorspace indicating that the SPP 4.2 targets regarding mix of land use are well met in the Secondary Centre. Moreover, the vacancy rate is generally quite low at 6.2%.

Uses such as gyms and health clubs have become a significant new land uses – hardly in existence a decade ago. And cafes, restaurants and function centres now make up 33% of all shop/retail floorspace offering a wide range of attractions.

To enable the Town to take advantage of the potential of the outdoor, informal and various experiences offered by the Albany Highway centre, a number of challenges need to be addressed. The Secondary Centre does not provide a clear retail offer, lacks vibrancy, is interspersed by non-retail uses, suffers areas of low streetscape amenity and has few public spaces. Landscaping is limited, of poor quality and lacks any consistent theme. The 3.4km strip requires that the sub-precincts be made distinct and differences be emphasized and promoted rather than indistinctly merge.

To deal with some of these challenges, the Strategy will assist in facilitating:

- The consolidation of retail activity into the major centres recognising that the Town is well-provided with retail floorspace, with little scope for major expansion;
- The development of diverse shopping experiences provided by the combination of enclosed shopping centres and strip shopping and the emerging trend of recreational commercial uses, such as restaurants along Albany Highway;
- The establishment of a unifying approach to landscaping, entry statements and small parks for each of the Secondary Centre's sub-precincts;
- The implementation of policies that reduce the parking standards for non-residential land uses within the Secondary Centre.
- Maximise the opportunities for density development within walking distance of the centres.

5.4.1 Northern sub-precinct

- Contrary to past expectations, the area used for car sales in the Northern sub-precinct has not declined. While the past policy has been to encourage the phasing out of such uses, there are some advantages to the Town of their retention in the short term. Retention of the large land parcels provides a valuable asset to facilitate long term comprehensive development.

5.4.2 Victoria Park sub-precinct

- A comprehensive design theme be created for the sub-precinct with landscaping, public art, street furniture, activity and small parks to create a unique identity.

5.4.3 CENTRAL SUB-PRECINCT

The area used for car sales in the sub-precinct has yet to contract. While it is important to resist land fragmentation, a gradual transfer of the uses to residential with some commercial would be desirable. A design theme should be implemented particularly through tree planting in the road reserve.

5.4.4 TOWN CENTRE SUB-PRECINCT

- A comprehensive design theme be created for the sub-precinct with landscaping, public art, street furniture, activity and small parks to create a unique identity. Implement reduced parking standards for shop/retail and convert some parking spaces adjacent to Albany Highway in front of the Park Centre to a linear park.

5.4.5 RESIDENTIAL/COMMERCIAL SUB-PRECINCT

- Promote a predominantly residential precinct with limited provision for commercial uses at street level with consistent design theme for new development and public areas.

5.4.6 GATEWAY SUB-PRECINCT

- Promote transition to more pedestrian friendly frontages to commercial uses and provide significant entry statement to the Town.

5.5 Specialised Activity Centres

The development of the Town's two Specialised Activity Centres, at Burswood and Curtin/Bentley, will have a profound impact on the Town's future:

The Burswood Peninsula is a large strategically located site constrained from development until recently. In view of its favourable location it should continue to develop as a centre of entertainment and tourism. In addition, it will provide most of the Town's future population and employment growth. How the future population and workers on the Peninsula should be serviced is an important issue.

The very large commercial space and significant retail space indicated by recent Burswood sub-precinct structure plans has potential to adversely impact on the hierarchy of Activity Centres in the Town. Modeling has shown that retail floorspace beyond that required for daily convenience would be of detriment to investment in the Secondary Centre.

The Bentley/Curtin Precinct comprises the Curtin University campus, adjoining Technology Park and various other institutional uses. The land is currently developed with low intensive uses. This could change in the future as the site's strategic location is capitalized upon. How the future development of the Precinct impacts on the Town needs to be considered and planned for.

- The Strategy should support convenience shopping for the local communities in the Burswood and Curtin Specialised Activity Areas but critically assess larger proposals for their impact on the retail hierarchy.
- Any application for retail development over 5,000m^2 at Burswood or Curtin should be subject to an independently prepared retail sustainability assessment in view of the modeling
- demonstrating that the Secondary Centre would be detrimentally affected by significant retail development in the Specialised Activity Centres.

5.6 Other Activation Areas

5.6.1 CAUSEWAY

The Causeway Precinct provides a strong urban link between the Secondary Centre and Burswood.

- Strengthen the Activation Area with higher density residential adjacent to GO Edwards Park and office development elsewhere subject to achieving the standards set out in LPP 22.
- Designate the Causeway Precinct as a District Centre within the Activity Centres Hierarchy.

5.6.2 OATS STREET

This important future Activation Area at the Town's southern boundary is reliant in part on station relocation and rezoning of land from industrial use.

- Prepare for future activation by appropriate rezoning of some areas from industrial to residential/commercial and the raising of R codings or appropriate form-based codes, from low density to medium density.

5.6.3 BERWICK STREET

This centre should continue to develop as a highway commercial centre.

- Support redevelopment for higher density residential with some offices and showrooms in preference to retail uses.

5.6.4 ARCHER STREET

Archer Street offers a relatively strong Activation Area with some potential for consolidation of the surrounding residential areas.

- Strengthen the links with the Secondary Centre by reviewing up-coding possibilities within 200m of Archer Street between Mars Street and Albany Highway.

5.6.5 VICTORIA PARK STATION

This well-located area offers scope for some consolidation as a transport orientated development area.

- Review R coding, or appropriate form-based coding, directly north and south of the Victoria Park station to better consolidate the residential area and provide a stronger urban link to Albany Highway.

5.7 Local Activation Areas

A number of small centres provide a small amount of convenience shopping but limited other amenities. The Lathlain centre provides a model for emulation elsewhere – in part as a result of improvements in the public domain the centre thrives.

- Maintain the existing convenience shopping which provide focal points in the residential districts and make landscape improvements to the public domain where possible.

ACTIVITY
CENTRES STRATEGY

APPENDICES

PLANWEST (WA) Pty Ltd

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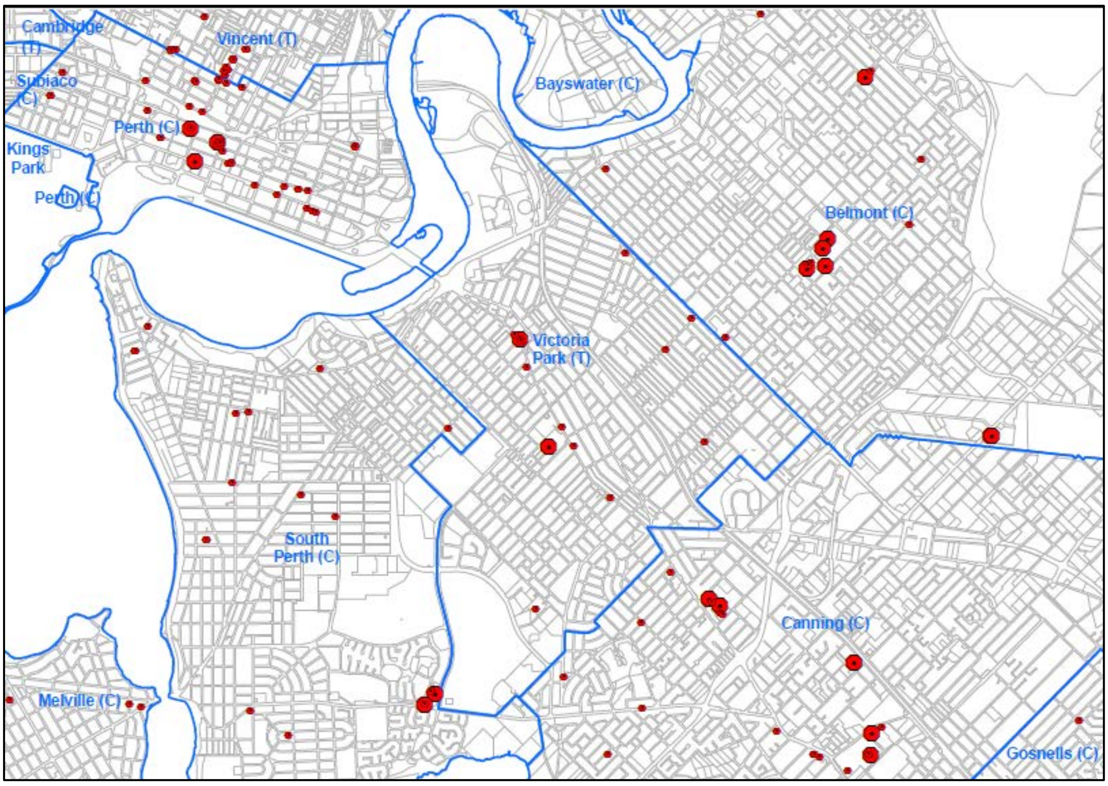
APPENDIX 1

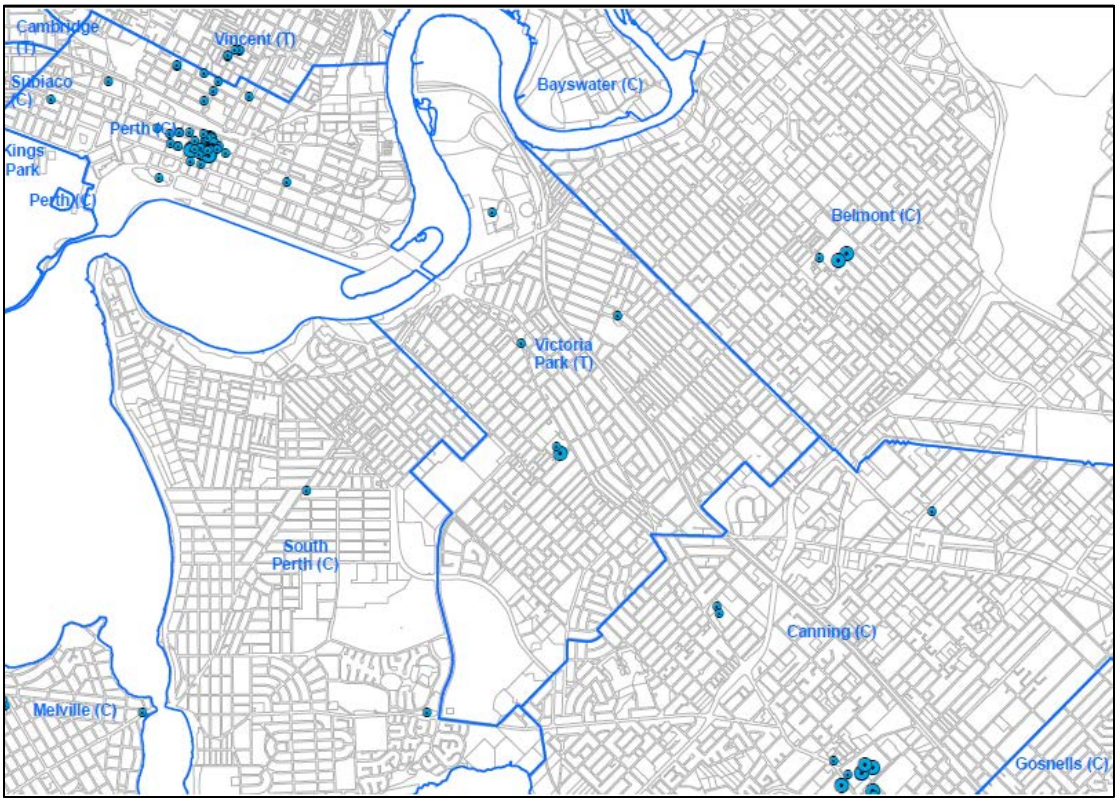
SHOP & OFFICE DISTRIBUTION IN VICTORIA PARK & SURROUNDING LOCALITIES

(SOURCE: DOP LAND USE SURVEYS 2015)

