














sunshine town centre map



-  RECREATIONAL SPACE
-  CREEK
-  RAIL LINE
-  PEDESTRIAN UNDERPASS/ OVERPASS
-  RAIL STATION
-  BUS STOP / TERMINAL
-  PARKING
-  SHOPS AND SERVICES
-  LIBRARY
-  LEISURE CENTRE
-  GOVERNMENT SERVICES
-  UNIVERSITY
-  SCHOOL



sunshine rising

revitalising our town centre

SUNSHINE RISING IS AN INITIATIVE OF BRIMBANK CITY COUNCIL



We think the Sunshine Town Centre is a fantastic place. It has so much to offer our community - with more than 450 shops, businesses and services there really is something for everyone.

What we love about the Sunshine Town Centre is that it has its own special character that reflects the multi cultural make up of our community and that it caters for lots of individual tastes and prices.

This Business Directory has been developed to help you understand and find what we have to offer.

The Sunshine Town Centre is developing a strong reputation for culturally diverse fresh food, great value, a growing café and restaurant scene and our large range of business, personal and community services.

Our centre is also undergoing a range of improvements with the recent completion of Hampshire Square, a new public space and an improved cleaning and maintenance program. Plans are also underway to improve the Sunshine Station, Sunshine Library and construct a new integrated youth and community hub, known as the Visy Cares Hub.

Supporting the Sunshine Town Centre sustains locally owned businesses, creates more jobs and strengthens our local economy.

The Business Directory has been produced by Sunshine Rising in partnership with the Sunshine Business Association. Sunshine Rising is a Brimbank City Council initiative to revitalise the Sunshine Town Centre.

Mr Peter Lewinsky, Chair of Administrators, Brimbank City Council



SBA

Sunshine Business Association

The Sunshine Business Association (SBA) represents and advocates on behalf of businesses and services in the Sunshine Town Centre. The SBA is pursuing a range of initiatives and programs including:

- events and activities that promote the Sunshine Town Centre
- opportunities for business networking and support
- centre improvements including cleaning, maintenance and streetscape upgrades

For further information please contact Mr. Bruce White (SBA President) on 9300 6651.

A MESSAGE FROM THE SBA PRESIDENT

As you may know the Sunshine Business Association is run by volunteers who are passionate about making Sunshine a great place to live, visit and work.

In 2012 SBA have organised a range of events and initiatives including :

- Sunshine Short Film Festival
- Fastest Pho in the West
- Sunshine Street Market
- Full Moon Festival

SBA continues to work closely with Council to improve the Town Centre and create a vibrant and lively atmosphere.

Recent work includes new rubbish bins, footpath repairs, landscaping, and cleaning programs to ensure growth in local pride. We have continuously consulted on future planning for safety, lighting, structure planning and regional rail link projects.

We invite you to join and help us strengthen and improve the Sunshine Town Centre.

Bruce White



Sunshine Business Association

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PO Box 205

Sunshine Vic 3020



SUNSHINE BUSINESS ASSOCIATION

Business Plan

2009 - 2014

OUR VISION

SBA will develop a friendly, accessible, safe and vibrant centre that is family orientated and linked to the community, providing value to customers, an improved image and increased trade for business.

SBA will foster an active association that works effectively in partnership with all businesses in the centre, the wider community and Brimbank City Council.

OUR BUSINESS PLAN

A 5 year business plan has been prepared to guide the work and operation of the Sunshine Business Association (SBA) within the Sunshine Town Centre. It outlines a new vision and mission statement for the SBA and provides a set of strategies to achieve the vision in terms of business development, marketing and public relations, community development, centre management, communication and finance.

OUR MISSION STATEMENT

The mission of the SBA is to:

- Promote Sunshine so that it becomes a busy and vibrant centre
- Improve the image and profile of the Sunshine Town Centre
- Generate interest and enthusiasm in the activities of the Association
- Develop more cohesion and involvement among all the businesses in the centre
- Maximise SBA membership across the centre
- Act as leaders and ambassadors for the centre
- Work to improve the overall trading performance of the centre by 5% each year
- Develop positive partnerships with Brimbank City Council, the community and other key stakeholders.
- Continue to lobby Council and State Government for improvements in the physical infrastructure and appearance of the centre

STRATEGIES TO ACHIEVE OUR VISION

The focus over the next five years is to:

- Develop a strong and active Business Association with good governance and effective communication with the business community
- Build the membership of the Association and ensure it reflects the diversity businesses and interests across the centre.
- Undertake various marketing and promotional activities
- Develop and implement a self-funded marketing and development program
- Develop stronger connections with the Sunshine community and involve various multicultural and community groups in promotional activities
- Work to improve business standards and resolve problems
- Develop the business mix in the centre
- Maintain ongoing communication with Council and key partners
- Work to improve cleaning and maintenance standards through the centre
- Support and partner with, where appropriate, Brimbank City Council to market and develop the centre



