



CITY OF GREATER GERALDTON COMMERCIAL ACTIVITY CENTRES STRATEGY

PREPARED AND ADOPTED AS A LOCAL PLANNING STRATEGY
PURSUANT TO REGULATIONS 12A AND 12B OF THE *TOWN PLANNING REGULATIONS 1967*

Draft – September 2012



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**Hames
SHARLEY**



This Strategy should be read in conjunction with the City of Greater Geraldton Residential Development Strategy and the associated Background Report. The latter report contains the research and analysis used to formulate both Strategies.

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The City of Greater Geraldton hereby adopts the Local Planning Strategy, at the Ordinary meeting of the Council held on _____

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1. INTRODUCTION

The City of Greater Geraldton is planned to grow into a vibrant, resilient regional community of 100,000 residents. This will be driven by both the City and the Greater Mid West Region entering a period of high economic growth due to an increase in mining-related activities (both regionally and throughout the state), the construction of the Oakajee Port just north of the City of Greater Geraldton, and other major regional projects including the Square Kilometre Array and installation of the National Broadband Network. As Geraldton is the primary regional centre for the Mid West it is expected much of the primary and secondary flow-on activity and population growth resulting from these drivers will occur within the City's urban area.

Achievement of the target of 100,000 residents will present a range of opportunities and challenges for decision-makers and the community at large, one of which is the continued development of a strong, resilient network of activity centres that:

- Supports the main strategic drivers for envisaged growth;
- Has the capacity to meet the needs of existing and future residents, workers, visitors and firms; and
- Continues to provide the lifestyle and amenity that Geraldton is renowned for.

The ultimate scale and type of commercial activity developed will be dependent upon the ability of the City's activity centres to meet the needs of residents, workers, visitors and firms. The City of Greater Geraldton Commercial Activity Centres Strategy ('the Strategy') provides a strategic framework for managing future growth in commercial activity by providing performance-based criteria for commercial centres based on eight guiding principles. These are:

1. Efficient, intense and compact centres;
2. Optimise the frequency and quality of transactions within the City;
3. Support the maturation of Geraldton CBD into a diverse, intense and highly connected activity centre;
4. Optimise access to and within centres for residents, workers and visitors;
5. Place identity, amenity and integrity;
6. Place equity;
7. Meet the needs of future as well as current users; and
8. Appropriate configuration of land inside and outside of activity centres.

By linking these principles to the performance expectations of existing and planned commercial activity centres, the City is seeking to provide a Strategy that:

- Guides future activity centre performance for the betterment of the Geraldton community;
- Provides clear expectations for proponents seeking to expand existing activity centres, or develop new centres;
- Supports City officers and elected officials in making timely and correct decisions based upon a strong evidence base; and
- Remains relevant as Geraldton grows and develops.

Figure 1 provides an overview of the activity centre network and hierarchy proposed within the Strategy for the Geraldton Urban Area. Details on the hierarchy, its rationale and its performance expectations is discussed in Chapters 6 and 7.

Please see separate

Figure 1: Commercial Activity Centres Strategy Map (Geraldton Urban Area)

2. VISION AND PURPOSE OF THE STRATEGY

2.1 OVERALL STRATEGIC VISION

The City of Greater Geraldton has the following City-Region vision for their ongoing growth and development (City of Greater Geraldton Strategic Community Plan 2011 – 2021):

“A creative city-region which has a prosperous, diverse and sustainable community with an attractive Western Australian setting. In working towards this Vision, the City of Greater Geraldton will:

- *Leverage our resources to provide a positive lasting legacy for all members of our community.*
- *Be recognised as a powerhouse of the new economy, a community which people recognise for its vibrancy and amazing transformation. It will be a preferred choice to live, work and play.*
- *By 2021, have the capacity to sustain a population of 80,000 to 100,000 people. It will be the focal point for an active and vibrant region containing significant district activity centres to the north, south and the hinterland.*
- *By 2050, be Western Australia’s primary regional city and centre of global significance.”*

2.2 COMMERCIAL ACTIVITY CENTRES STRATEGY OBJECTIVES

The Strategy is a response to the changing local and regional economic environment and the requirement to provide for the needs of current and future residents, firms, workers and visitors. The primary objectives of this project are to:

1. Identify the amount of additional shopping floorspace required to service anticipated population growth (inclusive of the wider Mid West catchment) and indicate where this expansion will be most beneficial to the community;
2. Establish a clear hierarchical structure to guide sizing and location of major commercial activity centres, identify requisites for growth of major activity centres to cater for existing populations and future population growth;
3. Identify and promote development of centres and nodes that provide a wide mix of activities, services and other uses that are complimentary to their retail function and that promote use of the centres by local communities and consolidate complementary activities within centres;
4. Identify strategies to ensure activity centres develop in an integrated fashion;
5. Identify infrastructure requirements associated with future commercial activity;
6. Identify drivers of change in retailing;
7. Examine potential impacts of retailing trends, including deregulation of shopping hours, out of centre retailing, increased diversification, convenience shopping and electronic shopping; and
8. Ensure that retail activities that occur away from the town centre involve an aggregation of uses at appropriate locations, and that such development contributes to the net community benefit and does not undermine commercial activity in the central area.

3. MEASURES OF SUCCESS

3.1 PRINCIPLES

To define what a successful network of activity centres means for Geraldton, a series of principles have been developed through careful examination of the challenges and opportunities facing the City as well as extensive consultation with the City. The principles will guide the development of statutory planning instruments to be used to implement the Strategy, as well as on-going monitoring and review.

The eight guiding principles are centred around the growth and maintenance of activity centres and can be applied to centres of all sizes and types. Whilst focused on activity centres as the basic 'building block' of the urban structure, many are applicable to the urban and rural areas outside of activity centres as they guide the type, scale and performance of all urban development.

PRINCIPLE 1: EFFICIENT, INTENSE AND COMPACT CENTRES	
Value Statement:	
<ul style="list-style-type: none"> The City values activity centres that have a self-perpetuating 'energy' and a diversity of activity appropriate to the purpose of the centre. The City recognises that this relies on functional efficiencies, enhanced by contiguous configurations of related activities and compact urban form. 	
Desired Outcomes:	Avoid/Mitigate:
<ul style="list-style-type: none"> Delivery of efficient, intense and compact centres. A network of centres that meet the full range of user needs. Development of centres that facilitate multiple purpose trips. Encouragement of land use synergies which create useful spaces and character areas. Maximisation of the hours of activation of centres Delivery of centres that are adaptable and well-staged without adverse impact on the efficiency and intensity. 	<ul style="list-style-type: none"> Nodal Centres with 'dead spaces'. Single use/limited function centres that are inconsistent with their purpose. Centres that only accommodate single purpose trips.

PRINCIPLE 2: OPTIMISE THE FREQUENCY AND QUALITY OF TRANSACTIONS WITHIN THE CITY	
Value Statement:	
<ul style="list-style-type: none"> The City recognises the need to maximise the return of scarce resources to develop centres for the benefit of users. The City also wants centres to be effective in performing their purpose. To do so, they should pursue opportunities to maximise the frequency of high quality transactions that occur within activity centres. 	
Desired Outcomes:	Avoid/Mitigate:
<ul style="list-style-type: none"> Recognition and prioritisation of activities in centres that maximise the performance of the centre according to its purpose and user mix. 	<ul style="list-style-type: none"> Allowance for activities, urban forms and movement networks that compromise the optimal frequency and quality of transactions within activity centres.

PRINCIPLE 3: SUPPORT THE MATURATION OF GERALDTON CBD INTO A DIVERSE, INTENSE AND HIGHLY CONNECTED ACTIVITY CENTRE

Value Statement:

- The City recognises the primacy of the Geraldton CBD in the network of activity centres.
- The City values the maturation of the Geraldton CBD into a diverse, intense and highly accessible centre however this should not come at the expense of other centres achieving their defined purpose.

Desired Outcomes:

- The maturation of Geraldton CBD into a diverse, intense and highly connected activity centre.
- The maturation of Mullewa as a regional satellite town centre serving local needs.
- The continuation of the existing Aboriginal Settlements as small nodes of activity.

Avoid/Mitigate:

- The development of other centres which is inconsistent with their purpose and compromises the maturation of the Geraldton CBD.
- The maturation of the Geraldton CBD at the expense of other activity centres achieving their designated purpose.

PRINCIPLE 4: OPTIMISE ACCESS TO AND WITHIN CENTRES TO RESIDENTS, WORKERS AND VISITORS

Value Statement:

- The City values activity centres that are highly accessible to all users.
- The City recognises that centre accessibility must be considered in terms of access to and from the centre and access within centres.
- The City understands the need to balance accessibility with the need to safeguard the overall efficiency and integrity of the broader movement network.
- In order to protect the efficiency and integrity of the City's movement network, accessibility needs to be considered at a regional, district and local level.
- Protection of the efficiency and integrity of the movement network also requires aligning activity with appropriate location in terms of the accessibility needs of the activity and its users.

Desired Outcomes:

- Activity centres that facilitate multiple purpose, higher occupancy trips in alignment with their defined role.
- Activity centres that encourage active transport options for users accessing and moving within the centre.
- A highly efficient movement network at the local, district and regional levels.

Avoid/Mitigate:

- Accessibility to any one centre/area, or via any one transport node, that compromises the overall efficiency of the movement network.
- Attraction of private vehicle and freight movement to an area which is inconsistent with the purpose of the area and the available transport infrastructure.

PRINCIPLE 5: PLACE IDENTITY, AMENITY AND INTEGRITY

Value Statement:

- The City values places that have a clear and positive sense of identity, that users care about, and in which they can invest. The public realm is an important arena for creation of a sense of identity as it is the communal space in which users can share experiences and build connections.
- The City's role is to provide and facilitate investment that generates utility for users of all activity centres. The City will strive to provide the appropriate type and level of amenity to meet the needs of users.

Desired Outcomes:

- The creation of places that are more than their utilitarian function.
- The creation of places that communities can care about.
- The creation of places that are demonstrably authentic with a sense of integrity.
- Alignment between place identity and the mix of amenity with the intended purpose and user mix.

Avoid/Mitigate:

- Planning and decision-making that is counter-productive to, or discourages, the alignment of amenity with purpose.
- Development of centres which lack a clear and positive sense of identity.

PRINCIPLE 6: PLACE EQUITY

Value Statement:

- The City recognises its role in balancing the economic pursuits of activity centres against the broader needs and aspirations of the community.
- The City understands that transactions within an activity centre are not just economic, but also social and cultural. Planning will aim to support all needs in an equal way.

Desired Outcomes:

- Equitable access for all users to fulfil their range of required transactions.

Avoid/Mitigate:

- Centres that exclude potential users from undertaking the range of transactions that are appropriate for that type of centre.

PRINCIPLE 7: MEET THE NEEDS OF FUTURE AS WELL AS CURRENT USERS

Value Statement:

- The City recognises its role in balancing the impact of short-term market drivers with the long term strategic vision for activity centres.

Desired Outcomes:

- Equitable planning that balances the needs of current centre users with future centre users.

Avoid/Mitigate:

- Planning that prioritises the needs of the existing user mix at the expense of the needs of the future user mix.
- Planning that prioritises the needs of the future user mix at the expense of the needs of the existing user mix.

PRINCIPLE 8: APPROPRIATE CONFIGURATION OF LAND INSIDE AND OUTSIDE OF ACTIVITY CENTRES

Value Statement:

- The City recognises the need to protect the area outside of activity centres from land uses more appropriate to within activity centres, and vice versa.

Desired Outcomes:

- Equitable planning that balances the needs of residents and commercial development while placing a high value on the preservation of the natural environment and natural resources.

Avoid/Mitigate:

- Planning for residential or commercial development that prioritises the development at the expense of other strategically important land uses, such as land of significant agricultural value.

3.2 REASONABLE SCALE

The Strategy informs the City and proponents of the potential scale for future retail and commercial development within existing and planned activity centres based upon outlined population growth and distribution scenarios. This is to provide all parties with a shared understanding of the scale that is justified by a standardised distribution of demand. This provides the starting point for activity centre planning, whereby developments that sit within this band should be considered to be conforming, whilst proposals outside are not discounted but are required to provide greater justification as to the reason for higher expenditure capture.

By providing this information, the Strategy recognises the importance of activity centres developing in conjunction with available expenditure pools, ensuring that the network of centres is:

- Aligned with the strategic principles identified in the Strategy;
- Efficient in meeting the needs of Geraldton’s residents; and
- Encouraging competition and investment.

Further information on retail floorspace modelling is included in Chapter 7.

4. POPULATION STRUCTURE AND PROJECTIONS

4.1 CONTEXT

Three population growth scenarios have formed the basis of the Strategy future demand projections for commercial activity, employment and residential development. These scenarios are detailed in the Background Report.

- Scenario 1 follows a conservative growth rate of 1.5% over 20 years, increasing the current population of 39,000 residents to around 50,000 residents.
- Scenario 2 follows a medium growth rate of 3%, increasing the population to around 70,000 residents.
- Scenario 3 follows a very high growth rate of 5%, increasing the population 100,000 residents.

The last scenario is set out in the Mid West Region Investability Report and relies on economic growth in export-driver industries to provide employment for a significantly larger population.

The three population scenarios are shown in Figure 2.

Figure 2: Population Scenarios

Scenario	Total Population	Total Households *
1	50,000	21,325
2	70,000	28,597
3	100,000	42,011

*Assumes average household size of 2.4 people.

As identified in the Greater Geraldton Structure Plan Update (2011), there is sufficient land in the Geraldton Urban Area and to the north in the Shire of Chapman Valley to accommodate more than 100,000 residents at an average density of R20. This means there is sufficient land available to develop a variety of lot sizes, from rural residential lots to high density dwellings.

4.2 RESIDENTIAL STRATEGY ALIGNMENT

The pattern of residential development outlined in the Residential Development Strategy (see Figure 3) has been used to estimate the demand for commercial floor space across the Geraldton Urban Area.

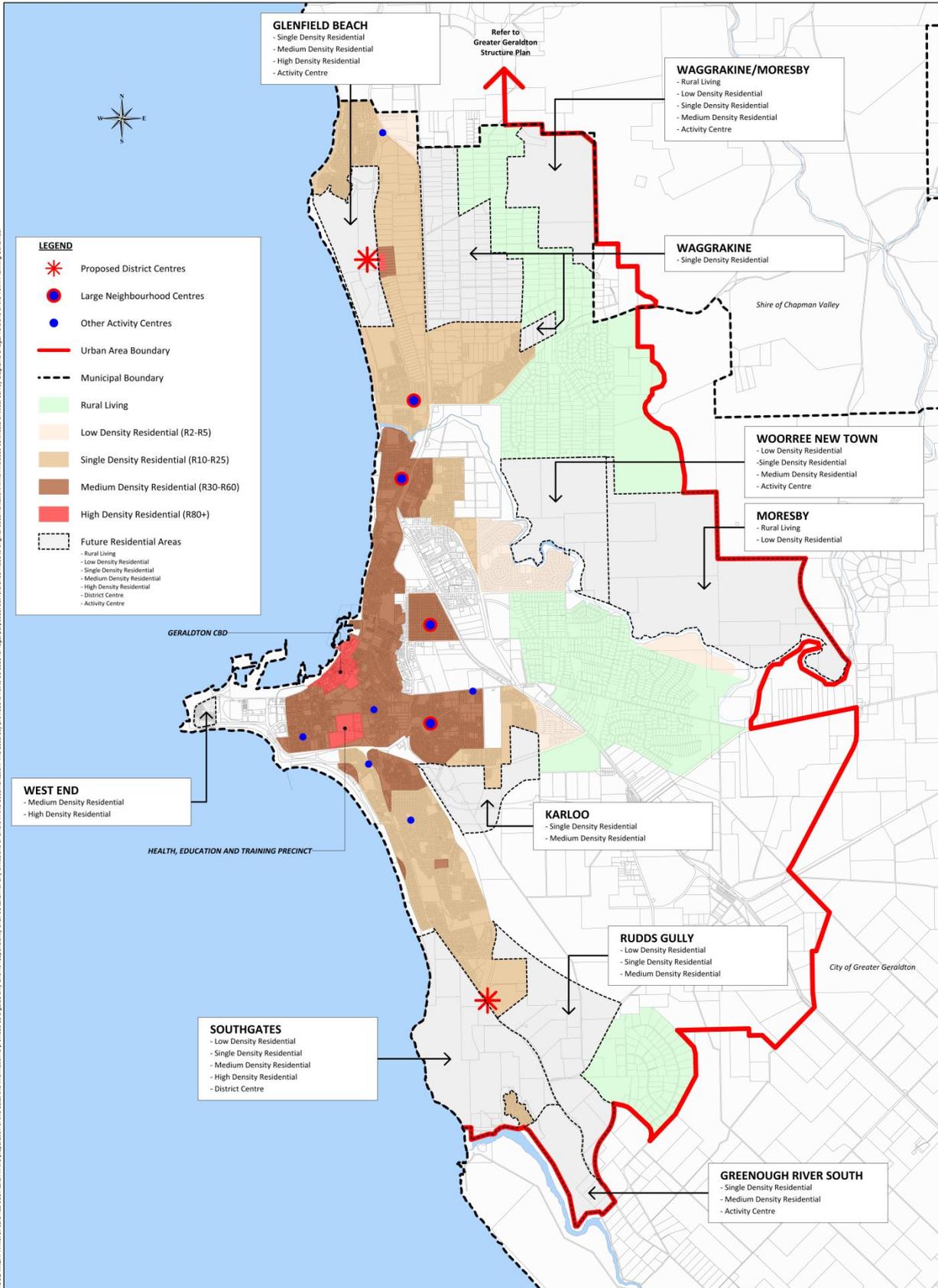


Figure 3: Residential Development Strategy Map (Geraldton Urban Area)
Refer to the Residential Development Strategy

4.3 POPULATION PROJECTIONS

4.3.1 Approach

The Strategy assumes that non-CBD locations of increased floor space for commercial activity are driven by localised population increases. The approach taken to determining the locations of increased residential development and density is detailed below:

Stage 1: Population Scenarios

The population scenarios described in Chapter 4.1 were used to guide the projected increase in residential population in the City of Greater Geraldton.

Stage 2: Current and Future Planned Developments

There are a number of planned developments in Geraldton in varying stages of design, approval and endorsement. All endorsed structure plans and outline development plans (at the time) have been used to project the primary locations of residential development in Scenarios 1 and 2. Developments in the early planning stages have also been included in Scenario 2 as well as a proportion of the remaining areas designated "Future Residential" in the Residential Development Strategy (Figure 3). Future Residential areas were used in Scenario 3 to estimate future greenfield residential estate development.

Stage 3: Infill Development

A set percentage of infill development in existing residential areas was used to estimate additional population likely to be incorporated into these areas under each scenario.

Stage 4: Activity Centres

The remaining proportion of additional population under each scenario was allocated to the five *Status 1* activity centres (refer to Chapter 5), with the greatest emphasis on higher density development in the Geraldton CBD. The Status 1 activity centres are:

- Geraldton CBD
- Bluff Point
- Rangeway
- Sunset Beach
- Wonthella

Stage 5: Development Capacity

The final allocation of additional residential development was checked against the capacity of the Geraldton Urban Area to support additional residential development. Based upon this assessment the spatial distribution of Geraldton was broken down into seven zones using ABS collection districts (Figure 4). Under the population scenarios there is more than sufficient supply of land to accommodate residential expansion in all areas used to model localized population increases.

Figure 4: Geraldton Zones



4.3.2 Assumptions

Quantitative economic analysis relies upon certain assumptions about the variables used in the analysis. The extent to which these assumptions hold true will affect the validity of the results. The following assumptions underpin the population structure projections for the City of Greater Geraldton.