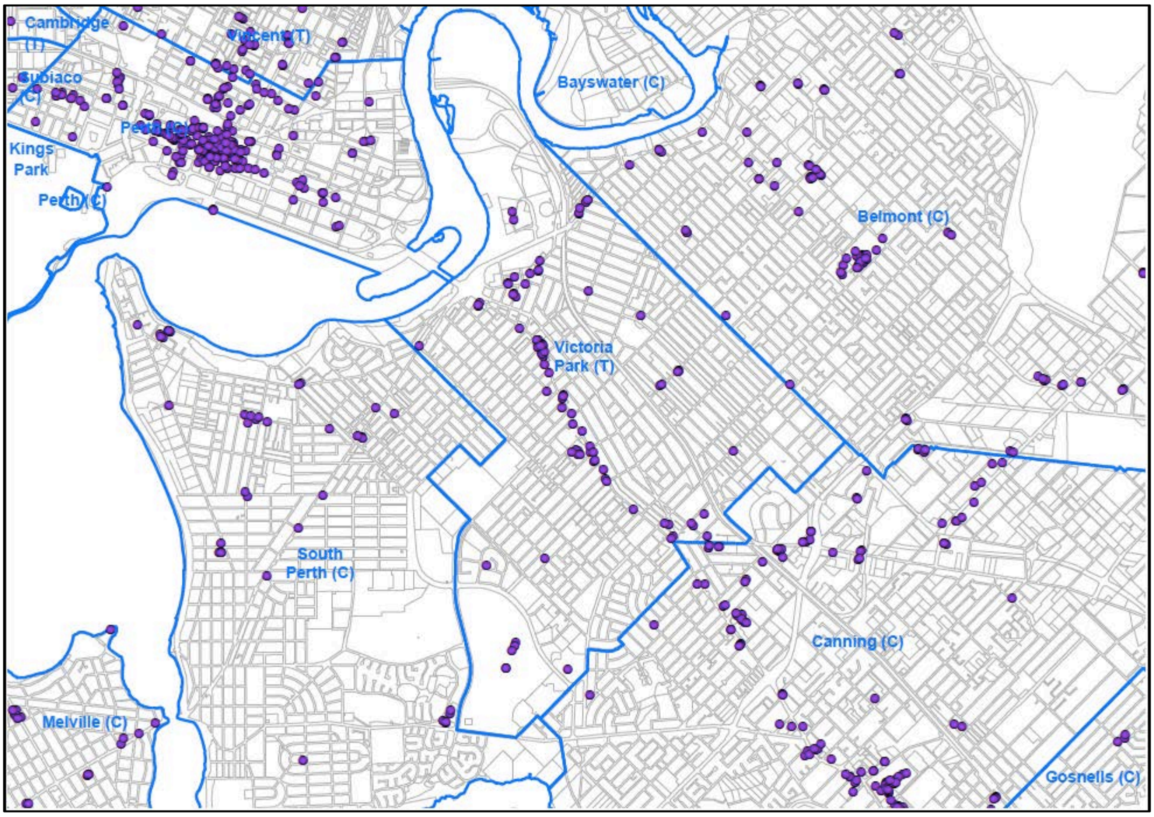
A1 DISTRIBUTION OF SUPERMARKETS



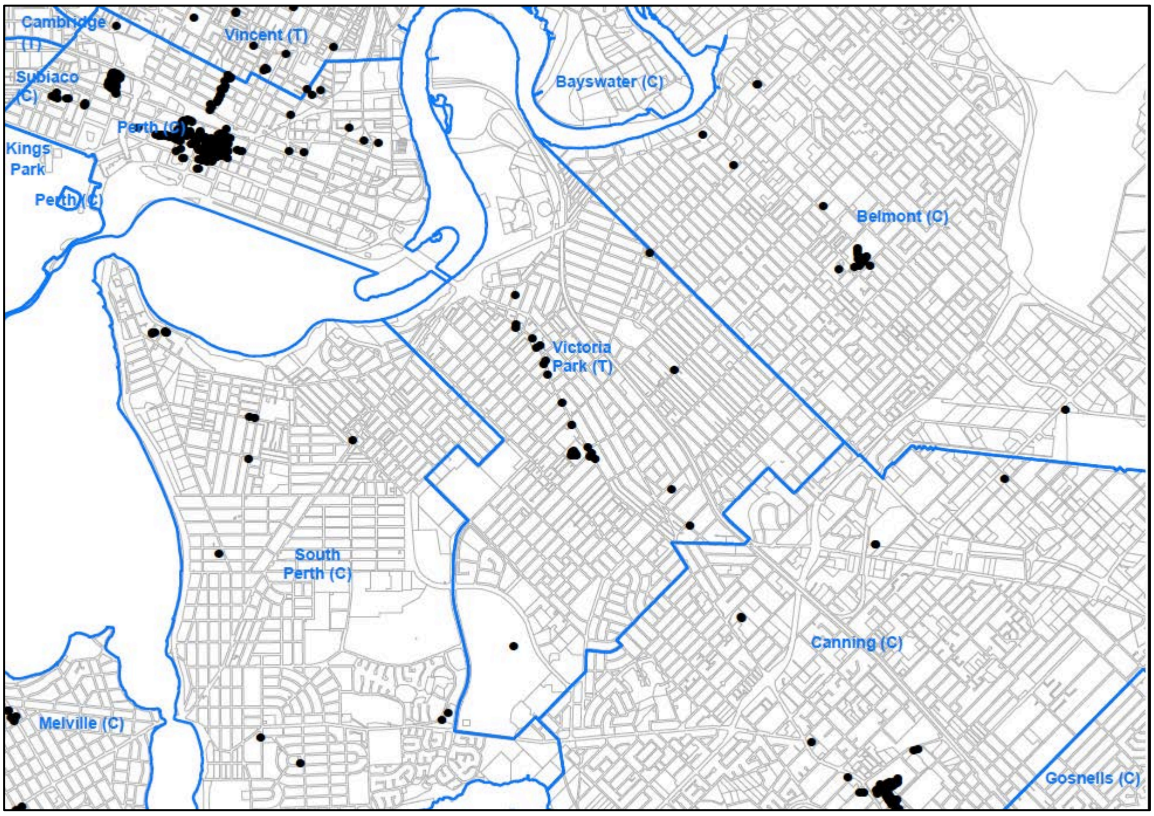
A2 DISTRIBUTION OF DEPARTMENT AND DISCOUNT DEPARTMENT STORES



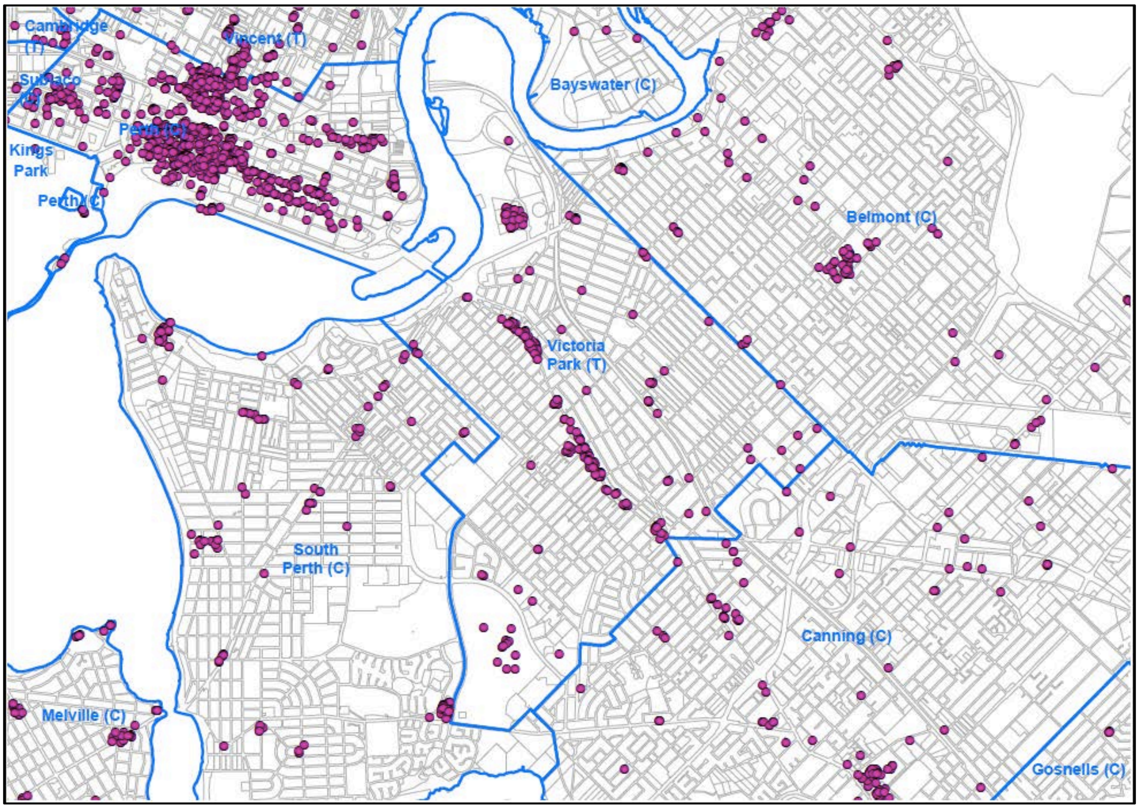
A3 Specialty Shops



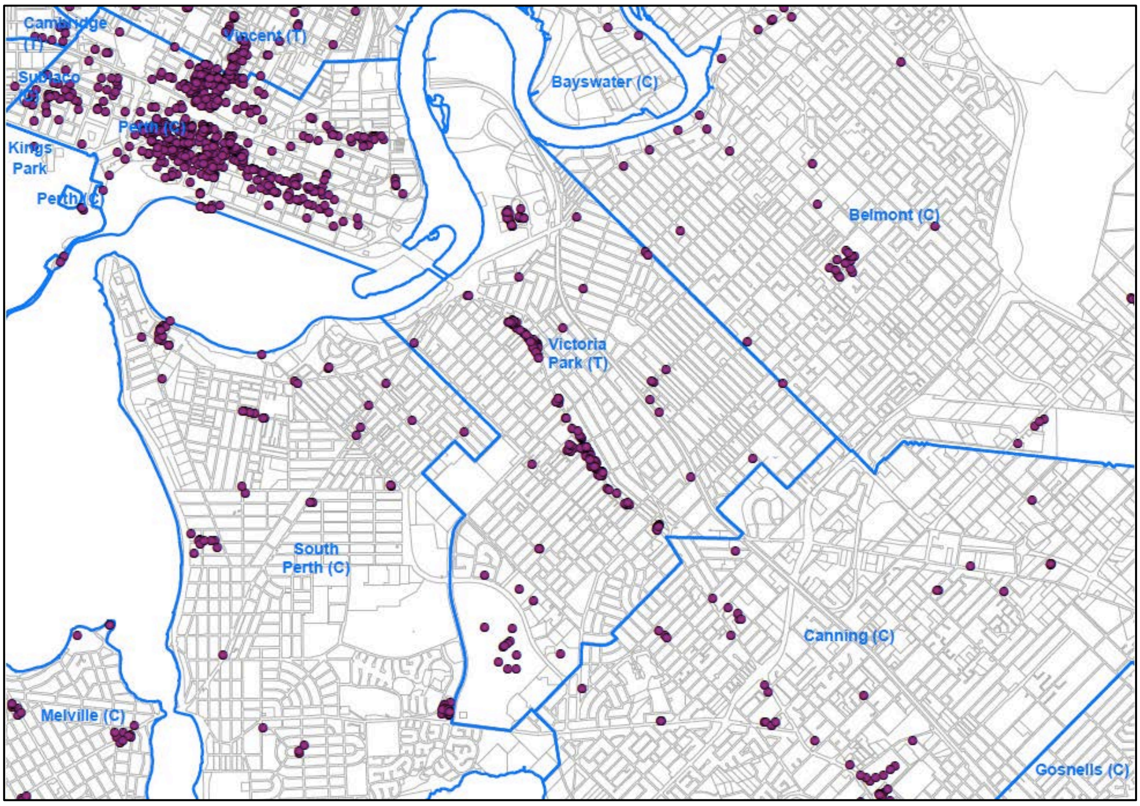
A4 Apparel Shops



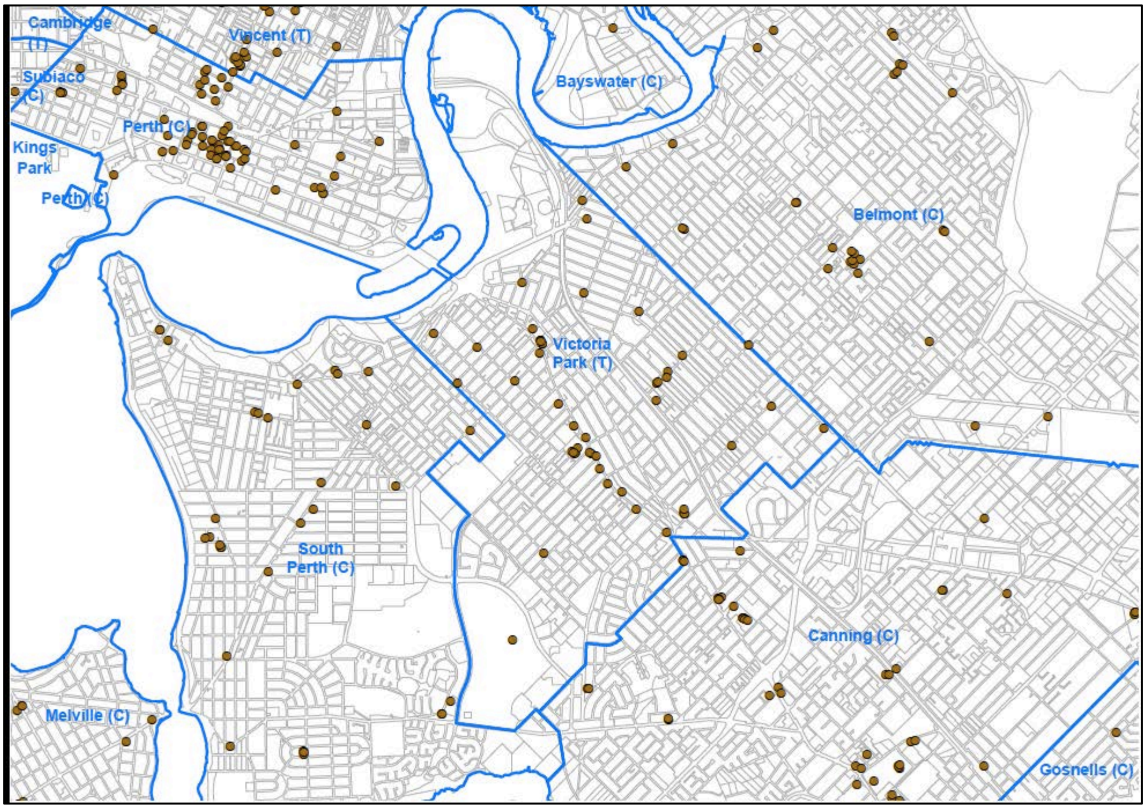
A5 RESTAURANTS CAFES TAVERNS