Population Concentration

Whilst a small amount of the projected population increase will be located outside of the Geraldton Urban Area (for example in Mullewa, Walkaway and throughout rural areas), the vast majority is expected to be located within the Geraldton Urban Area. Therefore the full quotient of increased population has been modelled for the Geraldton Urban Area only.

Planned Developments

Developments already in the planning stages have been used to indicate the initial stages of residential expansion in Geraldton. It has been assumed that all currently planned developments will go ahead and make up the majority of new residential development. In terms of timing, due to the high dwelling yield from planned developments it has been assumed that planned developments will go ahead in stages in line with the demand for additional dwellings set out in the population scenarios.

Future Residential Zoning

There is a substantial area of land available in the City of Greater Geraldton designated "Future Residential" under the Residential Development Strategy, and suitable for greenfield residential estate development. It is assumed the majority of new residences in the future will be located in these areas. Assuming the primacy of existing structure planned development over unplanned areas, no development in the Future Residential areas were assumed until the development of the existing and known future structure planned areas is complete. 60% of the population increase remaining after planned developments have gone ahead was allocated to Future Residential areas.

Infill Development

A constant rate of infill development has been assumed. The amount of infill development was spread evenly across "low density residential", "single residential" and "medium density residential" areas with an average density assigned for each (refer to the Residential Development Strategy and Figure 3). High density development was excluded from infill development as the Residential Development Strategy indicates that the only significant proportion of high density development is to be located within the Geraldton CBD activity centre. Assuming the primacy of existing structure planned development over infill, the infill level was assumed to be 5% until the development of the structure planned areas is complete (equivalent to a maximum of 127 dwellings per annum). Beyond this, 10% of the population increase remaining after planned developments are completed was allocated to infill development (equivalent to a maximum of approximately 259 dwellings per annum).

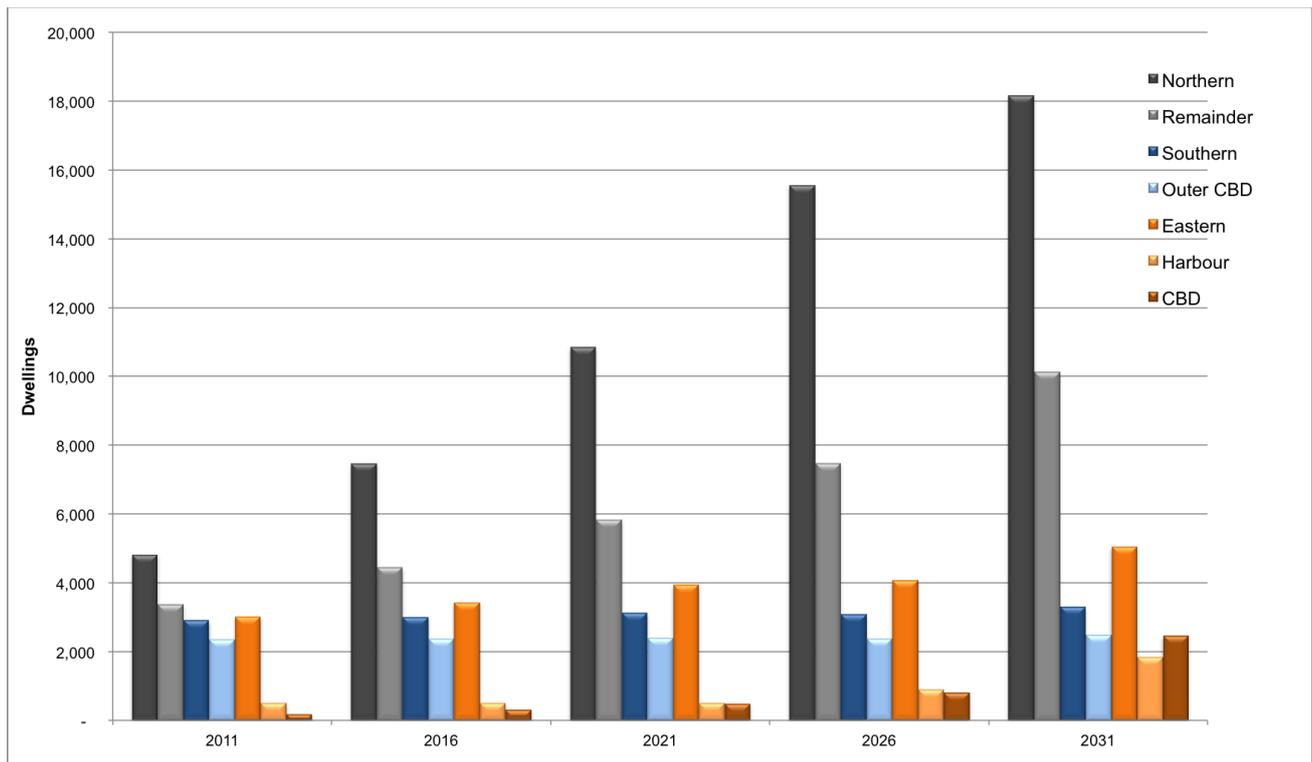
Activity Centres

Assuming the primacy of existing structure planned development over infill around activity centres, the infill level was set at 5% until the development of the structure planned areas is complete. 30% of the population increase remaining after planned developments have gone ahead was allocated to activity centres development. Of this, 60% was allocated to the Geraldton CBD and the balance was equally distributed to the other four Status 1 centres.

4.3.3 Results

While there are three scenarios for population growth, the City’s stated objective is a population of 100,000. As such, the results outlined below and the subsequent demand analysis are based on growth Scenario 3. Figure 5 outlines the spatial distribution of dwelling growth in the City of Greater Geraldton to 2031 based on the aforementioned assumptions. In absolute terms the northern precinct will be the highest growth area accounting for as much as 63% of the total dwelling growth in the City. In relative terms the CBD will experience the most significant change with over a 2,000% increase in the number of dwellings by 2031.

Figure 5: Spatial Distribution of Dwelling Growth



Source: Pracsys Analysis

4.4 SOCIO-ECONOMIC PROFILE

The City’s median weekly household income and average household size is low compared to the State average. The unemployment rate is much higher and the participation rate is considerably lower. The City also has a slightly higher proportion of families with dependent children.

Generally the following relationships exist between demographic characteristics and demand for goods and services:

- Income is a significant factor in determining demand. Households with higher income levels tend to demand a great quantum and quality of goods; and

- Life cycle and generational differences translate into different demand patterns. Both the types and quantum of goods demanded will vary as households transition through the different stages of the life cycle. For example, young individuals or couples without children form smaller households and typically spend less on home-related items and more on entertainment. In contrast, families form larger households and expenditure related to children, home-related goods, and food will increase significantly.

Figure 6 summarises the socio-economic characteristics of Greater Geraldton relative to Western Australia.

Figure 6: City of Greater Geraldton Socio-economic Characteristics (2006)

	Geraldton (LGA)	Greenough (LGA)	Mullewa (LGA)	Western Australia (State)
Median Age (years)	36	34	31	36
Median Household Income (\$/week)	738	1,167	982	1,066
Average Household Size (people/household)	2.4	2.9	2.7	2.5
Labour force Participation Rate	62%	71%	73%	67%
Unemployment Rate	7.53%	4.13%	6.06%	3.77%
Families with children under 15 years	42%	52%	46%	40%

Source: Pracsys 2012 and ABS Census of Population and Housing 2006

The City's relatively young population, below-average earnings and weak attachment to the labour force means that demand for goods and services can be expected to be below average. It should also be noted that the City has a lower proportion of dwellings that are in the process of being purchased (i.e. homes under mortgage). This will mean that retail demand can be expected to be less sensitive to movements in interest rates.

Relative to the current population, the future demographic of the City of Greater Geraldton is likely to be:

- More affluent;
- Older;
- In smaller households with fewer children;
- Tertiary educated; and
- In high quality knowledge-intensive jobs.

While the increasing affluence of the catchment will translate into increased demand for goods and services, the trend toward smaller households with fewer children will weaken demand, particularly for some categories.

5. TRENDS OF COMMERCIAL ACTIVITY

The City of Greater Geraldton's Commercial Activity Centres and Residential Development Strategies will need to balance the big-picture strategic objectives of the City, with an understanding of the commercial and housing demand drivers that will inform the investment decisions of Centre owners and residential developers.

To achieve this, a clear understanding of the demand likely to be experienced across a variety of land use categories and business models is required. The analysis described in this Chapter seeks to provide this understanding.

When reviewing these preliminary numbers, it should be noted that the current distribution of available expenditure has been estimated using a gravity model that assumes expenditure patterns based upon proximity and scale of offer. The model has been adjusted to address the specific issues which need to be addressed by the City (specifically the management of scale of neighbourhood and local centres). The forecasting of dwellings is predicated using the population scenarios outlined in Chapter 4.

The purpose of this Chapter is to identify the key trends affecting the economic structure of certain industries in the City of Greater Geraldton. These trends will underpin the key assumptions in the subsequent demand modelling.

5.1 RETAIL INDUSTRY

Retail is highly a dynamic sector, constantly evolving as new products, formats, concepts and fashions emerge to meet changing consumer preferences. The three industry trends identified as being the most applicable to the City of Greater Geraldton are:

- Retail Trading Hours;
- Large Format Retail; and
- Online Retailing.

5.1.1 Retail Trading Hours

The issue of trading hours has been widely debated in Australia. Currently, trading hours are fully deregulated in the ACT and the Northern Territory. Beyond this, restrictions on trading hours apply with varying levels of intensity, with Western Australia, South Australia and Queensland having the most restrictive regulations.

The Retail Trading Hours Act 1987 applies to retail shops in Western Australia south of the 26th parallel. The Act states that general retail shop standard hours in Western Australia extend:

- 8am to 6pm, Monday, Tuesday, Wednesday and Friday
- 8am to 9pm, Thursday
- 8am to 5pm, Saturday

Local government authorities outside the Perth metropolitan area can apply to Consumer Protection to extend the trading hours for General Retail Shops in their district beyond those stipulated in the Act. Small shops (i.e. shops owned by up to 6 people who operate no more than three retail shops and in which up to 13 people work at any one time) may be exempted from general retail shop standard hours and may, if they choose, trade up to 24 hours per day, seven days per week.

In practice small retail shops, depending on the type of shop, tend to follow general retail trading hours, but some trade seven days if it suits the individual business.

The Retail Trading Hours Amendment Act 2010 came into effect on 1 November 2010. This Act amended the Retail Trading Hours Act 1987 to permit general retail shops located throughout the Perth metropolitan area to trade from 8am – 9pm on all weeknights rather than having to close at 6pm other than on late night shopping nights. Recently an additional amendment to retail trading hours has been proposed – the Retail Trading Hours Amendment Bill 2012 currently being debated in the Western Australian Legislative Assembly. The Bill proposes to allow all general retail shops in the Perth Metropolitan Region to trade on Sundays from 11am to 5pm and abolish special trading precincts currently operating. Discretion to vary retail trading hours during some public holidays is also proposed.

Deregulation of trading hours effectively means that general retailers currently regulated by general shop retail hours may, under a deregulated trading hours regime, have the option to trade under the same conditions as small shops and /or special retail shops.

A recent report by the Australian Productivity Commission on the economic structure and performance of the Australian retail industry proposes that retail trading hours should be fully deregulated in all states, citing the following reasons:

- Restrictions tend to discriminate between retailers on the basis of products sold, size and location;
- There does not appear to be any compelling evidence of a relationship between the regulation of retail trading hours and social connectedness;
- Restrictions constrain brick and mortar retailers ability to respond to changing consumer preferences;
- As consumers have become increasingly time poor, they have placed a higher value on shopping convenience in terms of when they can shop and where they can shop. Restricting trading hours does not maximise consumer welfare; and
- Deregulation of trading hours provides those individuals who prefer to work outside of ‘normal hours’ with job opportunities they would not have otherwise.

A separate report, independently prepared by the University of Western Australia in 2011, reached similar conclusions, finding that the long-term consumer interest was best served by the deregulation of shop trading hours.

The topic of deregulation of retail trading hours in the City of Greater Geraldton is a contentious issue. In 2009, Pracsys undertook an investigation into the economic impacts of the possible deregulation of retail trading hours on the (then) City of Geraldton-Greenough. The study found:

- Consumers will benefit from the choice of retail options in a deregulated environment;
- Deregulation may lead to a rationalization and increased concentration of retail activity within activity centres; and
- It is uncertain as to whether overall expenditure level will vary to any great extent.

In considering the merits of the deregulation of retail trading hours, it is suggested that rather than blanket deregulation of trading hours across the board, and in the interests of engendering city vitality over the medium to longer term, the City might consider the establishment of a special shopping/entertainment precinct which may feature deregulated trading hours as part of its profile. This may be used to reinforce the economic activation and creation of multiple value propositions in the city centre.

5.1.2 Large Format Retailing

This retail format emerged in the United States, pioneered by Wal-Mart, in the late 1980's. Extensive internationalization has occurred in the last two decades, with the model gaining popularity in Australia in the last decade.

The format is characterized by single storey freestanding retail property with a floorspace typically ranging from 1,000 m² to 30,000 m². A product of a car based society, these retailers tend to be surrounded by at grade parking and typically located at highly visible locations at major intersections or adjacent to highways. As a result of the requirement for large areas of relatively cheap land, many large format retailers develop outside of activity centres.

As a business model, large format retail has financially been very successful, however it has created numerous challenges for planners and policy makers. These include:

- Accessibility and traffic management issues;
- Low quality environmental and urban design outcomes;
- Poor integration with the activity centres network;
- Declining competition and emerging monopoly/duopolies in the specific areas of the retail market; and
- Erosion of industrial land.

Understanding that the continued financial success of the business model is likely to drive its proliferation, intervention is necessary in order to ameliorate these negative effects and properly plan for large format retail.

The consequences of this for the City of Greater Geraldton is the potential for continued proliferation of this business type down the North West Coastal Highway, with subsequent activity leaking from major activity centres. Management of this type of activity requires a significant change in planning paradigm, with increased focus on the business model of retailers rather than the stock being held.

5.1.3 Online Retail

Online Retailing has received extensive coverage in the Australian media recently particularly in the lead up to Christmas 2011. Following lackluster Christmas sales in 2010, Retail Majors began lobbying the Australian government to apply GST to goods purchased online. This was rejected on the basis that the cost of implementation would outweigh any benefits.

In mid 2011, a draft report by the Australian Productivity Commission on the Economic Structure and performance of the Australian Retail Industry further fuelled debate. The Commission considers that total online sales account for 6% of total retail sales in Australia. This equated to around \$12.6 billion in 2010. It is assumed that approximately a third of online sales are sourced from overseas.

Relative the other countries Australia also appears to lag in its development of online retailing. There is general consensus among analysts that online sales from Australia will grow strongly in the short-term with the roll out of the National Broadband Network facilitating an increase in e-commerce both locally and globally.

In parallel with the increasing level of online retail activity is the emergence of hybrid retailers, that is, firms that employ both electronic and physical channels and exploit the synergies between them. This model typically combines the searchability, accessibility and flexibility of e-commerce, with the proximity and efficiency of a traditional activity centre based store. While this model will not suit all retailers, the shift will help balance and maintain or reduce to leakage of retail expenditure the percentage of retail sales captured by domestic businesses.

Planning for expansion of commercial activity within regional centres such as Geraldton needs to be cognisant of the trend towards online retailing (especially with the introduction of the National Broadband Network), with appropriate feedback mechanisms in place to revise the supply of retail over time as the need for retail floorspace changes.

5.2 ENTERTAINMENT RECREATION AND CULTURE INDUSTRY

The entertainment, recreation and culture industries are highly innovative and constantly evolving. The three industry trends identified as being the most applicable to the City of Greater Geraldton are:

- Technological Innovation;
- Liquor Licensing Reform; and
- Cultural Homogenisation.

5.2.1 Technological Innovation

Technological innovation has resulted in a boom in content and a variety of new media and formats over the past decade. Consequently, traditional entertainment offerings are under increased competition from product substitutes. Digital home entertainment now allows users to access a comparable value proposition while removing the requirement to travel and the restriction of trading hours. Consequently, entertainment goods that have traditionally been consumed in the public realm are now increasingly being consumed in the private realm, which translates into a declining demand for large scale commercial entertainment offerings.

The impact of digital migration continues to vary geographically, due in large part to the relative availability and affordability of broadband and mobile infrastructure. The roll out of the National Broadband Network in Australia is set to facilitate an increase in access to online entertainment and in turn increase digital migration.

Planning for expansion of entertainment activity within regional centres, such as Geraldton, needs to be cognisant of digital migration (especially with the introduction of the National Broadband Network), with appropriate feedback mechanisms in place to revise the supply of entertainment floorspace over time as consumer needs change.

5.2.2 Liquor Licensing Reform

Western Australian liquor laws were modified in 2007 to better reflect community expectations regarding the way alcohol is purchased and consumed. A key component of the reform package was the introduction of Small Bar licenses. According to the Small Bar Association of Western Australia *“The Small Bar concept is seen as a way to reduce alcohol related harm because of the reduced numbers of patrons, smaller premises, uniqueness of the concept and the prospect of greater licensee control over the operation.”*

While the uptake of the new licences was slow initially, 45 licenses have been approved in the Perth metropolitan area since the introduction. Outside the metropolitan area, 10 licenses have been approved, predominantly in the southwest. To date, one small bar license has been granted in the City of Greater Geraldton, to the Provincial Café and Wine Bar, which opened in 2010.

Local governments play a pivotal role initially in the liquor licensing application process however as the priorities of local governments vary so too does the ease and expediency with which applications are processed and approved. Understanding how the delivery of a diversified entertainment value proposition can support the development of vibrant activity centres, the City should seek to encourage this development through the provision of streamlined and transparent processes which are clearly aligned with the vision and objectives of this Strategy.

5.2.3 Homogenisation of Culture

Homogenisation of culture refers to the process by which cultures converge and become increasingly standardised. Debate in sociology proposes that globalisation leads to homogenisation of culture through media and cultural imperialism. Standardisation of cultural products, ignoring the influence of local circumstances, in turn leads to a standardisation of consumer preferences and behaviour leading to further erosion of cultural diversity.

The City should be cognisant of these effects and, where possible intervene to promote a wider and more diverse cultural offering to residents.

6. GERALDTON ACTIVITY CENTRES HEIRARCHY

The Activity Centres Hierarchy (Figure 7) provides a strategic planning framework to guide the long-term planning for and development of the City's activity centres. Figure 7 reflects a hierarchy that is generally consistent to that outlined in the WAPC's SPP4.2 – Activity Centres for Perth and Peel (see Figure 1 for a map showing centre locations).

The core aim of the hierarchy is to achieve the optimum maturation, performance and distribution of activity centres to:

- Support the agglomeration of strategic activities in major commercial, industrial and specialised centres, to provide for local high quality business and employment opportunities;
- Meet community needs by enabling employment and goods and services to be accessed efficiently and equitably by the resident population; and
- To provide a level of certainty for public and private investment in activity centres.

Figure 7 provides an overview of the hierarchy based upon existing activity centre characteristics and the aspirations of the City. In addition, based upon consultation with the City, each centre has been assigned a status. This provides an insight into which centres the City has identified as areas of priority for intervention.

The hierarchy provides the City, the public and landholders with an insight into the level of performance expected of an activity centre. Broad descriptions of expectations for centres are outlined in Figure 8. These descriptions provide high level information for each activity centre type, enabling potential developers and the City to inform their decisions on appropriate types, scale and features of development in activity centres. This provides the:

- City with a tool to assess current performance (e.g. during the preparation of an Activity Centre Plan);
- City with a tool to assess the impact of proposals within activity centres;
- Public with a measurable set of standards against which to understand and articulate centre performance;
- Proponents with clear expectations against which proposals impacting upon activity centres will be measured; and
- Proponents with a consistent language to engage with decision makers in regards to the vision, initiatives and impacts of projects.