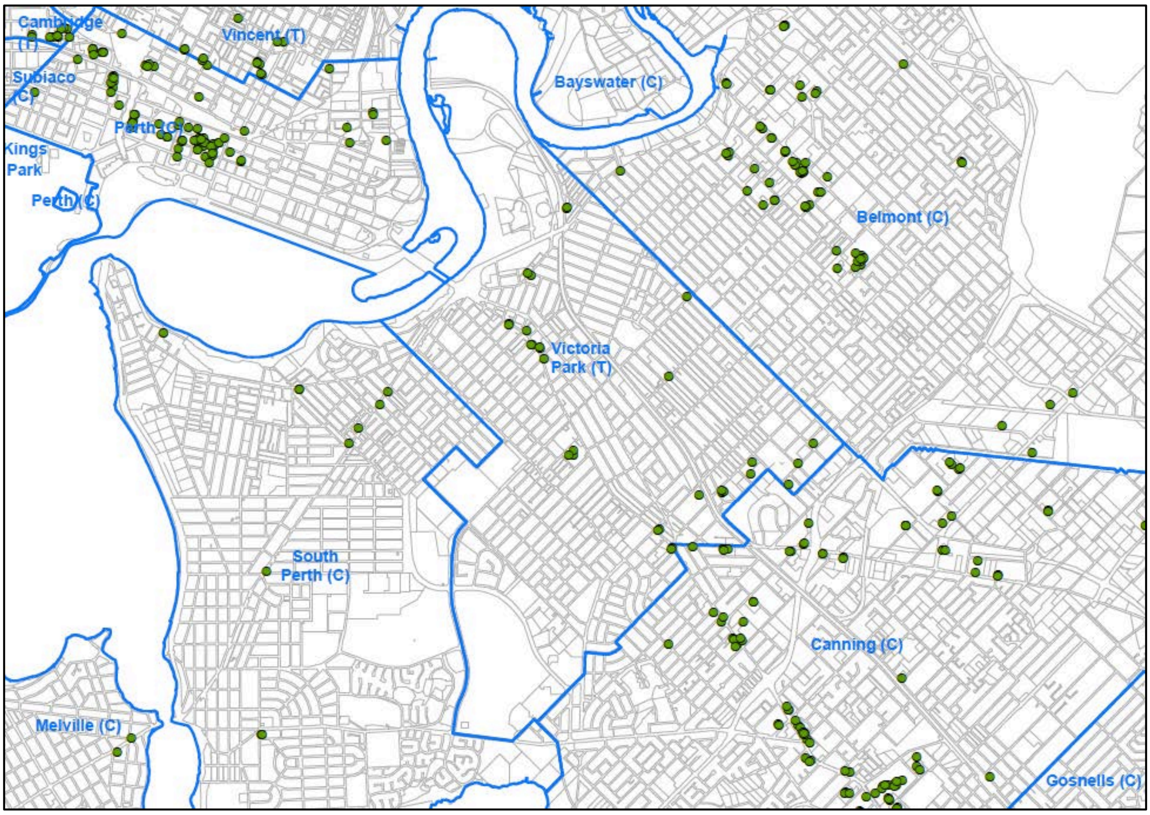
A6 RESTAURANTS



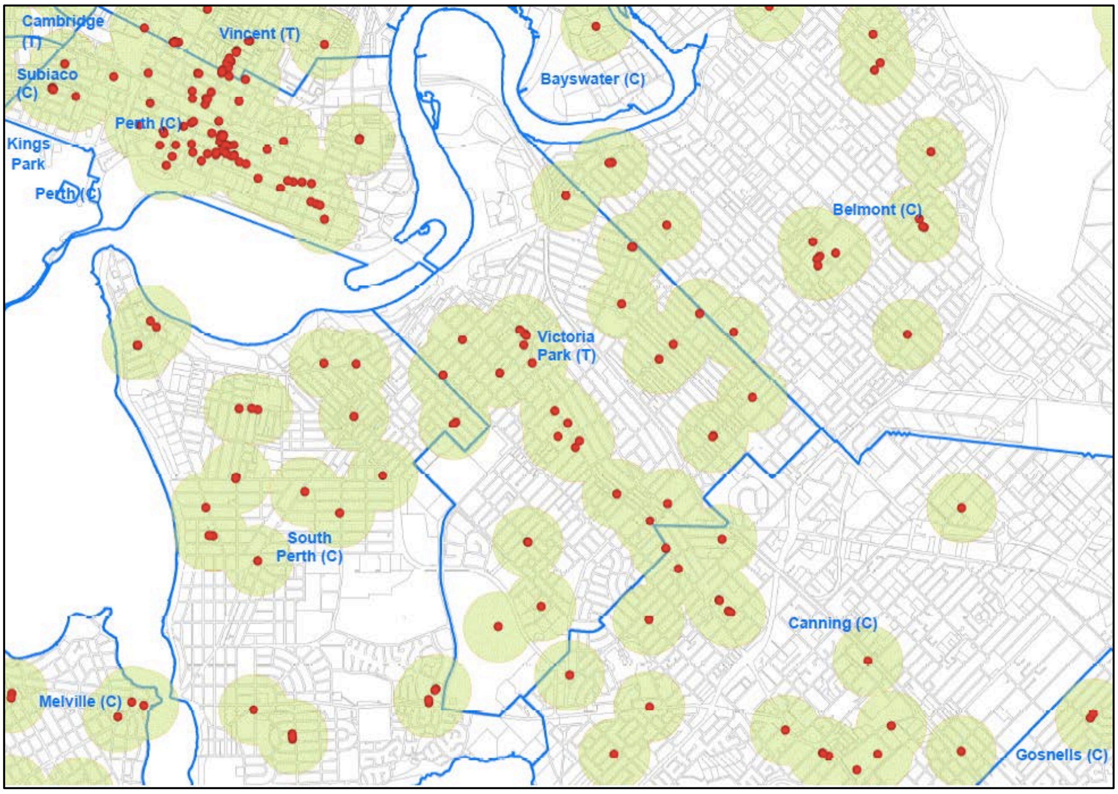
A7 Small Food and Liquor Shops



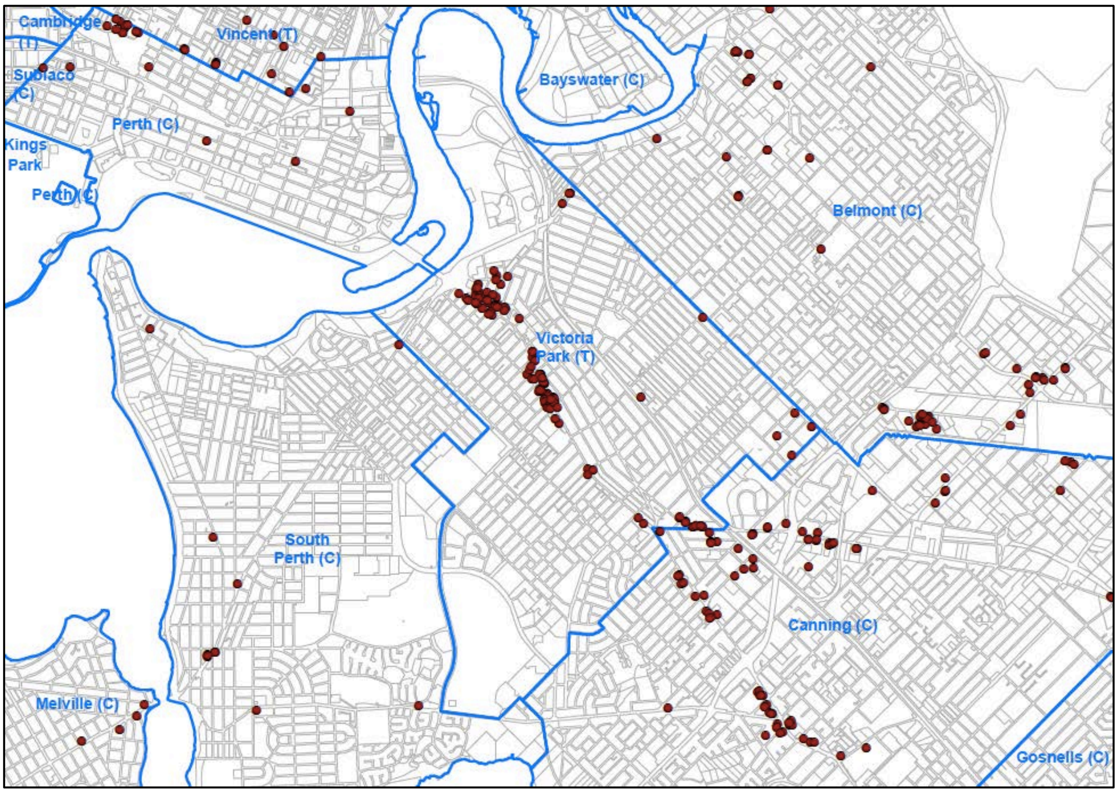
A8 Hardware, Homewares and Furnishings Shops



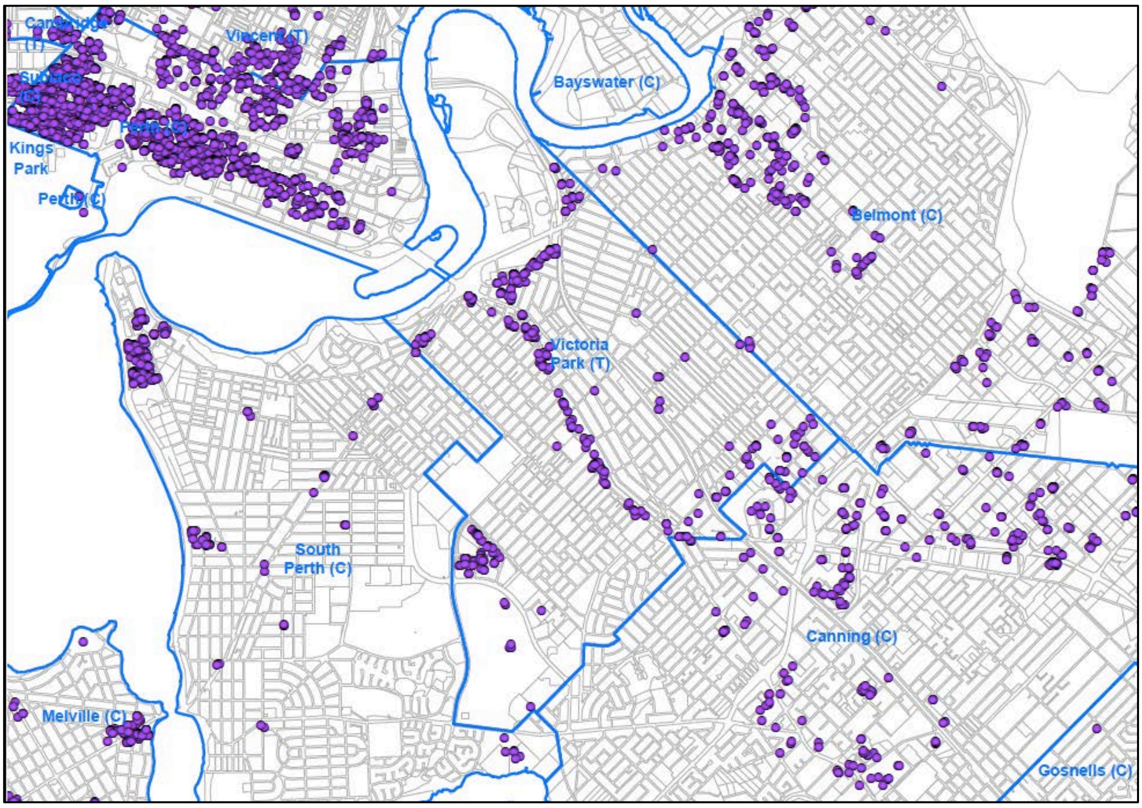
A9 THE 'BREAD AND MILK' MAP (analysis of the coverage of basic convenience shops within walking distance – 400 metres radius).



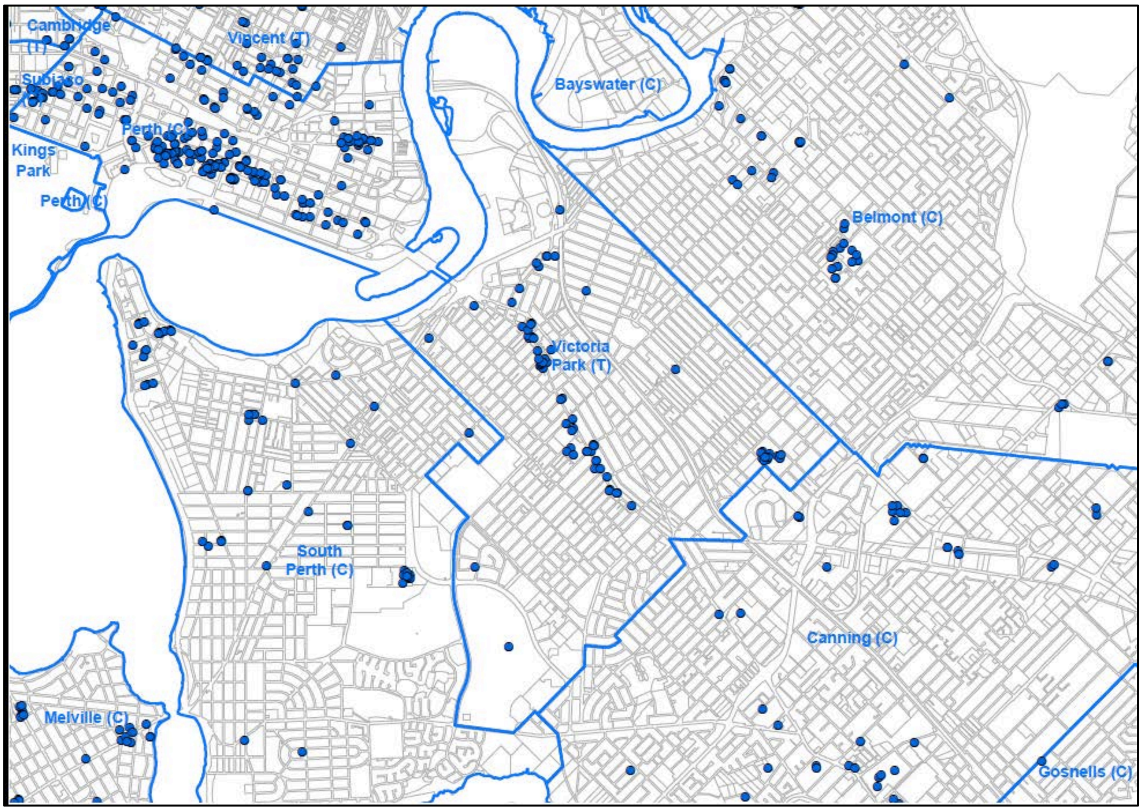
A10 AUTOMOTIVE ESTABLISHMENTS



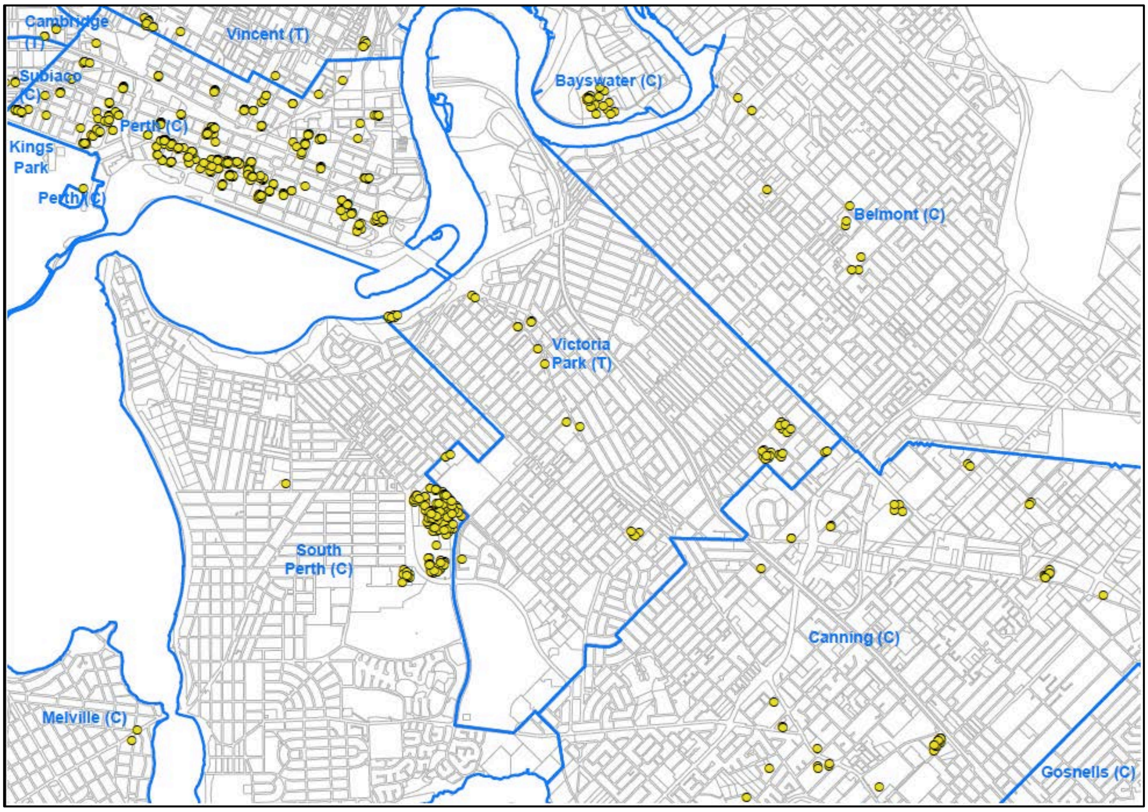
A11 Regionally Orientated Offices



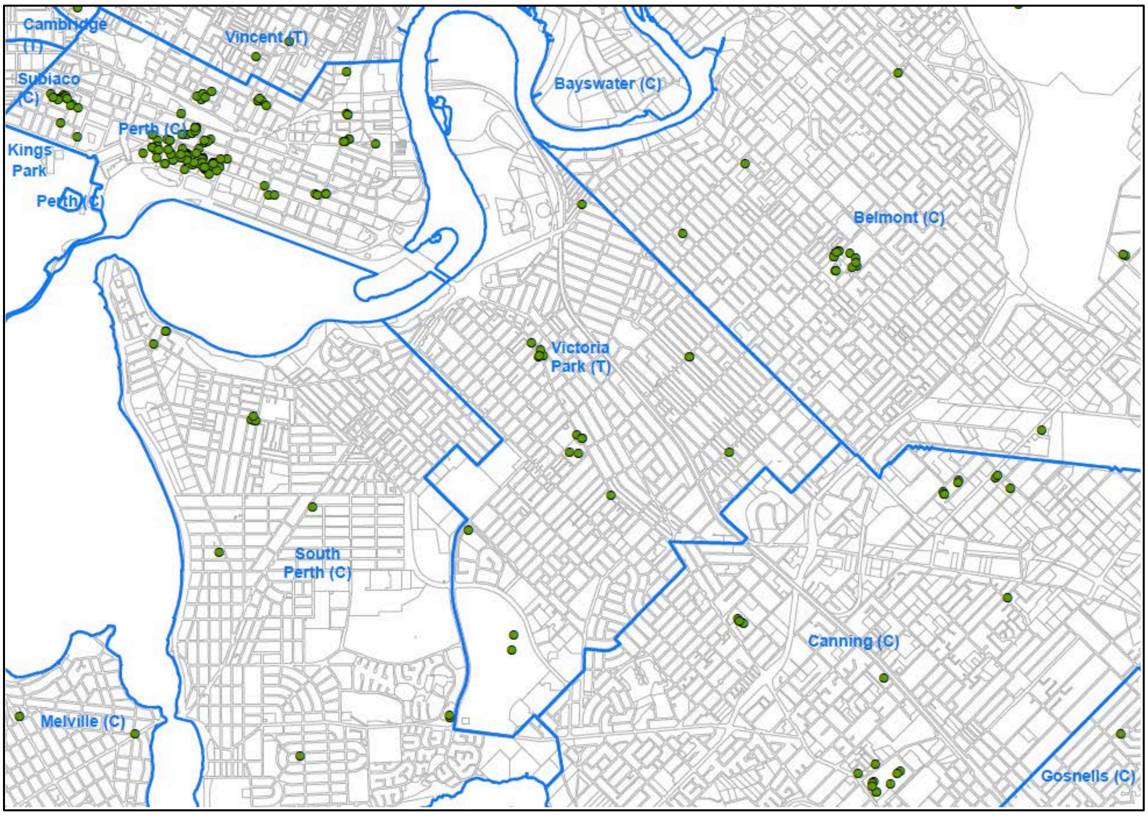
A12 Locally Orientated Offices



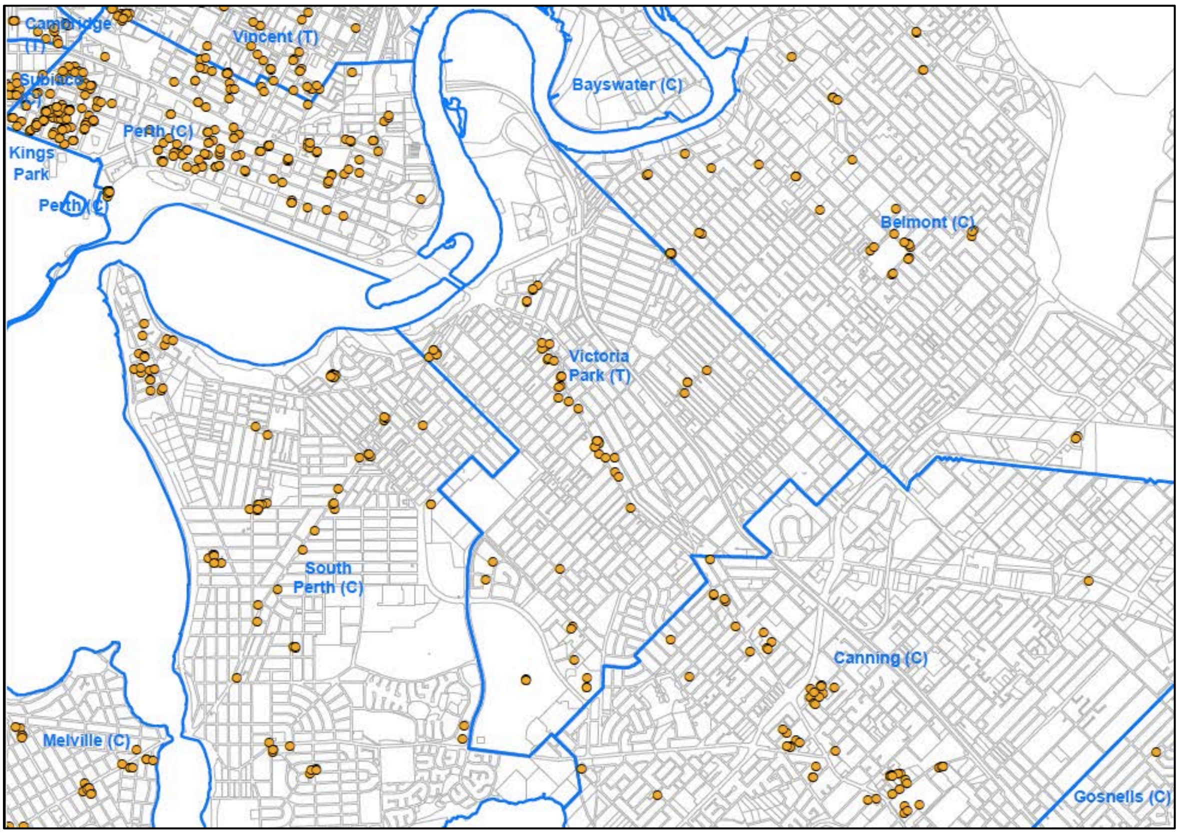
A13 Government Offices



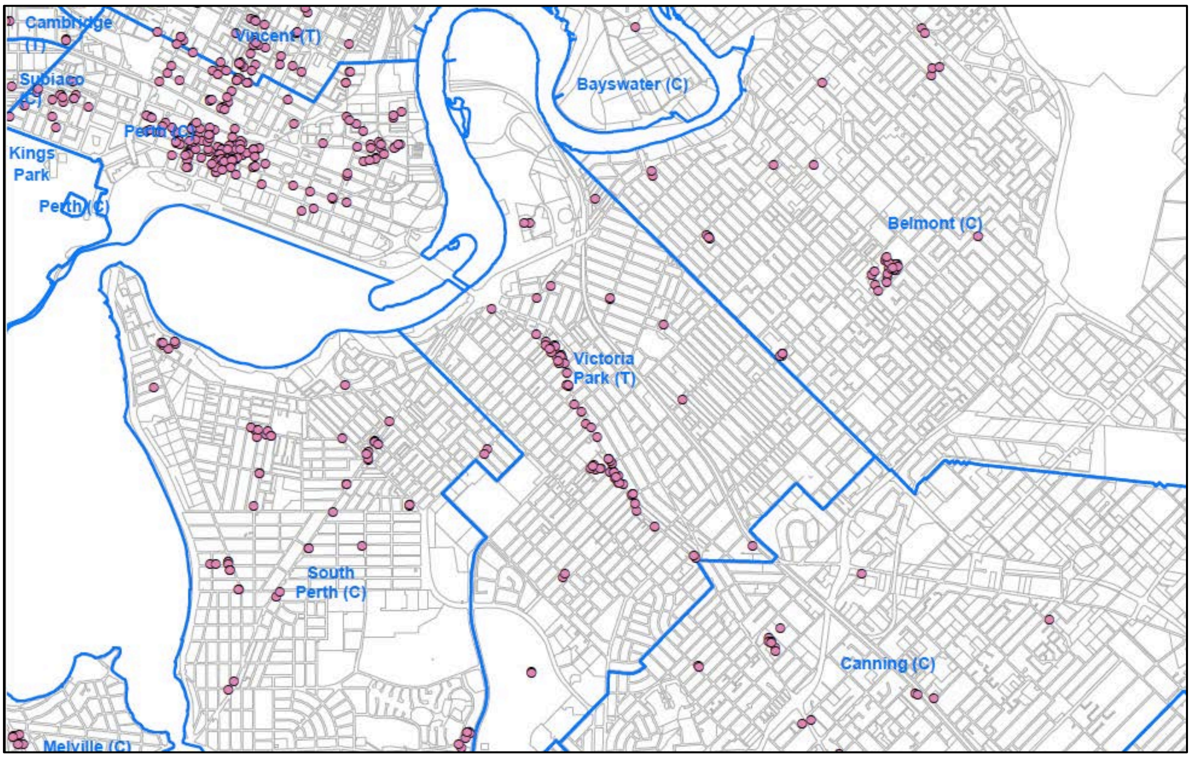
A14. Banking Services



A15 MEDICAL OFFICES



A16 PERSONAL SERVICES

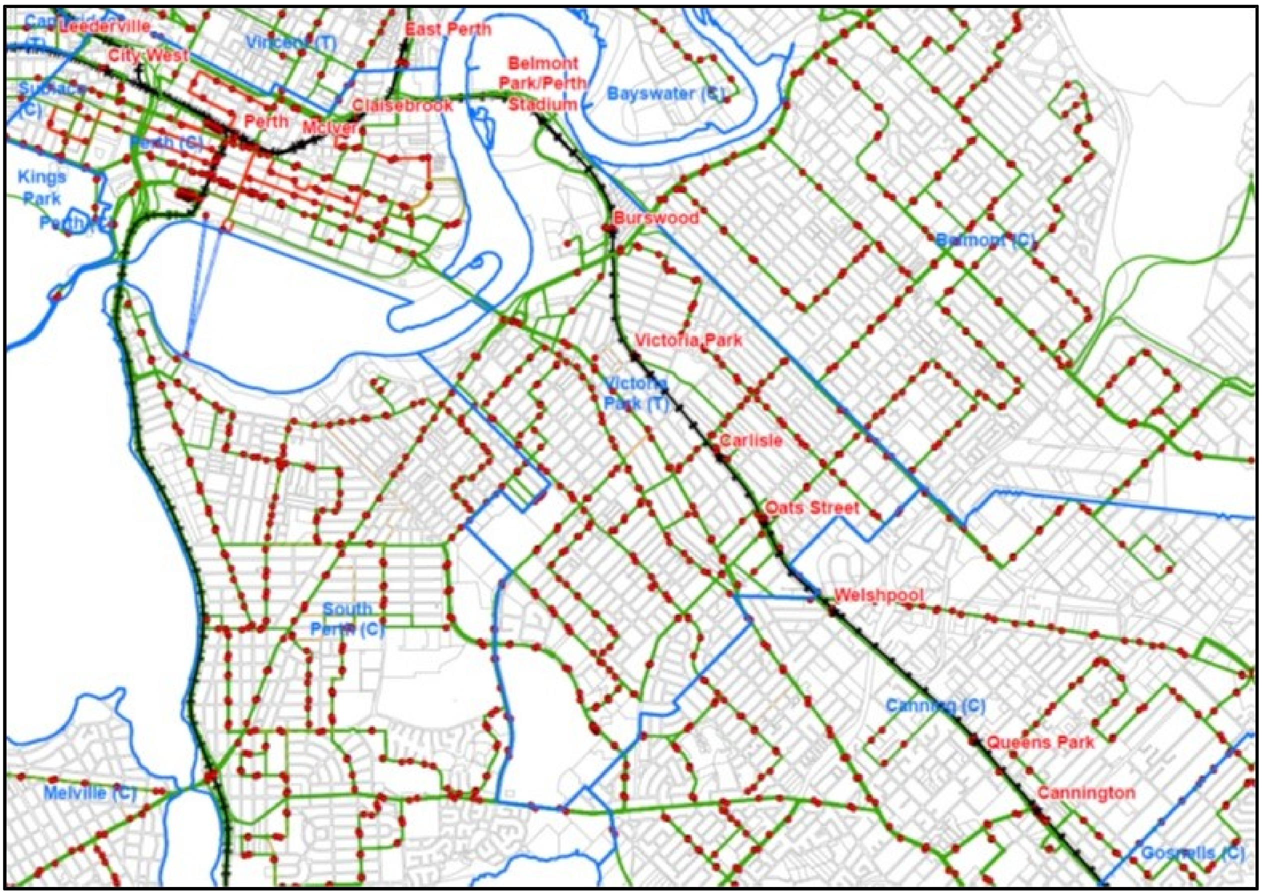


A17 BUS ROUTES, STOPS AND RAILWAYS WITH STATIONS IN AND AROUND.

Victoria Park has possibly the best public transport frequency of service in the metropolitan region, especially to and from Perth.

Buses serve all of the zoned commercial areas and shopping centres along Albany Highway and in the suburbs in Victoria Park. Victoria Park also has a good train service.

There are no public transport constraints to shopping centres and commercial development in Victoria Park.



APPENDIX 2
COMMERCIAL AND INDUSTRIAL FLOORSPACE DEMAND ASSESSMENT

1 INTRODUCTION

In 2013 Planwest produced a draft activity centres strategy for the town of Victoria Park. The data used in the analysis draft strategy was derived from the 2007 commercial and industrial land use survey produced by the Department of Planning. Since then the Department carried out a more recent land use survey in 2015 and the data has been made available for this report.

A comparison of the 2007 and 2015 land use surveys indicates that there has not been much change in the commercial and industrial structure in Victoria Park. The major change has been in the redefinition of the boundaries of the activities centres in the 2015 surveys to include areas outside those zoned for commercial and industrial uses.

The population data used in the 2013 draft strategy was derived from the 2011 ABS Census and subsequent analysis carried out by consultants for the town of Victoria Park on that Census data
For the most part the work carried out in 2013 is just as relevant today as it was then. The work in this analysis is therefore an update of the work carried out in 2013 rather than a complete rewrite.

2 POLICY STATEMENT SPP 4.2

SPP 4.2 requires that local activity centres strategies, where they are to be parts of local planning strategies must undertake a retail needs assessment. For ease of reference the relevant clause is given below.

6.2.2 Retail Needs Assessment

(1) Local planning strategies provide an information base to support planning decision making by including an assessment of projected retail needs of communities in a local government area and its surrounds. They should take account of the impacts of strategy proposals on adjacent local government areas and existing or planned centres.

(2) The local planning strategy should show the estimated retail need and indicative distribution of floorspace across the activity centres in the local government area, consistent with the activities centres hierarchy.