Figure 7: Activity Centres Hierarchy

ACTIVITY CENTRES HEIRARCHY	STATUS *
Regional Centre	
Geraldton CBD	1
District Centres (proposed)	
Glenfield Beach	2
Southgates	2
Large Neighbourhood Centres	
Bluff Point	1
Rangeway	1
Sunset Beach	1
Wonthella	1
Neighbourhood Centres	
Cape Burney – not developed	3
Geraldton (Durlacher Street)	2
Moresby (Woorree New Town) – not developed)	3
Mt. Tarcoola	2
Seacrest – not developed	2
Strathalbyn – not developed	3
Utakarra	2
Waggrakine – not developed	3
Local Centres	
Beachlands	2
Drummond Cove	2
Mahomets Flats (Fortyn Court)	2
Spalding – not developed	3
Wandina	3
Woorree – not developed	3
Highway Commercial	
Geraldton Business Park	n/a
North West Coastal Highway	n/a
Verita Road	n/a
Specialised Centres – primary function	
CSBP Site – development investigation area	n/a
Geraldton Airport – aviation and logistic services / technology park	n/a
Geraldton Port – port services	n/a
Health, Education and Training Precinct – health, education & training	n/a
Narngulu – strategic industry	n/a
Webborton – service industry / service commercial	n/a
Regional Towns	
Central Greenough	n/a
Mullewa	n/a
Walkaway	n/a

- * 1: Active intervention by the City to encourage additional development.
 2: Maintain current role with future private sector driven expansion possible.
 3: Potential to maintain current role or transition of activity centre into alternative use.
 n/a: Not assigned a status. Future development decisions to follow the activity centre role and expectations.

Figure 8: Activity Centres Hierarchy – Performance Measures, Roles and Expectations

	Regional Centre	District Centres (proposed)	Neighbourhood Centres	Local Centres	Specialised Centres	Regional Towns	
Name of Activity Centre	Geraldton CBD	<ul style="list-style-type: none"> Glenfield Beach Southgates 	<ul style="list-style-type: none"> Bluff Point Cape Burney* Geraldton Moresby* Mt. Tarcoola Rangeway 	<ul style="list-style-type: none"> Seacrest Strathalbyn* Sunset Beach Utakarra Waggrakine* Wonthella 	<ul style="list-style-type: none"> Beachlands Drummond Cove Mahomets Flats Spalding* Wandina Woorree* 	<ul style="list-style-type: none"> CSBP Site Geraldton Airport Geraldton port Health, Education and Training Precinct Narngulu Webborton 	<ul style="list-style-type: none"> Central Greenough* Mullewa Walkaway
Main Role / Function	The City centre is the largest multi-functional centre of activity, providing the most intensely concentrated development in the region. It has the greatest range of high order services and jobs and the largest commercial component of any activity centre. The centre services the greater Geraldton and Mid West region.	District centres are multipurpose centres that provide a diversity of uses. They share some characteristics with the regional centre but serve smaller sub-regional catchments. They offer a range of essential services, facilities and employment opportunities to support their sub-regional catchments. They perform an important role in the City's economy.	Neighbourhood centres have a greater focus on servicing the daily and weekly household shopping needs of residents and providing community facilities and a small range of other convenience services. Their relatively small scale and catchment enables them to have a greater local community focus and provide services, facilities and job opportunities that reflect the particular needs of their catchment.	Local centres provide for primarily daily household shopping needs and small range of other convenience services.	Special centres providing specialised services for the region.	Town centres are the main rural activity/service centres. They are multi-purpose centres that provide a diversity of uses and the full range of economic and community services necessary for the communities in their catchments.	
Transport Connectivity	The focus point for all local and regional passenger networks. Fine grain walking and cycling network providing direct and convenient access.	Important focus for local passenger networks. Fine grain walking and cycling network providing direct and convenient access.	Focal point for local passenger networks and public transport. Walking and cycling network providing direct and convenient access.	Stopping point for public transport. Walking and cycling network providing direct and convenient access depending on local traffic volumes.	Important focus for public transport.	Focal point for local passenger networks and public transport.	
Typical Retail Types	<ul style="list-style-type: none"> Department Stores Discount department stores Supermarkets Full range of speciality shops Personal services 	<ul style="list-style-type: none"> Discount department stores Supermarkets Convenience goods Small/medium scale comparison shopping Some speciality shops Personal services 	<ul style="list-style-type: none"> Supermarkets Convenience goods Personal services 	<ul style="list-style-type: none"> Convenience goods (may be combined with service station) 	<ul style="list-style-type: none"> Specific to the centre 	<ul style="list-style-type: none"> Supermarkets Convenience goods Speciality shops Banks 	
Typical Office Development	<ul style="list-style-type: none"> Major offices Commonwealth and state government agencies Major institutional uses such as courts and local government office 	<ul style="list-style-type: none"> Professional and service businesses District level office development Local professional services 	<ul style="list-style-type: none"> Local professional services 	n/a	<ul style="list-style-type: none"> Professional services related to the centre 	<ul style="list-style-type: none"> State government agencies where demand and funding warrants Local government offices Local professional services 	
Entertainment	<ul style="list-style-type: none"> Regional convention centre/theatre Exhibition centre (gallery, museum) Restaurants Cinema Amusement parlour Wide range of arts, cultural and entertainment facilities 	<ul style="list-style-type: none"> Smaller scale restaurant and tavern Amusement parlour Cinema Sub-regional scale recreation/sporting facilities 	<ul style="list-style-type: none"> Amusement Parlour Small scale eating house/cafe 	n/a	<ul style="list-style-type: none"> Specific to the centre 	<ul style="list-style-type: none"> Smaller scale arts, cultural, recreation and entertainment facilities Amusement parlour Smaller scale eating house/café and tavern 	

Figure 8: Cont.

	Regional Centre	District Centres (proposed)	Neighbourhood Centres	Local Centres	Specialised Centres	Regional Towns
Public Realm and Amenity	The public realm is a very important element of regional and district centres. These centres are places of recreation for a wide catchment and the focus of many events. These centres should offer high amenity, functional spaces which are freely accessible to the public. A significant level of investment in the public realm should be provided. This investment would normally include public seating, art, play equipment, drink fountains, etc. A variety of spaces should be provided which aim to satisfy all foreseeable use needs.		The public realm in neighbourhood centres is generally provided through small parks and within the street environment. These spaces should be of high amenity but has a lower level of investment in public infrastructure.	The public realm of local centres is limited to what is provided on-site although there may be minor upgrades to the street environment. There is generally no public investment in infrastructure.	The public realm is specific to the primary focus of the centre and is generally provided on-site and there may be minor upgrades to the street environment.	The public realm is an important element especially in the 'main street'. These spaces should be of high amenity with a moderate level of investment in public infrastructure.
User Mix	Regional centres encourage the melding of a wide range of visitors, workers, residents and firms throughout the centre. Nodes of activity are integrated to encourage users to interact with the centre to meet a wide variety of needs, over a wide range of time.	While these centres are retail dominated they may emerge to be important mixed use and employment centres.	Neighbourhood centres are primarily focussed on servicing the needs of residents.	One of the most viable current models of local centre is the convenience store combined with a service station.	Specific to the primary focus of the centre.	Primarily focused on servicing the needs of the town and surrounding rural hinterland population.
Diversity	n/a	Centre size – Shop Retail floorspace component More than 100,000m ² 50% More than 50,000m ² 40% More than 20,000m ² 30% More than 10,000m ² 20% 5,000m ² – 10,000m ² 15% Less than 5,000m ² n/a	Mix of land uses floorspace as a proportion of the centre's total floorspace	n/a	n/a	n/a
Intensity (desirable) **	Highly intense with significant integration of a range of residential, population-driven and strategic uses in higher density multiple story sites both within the centre, and the areas of influence.	Intense levels of district education/healthcare, retail and household services within the centre, with potential for significant increases in residential densities within the areas of influence (30 dwellings per gross hectare).	Moderate levels of local retail/household services within centre with potential for incremental increases in residential densities within centre and defined areas of influence (20 dwellings per gross hectare).	Lower levels of local retail services within centre with potential for incremental increases in medium residential densities within centre and immediately adjacent.	n/a	n/a
Employment (Refer also to employment targets in Appendix G)	A major regional employment node that provides for high quality strategic employment as well as significant densities of overall employment.	A district employment node with significant densities of population driven employment.	A local employment node providing population driven employment.	A minor employment focus.	Depending on the primary focus of the centre and can range from a regional employment to a local employment node.	An employment node providing town and surrounding rural hinterland population driven employment.
Walkable Catchment	800m	400m	200m	200m	n/a	n/a
Shop Retail Floorspace Guide ***	Unlimited	20,000m ² – 30,000m ²	4,000m ² – 6,000m ²	500m ² – 1,000m ²	n/a	n/a

* Future Activity Centre

** Typically, the average R Code (or net density) equivalent to 2 to 3 times the number of dwellings per hectare.

*** The Floorspace Guide is not intended to be applied rigidly. The figures do not preclude higher floor space, but each application will need to be justified and examined in the context of the principles of the Strategy and the role and expectation of the individual centre.

Source: Pracsys (2011), SPP 4.2 Activity Centres for Perth and Peel (2010), City of Cockburn Draft Local Commercial and Activity Centres Strategy (2011), Activity Centres for Greater Bunbury Policy (2012) and the City of Greater Geraldton Interim Commercial Activity Centres Strategy (2011)

7. FUTURE DISTRIBUTION OF COMMERCIAL ACTIVITY

Whilst the Strategy promotes the rapid maturation of activity centres, it is essential to understand the effect of market potential on activity centre development. The analysis considers the relative merit of proposed uses within each activity centre, based upon assumptions of population expenditure and benchmark turnover for the offerings.

The purpose of this assessment is to provide a broad insight into the demand for the offerings based on medium to long-term economic trends. The analysis does not constitute an assessment of the viability of individual businesses as each enterprise develops based upon their individual business model.

The model also does not represent a complete insight into short-term market drivers that may impact upon businesses. Decision makers should not consider the results of the analysis literally (i.e. exact levels of expenditure at exact years), but instead utilise the results as an indication of the overall economic functionality of the centres within the regional economy.

The market potential for land use in each centre is expressed in terms of a level of floorspace demand. An excess in demand over supply does not necessarily represent a case for the further expansion of supply. It simply indicates that at that level of supply the activity will likely be achieving floorspace productivities in excess of the benchmark levels.

The results must also be considered in the context of:

- The physical capacity of each centre to deliver these yields; and
- The built form aspirations for each centre.

Of all centres included in the analysis, the Geraldton CBD is the largest activity centre in the City of Greater Geraldton. It is comprised of 83% of total shop floor space, 97% of total other retail floor space and 99% of entertainment; therefore, emphasis has been given to this centre.

Detailed documentation of the methodology and assumptions that underpin this analysis has been included in Appendices A – E.

7.1 INTERPRETING RESULTS

The following results represent a range of potentially viable population driven demand for commercial offerings by floor space category. The diagrams represent the range of floorspace justifiable between moderate and high floorspace production. The consequence of this is the higher the floorspace projection, the lower the productivity. They do not represent, for categories such as entertainment, culture and recreation, the optimal public provision of facilities.

The results contained within this discussion are based on population growth Scenario 3 (included in Appendix E). As a potential future reference the results for Scenario 2 have been included in Appendix D.

7.2 GERALDTON CBD

The Geraldton CBD is the largest multi-functional centre of activity, providing the most intensely concentrated development in the region. It has the greatest range of high order services and jobs and the largest commercial component of any activity centre. The centre services the greater Geraldton and Mid West region.

Presently Geraldton CBD has a total floor space of 85,100m²; comprised of 58,800m² of shop retail, 8,000m² of other retail and 18,300m² of entertainment floor space.

The outcomes of Shop Retail demand analysis for Geraldton CBD are shown in Figure 32. The range of floorspace recognises that retail operators require a minimum level of productivity (turnover per m²) to ensure the viability of the business. These targets will vary for different retail types and brands. Based on estimated rates of retail expenditure capture, a range for future floorspace requirements has been constructed using a minimum floor space productivity of \$4,500/m², and a maximum floor space productivity of \$7,500/m². Based upon these assumptions the modelling suggests that current floorspace supply is on the lower end of sustainable levels. The implications for this are that whilst the raw supply of commercial floorspace for Geraldton is appropriate, its configuration and activity is performing at a relatively low floorspace production. It is noticeable that viable Shop Retail floorspace increases only very slowly until post 2026. This is due to the impact of the floorspace introduced in district centres competing with floorspace in the Geraldton CBD, until population growth provides sufficient demand.

Figure 33 outlines the projected demand for Other Retail floorspace within Geraldton CBD. The ranges of Other Retail floorspace demand shown in Geraldton CBD continue to be well below the current supply throughout the time period modelled. This indicates a chronic oversupply of this type of floorspace in the City that will not be overcome by the projected population increase to 2031.

The addition of Other Retail floorspace in district activity centres will further compromise the productivity of this type of floorspace across the network of centres. Such low productivity shows the land being currently used for Other Retail may not be the 'highest or best use' in the location. A planned contraction in Other Retail floorspace in Geraldton CBD may be required to maintain reasonable levels of productivity.

Figure 34 outlines the anticipated market potential of entertainment activity within Geraldton CBD. Significant growth is projected in this land use as a greater spread of workers, residents and visitors access the activity centre for a diverse range of uses. In addition the development of the second stage of the Batavia Coast Marina will provide opportunities for expansion of this type of floorspace to service the City's future population.

The analysis assumes that existing and future demand for a discount department store is allocated to the CBD or future district centres. There is currently significant regional demand for a discount department store. The analysis considers the best possible outcome to meet the existing and short-term future demand will be consolidation of existing under-performing floorspace within the CBD (notwithstanding the planning challenges associated with this).

If this demand is not to be met within the CBD in short-term there may be a planning argument for bringing forward the development of a DDS anchored district centre sooner than 2021. However given the principles outlined in Chapter 3 of this Strategy the strategic merits of this would need to be carefully considered by the City, based on detailed proposal by a proponent, in order to ensure the ongoing viability of retail in the CBD.