(3) Retail needs assessments are also intended to guide district and activity centre structure plans, and generally include:
- *The projected population and its socio-economic characteristics;*
- *household expenditure and required retail floorspace;*
- *changing shopping patterns and trends; and*
- *The needs of different retail sectors.*

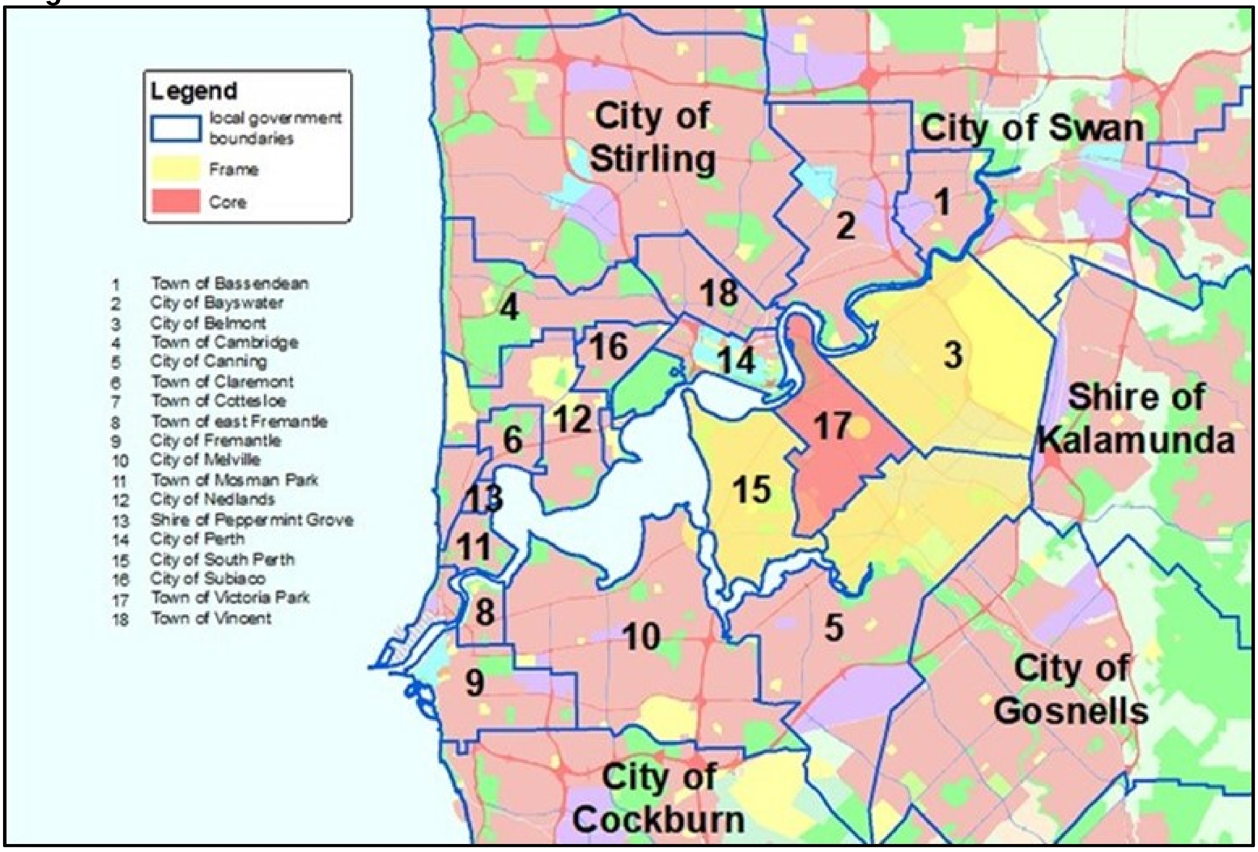
The analysis of a retail needs assessment is based on the land use data collected by the Department of Planning from time to time of all commercially zoned land in the metropolitan region. There have been a number of such surveys undertaken since 1990, the latest being the 2015 commercial and industrial land use survey. At the outset, it should be noted that the data contained in each of the surveys does have gaps and inconsistencies because it is difficult to follow exactly the same methodology is for surveying and coding the different land uses. In particular, the 2015 survey has considerable inconsistencies owing to different methodologies used for coding the different land uses. This has resulted in comparisons between land uses over time showing considerable changes to land use which do not appear to be reflected on the ground. For this reason, a careful examination has been made of the 2015 data to identify and explain some of the apparent dramatic changes in land use, especially along the Albany highway commercial strip.

Another inconsistency between previous surveys and the 2015 survey is that the boundaries for data collection have been changed to more closely reflect the definition of activity centre boundaries as contemplated in the more recent metropolitan development strategy as reflected in Perth and Peel @3.5million. Since the adoption of policy statement SPP 4.2, now that activity centre boundaries have been realigned to extend beyond areas zoned for retailing, commercial and industrial purposes, there are substantial gaps in the non-commercial data collected in the land use surveys.

3 The Study Area for Analytical Purposes

The study area is divided into two parts which constitute the primary and secondary trade areas. The core or primary trade area comprises the Town of Victoria Park. The frame comprises the secondary trade area and includes the local authorities of Belmont, South Perth and Canning north of the Canning River.

Figure1: Town of Victoria Park Core and Frame Trade Areas



Source: Planwest

Because of very strong competition to the south and the east of Victoria Park the trade area to the south and east is truncated. To the south the Bentley District shopping centre and the Cannington strategic metropolitan centre are both located on Albany Highway, which is the principal commercial thoroughfare through Victoria Park. The recent City of Canning Activity Centres Strategy showed that virtually the whole of Victoria Park fell within the primary trade area of the Carousel shopping centre from which 50% of Carousel's trade is drawn. The Carousel shopping centre is currently in the process of a major expansion which is likely to siphon off most, if not all, of any expansion in trade potential within its trade area.

The primary trade area for the Bentley District shopping centre also has a major part of its primary trade area in Victoria Park, elongated to the north along Albany Highway. Perhaps fortunately for Victoria Park, the modelling and an inspection of Bentley District shopping centre shows that it is not trading very strongly and does not therefore, despite its proximity, have a major impact on the shopping along Albany Highway.

To the east, the Belmont Forum shopping centre has a primary trade area very close to the western boundary Victoria Park. Its secondary trade area, which accounts for up to 25% of the Bentley District shopping centre trade potential covers the whole of Victoria Park.

To the west, Victoria Park will benefit to some extent from trade emanating from the central and northern parts of South Perth. However, the local road system, aside from Canning Highway, is not conducive to easy movement between South Perth and Albany Highway in Victoria Park.

Bounded as it is by large shopping centres to the west and south, commercial development in Victoria Park will continue to have a truncated trading area which does not extend southwards and eastwards beyond the local authority boundary. Hence it is the socio-economic characteristics of the Victoria Park community which has in the past, and will continue to be in the future, the determinant of the existing and future potential of commercial development in the Town. For this reason it is studied in much finer grain than the outer frame areas in the forecasts of future floorspace demand.

4 THE PROJECTED POPULATION AND ITS SOCIO-ECONOMIC CHARACTERISTICS

People are consumers of goods and services and the number of people is the primary generator of retail floorspace demand. It is true that demand can be widely influenced by socio-economic conditions where extremes prevail, but in developed countries such as Australia the per capita consumption for modelling purposes can be averaged quite accurately.

The population geographical units used in the retail model are based on Main Roads WA traffic zones and population forecasts for these zones by the Department of Planning and Forecast .id. These are summarised by local authority in **Table 1**.

There are several variables that will affect these projections in the short to medium term. The most notable are the planned housing developments within the Burswood Peninsula in the future. The Burswood Peninsula developments will have a significant impact on the population forecasts in the longer term as it is the last remaining undeveloped large site in the town.

The table below includes the increase in population likely to result from this project.

Table 1: Summary of Population Projections for Victoria Park and the Main Trade Area

	2011	2016	2021	2026	2031	2036
Vic Park	34,802	39,084	42,936	47,371	52,052	57,044
S Perth	43,694	46,218	49,811	52,250	56,922	62,377
Belmont	37,100	42,380	44,499	46,724	49,060	51,513
N Canning	32,784	40,017	45,818	51,826	57,682	63,259
Totals	**148,380**	**167,699**	**183,064**	**198,171**	**215,716**	**234,193**

Source: Forecast .id based on the 2011 census

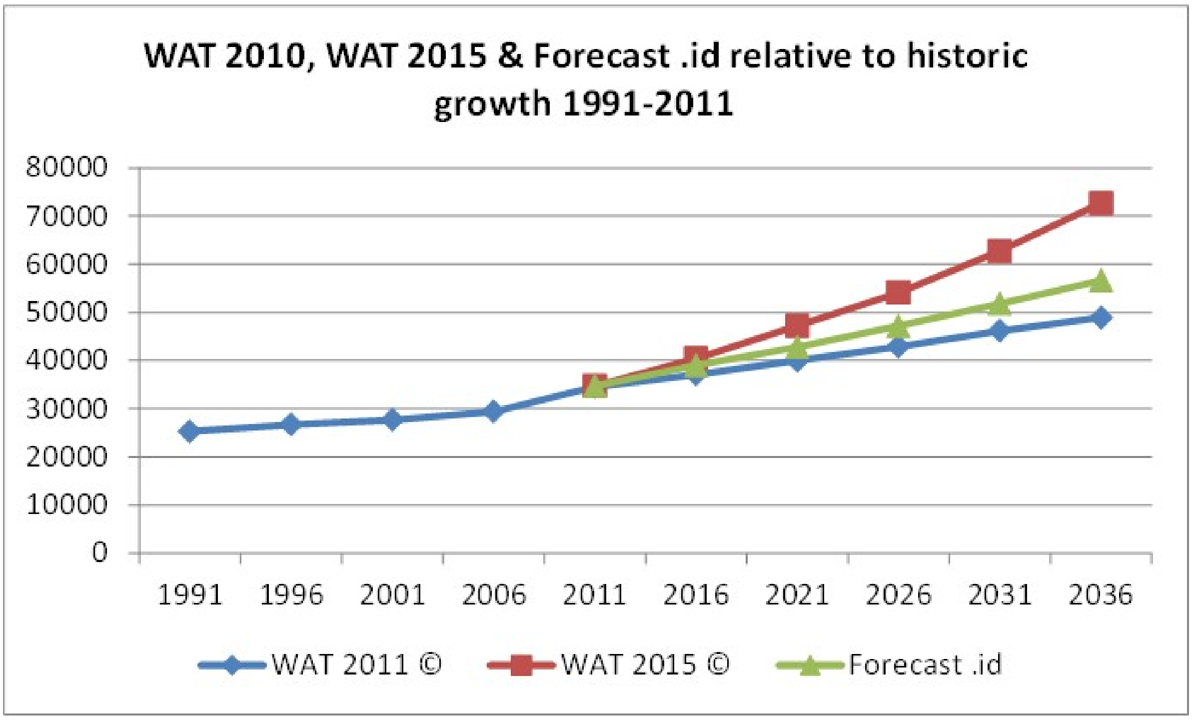
The Forecast .id projection for Victoria Park is not the only forecast that has been made. A comparison is made in the diagram below showing the historic growth of population in Victoria Park between forecasts made by the Department of Planning and those made by Forecast .id.

Table 2: Victoria Park - Different Five Yearly Projected Population Growth 2011-2036

	2011	2016	2021	2026	2031	2036
WAT 2011 ©	33,600	37,100	40,000	42,900	46,150	48,900
WAT 2015 ©	34,720	40,430	47,190	54,070	62,708	72,700
Forecast .id	34,734	39,024	42,817	47,179	51,780	56,625

WA Tomorrow 2010, W.A. Tomorrow 2015, by the Department of Planning, and Forecast .id.
Note; the figures in red are trend projections based on the 2011-2026 compound annual increase between 2011 and 2026. The .id forecasts are as provided by Victoria Park. It is noted that in the latest release of the ABS estimated residential population (ERP) for Victoria Park for 2016 indicates a population of 36,755. It would appear that the forecast .ID projections for 2016 of 39,026 were 6% optimistic. However as there are no updated population projections the floor area assessments made later in this report are based on the population projections in **Table 2** above.

Graph 1: Different population forecasts for Victoria Park 2011 – 2036 relative to historic growth 1991 – 2011



ABS Census (Historic), WA Tomorrow 2010, W.A. Tomorrow 2015, by the Department of Planning, and Forecast .id.

In the graph above the red line derived from W.A. Tomorrow (2015) can be regarded as aspirational, based on the growth of the in areas of Perth foreseen in Perth and Peel @3.5million. It is based on an additional 19,000 new dwellings being constructed (and occupied) in Victoria Park by 2031. The second green line is the Forecast .id forecast. The third blue line by the Department of Planning In W.A. Tomorrow (2010) is a forecast based on the previous trend 1991 – 2011. There is a difference of 23,800 between the Department for Planning aspirational and the trend line projections.

The trend line (the blue line) forecasts an increase in population in Victoria Park of 8,900 between 2016 and the 2036. The aspirational forecast (the redline) shows a growth of about 32,300 or about 3 ½ times the trend forecast. The Forecast .id forecast (the Green line) is in between, with a growth of 17,600. It must be a question of judgement over which of the forecasts above to use in the assessment of floorspace demand for activity centre uses in Victoria Park. More will be said about this later.

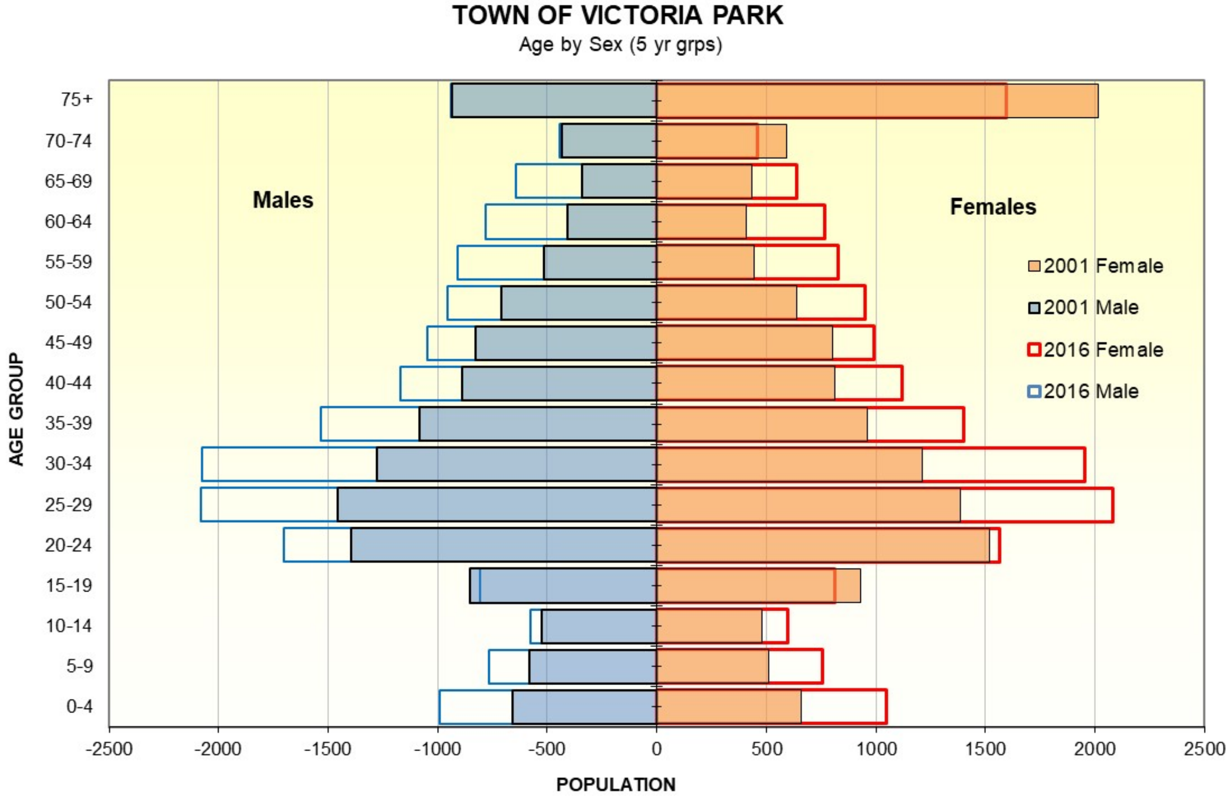
Once the full 2016 Census results become available it will be interesting to check how the three different forecasts are comparing. However, based on preliminary results the population growth 2011-2016 appears to be closer to the trend line in the graph above.