Figure 32: Geraldton CBD Shop Retail Floorspace Demand

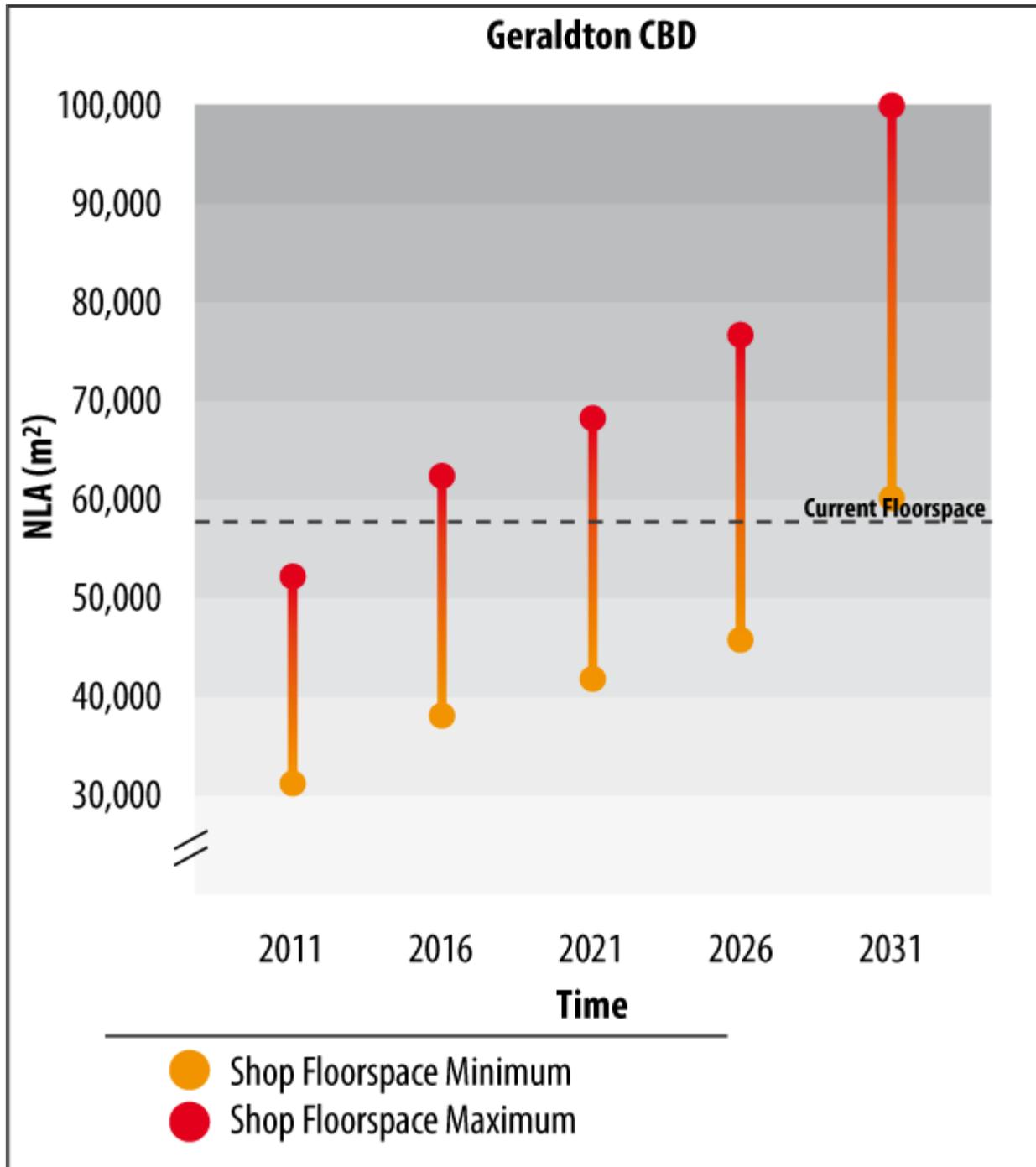


Figure 33: Geraldton CBD Other Retail Floorspace Demand

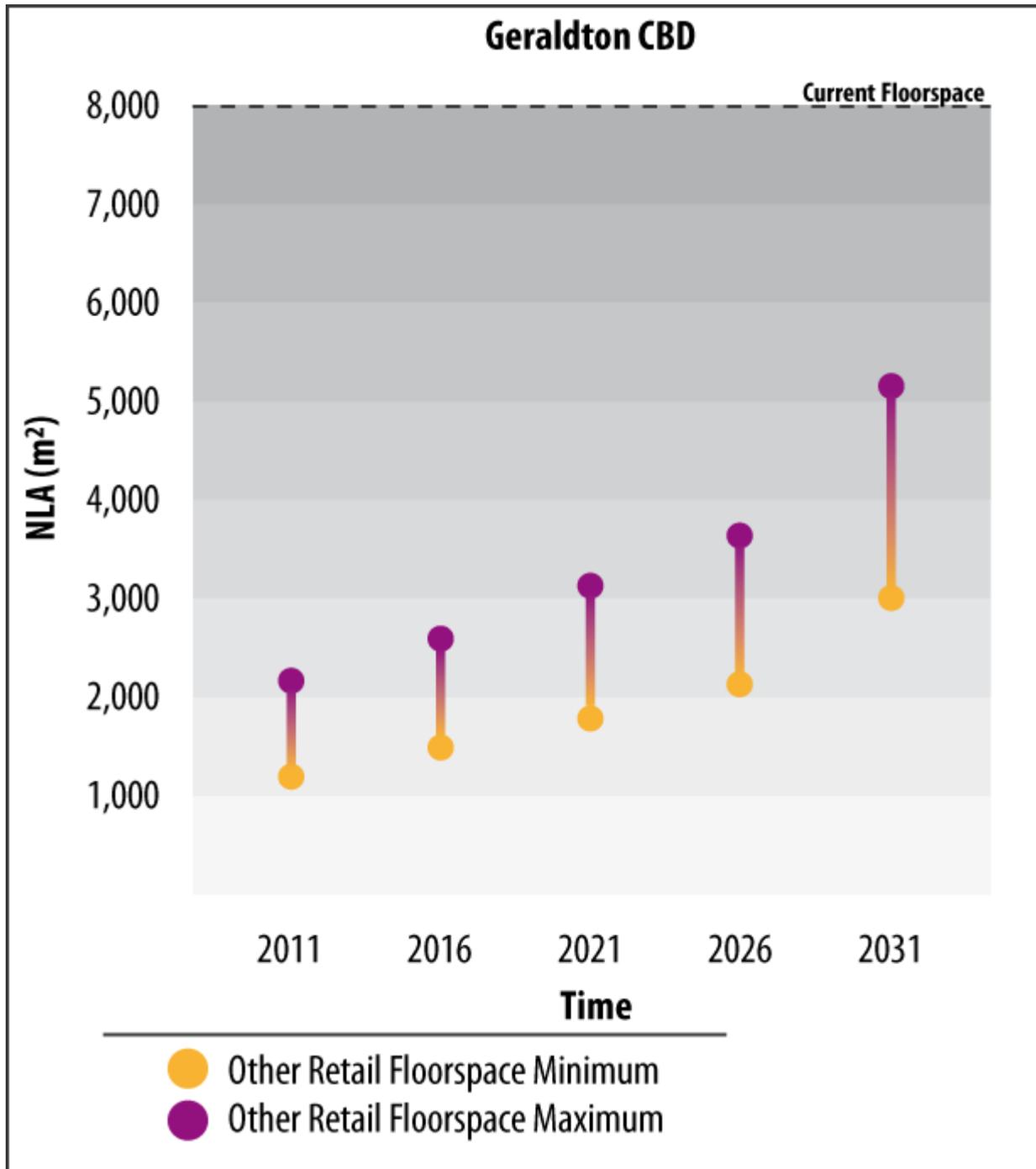
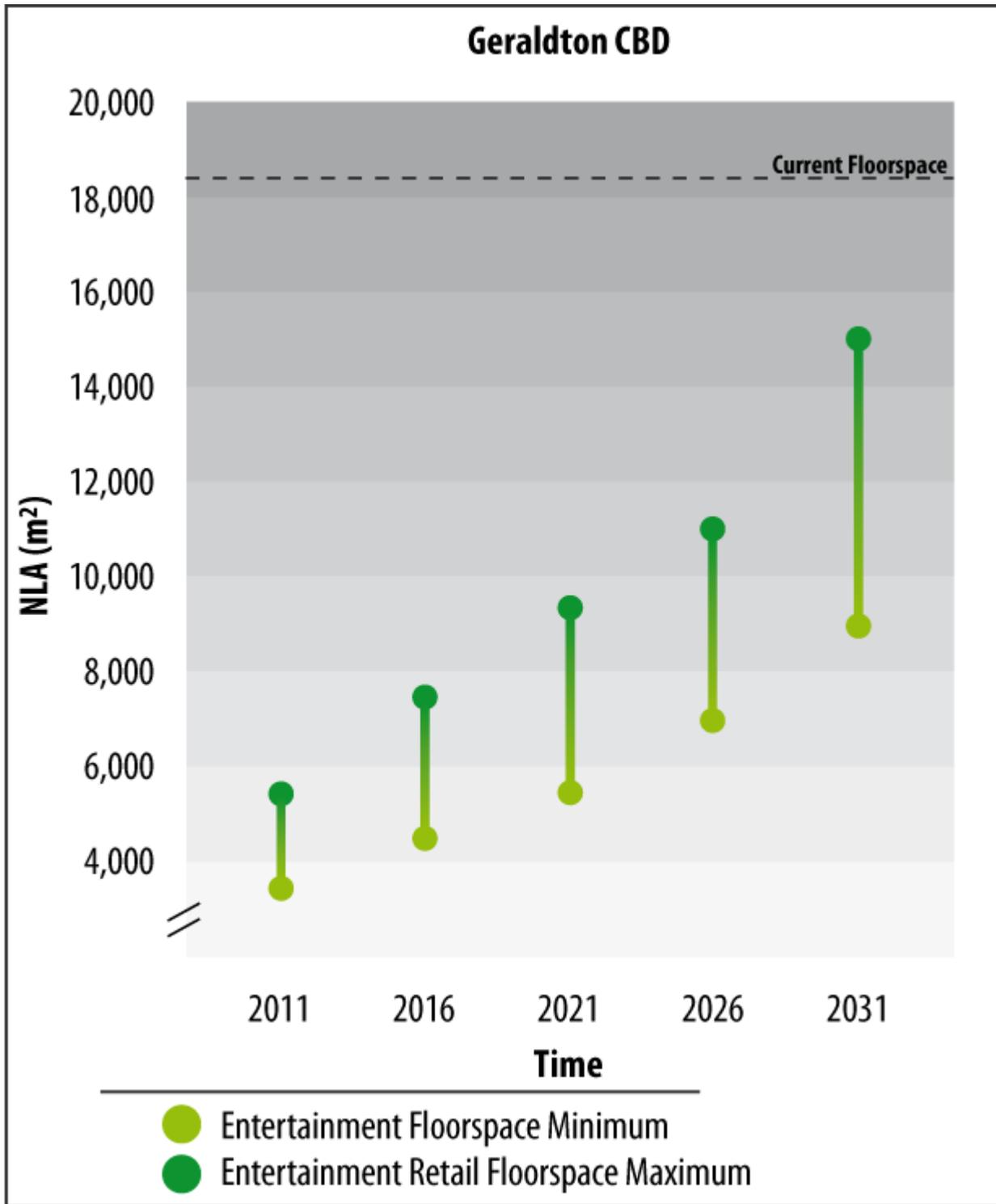


Figure 34: Geraldton CBD Entertainment Floorspace Demand



7.3 DISTRICT CENTRES

District centres are multipurpose centres that provide a diversity of uses. They share some characteristics with the regional centre but serve smaller sub-regional catchments. They offer a range of essential services, facilities and employment opportunities to support their sub-regional catchments. They perform an important role in the City's economy.

The expansion of the City of Greater Geraldton to a population of over 100,000 people will require the eventual development of one or more district centres. These centres will be preferred locations for the development of one or more discount department stores.

The modelling of future district centres has been based on the development of a northern district centre by 2016 and a southern district centre by 2021. Initially the northern centre has been modelled at neighbourhood centre size (i.e. with a single supermarket), with growth to a full district centre by 2026 (i.e. two supermarkets and a discount department store), although further growth is modelled until 2031.

The southern district centre is assumed to start developing from 2021 and grow to a full district centre by 2026. This timing of the development of these centres is designed to allow the Geraldton CBD to maximise its floorspace productivity.

The outcome of Shop Retail demand analysis for the future district centres is shown in Figure 35. The range of floorspace recognises that retail operators require a minimum level of productivity (turnover per m²) to ensure the viability of the business.

These targets will vary for different retail types and brands. Based on estimated rates of retail expenditure capture, a range for future floorspace requirements has been constructed using a minimum floor space productivity of \$4,500/m², and a maximum floor space productivity of \$7,500/m².

Figure 36 outlines the projected demand for Other Retail floorspace within future district centres. Due to the oversupply of Other Retail floorspace in Geraldton CBD and the need to minimise the impact of the district centres on Geraldton CBD, no Other Retail floorspace demand has been projected for district centres until 2021.

Figure 37 outlines the anticipated market potential of entertainment activity within future district centres. Similar to demand for Other Retail floorspace, low demand for entertainment floorspace in district centres is projected until 2026. Again this is due to the need to limit the impact of the district centres on the viability of existing floorspace in Geraldton CBD.

Figure 35: District Centres Shop Retail Floorspace Demand

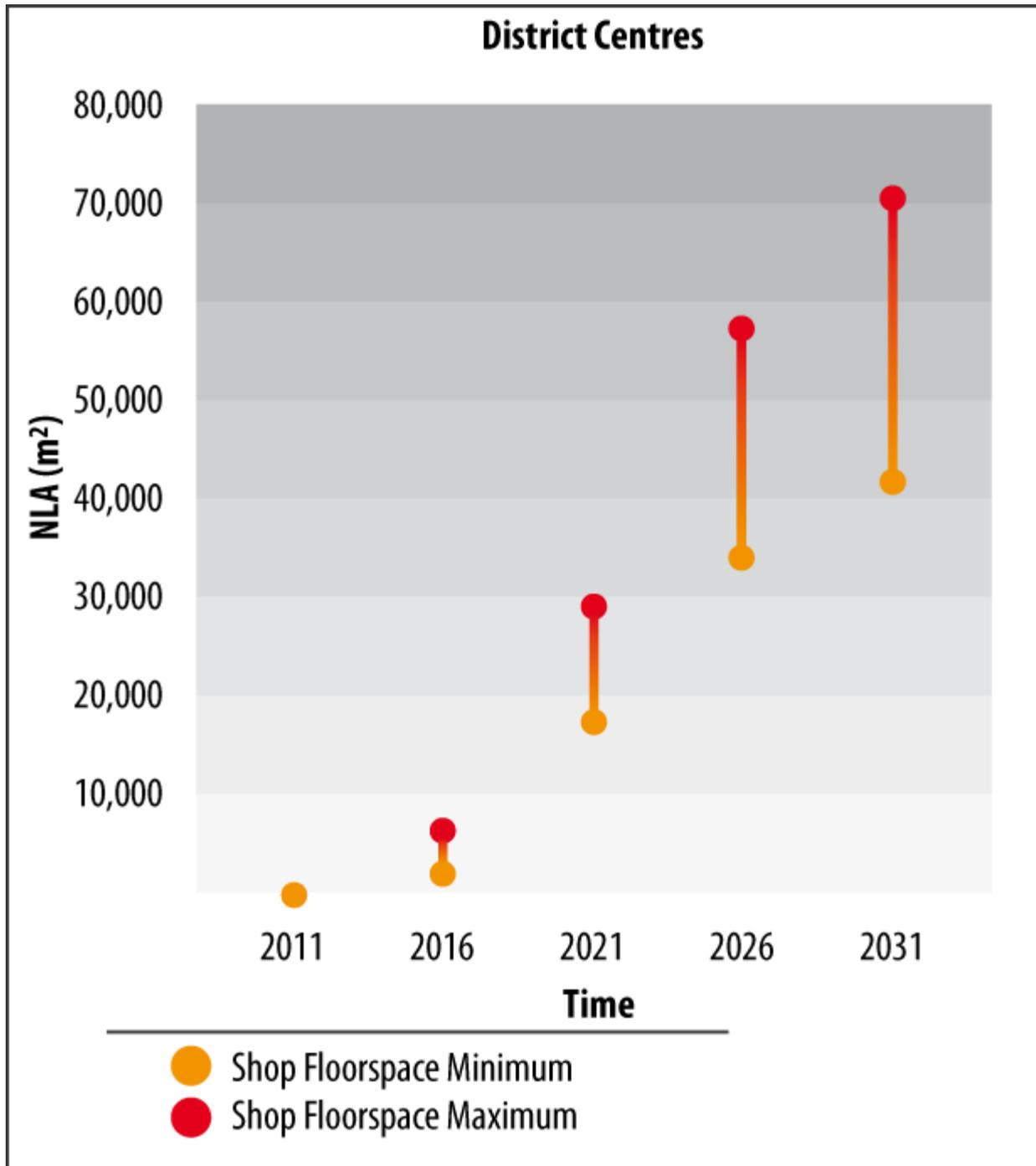


Figure 36: District Centres Other Retail Floorspace Demand

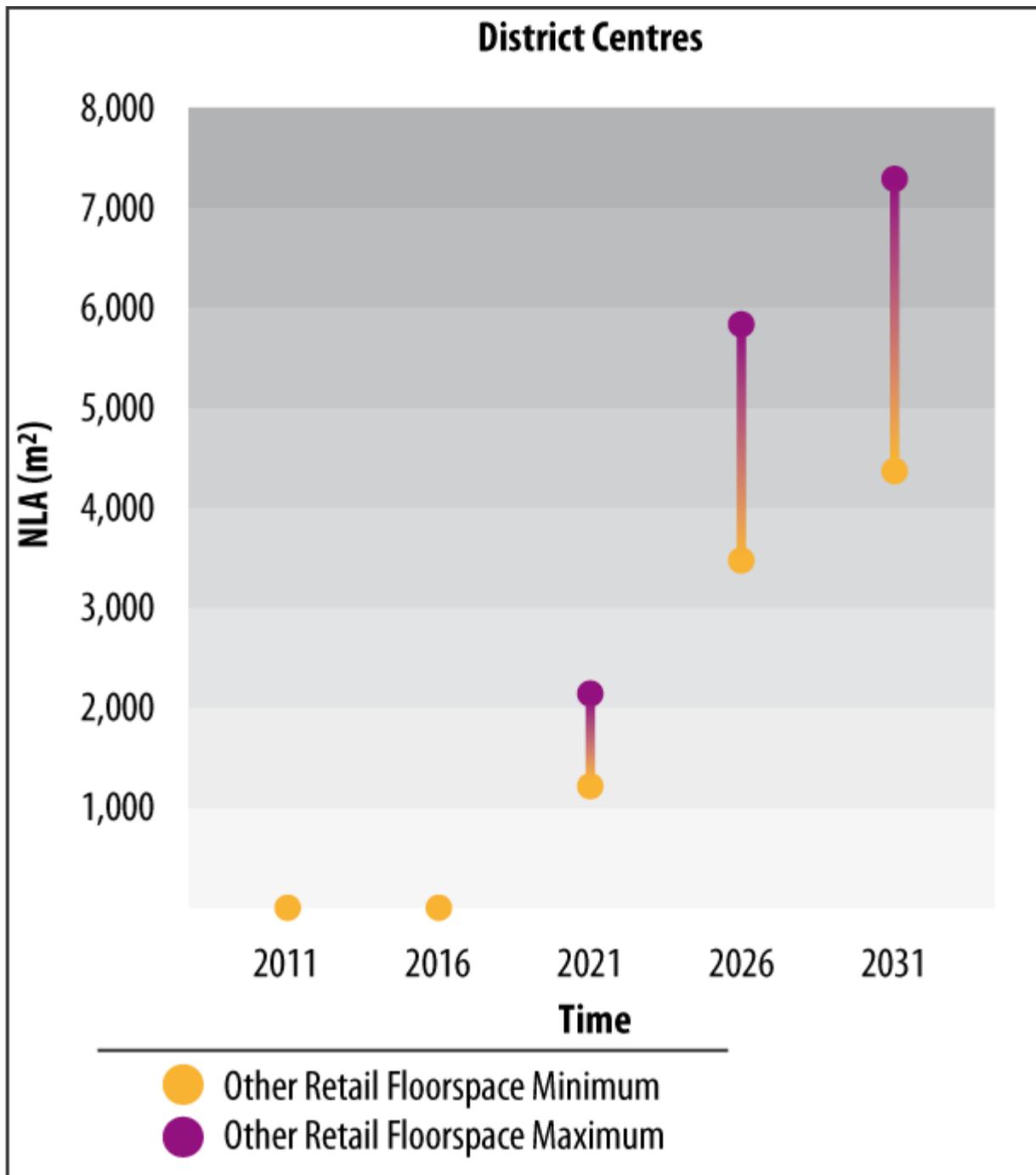
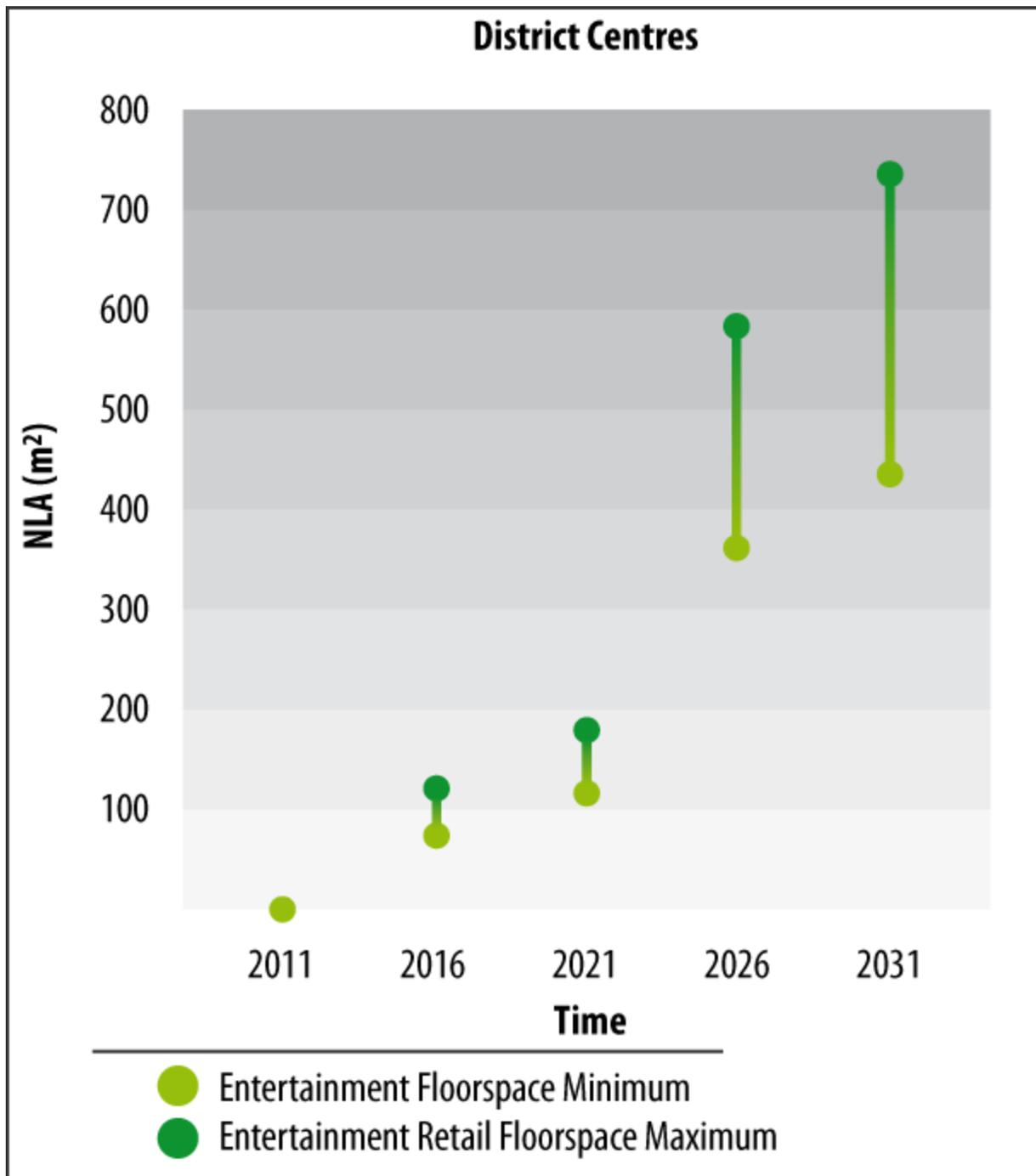


Figure 37: District Centres Entertainment Floorspace Demand



7.4 NEIGHBORHOOD AND LOCAL CENTRES

Neighbourhood centres have a greater focus on servicing the daily and weekly household shopping needs of residents and providing community facilities and a small range of other convenience services. Their relatively small scale and catchment enables them to have a greater local community focus and provide services, facilities and job opportunities that reflect the particular needs of their catchment.

Local centres provide for primarily daily household shopping needs and small range of other convenience services.