The important implication of the discussion above to the activity centres strategy is that if the shopping floorspace demand of the future Burswood Peninsula population is provided or exceeded on the Peninsula, the growth and refurbishment prospects for the existing shopping structure of the town are marginal.

5 POPULATION CHARACTERISTICS

Since 2001 the Town of Victoria Park has had an age structure typical of stable inner-city suburbs. Although the population has expanded, the age structure has remained relatively constant. There has, however been a reduction in the number of aged people over 70. There are relatively few dependent children, a concentration of young adults, fewer of family caring age and a fairly heavy contingent of older people. These characteristics are reflected in the population pyramid for Victoria Park in 2001 and 2016 supplied by the Australian Bureau of Statistics. It is doubtful that the recent high density residential development that has taken place at Burswood Peninsula now and in the future will affect the overall social demographic profile of the town to a significant degree. It will likely have a higher economic demographic then the current average for Victoria Park. High density residential will tend to attract the same age demographic that is characteristic of the population pyramid depicted below.

Graph 2: TOWN OF VICTORIA PARK POPULATION PYRAMID 2001 and 2016



Source: Australian Bureau of Statistics Census compiled by Planwest

While the population pyramid above shows an increase in age groups up to the age of 69, with a decline in the older age groups between 2001 and 2016, the overall shape remains. The pyramid above is typical of the inner suburbs of the Perth Metropolitan Region. Its dominant feature is the lack of a young base of dependent children, so much so that the typical 'pyramid' is rather an ‘urn’. The pattern has been constant for a considerable period although numbers have increased slightly. The pattern is expected to continue into the foreseeable future.

While the population pyramid above shows an increase in all age groups up to the age of 64, with a decline in the older age groups between 2011 and 2016, the overall shape remains. The pyramid above is typical of the inner suburbs of the Perth Metropolitan Region. Its dominant feature is the lack of a young base of dependent children, so much so that the typical ‘pyramid’ is rather an ‘urn’. The pattern has been constant for a considerable period although numbers have increased slightly. The pattern is expected to continue into the foreseeable future.

This is an important factor in determining spending patterns. The typical pyramid found in the outer suburbs which is shaped more like a pyramid is indicative of high weekly spending on food and groceries and other everyday household necessities. The pyramid (as opposed to the urn shape in the figure above) is major supermarket country and major supermarkets favour the developments of large District Shopping Centres.

The ‘urn’ demographic spending patterns are not so focused on bulk shopping and bargain hunting. Shoppers tend to be older and more discerning. The urn represents more convenience shopping at the local level and higher order comparison shopping at the regional level. When combined with higher residential densities and income levels the ‘urn’ is fertile country for the cafes and restaurants as is now becoming evident along Albany Highway since 2011.

The inference to be drawn from this data is that there will be increasing demand for niche comparison speciality shopping providing opportunities for redevelopment and refurbishment of the existing retail stock rather than the development of additional shops. Bulk shopping represented by weekly grocery shopping will remain constant relative to the population.

6 HOUSEHOLD CHARACTERISTICS

As shown in **Table 3**, between 2011 and 2016 there was an increase in household sizes of three per dwelling and above, both numerically and proportionally. This may be indicative of an increase in families with children returning to Victoria Park but it is still too early to tell given the stability of the population pyramid shown above where children in the 0 - 15 year range are increasing slowly but they are still below the metropolitan average.

Table 3: Household size

Town of Victoria Park	2016		2011	
Number of persons usually resident	Number	%	Number	%
1 person	4,278	31.5	4,426	33.8
2 persons	4,841	35.6	4,685	35.8
3 persons	2,126	15.6	1,996	15.3
4 persons	1,628	12.0	1,358	10.4
5 persons	510	3.8	435	3.3
6 or more persons	204	1.5	186	1.4
Total classifiable households	13,587	100.0	13,086	100

Source: Australian Bureau of Statistics, Census of Population and Housing 2016 and 2011. Community.id, for the Town of Victoria Park.

The increases in household size carry through to household type in **Table 4.** There is an increase in couples with and without children between 2011 and 2016.

Table 4: Household Types

	2016			2011			Change
Households by type	**Number**	**%**	**Greater Perth%**	**Number**	**%**	**Greater Perth%**	**2011-2016**
Couples with children	3004	20.4	32.3	2676	19	31.6	328
Couples without children	3776	25.6	25.4	3498	24.8	25.7	278
One parent families	1003	6.8	9.8	996	7.1	9.9	7
Other families	333	2.3	1.3	345	2.4	1.4	-12
Group household	1182	8	3.8	1149	8.1	4	33
One person household	4278	29	21.7	4423	31.4	22.4	-145
Other not classifiable household	988	6.7	4.8	806	5.7	3.9	182
Visitor only households	169	1.1	1	206	1.5	1.1	-37
Total households	**14733**	**100**	**100**	**14099**	**100**	**100**	**634**

Source: Australian Bureau of Statistics, Census of Population and Housing 2011 and 2016. Compiled by Community.id, for the Town of Victoria Park Community Profile

Table 5 is indicative that Victoria Park is predominantly comprised of low density houses which tend to hold, on average, larger households. In the future as higher density housing increases proportionally in Victoria Park it can be expected that the average household size will decline.

Table 5: Calculation of Average Household Size 2016

(Victoria Park - Enumerated)	2016			2011			Change
Dwellings	**Number**	**%**	**Town of Victoria Park %**	**Number**	**%**	**Town of Victoria Park %**	**2011 to 2016**
Occupied private dwellings	4,043	--	--	4,037	--	--	6
Persons in occupied private dwellings	8,430	--	--	8,478	--	--	-48
Average household size (persons per dwelling)	2.08	--	2.2	2.1	--	2.18	-0.02

Source: Australian Bureau of Statistics, Census of Population and Housing 2016 and 2011. Compiled by Community .id, for the Town of Victoria Park Community Profile

In many ways Victoria Park is typical of the modern inner suburbs of Perth. The process of preferred inner city living and renewal of old housing stock is beginning. For younger people with good long-term prospects it is becoming a desirable address, but it is still quite far behind South Perth, for example, in this regard.

7. Per Capita Income 2016

Table 6 provides the spread of incomes for the Victoria Park population compared with that of the Greater Perth region.

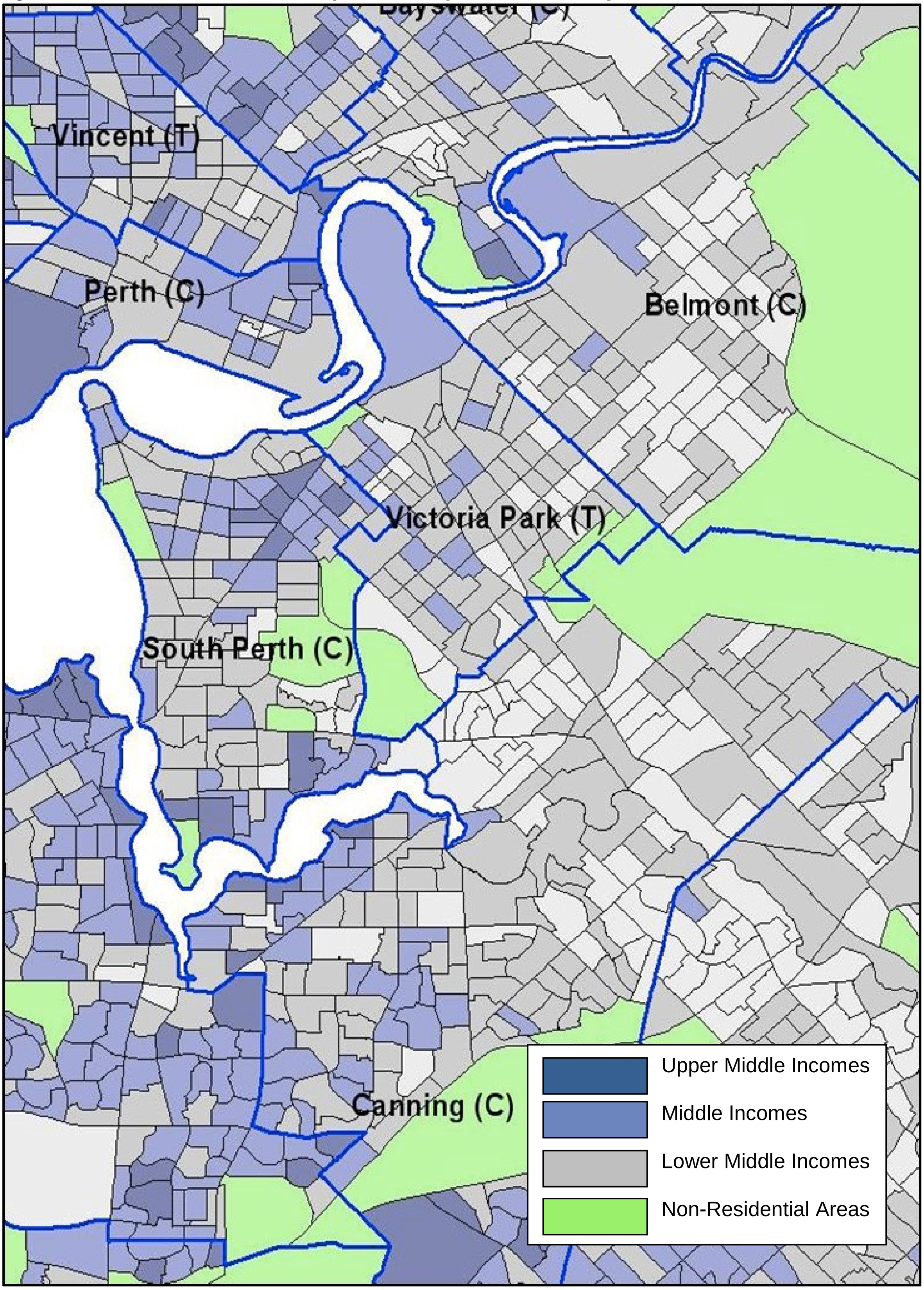
Table 6: Town of Victoria Park: Per Capita Weekly Income Groups 2016

Weekly individual income			
Town of Victoria Park - Persons aged 15+ (Usual residence)	2016		
Weekly gross income	Number	%	Greater Perth %
Negative Income/ Nil income	3,073	10.2	10.7
$1 - $149	1,039	3.4	4.4
$150 - $299	1,790	5.9	6.5
$300 - $399	1,932	6.4	7.2
$400 - $499	2,139	7.1	6.9
$500 - $649	1,920	6.3	6.7
$650 - $799	1,732	5.7	6.4
$800 - $999	2,142	7.1	7.4
$1,000 - $1,249	2,472	8.2	8.5
$1,250 - $1,499	1,886	6.2	6.2
$1,500 - $1,749	1,604	5.3	5.5
$1,750 - $1,999	1,253	4.1	4
$2,000 - $2,999	2,260	7.5	6.8
$3,000 or more	1,244	4.1	4.3
Not stated	3,769	12.5	8.6
Total persons aged 15+	**30,255**	**100**	**100**

Source: Australian Bureau of Statistics, Census of Population and Housing 2016. Compiled by Cmmunity.id, for the Town of Victoria Park Community Profile.

Figure 2, derived from the 2016 Census, gives an indication of the per capita incomes in Victoria Park, compared to some of the surrounding local authorities. It is evident that the South East corridor, to the south of Victoria Park, is in the lower income brackets. Victoria Park itself has since 2006 showed an increasing per capita income indicative of the more recent move to inner city living by those who can afford it. For purposes of retail analysis income levels in the South East corridor tend to reflect that the predominant types of shopping will be convenience shopping with the main anchor shops tending to be discount Department stores and supermarkets. High end shopping is likely to be more restricted than could be expected in the western suburbs of Perth where income levels are generally higher. The most obvious change to the retailing in Victoria Park especially along Albany Highway reflecting increased household incomes, is the increase in restaurants and cafes.

Figure 2: Distribution of Per Capita Weekly Income Groups 2016



Source: ABS 2016

In summary, Victoria Park's socio-economic characteristics could be described as mixed but predominantly working class, small, lower to upper middle-income households comprised of young adults or retirees without dependent children.

From a commercial perspective it can be inferred that there will be a relatively low demand for bulk, high retailing establishments, chain supermarkets, Discount Department Stores etc. However, increased population density, especially in high and medium density housing brings with it demand for niche retailing, retail services and recreational retail such as restaurants.

There is, on the other hand, likely to be slowly growing demand for small office space from the large and growing professional class, to meet the escalating trends in self-employment.

8 Per Capita Expenditure and Retail Floorspace Requirements

In all previous land use surveys conducted by the Department of Planning only retail in commercial areas were included in the retail shopping policies that the Department produced from time to time going back to the early 1970s. Although retail shopping in industrial areas was also surveyed it did not feature in retail policies and strategies. Consequently, local authority commercial strategies followed suit.

In the 2015 commercial and industrial surveys the data captured has included activity centres which were previously not surveyed and also re-aligned centre boundaries based on activities rather than zoning. For example, the 2015 land use survey includes the Burswood Peninsula and the Bentley – Curtin Specialised Activity Centre. These additional areas have included an amount of floor area classified as retail but entailing such uses as cafes, restaurants and function centres in addition to small food outlets (canteens) which would probably serve only people living or employed on the premises.

To be able to compare the 2015 land use data with previous surveys to observe trends over time the following analysis has extracted retail shopping floor areas for 2015 from commercial zoned areas only.

As population is the main driver of floorspace demand it is useful to get a good idea of the relationship of population to shopping floorspace in any particular locality over time. Over the preceding years, as far back as the first land use surveys in 1976, it has been found that for the metropolitan region as a whole the average per capita floorspace for suburban retail shopping (in shopping centres small and large) has been of the order of 1.74m^2. However, it has also been found that outer suburbs are well below this average while inner suburbs such as Victoria Park are well above. The reason for the inner suburbs having a higher per capita ratio is that they have inherited a large legacy of old shops, many of which are used for marginal retailing purposes that are under performing in terms of turnover generated compared to newer shops in the outer suburbs.