These centres can provide much of the local amenity that defines a local community, and also perform an important economic function in providing for the local convenience retail needs of residents. On occasion neighbourhood and local centres can also develop specific niche economic functions based around agglomerations of small business activities.

The four Status 1 neighbourhood centres were prioritised in the modelling due to foreshadowed Local Government intervention (as per consultation with the City). Figures 38 – 41 summarise the outcomes of the demand analysis for these priority centres, given population Scenario 3 plays out. Minimal increases in projected floorspace for these centres are expected until post 2026 due to the addition of a district centre to the activity centres network in 2016 and a second district centre by 2021.

This does not preclude other centres from achieving or aspiring to a change in status. Any proposal for development requiring or indicating a change in status should be considered by the City in the context of the principles outlined on Chapter 3.

The projected demand for the balance of the City's local and neighbourhood centres for both Scenarios 2 and 3 are outlined in Appendix D and E.

Future changes in the status of centres will mean a change in the allocation of floorspace.

7.5 BULKY GOODS RETAIL

Demand for bulky goods and large format retail floor space is expected to double over the next 20 years – assuming the split of expenditure between the two business models remains at current levels – as shown in Figure 42. The range of floorspace recognises that retail operators require a minimum level of productivity (turnover per m²) to ensure the viability of the business. These targets will vary for different retail types and brands. Based on estimated rates of retail expenditure capture, a range for future floorspace requirements has been constructed using a minimum floor space productivity of \$1,250/m², and a maximum floor space productivity of \$3,250/m².

As consumption patterns change, it is likely that more of the retail functions traditionally held within an activity centre will transition to a bulky goods and large format retail business model.

Figure 38: Bluff Point Floorspace Demand

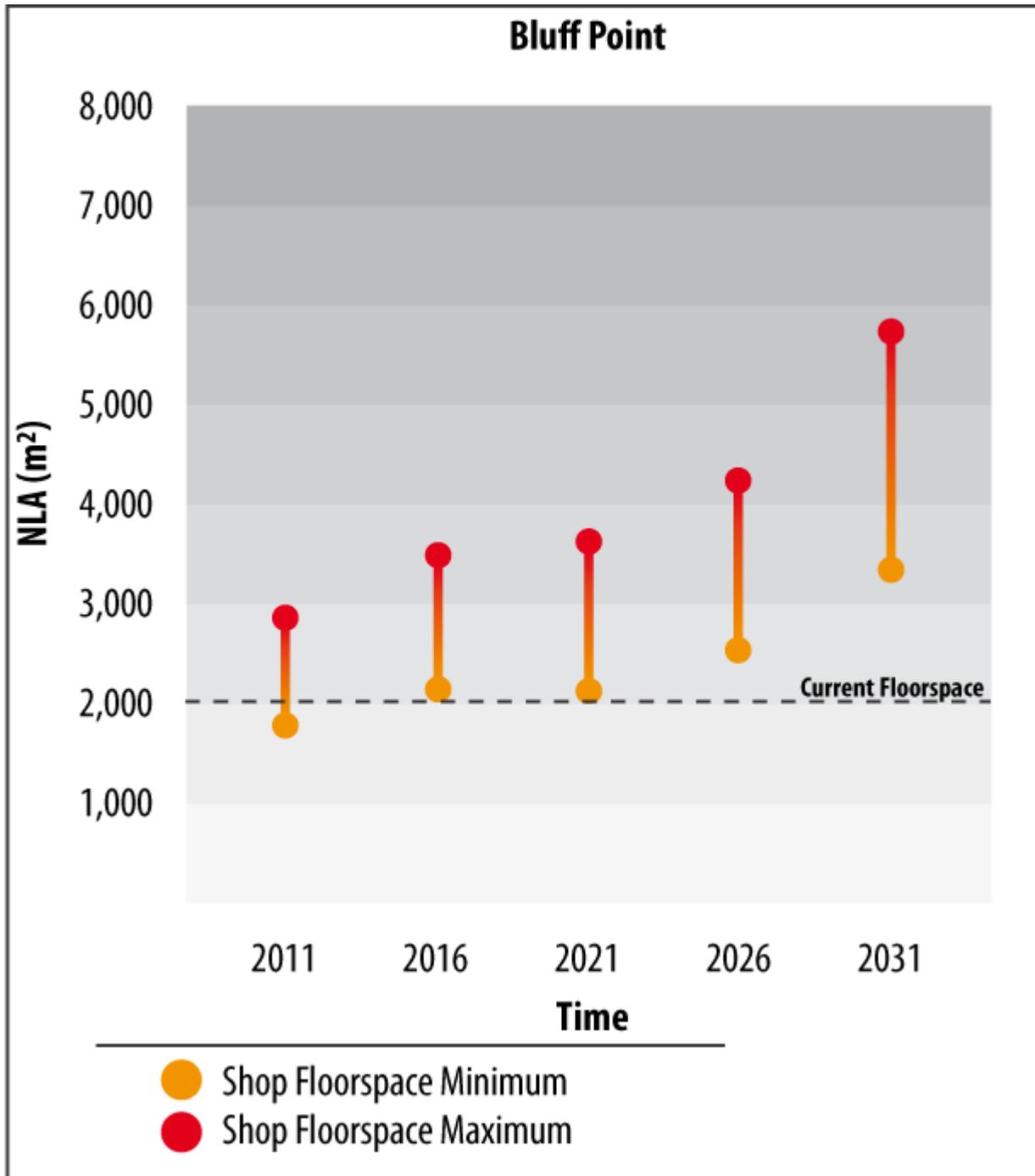


Figure 39: Rangeway Floorspace Demand

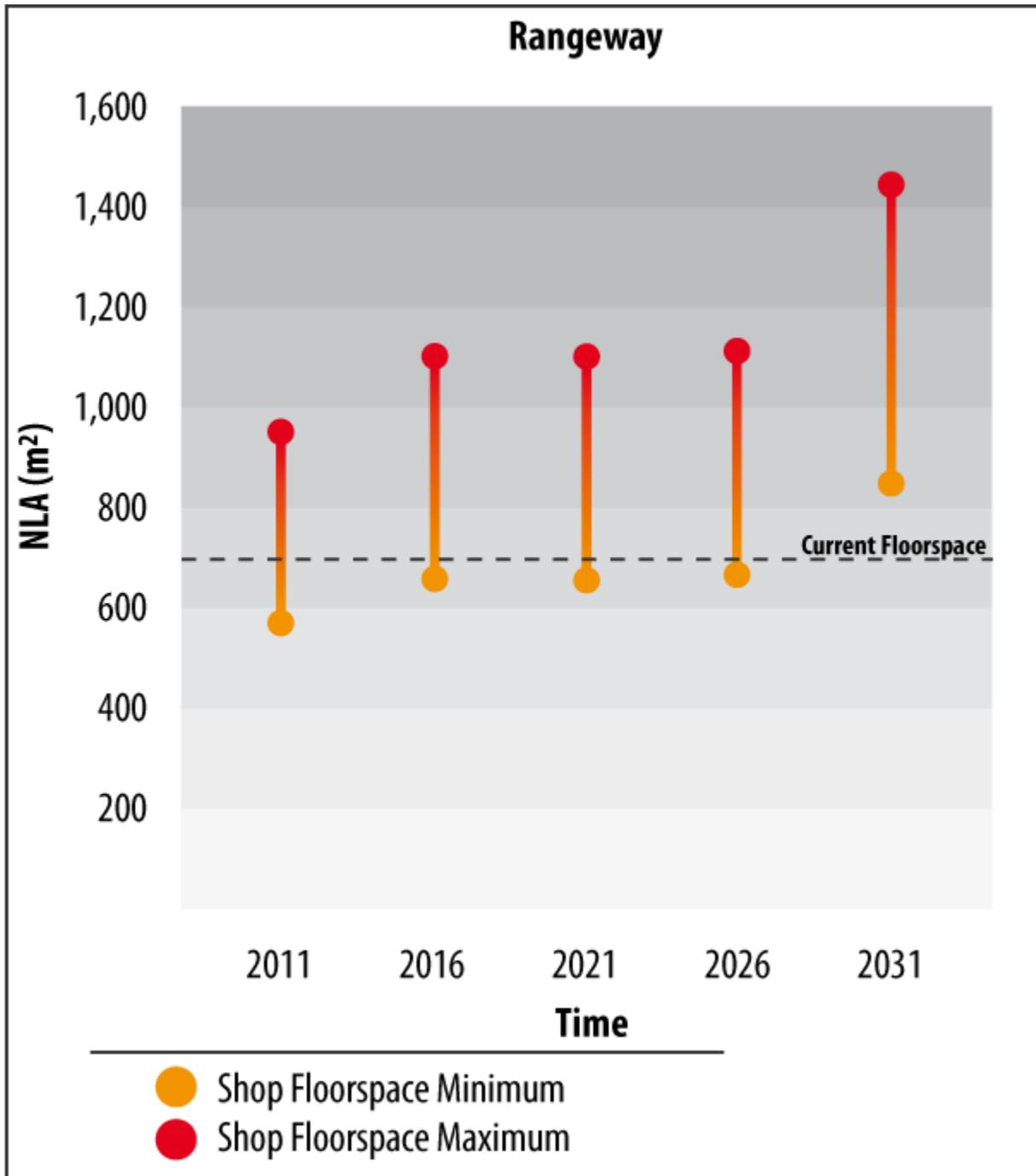


Figure 40: Sunset Beach Floorspace Demand

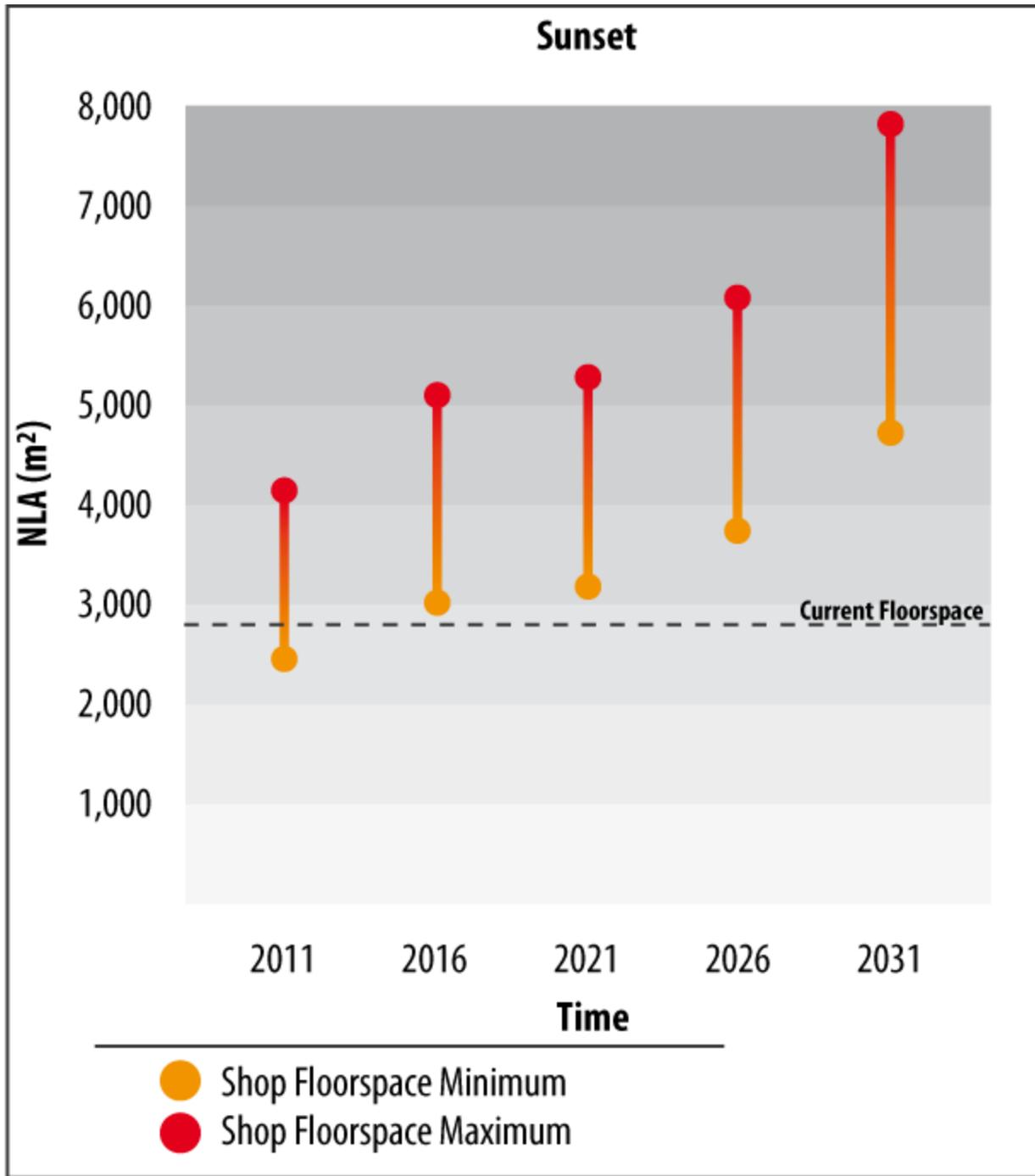


Figure 41: Wonthella Floorspace Demand

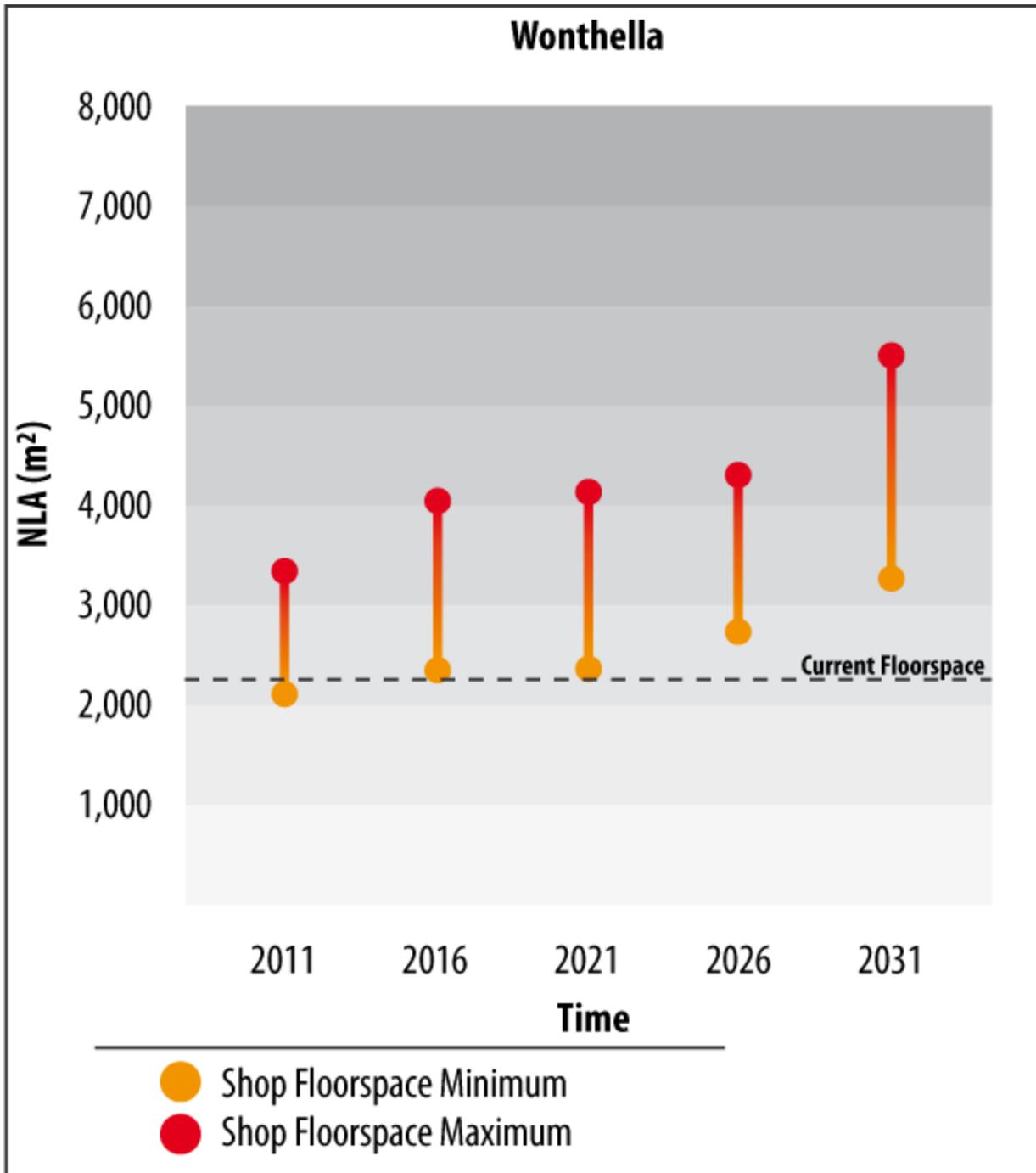
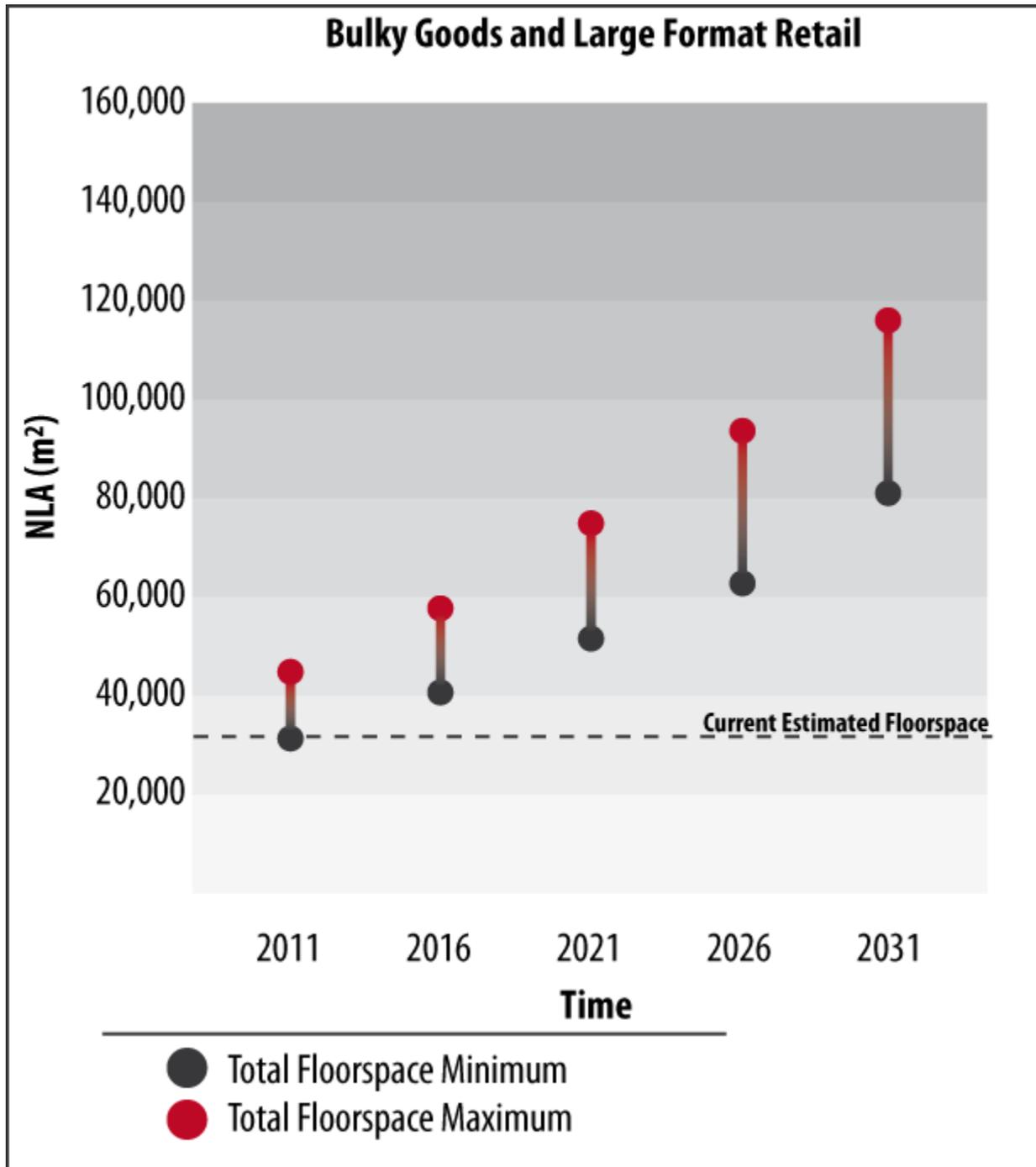