Table 7: Shop Net Lettable Area 1991-2015

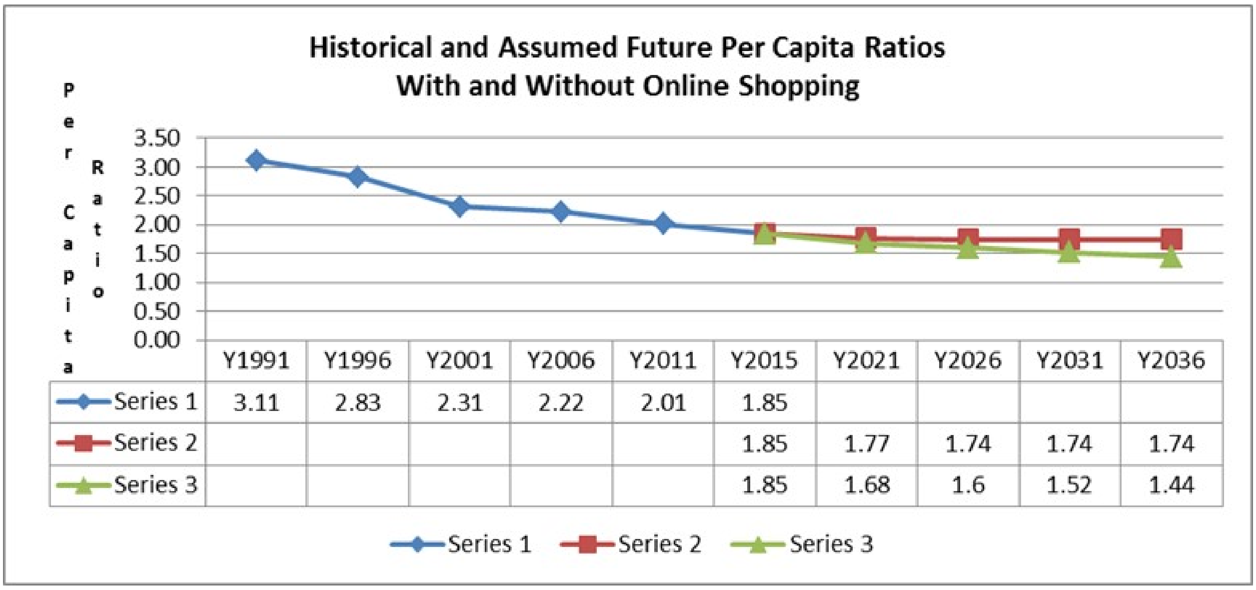
	1991	1996	2001	2006	2011[1]	2015[2]
ERP	25297	26719	27688	29404	32433	36755
SHP[2] nla m^2	78645	75515	63929	65286	65286	67916
Per Capita	3.11	2.83	2.31	2.22	2.01	1.85

Source: ABS Census, Department of Planning land use surveys 2007 (the 2011 figure for floorspace is the same as the 2007 floorspace because there was no observable increase in retail floorspace between 2006 – 2011.)

The trend in the per capita ratio of shop floorspace to population over the 24-year period 1991 – 2015 has been downwards as shown more clearly in **Graph 3**.

[1] The ERP shown for 2011 and 2016 is the population for Victoria Park from ABS Census 2011and 2016
[2] The nla for 2015 is taken from the 2015 PLUS survey.

Graph 3: Historical Trends and Future Assumptions in Per Capita Shop Floorspace Ratios for Victoria Park.



	Y1991	Y1996	Y2001	Y2006	Y2011	Y2015	Y2021	Y2026	Y2031	Y2036
Series 1	3.11	2.83	2.31	2.22	2.01	1.85				
Series 2						1.85	1.77	1.74	1.74	1.74
Series 3						1.85	1.68	1.6	1.52	1.44

Source: Historical and current populations and Shop nla m^2 for shopping centres in Victoria Park

In the above graph, Series 1 is the historical per capita ratio of shop floorspace to population in Victoria Park between 1991 and 2015. Series 2 is the assumed future per capita ratio between 2015 and 2036 on the basis that previous trends will continue. Series 3 gives an indication of the impact on floorspace requirements on a per capita basis should online shopping (“e” Trade”) account for 20% of retail shopping spending by 2036 (21 years).

Graph 3 indicates that over the past 24 years the per capita floor area ratio in shopping centres has been falling on average 2.23% per annum (Series 1). This is apparent because the shopping floorspace declined between 1991 and 2007 and has remained relatively constant between 2007 and 2015, over the same period the population of Victoria Park has been increasing. The question is will per capita floor area ratio continue to fall in the future? We believe so. As the population continues to grow and until the average of about 1.74m^2 per capita is reached, turnover levels per square metre will reach a level that will support refurbishment and minor increases in new shop floor area (Series 2). This process has already begun and will accelerate towards 2021 and beyond.

Series 3 in **Graph 3** represents the possible impact of “e” trade on physical shopping floor space requirements per capita in the future. The use of electronic media directly linked to retailing establishments to allow customers to shop from home is a relatively new phenomenon. The jury is still out on the extent to which retailing will go this way, but earlier indications were below early expectations. However, there are indications that this is changing. In the last decade there has been considerable literature speculating on future directions for retailing.

We believe recent developments, such as the imminent opening of major distribution centres in all major cities by the internet retailing giant Amazon, will have an impact on the amount of physical shop floorspace per capita required. We have therefore tested the impact that online shopping could have on the shop floorspace requirements for the future shopping structure in Victoria Park.

9 FORECASTING FUTURE RETAIL SHOPPING FLOORSPACE REQUIREMENTS

It has been accepted by the Department of Planning that retail floorspace requirements can be calculated two ways, via the income and expenditure approach or modelling based on per capita floor area ratios. In this analysis both approaches are used for comparison purposes.

There are two types of retailing which function differently: ancillary retailing and normal competitive retailing.

Non-competitive – Ancillary retail depends on the drawing power of main function and does not follow laws of competition because it depends on success of main function, for example Burswood Casino and Bentley-Curtin. The retailing in industrial areas such as lunch bars etc is also mainly ancillary. This type of retailing is virtually independent of the normal shopping structure in Victoria Park and does not compete with it. It is considered independent. This type of shopping has not been included in the retail assessment and is not modelled.

Competitive – depends on its drawing power relative to its competition. The type normally found in centres where the theory of retail competition has been the subject of research since the 1960's and is well understood. This type is the subject of the retail assessment and is modelled.

The total amount of shop-retail in Victoria Park identified in Victoria Park in the 2015 land use survey was 88,889m^2. Of this, 65,577m^2 is competitive and 23,312m^2 is ancillary or NAC (not elsewhere classified). The future shop floorspace proposed in the Burswood Peninsula District Structure Plan (2015) and the Bentley-Curtin draft structure Plan (2017) is regarded as competitive and has been included in the analysis. (The figures for Victoria Park floorspace do not precisely match those used in Chapter 3 of the main report. The reason for this is that Chapter 3 aims to provide a comparison with earlier years and therefore excluded retail in industrial areas, development on reserved land and land occupied by residential uses).

10 INCOME EXPENDITURE

Data for income is readily available from the 2016 ABS Census and is reliable. However, data for expenditure patterns for relatively small geographical areas such as local authorities has proved so unreliable that the Australian Bureau of Statistics no longer follows the practice. Current statistics are based more on household expenditure characteristics for State and metropolitan areas.

Table 8 shows the per capita gross weekly incomes for persons over 15 years in Victoria Park.

Using the median of the income groups in **Table 8** multiplied by the number of people in each category it is possible to calculate a reasonable approximation of the gross weekly and annual incomes and an average annual income for the 15+ year old population of Victoria Park.

The overwhelming majority of shops in Victoria Park are strip shops, which we believe would reflect the turnover per m^2 discussed above (suitably adjusted to 2016). Of these most of the older shops would be tending towards the lower end of the turnover scale for strip shops, which may explain why refurbishment and redevelopment is very slow.

It is our opinion that there are some shopkeepers in Victoria Park, especially in the old small local clusters of shops who are "basically buying a job", which may explain the fluctuating types and number of shops in these locations over succeeding survey periods.

Table 8: Per Capita (15 years +) Gross Weekly Income

Weekly income	Victoria Park Number	%	Greater Perth %
Neg/Nil Income	288	2.1	1.6
$1 - $149	133	1	0.7
$150 - $299	313	2.3	1.9
$300 - $399	430	3.1	2.4
$400 - $499	902	6.6	5.4
$500 - $649	586	4.3	3.8
$650 - $799	730	5.3	5.8
$800 - $999	797	5.8	5.6
$1,000 - $1,249	1,002	7.3	7.3
$1,250 - $1,499	854	6.2	6.7
$1,500 - $1,749	783	5.7	5.8
$1,750 - $1,999	752	5.5	5.6
$2,000 - $2,499	1,518	11	11.3
$2,500 - $2,999	855	6.2	7
$3,000 - $3,499	622	4.5	4.7
$3,500 - $3,999	768	5.6	4.6
$4,000 - $4,499	277	2	2.4
$4,500 - $4,999	272	2	2.3
$5,000 - $5,999	255	1.9	2
$6,000 - $7,999	192	1.4	1.6
$8,000 or more	23	0.2	0.2
Not stated	1,395	10.1	11.4
Total households	13,747	100	100

Source: Australian Bureau of Statistics, Census of Population and Housing 2016. Compiled and presented by .id, for the Town of Victoria Park Community Profile.

11 ASSUMPTIONS FOR RETAIL EXPENDITURE AND SHOP $TURNOVER

In an unpublished analysis carried out by the author in 2004 of a number of retail studies by retail consultants between 1994 and 2004 it was found that shop $turnover per m^2 increased by about 1.5% per annum over that period. In this report this finding is carried over into the modelling for the period 2016 – 2036 for Victoria Park.

The ABS Catalogue 1370.0 - Measures of Australia's Progress, 2010 states that:
"Australia experienced real per capita income growth throughout the past two decades (with the exception of the period of economic downturn in the early 1990s), averaging 2.1% growth per year in real net national disposable income per capita over the 20-year period to 2008-09. Between 1998-99 and 2008-09, growth averaged 2.6% per year, considerably higher than the average growth experienced over the previous decade (1.5%). The lower growth rate in the earlier period was partly the result of negative growth during the recession of 1990-1992."

For the purposes of this study it is assumed that a 2.1% growth in real disposable income will continue for the period 2016-2036. It is also assumed that average shop turnovers per m^2 will match that 1.5% pa.

The overwhelming majority of shops in Victoria Park are strip shops, which we believe would reflect the turnover per m^2 discussed above (suitably adjusted to 2016). Of these most of the older shops in would be tending towards the lower end of the turnover scale for strip shops, which may explain why refurbishment and redevelopment up until now has been very slow.

It is our opinion that there are some shopkeepers in Victoria Park, especially in the old small local shops in the suburbs who are "basically buying a job", which may explain the fluctuating types and number of shops in small local shopping centres in Victoria Park over succeeding survey periods.

Choosing an appropriate average turnover level for shops in Victoria Park is therefore a matter of judgement, but given the indicative turnovers above for 2016 and what has been said about the character of the shopping in Victoria Park an average turnover of $6,657 per square metre in 2016 has been adopted for analytical purposes.

A further assumption has been included. Provision has been made for the possible impact of "e" trade on available retail expenditure in five yearly intervals between 2016 and 2036. The assumption used is that by 2036 "e" trade will capture 20% of the available retail expenditure. This assumption is considered conservative. The relationship of retail expenditure to floor requirements is not direct. By 2036 a 20% fall in expenditure availability translates into a 17% fall in shop floorspace potential. Part of the reason for this is that takeaway food is a substantial part of the existing "e" trade in the metropolitan area but because it is sourced from local restaurants and cafes it still represents local shopping expenditure. Other forms of "e" trade siphon off local expenditure to distant distribution centres which are not part of any local shopping structure. Remote "e" trade does not provide the same employment and other benefits as local shopping. This latter scenario may be the case once powerful worldwide "e" trade organisations like Amazon open operations in Western Australia.

Using these assumptions, the retail expenditure for Victoria Park for the period 2016, 2026 and 2036 has been calculated to provide a measure of the retail floorspace requirements over this period.

Table 9: Calculation of Retail Floorspace Requirements 2016-2036 Using the Income and Expenditure Approach Showing the Possible Impact of "e" Trade

		2016	2026	2036
1	PTA Population Forecasts	47010	56124	67402
2	Per Cap expenditure on Shop/Retail increasing @2.1%pa	$9,567	$11,777	$13,341
3	Victoria Park annual retail expenditure (1x2) ($000s)	$449,743	$660,972	$899,207
4	Acceptable Average T/O per m^2 increasing at 1.5% pa	$6,657	$7,726	$8,966
5	Supportable floorspace to promote redevelopment and refurbishment m^2 (3/4)	67,559	85,552	100,291
6	Possible Impact of "e" Trade on supportable floorspace	0%	-8%	-17%
7	Supportable floorspace after "e" trade (m^2)	67559	78668	82999

Source: Planwest, see discussion above.
Note 1: The Primary Trade Area for Albany Highway includes all of Vic Park and the suburbs of Kensington and South Perth east of Douglas Avenue

The total floor space survey for Victoria Park and the 2015 land use survey was 65,577m^2 (noting the qualifications provided in section 9 above). **Table 9** indicates that on the basis of the assumptions used for the impact of "e" trade the available retail expenditure should be able to support an additional 15,440m^2 of retail floor area in Victoria Park by 2036 without any additional shopping competition. However, if by 2036 the 59,000m^2 of retail contemplated in the Burswood Peninsula District Structure Plan (2015 Department of Planning) is realised there will be a significant overprovision of retail floorspace. Also, if the 10,000m^2 of additional retail floorspace contemplated in the draft Bentley Curtin structure plan (Department of Planning, 2017) is added by 2036, the overprovision of retail floorspace is exacerbated. However, as we will discuss below it will become evident that the retail proposals for Burswood Peninsula in particular are over-optimistic and it is considered likely that they will be revised downwards or abandoned.

There are two shortcomings to this expenditure approach outlined in **Table 9**. The first is that there is no spatial context of available retail expenditure to the geographical locations of the shopping centres in Victoria Park. However, Planwest considers the results are a good indicator of the expenditure potential available to shops in Victoria Park because in the context of the surrounding competition within the trade area for Victoria Park is essentially the local authority area and the north-east corner of South Perth.

12 THE SPATIAL MODELLING APPROACH

The alternative approach uses spatial modelling to assess retail floorspace requirements in different locations in Victoria Park based on the distribution of population growth in the town. Three models were built, one for each of the years 2016, 2026, and 2036. The results are summarised in **Table 9**. The model was set up to contain the retail centres and shown in **Figure 3**.

In all previous retail assessments modelling carried out by Planwest, the location of activity centres was taken as the centroid of each activity centre modelled. For Victoria Park these centroids had been virtually constant since the early Department of Planning land use surveys dating back to 1991. All this is now changed. The boundary of the activities centres in Victoria Park is very different to what they were previously. While this may be the case the localities of the concentration of retail activities has not changed and consequently it has been possible to assume centroids for modelling purposes as they were used for previous exercises undertaken in 2003 and 2013 for Victoria Park.

The outputs for the models developed for Victoria Park for the years 2026 and 2036 are **NOT** recommended floorspace caps. They are generalisations built on assumptions, which may or may not be relevant in the future. At best they should be regarded as indicators of the potential for future expansion and refurbishment. It must be remembered that there is a considerable amount of vacant floor area in Victoria Park which may well be used by new tenancies in place of constructing new buildings.

In the model, only occupied retail floor area is modelled. The model is then used to calculate future hypothetical requirements at specified time periods. In the case of Victoria Park as a whole, which has a moderate vacancy rate especially in the small centres outside Albany Highway, any indications of any additional retail floor area potential modelled may not be an indication of new shops to be developed but a take-up in the vacant floor area.