Figure 42: Bulky Goods Floorspace Demand



8. DECISION MAKING STRUCTURES

8.1 STATUTORY PLANNING DECISION-MAKING

8.1.1 *Flow-On to Statutory Planning*

Activity centre principles, roles and expectations and performance measures must be embedded into the City of Greater Geraldton’s statutory planning processes in order for them to be effective in implementing the Strategy. In order to achieve this, the following aspects need to be addressed:

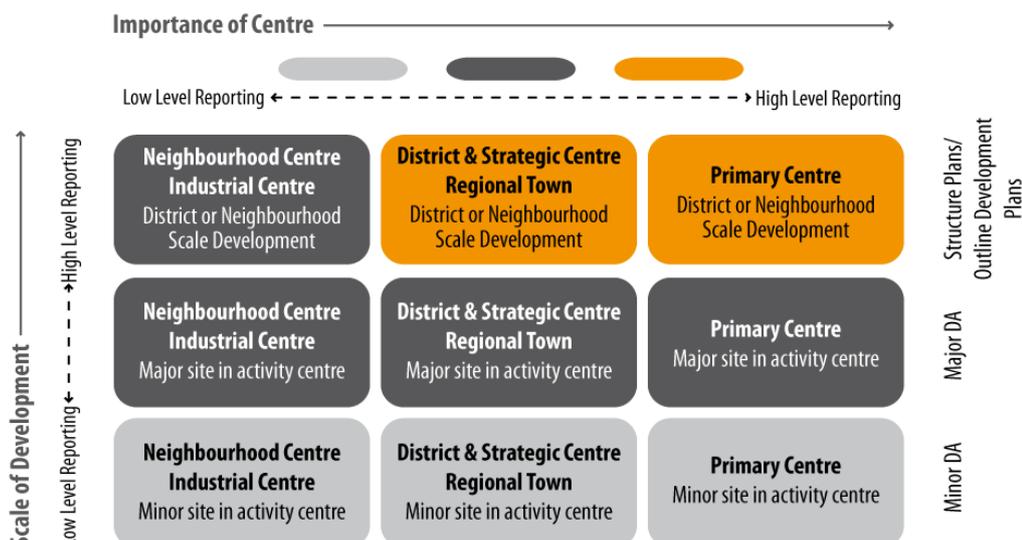
- An understanding of the City of Geraldton’s decision-making processes;
- A clear link between the identified activity centre principles and performance measures and the decisions which need to be made by the City;
- A robust and defensible evidence base around which decisions are structured;
- Clear and defined links with the objectives of the Strategy; and
- Structures which provide the City with the information, competence and evidence required to make decisions.

The Strategy provides information on the intent for each activity centre, overarching principles to guide development as well as measures specific to achieving a minimum standard of development in each identified area of focus.

8.1.2 *Triggers*

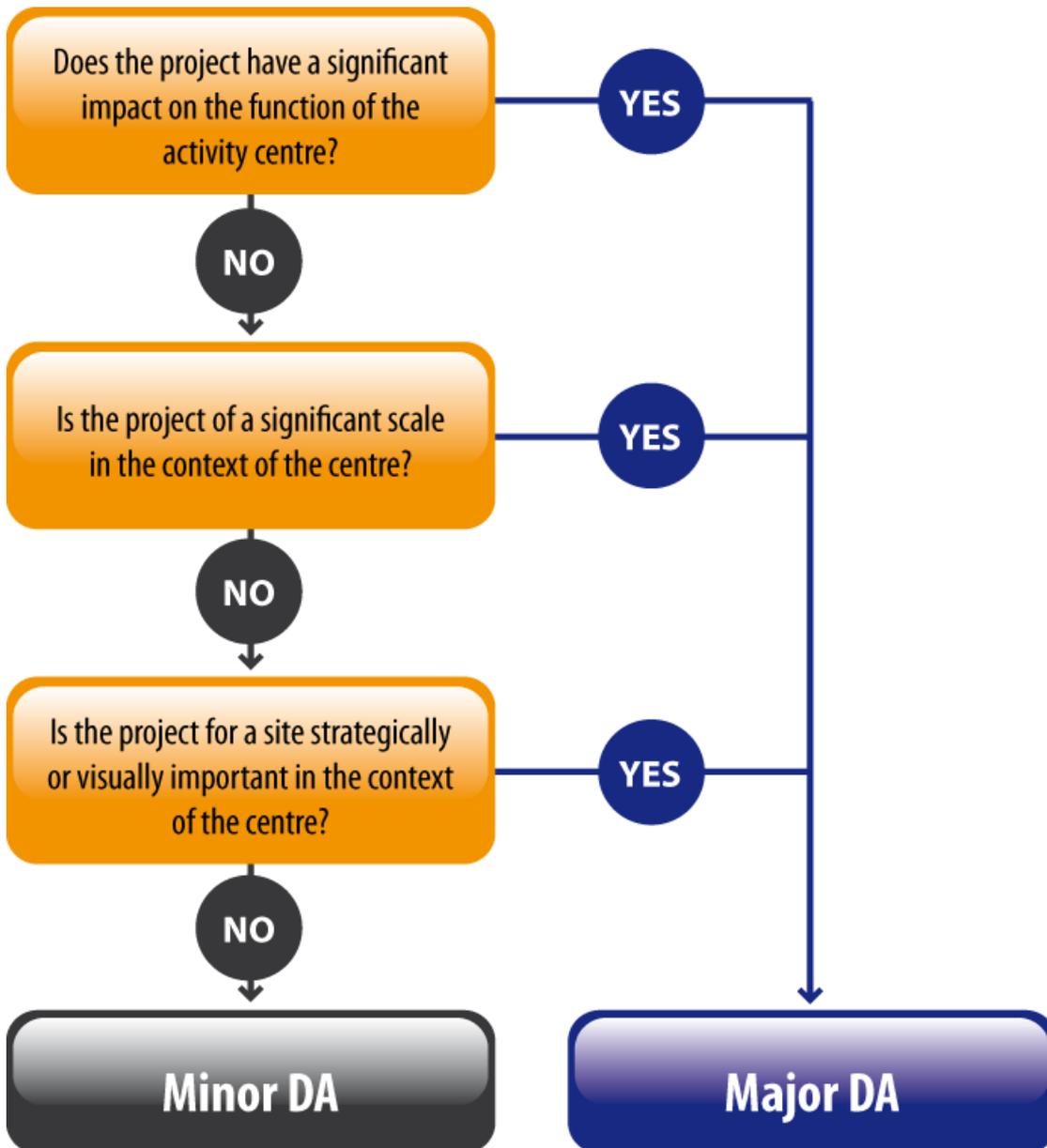
While it is important that all developments proposed for activity centres are assessed to determine their appropriateness for the centre in terms of activity centre rules and congruence with the performance measures for the activity centre type, not all proposals will require the same level of assessment. Classifying development proposals as ‘minor’ or ‘major’ in terms of their effect on the functioning of the activity centre will allow clear communication to development proponents of the level of information they are expected to provide in their proposals and of the performance measures they are expected to meet. Figure 44 outlines three levels of planning proposals that are likely to need to be considered in the implementation of the Strategy.

Figure 44: Criteria for Level of Planning Required



While structure plans and outline development plans are currently a primary means of planning large-scale developments in the City of Greater Geraldton, there is no further distinction between major and minor development applications. Developing a clear definition of development applications as major or minor will allow the City to ensure proponents provide adequate information for major developments but reduces the burden for minor developments. Figure 45 outlines a proposed decision for determining major developments.

Figure 45: Proposed Definition of Major or Minor Development Applications



9. STRATEGY IMPLEMENTATION

Successful implementation of the Strategy will require a number of initiatives by the City and other key stakeholders.

9.1 RECOMMENDATIONS

9.1.1 Future Strategic Planning Requirements

The Strategy should be used to guide future strategic planning exercises in the City of Greater Geraldton, including the preparation of a new Local Planning Strategy and detailed planning/structure planning of activity centres. The strategic planning required to implement this Strategy should be informed by the Strategy principles.

9.1.2 Performance Based Decision Making

Emphasis will need to be placed on performance based decision making (a relatively new paradigm within local government statutory planning). Stakeholders will need to have a clear understanding of the City's expectations, as well as an understanding of the opportunities implicit within the Strategy to deliver more flexible and innovative developments.

9.1.3 A Single Local Planning Scheme

Currently there are multiple local/town planning schemes operating within the City of Greater Geraldton. In order to simplify the statutory planning system, give greater certainty and apply consistent planning across the municipality a new scheme covering the entire City should be produced with consistent zones. The Scheme should adopt a more performance based approach, especially for activity centres, which can be combined with the Model Scheme Text.

9.1.4 Other Statutory Planning Instruments

In an environment of growth such as that envisaged by the City, a simplified statutory planning system with simple, clear, usable and targeted planning instruments is required to produce optimal outcomes for the existing and future community.

9.1.5 Determine Need for Additional Infrastructure

The infrastructure contributing to the utility and amenity of each activity centre should be assessed and the need for improvement, additions and maintenance identified. Infrastructure may be provided by the local government, state/regional government organisations, the private sector or as a joint venture. However it is critical the need for additional infrastructure is identified regardless of the provider. Infrastructure may be related to:

- Access (e.g. footpaths, street trees, wayfinding signage, cycling infrastructure, public transport, road and car parking);
- Amenity (e.g. street trees, parks, soft and hard landscaping, public art, playgrounds, sports equipment and facilities, picnic amenities and seating);
- Community (e.g. public resource centre, library, childcare, schools, aged citizens or youth facilities);
- Health (e.g. medical or wellness services, including child health services); and
- Other specialised infrastructure.

9.1.6 Encourage Activity Centre Planning from a Strong Core

Prioritise the active redevelopment of existing sites within the core of activity centres rather than adjacent rezonings being supported due to difficulty in redeveloping older sites.

9.1.7 Geraldton CBD

Actively encourage the consolidation and prioritisation of the Geraldton CBD, which needs to continue to mature into an intense, diverse Regional Centre that provides a range of opportunities for work, leisure and accommodation.

9.1.8 Status 1 Activity Centres

Actively encourage the development of a diverse range of activities within Status 1 centres, which have been identified due to their potential to provide a range of opportunities for their users. Encouraging the establishment of diverse activities requires a focused effort that goes beyond traditional zoning and land use controls.

9.2 GENERAL POLICY MEASURES

9.2.1 Diversity and Intensity of Activities

Retail, commercial, health, education, entertainment, cultural, recreational and community facilities and higher-density housing should be concentrated in centres in a compact urban form. Diversity of land uses promotes a more equitable distribution of services, facilities and employment and an overall reduction in travel demand.

Land uses that generate activity outside normal business hours (i.e. hospitality, entertainment, community facilities, gymnasiums) should be located in activity centres to generate additional evening and weekend activity and to take advantage of shared use of facilities such as car parking and public transport. Lower intensity uses such as showrooms should be located outside the core of activity centres.

This Strategy encourages activity centres to develop in a manner that does not result in a predominantly single purpose centre.

9.2.2 Managing Retail Development Impact

In determining major shopping developments the City will generally not support proposals which are, in the opinion of the City, likely to:

- Undermine the established and/or planned hierarchy of centres;
- Adversely affect the economic viability of existing, approved and planned activity centres where this could result in a deterioration in the level of service to the local community or undermine public investments in infrastructure and services; or
- Adversely affect the amenity of the locality.

9.2.3 Promoting the Use of Public Transport

Activity centres should be planned to provide public transport at central and convenient locations. Centres should be conveniently accessible by various transport modes, including walking, cycling, cars and freight vehicles, and particularly by public transport.

9.2.4 Promoting Attractive Centres as Community Focal Points

Activity centres should be developed with a wide range of uses comprising a mix of appropriate retail, office, entertainment and commercial uses as well as appropriate residential uses. Centres with a mix of uses can help public transport patronage through creating greater demand, whilst also reducing the need for travel by car.

9.2.5 Encouraging a More Even Distribution of Employment

Employment opportunities should be provided at centres throughout the hierarchy by encouraging the development of a maximum range of appropriate uses to improve access to jobs and reduce the need for long journeys to work. Planning decision-making should facilitate:

- Employment opportunities in activity centres by maximising the density and range of activities to improve access to jobs;
- Small-scale offices and commercial tenancies, particularly in neighbourhood and district centres, to facilitate the transition of home-based businesses and the growth of small business;
- Low-impact service industries locating in activity centres close to residential areas;
- Education and training, health and other specialist facilities locating in activity centres;
- Co-locating retail, residential, commercial, entertainment and other compatible urban uses with tertiary education, health and other suitable specialised centres; and
- The horizontal and vertical integration of compatible land uses in activity centres.

9.2.6 Traffic and Parking

The siting and planning of centres and management of traffic should:

- Balance regional traffic requirements with local traffic access needs;
- Support an external street-based retail environment by encouraging appropriate traffic volumes through road design; and
- Sustain high levels of pedestrian movement.

Planning decision-making should promote an efficient supply and use of car parking, by an appropriate allocation of on-street, off-street public and shared parking. This should be implemented by cash-in-lieu and reciprocal use arrangements and management plans. The City may require a maximum rather than a minimum number of car parking bays. As a guide:

- 2 bays / 100m² for showrooms;
- 2-3 bays / 100m² for offices; and
- 5 bays / 100m² for shops.

The City should ensure safe and convenient access for pedestrians and cyclists (including end of trip facilities), and people with a disability, including weather-protected car bays for disabled workers and visitors. Parking structures should be located, designed and/or landscaped so that they do not visually dominate frontages to streets or other public spaces.

9.2.7 Main Street Shopping

A 'main street' environment with street frontages and containing a mix of uses is the preferred form of commercial development in both new and established centres.

The structure of activity centres should incorporate a network of streets and public spaces as principal organisational elements. The predominant pattern of subdivision/re-subdivision or development/redevelopment in larger activity centres should be a street grid, with dimensions that are generally consistent with their surrounds and which do not create out-of-scale street blocks.

Planning decision-making should ensure the arrangement of land use and buildings and transport avoids concentrating pedestrian-focused activities inside large-format, internally focused buildings, and minimises the amount of land allocated to car parking.

The predominant built form should enable buildings to face streets in a manner whereby pedestrian access to the majority of individual businesses can be achieved directly from the street or public space, and/or where car parks on private land generally do not separate the road reserve boundary from the front of the building.

All such development with frontage to a street or public space should have a direct primary customer, employee or visitor access from the street or public space, and be designed so as to accommodate ground floor uses that interact with the public realm.

9.2.8 Highway Commercial Areas

The primary function of the Highway Commercial Area is for forms of retail (such as large showrooms or bulky goods displays) whose floorspace requirements make them unsuited to locate in other areas of commercial development. Generally, office uses, or shopping uses of less than 300m² should not be supported in these areas. The number and smaller size of the existing land parcels along the North-West Coastal Highway may make this difficult to achieve, however preference will be given to larger forms of retail as the primary intent is to ensure that pedestrian-based shopping and uses are located in a pedestrian-friendly urban environment in the core of the activity centres.

9.2.9 Offices

Major offices should be located in the City, District and Specialised centres (where appropriate). State and local governments and other public authorities should, wherever possible, locate offices within higher-order activity centres. Office development in District centres should complement the function of the centre while Neighbourhood centres may include small-scale offices.

Offices, unless incidental to or servicing industrial developments, should not be located on land zoned for industry.

9.2.10 Keeping Industrial Areas for Industry

Retail and commercial developments, unless incidental to or servicing industrial developments, should not generally be permitted in industrial zones except where:

- It provides a local convenience service, predominantly for people employed in the locality; or
- Is ancillary to the predominant industrial use of the premises.

9.2.11 Bulky Goods Retailing

In general, bulky goods retail is unsuited to the walkable catchment or the core of activity centres given their size and car-parking requirements, low employment densities and need for freight vehicle access.

Bulky goods are displayed and sold from retail showrooms that typically comprise extensive display and storage areas with direct vehicle access and car parking. Bulky goods retailing does not include the sale of food, clothing or personal effects goods.

The City should promote clusters of bulky goods retail adjacent to, or in close proximity to activity centres and the regional road and public transport networks. This should maximise the use of infrastructure, including the shared use of car parking; limit the number of car trips; and economically support other activity centre business.

The encroachment of bulky goods retail into residential zones should be avoided. Furthermore, locating such development in an ad-hoc manner or as ribbon development along regional roads is discouraged. Bulky goods retail should be developed with access and urban design controls so as not to interfere with traffic flow and safety, or detract from the amenity of public transport or the locality.

The preferred sequence of suitable locations is:

- a. Edge-of-centre sites integrated with, but not within, the walkable catchment or core activity centre precincts;
- b. Where it is demonstrated that sufficient suitable sites in or adjacent to activity centres are not available, out-of-centre mixed business or equivalent zones integrated with established and well-located bulky-goods nodes; and
- c. In limited circumstances where it is demonstrated that sufficient suitable sites in or adjacent to activity centres or within or integrated with existing bulky-goods nodes are not available, other out-of-centre mixed business or equivalent zones.

9.3 ACTIVITY CENTRE STRUCTURE PLANS

Activity centre structure plans need to be prepared and endorsed prior to approval of any major development within an activity centre to ensure a centre's development is integrated, cohesive and accessible. Any proposal for commercial rezoning should also be accompanied by an "indicative" activity centre structure plan to support the application. Developments should comply with any endorsed activity centre structure plan or this Strategy and be consistent with the centres relevant centre hierarchy.

An activity centre structure plan sets out the spatial plan and strategy to achieve a compact, pedestrian friendly, mixed-use activity centre that will offer a range of lifestyle choices, reduce car dependency and limit environmental impact.

Activity centre structure plans, will need to address Liveable Neighbourhoods (Element 7), the provisions in the local planning scheme and/or model provisions pertaining to structure plans and the 'Model Centre Framework' contained within Appendix 2 of SPP 4.2. 'Activity Centres for Perth and Peel'.

An activity centre structure plan should include the above elements, providing for each:

- An analysis of existing conditions;
- Opportunities and constraints;
- A description of the alternative approaches considered; and
- A description of the proposed approach, supported by maps, diagrams, sketches and photographs.

Where possible, larger activity centres should be staged to take into account actual and projected growth of the number of people living and working in its trade area.

An existing endorsed structure plan will remain effective in the interim until an activity centre structure plan is endorsed in accordance with this Strategy.

The preparation of activity centre structure plans is to be the responsibility of landowners and developers.

While generally not subject to the activity centre structure plan provisions of the policy, the planning and development of Neighbourhood centres should be guided by detailed area plans where required by a local planning scheme or structure plan. In new urban areas such plans should demonstrate how the centre satisfies Liveable Neighbourhoods (Element 7).

9.4 DEFINING ACTIVITY CENTRE BOUNDARIES

Local planning strategies, schemes (or scheme amendments) and district and local structure plans should identify the indicative boundaries of activity centres in both established and new urban areas. In activity centre structure plans, the extent of the boundary should be consistent with the above or as agreed with the City for the purpose of:

- Identifying the extent of applicability of this policy;
- Estimating the growth potential and land use mix of an activity centre; and
- Managing the interface between centre-scaled development and adjacent land.

The centre boundary may be defined by factors such as:

- Existing zoning in the the local planning scheme;
- Topographical features;
- Major infrastructure elements;
- Walkable catchment to major public transport stops; and
- Use of rear boundaries as an interface or transition for land use change.

The resulting centre boundary must contain sufficient land to deliver an appropriate degree of land use diversity for the relevant type and scale of centre. Unduly elongated centre form and ribbon commercial development is not supported, to avoid adverse impacts on the safe and efficient flow of traffic on major through-traffic routes.

Activity centre structure plans should encompass the whole of a centre as defined by the boundaries.

10. APPENDICES

- APPENDIX A: DEMAND DISTRIBUTION METHODOLOGY
- APPENDIX B: SUPPLY ANALYSIS
- APPENDIX C: DEMAND ASSUMPTIONS
- APPENDIX D: ACTIVITY CENTRE FLOORSPACE BREAKDOWN (SCENARIO 2)
- APPENDIX E: ACTIVITY CENTRE FLOORSPACE BREAKDOWN (SCENARIO 3)
- APPENDIX F: PLANNING LAND USE CATEGORY DEFINITIONS
- APPENDIX G: TARGET RANGES OF EMPLOYMENT FOR CENTRES BY SCENARIO
- APPENDIX H: INTERPRETATIONS

APPENDIX A: DEMAND DISTRIBUTION METHODOLOGY

The demand analysis conducted measures the current and projected future pool of demand across the following land use categories:

- Shop retail;
- Other retail; and
- Entertainment.

The analysis distinguishes between the two retail expenditure types: convenience and comparison. Convenience retail refers to the purchase of goods required by households on a regular basis (e.g. food, pharmaceuticals, cleaning goods, etc). Comparison retail refers to the purchase of goods on a less regular basis that generally require greater levels of consideration, research and comparison by households (e.g. whitegoods, furniture, high-end fashion, etc). Convenience retail is often located at sites perceived to be the most efficient for purchasing and transporting to the home. Shopping for comparison retail is often based upon travel to destinations away from the home to access the preferred offer.

The analysis also distinguished between the two retail business models: bulky goods / large format retail, and regular shop retail. Regular shop retail refers to the most common type of retail offering: characterized by its proximity to its regular customers base and the small-to-medium scale of goods on offer. Bulky goods and large format retail refers to the sale by retail, wholesale or auction of (or for the hire or display of) goods that are of such size, shape, weight, or volume as to require:

- A minimum floor space of 500m²;
- A large area for handling, display or storage; and / or
- Direct vehicular access to the site of the building or place by members of the public, for the purpose of loading and unloading the items into their vehicles after purchase or hire.

This may include the sale of a wide variety of goods, cater for an individual market, or the sale of bulky and durable goods. The sale of food or clothing is an incidental part of the business and this type of retail does not include supermarkets.

An estimate of the proportion of expenditure on bulky goods retail was derived from the Perth metropolitan area (DoP Land Use and Employment Survey 2002) and applied to the current and future floorspace supply. Retail expenditure, minus bulky goods / large format retail, was then allocated across all activity centres.

The proceeding methodology first describes the calculation of total expenditure for the main trade area, followed by the calculation of the bulky goods / large format retail component. The bulky goods / large format retail component is then subtracted from the expenditure pool – to be allocated outside of the retail gravity model.

RETAIL DEMAND GRAVITY MODEL

Retail demand gravity analysis was used to estimate expenditure capture for the three commercial floor space categories (shop retail, other retail, and entertainment). Change in a retail centre's revenue can be from one of three sources:

- Growth in available expenditure either as a result of population growth or as a result of growth in real expenditure (over and above inflation);
- Increasing the rate of expenditure capture, relative to existing offerings; and

- Reduction of expenditure leakage from the Main Trade Area.

Gravity models allow for the measurement of spatial interaction as a function of distance, to determine the probability of a given customer patronising a centre. They provide an approximation of trade area and sales potential for a development. This modelling technique uses the distance between a household and each centre and a measure of ‘attractiveness’ to define the probability model. The ‘attractiveness’ of a centre has been defined by total floorspace, and distance has been calculated by measuring straight-line distances between each centre and population. The formula used for the calculation of this attractiveness is shown in Figure 47.

Figure 47: Retail Gravity Model

$$P_{ij} = \frac{\frac{A_i}{D_{ij}^\beta}}{\sum_{j=1}^n \frac{A_i}{D_{ij}^\beta}}$$

P_{ij} = Probability of customer living/working in collection district i shopping at centre j.
 A_i = Size of the store/in square feet.
 D_{ij} = Distance from collection district i to shopping centre j.
 β = Parameter reflecting sensitivity of customers to distance.
 i = Collection districts ($i=1,\dots,m$)
 j = Centres ($j=1,\dots,n$)

Distance represents the cost associated with the journey to that centre. Area behaves as a proxy for the amenity offered by the centre. Area is separated into types, according to the Planning and Land Use Categories (PLUC), of which this study is concerned with the current supply of floor space for shop retail, other retail and entertainment.

The formula in Figure 47 is rigid in its prescription of the relative weighting for the costs (distance) and benefits (floor space): it implies that the cost of travel increases exponentially with distance, but that amenity is linearly constant with regard to area.

This is an assumption that may not best reflect the influence of these two factors on the consumer’s decisions within the Main Trade Area. For example, the conglomeration of activity may mean that an area’s floorspace increases, the attractiveness of the centre increases, but at an increasing rate. Similarly the relationship with distance may not be extreme in a highly car dependent location, such as Geraldton, where preferences for driving are higher and alternative modes of transport less accessible or available.

The retail gravity formulae used in this analysis has been refined to include an exponent on the measurement of area. The exponents reflect the supposed preferences for larger shopping centres (a sort of 'size premium').

One major weakness in the retail gravity model still unaddressed is the extent to which the trip decision is inherently costly; that is, there is a certain fixed cost involved in getting the consumer launched on any journey. To compensate for this, the analysis has included an inertial constant into the calculation of distance. The gravity formula is now represented by Figure 48.

Figure 48: Retail Gravity Model with Exponent on Area and Inertial Constant

$$P_{ij} = \frac{\frac{A_i^a}{c + D_{ij}^\beta}}{\sum_{j=1}^n \frac{A_j^a}{c + D_{ij}^\beta}}$$

a = Parameter reflecting sensitivity of customers to centre size
C = Inertial Constant

The inertial constant improves predictions of the model by weakening, but by no means removing, the direct relationship between place of residence and shopping centre.

This eliminates the scenarios where all consumers frequent only the closest shop – even though it lacks the amenity provided by a further, but in reality more attractive, shopping centre. Within the analysis:

- the exponent for area, *a* is: 1.1
- the exponent for distance *B* is: 1.5
- the inertial constant, *c* is: 1.0

The inertial constant quite literally translates to 1km worth of journey time as the equivalent effort required commencing a journey. It is included to reflect the cost of the next best alternative – i.e. not embarking on a journey. As the effort to get started is going to be generally the same for most trips, for most people, it is assumed to be constant.

The retail gravity model provides a clearer, reproducible outcome that can be more easily assessed. It does not, however, consider local factors including the comparative value proposition of centres (e.g. the presence of an 'anchor' attractor that draws significant market share), the brand preference of users, or the efficiency of transport networks (e.g. in some cases it may be easier for customers to access a centre that lies physically further away due to road configurations or traffic conditions).

APPENDIX B: SUPPLY ASSUMPTIONS

The supply side of the model considers all of those centres to which the expenditure of the main trade area is directed. Expenditure will be distributed among the centres on the supply side, via the retail gravity model, across the following three land use categories: shop retail, other retail and entertainment. One of the challenges with retail demand modelling in Western Australia is the incongruence between the available demand and supply data. The demand side data is very rich and provides very fine detail about consumer expenditure patterns. In contrast the available supply side information is very coarse, providing at best a broad indication of the current land use pattern within activity centres. To bridge the gap between these data sets, the supply side information for Geraldton has been further broken down based using benchmarking of the composition of supply at each level in the hierarchy (Figure 49).

Figure 49: Benchmark Supply Composition

	SHOP RETAIL		OTHER RETAIL	
	Convenience	Comparison	Convenience	Comparison
Neighbourhood Centre	57%	43%	n/a	n/a
District Centre	76%	24%	72%	28%
Secondary Centre (Perth Metropolitan comparison to Geraldton CBD)	21%	79%	1%	99%

Source: Pracsys (2011)

In addition to the above, the following assumptions underpin the supply side analysis:

- All existing commercial and major industrial centres within the City of Greater Geraldton were included with the exception of Greenough, Mullewa and Walkaway. They were excluded on the basis of small, local scale, limited catchments and limited influence on the flows of expenditure. Future modelling will capture any potential for growth in commercial activity at those sites.
- There is a significant degree of uncertainty surrounding the future competitive environment. This is particularly so in relation to the development of new centres as residential population growth in the area continues. The assumption under all scenarios is that the baseline level of attractiveness of each centre remains constant.

APPENDIX C: DEMAND ASSUMPTIONS

MAIN TRADE AREA

In undertaking an assessment of the development potential the analysis draws upon market capacity and growth to 2031. A key first step is to identify the geographic catchment likely to be served by the activity centre. In contrast to metropolitan location, the catchments in regional Western Australia are much simpler to delineate due to their geographic isolation. Figure 50 outlines the study area considered in this analysis.

Figure 50: Main Trade Area



POPULATION (CURRENT AND FORECAST)

For estimation of retail floorspace, population projections are not measured in terms of people, but instead dwellings. Dwellings are used because they represent the manner that people operate and spend their money as a household unit. Households are also the best available unit for measuring expenditure with data available through the ABS Household Expenditure Survey (2009-2010), which defines expenditure based on income per household. The location and number of dwellings is measured at the census collection district level¹.

¹ ABS Census of Population and Housing (2006)

The number of dwellings within the City was last recorded in entirety during the 2006 ABS census; modelling in subsequent periods was informed based on the three population growth scenarios outlined in the Background Report. A detailed explanation of how the projections were allocated spatially is included in Chapter 4.

DEMAND

The expenditure profile of residents varies across Australia and is primarily determined by level of income. Pracsys has assessed expenditure per household across the main trade area. The Household Expenditure Survey defines the expenditure patterns of households by level of income. The survey averages expenditure patterns into income dependent quintiles. That is, households with higher incomes spend more than those with lower incomes (Figure 51).

Figure 51: Household Expenditure Income Quintiles (\$/week)

	First	Second	Third	Fourth	Fifth
Mean gross household income per week	\$434	\$1,038	\$1,448	\$2,054	\$3,975

Source: ABS Household Expenditure Survey 2009-10

The average income within the main trade area was collected at the ABS census collection district level from the ABS 2006 census and then allotted to an expenditure quintile, according to the ABS Household Expenditure Survey (2009-10)². The relative level of average incomes has been assumed to remain unchanged. A detailed description of the socio-economic factors effecting demand in Greater Geraldton is included in Chapter 7.

The City of Greater Geraldton's household income profile was, on average \$1,448 per week, equivalent with a third quintile income. To align average expenditure over an array of miscellaneous goods and services with demand for a specific floorspace category, it was required that each good, or service, be matched to the floorspace category most suited to its delivery. In this fashion, the measurement of household expenditure (through the Household Expenditure Survey) is matched with the measurement of floor space (through the Planning Land Use Categories). Refer to Appendix B.

The average annual expenditure on each floor space category, by income quintile, is represented in Figure 52.

Figure 52: Household Expenditure Types by Retail Type and Household Income Quintile (\$/annum)

PLUC	Expenditure Type	First	Second	Third	Fourth	Fifth
Shop Retail	Convenience	\$6,856	\$9,888	\$12,531	\$15,113	\$18,745
Shop Retail	Comparison	\$3,797	\$6,334	\$8,724	\$12,325	\$19,458
Other Retail	Convenience	\$1,090	\$1,811	\$2,680	\$3,303	\$4,452
Other Retail	Comparison	\$1,959	\$3,090	\$4,683	\$6,198	\$10,073
Entertainment	Entertainment	\$730	\$1,117	\$2,027	\$2,824	\$4,048

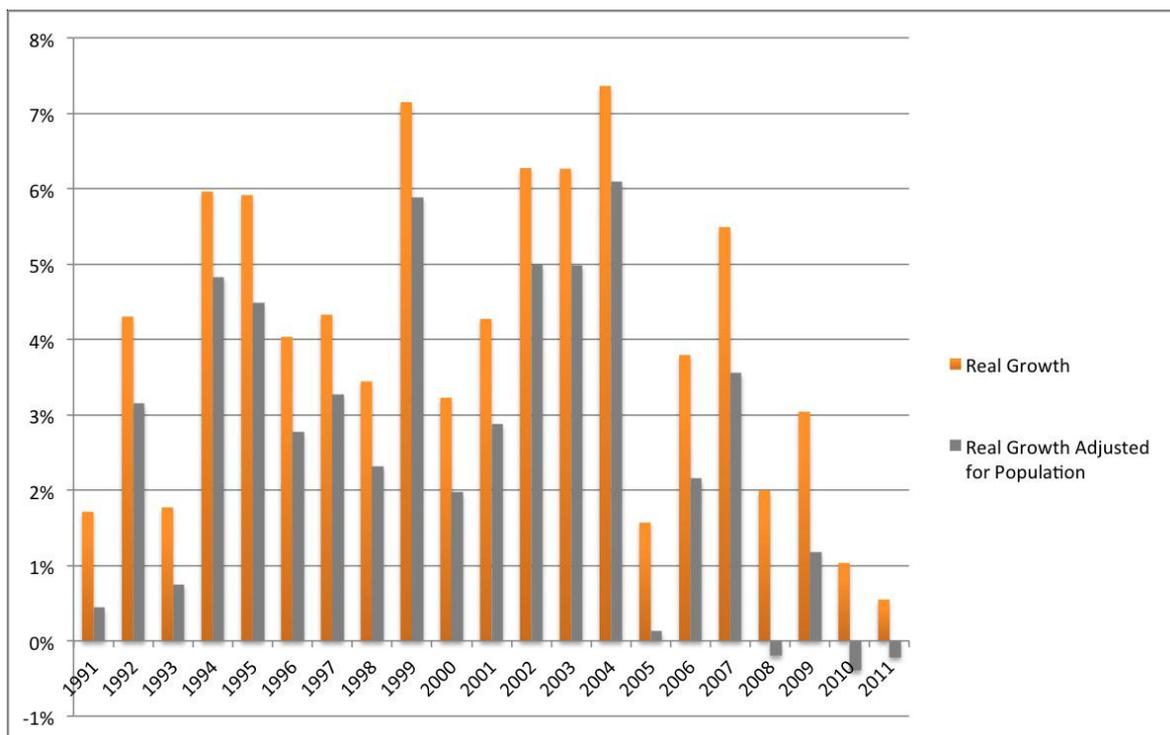
Source: ABS Household Expenditure Survey 2009-10

² All figures are adjusted for inflation so as to be current in (2011) dollar terms

The demand side of the retail gravity model requires both the point coordinate and expenditure pool of each census collection district. Latitudinal and longitudinal values position the collection district; the household expenditure survey generates the pool of total expenditure by PLUC and type.

Incomes and retail expenditure have shown strong growth over the last 20 years. Figure 53 outlines the average annual growth in retail turnover in Australia from 1991 to 2011.

Figure 53: Real Retail Turnover Growth (1991-2011)



Source: ABS Retail Trade Australia Cat. 8501.0 December 2011

To 2008, retail turnover had increased by about 3.8% pa in real terms (2.68% per annum when adjusted for population growth) with most of this growth on comparison goods rather than convenience goods. However recently weak economic conditions causing poor consumer confidence has seen retail turnover levels fall to the lowest in nearly 30 years.

Based on these historical growth rates, and understanding the assumption of continued economic prosperity that underpins the State governments WA Tomorrow Populations, a real expenditure growth rate of 1.5% (adjusted for population growth) for has been assumed for all other categories, which reflects a conservative estimate of future real growth in GDP per capita. The growth rate beyond 2016 should be treated with caution owing to the difficulty in forecasting on a range of variables. Expenditure growth estimates beyond 2016 are modelling estimates only and will require verification in the future. Planning for expansion of floorspace needs to be cognisant of industry trends such as digital migration (especially with the introduction of the National Broadband Network), with appropriate feedback mechanisms in place to revise the supply floorspace over time as consumer needs and preferences change.

Current and future expenditure levels for the main trade area are derived by multiplying the anticipated number of households by the average spend per household. Leakage of expenditure to surrounding areas (that which is beyond the boundaries considered in the Main Trade Area map, Figure 50) was assumed to be 10% for convenience retail, 30% for comparison retail and 30% for entertainment.

APPENDIX D: ACTIVITY CENTRE FLOORSPACE BREAKDOWN (SCENARIO 2)

Appendix D provides the City with an insight as to shop retail floorspace ranges under population growth consistent with Scenario 2 (a projected population of 70,000 people by 2031 – discussed in Chapter 4).

The tables are included as a reference to show the implications of slower-than-planned-for population growth on floorspace projections.