The Burswood Peninsula District Structure Plan proposes three new shopping centres. Firstly, 31,000m^2 of retail floor error is proposed for Belmont Park. Secondly, 20,000m^2 of retail floor area is proposed in the locality just west of Burswood railway station. Thirdly, a further 8000 m^2 of retail floor area is proposed east of the Burswood railway station. The total additional retail floor area proposed in the Burswood structure plan is 59,000m^2. This amounts to a 90% increase over the total retail floor area identified in the 2015 land use survey for the whole of Victoria Park.

Figure 3 - Town of Victoria Park Activation Centres showing previous shopping centre centroids

Source: Planwest, DoP

For modelling purposes, it has been assumed that the Belmont Park District shopping centre would be operational by 2036. The same assumption is made the additional 10,000m² proposed Curtin University.

In our 2013 Report we noted that the proponents of a large shopping centre at Belmont Park argued that it would be 'iconic'. The shops would be of a special nature that would attract wide ranging custom and would not therefore compete with the local existing and future shopping structure in Victoria Park. The Hillary's Marina would be considered an example of an 'iconic' development. However, we note that in the District Structure Plan there is no mention of 'iconic' or any statement to the effect that the proposed shopping centre would not comprise typical shops that would compete with the existing future shopping infrastructure in Victoria Park. We have therefore built this competitive assumption into our modelling.

13 BENTLEY-CURTIN SPECIALISED ACTIVITY CENTRE DRAFT STRUCTURE PLAN 2017

In the previous two local commercial strategies undertaken by Planwest for the Town of Victoria Park it was assumed that there was no shop retail floorspace in Curtin University for purposes of the Activity Centres Strategy. Of the 5,204m² of shop retail floorspace identified in the 2015 land use survey, 3,554m² was distributed amongst 17 premises in Curtin University. Virtually all of this floorspace, which was dispersed throughout the campus, was oriented to serving the needs of students and staff on the campus. The location of the numerous food and catering outlets classified as restaurants, cafes or function centres in the 2015 land use survey were located such within the campus that they are unlikely to attract a public clientele and therefore they will have no competitive impact on the other shopping structure in Victoria Park.

The draft structure plan proposes an additional 10,000m² shopping floorspace to be introduced in equal parts over 20 years. The exact configuration of this additional shopping is not explained but earlier ideas contemplated a village-style centre at the north-west corner of the University campus. For purposes of the modelling undertaken the 10,000m² has been allocated to this location.

14 DISCUSSION OF THE MODELLING RESULTS

Prior to modelling, the model was calibrated to reproduce, as closely as possible, the Department of Planning 2015 shop floorspace data for Victoria Park. The calibration of the model is difficult and a perfect match of model output to surveyed data is never possible. The models used for this report had a calibration of 1% or less for larger centres under 7% in small centres. The percentage variation for small centres tends to be larger than for larger centres because any small difference in shop floor area in small centres shows up as a larger percentage than it does in the larger centres. Nevertheless, the calibration achieved is acceptable for the purpose of the modelling in this report.

Further assumptions were made in the modelling about competing major shopping centres outside Victoria Park, firstly, that the proposed expansion of the Carousel strategic metropolitan centre to 128,000m² would be complete by 2019. Secondly, the proposed expansion of Garden City shopping centre to 120,000m² was assumed be completed by 2020. Thirdly, Bentley Plaza District shopping centre, just south of the local authority boundary, was assumed to expand to 20,000m² by 2026. Fourthly, Belmont Forum shopping centre (the Belmont town centre) was assumed to stay at its current size of 50,000m². Appropriate increases in the floor area of district and neighbourhood shopping centres in the adjoining the local authorities (inside the Victoria Park frame trade area) were also included. (See **Figure 1** for the extent of the frame area).

The model used the population projections for 2026 and 2036 as discussed earlier in this chapter.

Table 10: Retail Model Input-Output Table 2015-2036 Based on the Continuation of Current Trends

Centre	2015 Data Input	2015 Model Calibration	2015 Correlation	Model Output 2016	**Scenario 1** Model Output 2026 with only one new neighbourhood centre	**Scenario 2** Model Output 2036 Without Burswood and Curtin structure plan proposals	**Scenario 3** Model Output 2036 With Burswood and Curtin structure plan proposals	**Scenario 4** Model Output 2036 With Burswood and Curtin structure plan proposals enforced
Vic Park East (Res/Comm)	736	717	-2.6%	718	706	703	655	580
Belmont Park	0	0	na	0	0	0	11375	31070
Victoria Park	20833	20634	-1.0%	20738	27812	39790	31102	23179
East Victoria Park	28358	28291	-0.2%	28373	30384	31810	30508	25801
Alday St "Gateway"	6938	6868	-1.0%	6879	6726	6789	6521	5784
Canning Hwy/Berwick	2554	2545	-0.4%	2028	2148	1794	1734	1387
Archer St	2268	2258	-0.4%	2262	2125	2593	2118	1786
Orrong Rd/Archer St	690	656	-4.9%	657	597	1413	549	463
Lathlain	270	262	-3.1%	262	279	288	282	218
Burswood Nhbd. Centre	0	0	na	0	6533	4855	0	0
Burswood Stn West	0	0	na	0	0	0	6488	20030
Burswood Stn East	0	0	na	0	0	0	4325	8000
Etwell St	195	208	6.7%	209	228	232	230	201
Orrong Rd	741	751	1.4%	753	854	950	845	647
Curtin University	0	0	na	0	0	0	9162	14971
Sussex	200	205	2.4%	206	230	229	240	202
Oats St	485	472	-2.7%	472	414	466	391	343
Oats Street D.Centre	755	737	-2.3%	739	679	587	649	569
Cohn St	84	81	-4.1%	81	69	84	63	55
Carlisle	470	446	-5.1%	446	397	438	369	315
Totals	**65577**	**65130**	**0**	**64821**	**80181**	**93023**	**107604**	**135600**

Source: Retail Model & Department for Planning and Infrastructure Commercial Survey 2015.
* The 2015 Output is the calibration of the model.

In the above table and number of scenarios were modelled.

Scenario 1: By 2026 the increased trade potential in Victoria Park should be able to support an additional 14,600m² of shop floorspace. A neighbourhood shopping centre of 5,000m² in a location just west of Burswood Station would be viable. In the absence of any other new competition in Victoria Park, the two main shopping precincts of Victoria Park and East Victoria Park are undersupplied with shopping and would be trading very well. This particularly applies to Victoria Park which is the least affected by the assumptions of expansion for Bentley Park Plaza and Carousel. It also benefits directly from trade coming from South Perth along Canning Highway.

However, it is also noticeable that the smaller shopping centres do not reflect much growth potential. It is also noticeable that the Gateway precinct at the southern end of Albany Highway, being closer to the competition posed by Bentley Plaza and Carousel shopping centre will not gain the same benefits from the expanded population at 2026.

Scenario 2: In this scenario the assumption is that at 2036 aside from the new neighbourhood shopping centre discussed above, there has been no other new shopping development in Victoria Park. On these assumptions Victoria Park should be able to support an additional 27,500m² of shop floorspace. This amount is reduced by 5,000m² if the neighbourhood Centre (Burswood N in **Table 10**) discussed in scenario one has been built. Under this scenario trading conditions in Victoria Park would be booming and it would be fair to say that land values would have risen to a level that the numerous car yards in Victoria Park would have been displaced by a higher order land uses.

Scenario 3: The assumptions in this scenario are that all the proposals for additional shopping on the Burswood Peninsula and the Bentley Curtin complex are operational. The model reflects that in this situation the existing shopping structure in Victoria Park especially Victoria Park at Victoria Park East would be trading within acceptable levels. At first glance this would appear to be okay, but the real reason is that it only does so because the proposed centres in the Burswood Peninsula would fail to perform anywhere near a viable level and therefore the impact would be greatly reduced. With regard to Belmont Park the retail floorspace input was 31,000m² as reflected in the District Structure Plan. The model output is 11,375m². The model shows that Belmont Park at 31,000m² can only draw a third of the customer needs to be viable. It is doubtful that a centre of 11,375m² reflected by the model would be viable because the model is essentially showing that the Belmont Park location with respect to its trade area is a poor location that is unlikely to attract sufficient trade because the smaller the shopping centre the smaller the proportional amount of trade it would attract. The same can be said for Burswood Station West and Burswood Station East. Burswood Station West only attracts a third of the trade potential it requires while Burswood Station East attracts about half of its trade requirement. What the modelling is indicating is that these three proposals are not likely to be viable in the context of their locations, their trade area potential and the competition.

Scenario 4: Scenario 4 is a hypothetical scenario based on the improbable event that the proposals for Burswood Peninsula and the Bentley–Curtin would somehow be viable at their planned sizes. To do this the parameters in the model were altered to increase the attractiveness (drawing power) of the three proposals such that the model reflected viability commensurate with their proposed sizes. The purpose of this exercise is to demonstrate that were this to be the case, the impact on the future potential for the shopping along Albany Highway relative to what it could have been (Scenario 2) would be severe. For example, Victoria Park shows only a marginal improvement over its 2016 situation. All other centres along Albany Highway including East Victoria Park would be trading below their 2016 levels. Such an outcome in the unlikely event it was to occur would be seriously disadvantageous for the existing retail structure of the Town.

In the exercise above only four scenarios have been discussed. Any number of permutations can be done to test other hypothetical situations.

With regard to smaller shopping centres, the historical oversupply of floorspace where many former shops are no longer used for the purpose and not counted as shop floorspace, explains the apparent anomalies at the local shopping centre sizes. The model cannot account for the shopping floorspace fluctuations in Archer Street for example, which had 2,218m^2 retail in 1990, falling to 1,958m^2 in 1993, then rising to 3,168m^2 in 1997, then falling to 1,623m^2 in 2002, then rising fractionally to 1,663m^2 in 2007 then rising to 2,268m^2 in 2015. These changes are not a result of sudden changes in population numbers or economic conditions. They appear to be the result of an oversupply of shop buildings (mostly old) where new entrants to retailing can start off and move on or existing retailers can change location or leave the business at the end of a lease. Unfortunately, the data provided by the Department of Planning did not include the trade names as it previously did. It was not possible therefore to get an idea of the turnover of existing businesses since the previous land use survey in 2007.

The model results do not mean there will be no new shopping development (or very little) for the next 20 years. If the proposals for the Burswood Peninsula are moderated to about 20,000m^2 of shop floorspace (including the 5,000m^2 neighbourhood centre discussed above) by 2036, the prospects for refurbishment and redevelopment along Albany Highway would remain positive. As regards the Peninsula, the neighbourhood centre in the locality of Burswood Station West should be viable in the short to medium term. This could eventually be expanded to between 15,000 and 20,000m^2 between 2026 and 2036.

As regards east Burswood, between the railway line and Graham Farmer Freeway, it is difficult to see the potential for anything more than local shops to serve the local community. Along Great Eastern Highway there could be additional potential for highway orientated commercial. By its nature highway commercial is oriented to passing trade and would not pose competition to shopping in Burswood on the western side of the railway nor to shopping along Albany Highway.

With regard to the Bentley Curtin complex the result of the model in scenario three is perhaps the most realistic outcome for future potential at Curtin University, given that in the next 20 years it is difficult to see that the proposals contemplated by the Department of Planning structure plan will have been realised. Given the nature of university operation for nine months of the year rather than 12, so long as the retailing provided within the University campus is oriented to the needs of the students and staff and provisions made to close these facilities during student vacations, there would be no impact whatsoever on the existing shopping structure in Victoria Park (or for that matter in South Perth).

15 IMPACT OF "E" TRADE ON THE PHYSICAL RETAIL FLOORSPACE REQUIREMENTS IN VICTORIA PARK

As discussed above it has been assumed for purposes of this report that by 2036 there would be a 20% drawdown of available retail expenditure to the physical shopping infrastructure of the town by online trading. Because there is not a direct correlation between expenditure and floorspace a 20% drawdown of expenditure equates to a 17% impact on floorspace. To calculate the effect of "e" trade the outputs of the model above should be reduced by 8% for 2026 and 17% for 2036.

The assumption that "e" trade will reduce physical floorspace requirements for retail shopping is speculative. As stated above the owners of the major shopping centres in the Perth Metropolitan area have taken the view that the way to offset the impact of "e" trade is by major expansion of all the major shopping centres in Perth. The main investors in Perth's major shopping centres are confident that further investment is warranted despite negative predictions about "e" trade on the prospects for shopping centres. Current proposals are for $4.5 billion being expended in expanding most of the Region's large stand-alone centres which will result in eight centres being classified within the 'super regionals' category of over 75,000m^2 retail floor area in the near future.

16 CONCLUSIONS

The overall conclusion to be drawn from this analysis is that the future prosperity for the existing shopping structure in Victoria Park, especially Albany Highway, will depend on how the proposals envisaged for the Burswood Peninsula play out. So far as we can see the proposed expansion of the major shopping centres south of the river namely, Carousel and Garden City will not have an undue impact on the future shopping prospects in Victoria Park. The impact of future "e" trade on future shop floorspace requirements in Victoria Park are difficult to foresee but it could be an 8% impact by 2026 and a 17% impact by 2036.

The main conclusions to be drawn from the analysis are that:

- The retail structure of Albany Highway is in the process of evolution and improvement. Speciality shops are giving way to personal service and lifestyle premises such as cafes and restaurants. The vacancy rate of the Albany Highway secondary shopping centre has fallen from 9% in 2007 (excluding open car yards) to 6.3% in 2015. Notwithstanding this, retail floorspace represents only 27% of the overall floorspace of the Secondary Centre. However, the equilibrium point will be reached in the next few years.
- At this time Victoria Park is still slightly overprovided with shop floorspace relative to its trade potential. By 2026 Victoria Park will begin to see an increase in shop floorspace along Albany Highway especially around the Victoria Park sub-centre and to a lesser extent around East Victoria Park. The exact process is hard to foresee. For a while the economics of redevelopment may not produce new buildings but instead lead to the refurbishment and conversion of premises not currently used shopping purposes.
- Many of its commercial functions, in particular the automotive trade, but also regionally oriented offices and many of the restaurants along Albany Highway serve a district or regional area outside of Victoria Park, particularly the residents of South Perth. Because car yards occupy significant areas of land they should be regarded as sustainable land banks until economic conditions justify their conversion to higher order uses.
- Victoria Park is relatively well served with the daily 'milk and bread' walking convenience level facilities.
- The only area with potential for new shopping development in the next 20 years as a matter of course is on the Burswood Peninsula. However, the current proposals for an additional 59,000m² of shopping floorspace appear to be grossly excessive. Although we say that 15,000 – 20,000m^2 of shopping could be located on the Peninsula we believe that the Peninsular and Belmont Park in particular is not a good location for a 'run of the mill' competitive shopping centre. It is too isolated from the wider residential areas. Basically, we see the potential for shopping on the Peninsula as limited to serving local needs. For a large centre, such as that contemplated in the Burswood Peninsula District Structure Plan, to be viable it would need to be unique, special, different and have a very strong and wide attraction. Such a centre is difficult to imagine in the context of the existing metropolitan shopping structure.
- Until the aspirations of the Bentley – Curtin structure plan are more certain, the proposals for up to 10,000m² of additional retailing in Curtin University appear to be excessive. The indications are that a new centre of 10,000m^2 would not be viable at least until the other residential and employment components of the structure plan are substantially realised. Based on past trends this could be beyond 2036.