Figure 54: Scenario 2 – Shop Retail

	Current	2011	2016	2021	2026	2031
Geraldton CBD	58,828	31,620 - 52,700	34,770 - 57,950	34,620 - 57,710	36,200 - 60,340	41,580 - 69,300
District Centres	-	0 - 0	3,390 - 5,660	14,360 - 23,930	23,450 - 39,090	27,590 - 45,980
North West Coastal Highway Commercial	3,720	3,300 - 5,510	3,540 - 5,900	3,310 - 5,530	3,380 - 5,630	3,870 - 6,460
Neighbourhood Centres						
Bluff Point	2,020	1,800 - 2,990	1,920 - 3,210	1,800 - 2,990	1,880 - 3,130	2,180 - 3,640
Geraldton	2,362	1,900 - 3,320	2,120 - 3,540	1,980 - 3,310	1,980 - 3,290	2,240 - 3,730
Mt. Tarcoola	1,070	870 - 1,440	920 - 1,540	850 - 1,420	830 - 1,380	930 - 1,550
Rangeway	700	580 - 960	620 - 1,030	580 - 960	570 - 950	650 - 1,080
Seacrest	-	4,580 - 7,630	4,920 - 8,200	4,480 - 7,460	4,260 - 7,110	4,850 - 8,090
Sunset Beach	2,828	2,510 - 4,190	2,740 - 4,560	2,570 - 4,280	2,750 - 4,590	3,250 - 5,420
Utakarra	828	1,170 - 1,950	1,270 - 2,210	1,200 - 1,990	1,200 - 2,000	1,390 - 2,320
Wonthella	2,229	2,050 - 3,410	2,200 - 3,660	2,060 - 3,440	2,100 - 3,510	2,410 - 4,020
Local Centres						
Beachlands	100	70 - 120	70 - 120	70 - 110	70 - 110	80 - 130
Drummond Cove	-	60 - 110	60 - 110	60 - 90	60 - 100	70 - 120
Mahomets Flats	-	550 - 920	590 - 980	530 - 890	520 - 870	590 - 980
Wandina	500	310 - 510	340 - 560	310 - 510	290 - 480	340 - 560

Figure 55: Scenario 2 – Other Retail

	Current	2011	2016	2021	2026	2031
Geraldton CBD	8,045	1,440 - 2,410	1,650 - 2,750	1,760 - 2,940	1,860 - 3,7110	2,140 - 3,560
District Centres	-	0 - 0	0 - 0	1,230 - 2,040	2,770 - 4,620	3,260 - 5,440
North West Coastal Highway Commercial	51,601	11,030 - 18,370	12,700 - 21,170	13,550 - 22,590	14,430 - 24,060	16,600 - 27,680
Neighbourhood Centres						
Bluff Point	-	0 - 0	0 - 0	0 - 0	0 - 0	0 - 0
Geraldton	-	0 - 0	0 - 0	0 - 0	0 - 0	0 - 0
Mt. Tarcoola	-	0 - 0	0 - 0	0 - 0	0 - 0	0 - 0
Rangeway	-	0 - 0	0 - 0	0 - 0	0 - 0	0 - 0
Seacrest	-	0 - 0	0 - 0	0 - 0	0 - 0	0 - 0
Sunset Beach	-	0 - 0	0 - 0	0 - 0	0 - 0	0 - 0
Utakarra	-	0 - 0	0 - 0	0 - 0	0 - 0	0 - 0
Wonthella	250	0 - 0	0 - 0	0 - 0	0 - 0	0 - 0
Local Centres						
Beachlands	-	0 - 0	0 - 0	0 - 0	0 - 0	0 - 0
Drummond Cove	-	0 - 0	0 - 0	0 - 0	0 - 0	0 - 0
Mahomets Flats	-	0 - 0	0 - 0	0 - 0	0 - 0	0 - 0
Wandina	-	0 - 0	0 - 0	0 - 0	0 - 0	0 - 0

Figure 56: Scenario 2 – Entertainment

	Current	2011	2016	2021	2026	2031
Geraldton CBD	18,302	3,460 - 5,770	4,040 - 6,730	4,640 - 7,730	5,300 - 8,830	6,610 - 10,270
District Centres	-	0 - 0	0 - 0	80 - 140	220 - 360	260 - 430
North West Coastal Highway Commercial	2,585 - 2,585	490 - 820	580 - 960	660 - 1,110	760 - 1,280	890 - 1,480
Neighbourhood Centres						
Bluff Point	-	0 - 0	0 - 0	0 - 0	0 - 0	0 - 0
Geraldton	-	0 - 0	0 - 0	0 - 0	0 - 0	0 - 0
Mt. Tarcoola	-	0 - 0	0 - 0	0 - 0	0 - 0	0 - 0
Rangeway	-	0 - 0	0 - 0	0 - 0	0 - 0	0 - 0
Seacrest	-	0 - 0	0 - 0	0 - 0	0 - 0	0 - 0
Sunset Beach	-	0 - 0	0 - 0	0 - 0	0 - 0	0 - 0
Utakarra	-	0 - 0	0 - 0	0 - 0	0 - 0	0 - 0
Wonthella	-	0 - 0	0 - 0	0 - 0	0 - 0	0 - 0
Local Centres						
Beachlands	-	0 - 0	0 - 0	0 - 0	0 - 0	0 - 0
Drummond Cove	-	0 - 0	0 - 0	0 - 0	0 - 0	0 - 0
Mahomets Flats	-	0 - 0	0 - 0	0 - 0	0 - 0	0 - 0
Wandina	-	0 - 0	0 - 0	0 - 0	0 - 0	0 - 0

APPENDIX E: ACTIVITY CENTRE FLOORSPACE BREAKDOWN (SCENARIO 3)

Appendix E provides the City with an insight as to shop retail floorspace ranges under population growth consistent with Scenario 3 (a projected population of 100,000 people by 2031 – discussed in Chapter 4).

The tables can be used by the City to guide assessment of individual development proposals, structure plans, activity centre health checks and other relevant assessments. Where a proposal will result in floor space higher or lower than the indicated ranges the proponent should be required to demonstrate why this is justified.

Figure 57: Scenario 3 – Shop Retail

	Current (m ²)	2011 (m ²)	2016 (m ²)	2021 (m ²)	2026 (m ²)	2031 (m ²)
Geraldton CBD	58,828	31,620 - 52,700	38,130 - 63,560	41,460 - 69,110	46,160 - 76,940	60,350 - 100,590
District Centres	-	0 - 0	3,820 - 6,370	17,940 - 29,900	34,490 - 57,490	42,550 - 70,920
North West Coastal Highway Commercial	3,720	3,300 - 5,510	3,880 - 6,470	3,960 - 6,600	4,230 - 7,060	5,390 - 8,980
Neighbourhood Centres						
Bluff Point	2,020	1,800 - 2,990	2,130 - 3,560	2,190 - 3,650	2,530 - 4,220	3,440 - 5,730
Geraldton	2,362	1,990 - 3,320	2,310 - 3,840	2,330 - 3,880	2,400 - 4,010	3,000 - 4,990
Mt. Tarcoola	1,070	870 - 1,440	1,000 - 1,660	990 - 1,650	980 - 1,640	1,190 - 1,990
Rangeway	700	580 - 960	670 - 1,120	680 - 1,140	690 - 1,150	860 - 1,430
Seacrest	-	4,580 - 7,630	5,360 - 8,930	5,290 - 8,810	5,120 - 8,530	6,210 - 10,340
Sunset Beach	2,828	2,510 - 4,190	3,080 - 5,130	3,210 - 5,350	3,710 - 6,180	4,780 - 7,970
Utakarra	828	1,170 - 1,950	1,410 - 2,350	1,450 - 2,420	1,460 - 2,440	1,780 - 2,960
Wonthella	2,229	2,050 - 3,410	2,410 - 4,020	2,470 - 4,110	2,620 - 4,370	3,330 - 5,550
Local Centres						
Beachlands	100	70 - 120	80 - 140	80 - 140	90 - 140	110 - 180
Drummond Cove	-	60 - 110	70 - 120	70 - 120	90 - 140	100 - 170
Mahomets Flats	-	550 - 920	630 - 1,060	620 - 1,040	630 - 1,040	770 - 1,290
Wandina	500	310 - 510	370 - 620	370 - 620	360 - 600	450 - 750

Figure 58: Scenario 3 – Other Retail

	Current (m ²)	2011 (m ²)	2016 (m ²)	2021 (m ²)	2026 (m ²)	2031 (m ²)
Geraldton CBD	8,045	1,440 - 2,410	1,00 - 3,010	2,100 - 3,500	2,350 - 3,920	3,330 - 5,550
District Centres	-	0 - 0	0 - 0	1,550 - 2,580	4,180 - 6,970	5,180 - 8,630
North West Coastal Highway Commercial	51,601	9,680 - 16,140	12,210-20,350	16,260-27,110	18,030-30,060	23,300-38,840
Neighbourhood Centres						
Bluff Point	-	0 - 0	0 - 0	0 - 0	0 - 0	0 - 0
Geraldton	-	0 - 0	0 - 0	0 - 0	0 - 0	0 - 0
Mt. Tarcoola	-	0 - 0	0 - 0	0 - 0	0 - 0	0 - 0
Rangeway	-	0 - 0	0 - 0	0 - 0	0 - 0	0 - 0
Seacrest	-	0 - 0	0 - 0	0 - 0	0 - 0	0 - 0
Sunset Beach	-	0 - 0	0 - 0	0 - 0	0 - 0	0 - 0
Utakarra	-	0 - 0	0 - 0	0 - 0	0 - 0	0 - 0
Wonthella	250	0 - 0	0 - 0	0 - 0	0 - 0	0 - 0
Local Centres						
Beachlands	-	0 - 0	0 - 0	0 - 0	0 - 0	0 - 0
Drummond Cove	-	0 - 0	0 - 0	0 - 0	0 - 0	0 - 0
Mahomets Flats	-	0 - 0	0 - 0	0 - 0	0 - 0	0 - 0
Wandina	-	0 - 0	0 - 0	0 - 0	0 - 0	0 - 0

Figure 59: Scenario 3 – Entertainment

	Current (m ²)	2011 (m ²)	2016 (m ²)	2021 (m ²)	2026 (m ²)	2031 (m ²)
Geraldton CBD	18,302	3,460-5,770	4,460-7,440	5,650-9,420	7,050-11,750	9,020-15,040
District Centres	-	0-0	80-130	110-180	360-590	440-740
North West Coastal Highway Commercial	2,585-2,585	490-820	630-1,050	820-940	1,010-1,690	1,280-2,130
Neighbourhood Centres						
Bluff Point	-	0 - 0	0 - 0	0 - 0	0 - 0	0 - 0
Geraldton	-	0 - 0	0 - 0	0 - 0	0 - 0	0 - 0
Mt. Tarcoola	-	0 - 0	0 - 0	0 - 0	0 - 0	0 - 0
Rangeway	-	0 - 0	0 - 0	0 - 0	0 - 0	0 - 0
Seacrest	-	0 - 0	0 - 0	0 - 0	0 - 0	0 - 0
Sunset Beach	-	0 - 0	0 - 0	0 - 0	0 - 0	0 - 0
Utakarra	-	0 - 0	0 - 0	0 - 0	0 - 0	0 - 0
Wonthella	-	0 - 0	0 - 0	0 - 0	0 - 0	0 - 0
Local Centres						
Beachlands	-	0 - 0	0 - 0	0 - 0	0 - 0	0 - 0
Drummond Cove	-	0 - 0	0 - 0	0 - 0	0 - 0	0 - 0
Mahomets Flats	-	0 - 0	0 - 0	0 - 0	0 - 0	0 - 0
Wandina	-	0 - 0	0 - 0	0 - 0	0 - 0	0 - 0

APPENDIX F: PLANNING LAND USE CATEGORY DEFINITIONS

Storage / Distribution

Any land use activity which involves the storage, warehousing or wholesaling of goods usually conducted from large structures, or involving large bulky goods, but does not include activities that attract general retail trade activities.

Service Industry

This category includes service industries offering a range of services. The scale and environmental impact of such activities require their separation from other land uses. These services include film processing, cleaning, motor vehicle and other repair services, and other servicing activities, including some construction activities.

Shop / Retail

Any activity which involves the sale of goods from a shop located separate to and/or in a shopping centre other than those included in Other Retail.

Other Retail

Many of these activities normally are not accommodated in a shopping centre. By virtue of their scale and special nature, the goods of these activities separate them from the Shop / Retail category (e.g. car sales yard, carpet showroom).

Office / Business

Administrative, clerical, professional and medical offices are activities which do not necessarily require the land area / floor space or exposure of other land uses. Although offices require building and parking facilities, these needs are quite distinct from those of commercial uses and service industries.

Health / Welfare / Community Services

Includes government, government-subsidised and non-government activities which provide the community with a specific service, such as hospitals, schools, personal services and religious activities.

Entertainment / Recreation / Culture

Activities which provide entertainment, recreation and culture for the community and which occur in building and / or on land, such as passive and active sports venues, museums, amusements, gambling services, hotels and the like.

APPENDIX G: TARGET RANGES OF EMPLOYMENT FOR CENTRES BY SCENARIO

Appendix G provides detail of the target ranges for employment for activity centres within the City of Greater Geraldton hierarchy for each scenario listed in Chapter 4.

These ranges can be used by the City to guide assessment of individual development proposals, structure plans, activity centre health checks and other relevant assessments. Where a proposal will result in employment levels for a centre higher or lower than the indicated ranges the proponent should be required to demonstrate why this is justified.

Figure 60: Target Employment Ranges

Employment Ranges	Scenario 1 Population 50,000	Scenario 2 Population 70,000	Scenario 3 Population 100,000
Regional Centre	6,250 – 9,370	7,830 – 11,470	9,070 – 13,600
District Centres	0 – 0	550 – 830	1,620 – 2,440
Neighbourhood and Local Centres	70 – 100	90 – 140	140 – 200

Source: Pracsys (2012)

APPENDIX H: INTERPRETATIONS

Unless otherwise noted, terms used in this Strategy have common meanings and include those listed in the *Planning and Development Act 2005* and the *Town Planning Amendment Regulations 1999*.

Activity Centres are multifunctional focal points that provide a diverse range of services, facilities and activities. They vary in size and diversity and are designated to be well-served by public transport.

Amenity means all those factors which combine to form the character of an area and include the present and likely future amenity.

Bulky Goods Retail or showroom are large premises used to display, sell by wholesale or retail, or hire:

- Automotive / vehicle sales, parts and accessories
- Camping and recreational equipment
- Electrical light fittings
- Animal and pet supplies
- Floor coverings
- Furnishings, bedding and manchester
- Furniture
- Household appliances
- Office equipment supplies
- Home entertainment goods
- Party supplies
- Swimming pools and supplies
- Hardware
- Garden supplies
- Goods of a bulky nature that require a large area for handling, display or storage; or direct vehicle access to the site of the premises by the public for the purpose of loading goods into a vehicle after purchase or hire, but does not include Shop / Retail.

Centre Plan means a plan showing in outline the overall development intentions for an activity centre, and the coordination, integration and mix of uses of the activity centre. It includes land use, streets, access by various modes of transport, major utilities, public, community facilities space and indicative three-dimensional built form, for each precinct within an activity centre.

Discount Department Store (DDS) means a single retail store, selling a wide variety of different goods and with a Nett Lettable Area of 2,000m² or greater.

End-of-trip Facilities include secure bicycle parking, changing facilities and lockers for cyclists, joggers and walkers at their place of work. Providing these facilities means people can choose not to drive or take public transport to their place of work. These facilities will also benefit people who exercise during their lunch break.

Large Format Retail means any buildings where goods of a bulky or non-bulky nature, not normally purchased on a daily basis, are kept for display or sale by retail or wholesale and the area for display and sale is not less than 400m².

'Main Street' means mixed land use developments fronting to a street in a manner whereby pedestrian access to the majority of individual businesses can be achieved directly from the street and/or where customer car parks on private property generally do not separate the road reserve boundary from the front of a building.

Major Development means development of any building or extension/s to an existing building where the building or extensions are used or proposed to be used for *shop / retail* purposes and where the *shop / retail* Nett Lettable Area of the:

- Proposed building is more than 5,000m²; or
- Extension/s is more than 1,000m².

Mix of Land Uses means floorspace within the boundaries of an activity centre that is used or proposed for activities within the following land use categories:

- Office/business – administrative, clerical, professional and medical offices;
- Health/welfare/community services – government and non-government activities that provide services such as hospitals, schools, community services and religious activities;
- Entertainment/recreation/culture (excludes outdoor areas) – sports centres, gyms, museums, amusements, gambling services and hotels; and
- Showrooms (subject to compliance with section 9.2.11).

Net Lettable Area (nla) means the area of all floors within the internal finished surfaces of permanent walls but excluding:

- a. all stairs, toilets, cleaner's cupboards, lift shafts and motor rooms, escalators, tea rooms, and plant rooms, and other service areas;
- b. lobbies between lifts facing other lifts serving the same floor;
- c. areas set aside as public space or thoroughfares and not for the exclusive use of the occupiers of the floor or building; and
- d. areas set aside for the provision of facilities or services to the floor or building where such facilities are not for the exclusive use occupiers of the floor or building.

Shop / Retail (shopping or shop) means any activity that involves the sale of goods from a shop located separate to and/or in a shopping centre and includes the sale of food, clothing or personal effects goods, but does not include bulky goods retail or showrooms.

Shopping Floorspace means the shopping floorspace as defined in Shop / Retail Planning Land Use Category as specified in Appendix F.

Walkable Catchment is derived from application of the 'ped-shed' technique to the existing or proposed street network in the boundaries of the centre plan that is, the:

- Extent of the walkable catchment is either 800, 400 or 200 metres depending on the centre type (outlined in Figure 8; and
- Walkable catchment is measured from major bus transfer stations or stops located on high-frequency bus routes.

DISCLAIMER: Whilst all care has been taken in the preparation of this data, this information is provided as a guide only and no responsibility shall be taken for any omissions or errors in this documentation. The accuracy provided is not to be used for legal purposes, but reference made to original documentation, which includes certificate of titles, survey diagrams & legal versions of the Town Planning Schemes.

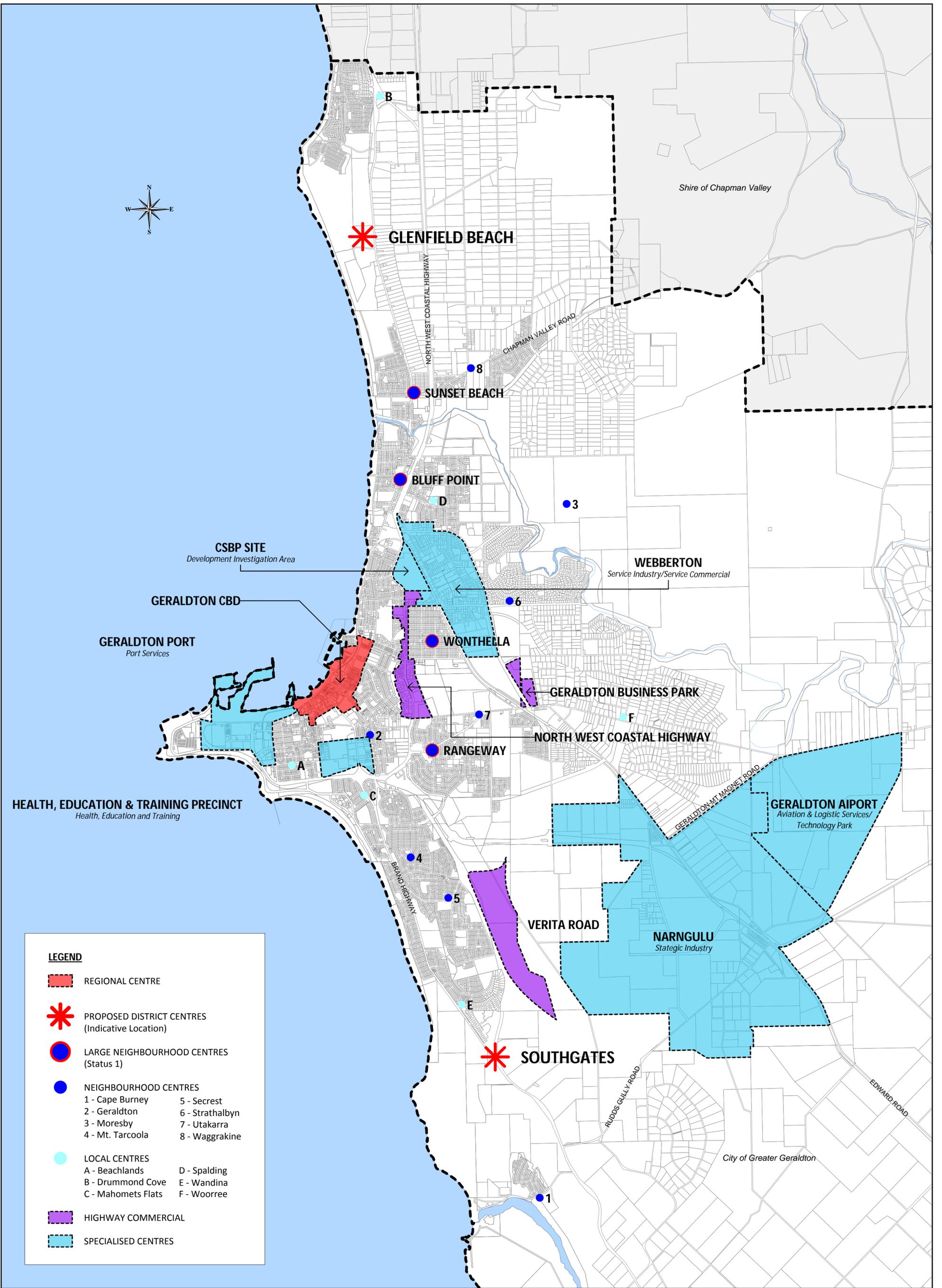


Figure 1: Commercial Activity Centres Strategy Map (Geraldton Urban Area)