WHAT WE WILL DO

An annual work program will be developed each year in line with the overall Business Plan

2013 WORK PROGRAM

- Continue to build the Association membership and increase to 200 members
- Explore funding models for ongoing marketing and management
- Continue to produce and distribute regular SBA business newsletters
- Increase promotion of businesses on the SBA website
- Continue regular communication and liaison with Council on a range of issues impacting Sunshine
- Produce a business directory in hard copy with business coupons
- Produce a new business kit for Sunshine
- Increase communications between SBA and local business and establish a system of street representatives
- Pursue a second short Film Festival in Sunshine for 2013
- Pursue streetscape and other improvements within the Sunshine CBD
- Continue to monitor and manage the

2013 Sunshine Festival (continued)

The festival precinct covers an extended area this year including the southern end of Hampshire Road, (between Devonshire and Harvester Road), Sunshine Plaza, Village Cinemas and Sunshine Marketplace.

Hampshire Road will be closed for the event and traffic diverted along Harvester Road from 2am the morning of Saturday 23 March and will re-open to traffic at 11pm in the evening. The festival will start at 10am and finish at 6pm.

Sunshine Art Spaces

Launched in 2012, Sunshine Art Spaces is an exciting Council initiative which provides support for artists from the Western Region and hosts a changing program of exhibitions, presented by local artists.

Sunshine Art Spaces is located at 2 City Place and 11 Sun Crescent. It is often open during the week and every second Saturday of the month when the artists run a monthly open studio providing the community an opportunity to visit and learn more about art-related topics and explore their creative side. The workshops are delivered by a professional artist at no charge. There are currently three artists working in the space; Lana Swarcz, Brad Axiak and Michael Shiell.

For further information visit www.sunshineartspaces.com.au or like on Facebook at www.facebook.com/SunshineArtSpaces



Tackling safety in Sunshine together

Council and the Victoria Police recognise the need for the community to work together to address anti-social behaviour in Sunshine. Taking a united approach to eliminating anti-social behaviour is crucial to ensure anyone in Sunshine feels safe.

Business operators and the community are encouraged to report anti-social behaviour to Victoria Police on telephone 000.

To report a crime that has already been committed, contact Crime Stoppers on 1800 333 000 or visit your local Police station.

Council is also forming a Sunshine District Safety Working Group, in partnership with the Victorian Police and community members to meet on a regular basis to discuss how community safety can be improved.

For further information, please contact Brimbank City Council on 9249 4000 or info@brimbank.vic.gov.au



Marketing and business development special rate to be considered

Following a request from the Sunshine Business Association (SBA), Council recently decided to give public notice of its intent to declare a marketing and business development special rate for a defined area of the Sunshine Town Centre.

The SBA consulted the business community about the proposal from November 2012 to January 2013 before finalising its request to Council.

There are nearly 60 special rate and charge schemes for marketing and business development throughout Victoria and these are considered a key ingredient of successful revitalisation programs. Special rate schemes can provide capacity for businesses and services to pursue a coordinated approach to the marketing and management similar to that of managed shopping centres.

The proposed scheme will raise \$117,000 per annum for a five year period with an increase of 2% per annum. It is proposed that the SBA be appointed to administer the proceeds of the Special Rate which will be spent on a program of marketing and business development events and initiatives including the appointment of a part time marketing coordinator.

Council has written to property owners and occupiers formally advising of its intent to make a decision about the special rate at its Ordinary Meeting on 28 May 2013 following the hearing and consideration of any written submissions and objections received. Written submissions and objections should be lodged with Council by 17 April 2013.

Contact Council's Economic Development Unit on 9249 4969 for further information.

Sunshine is at the centre of the Regional Rail Link Project and will become one of the most important stations in Melbourne's regional and metropolitan rail network. By 2016, Sunshine Railway Station will be at the convergence of the Bendigo, Ballarat and Geelong lines.

The Regional Rail Link (RRL) is Australia's largest public transport infrastructure investment in the Federal Government's Nation Building Program. At a cost of over \$4 billion dollars, it is a jointly funded project with \$3.225 billion provided by the Federal Government's Department of Infrastructure and Transport and the balance from the Victorian Government.

What is the Regional Rail Link and why do we need it?

Melbourne's west is the fastest growing region in Australia with a projected population of 851,000 people by 2031. Fundamental to this growth is the provision of public transport infrastructure which is readily accessible for residents, workers and visitors to Sunshine.

Increasing train services on the existing network was not possible due to regional trains sharing tracks with Melbourne's metropolitan commuter services. This causes interruptions and delays for both metropolitan and regional services.

To address this, new tracks will be built from West Werribee Junction to Deer Park and from Sunshine to Southern Cross Station. The line will use existing tracks from Deer Park to Sunshine. It will significantly increase train services providing capacity for thousands of more passengers during peak times. The RRL is scheduled to be completed by early 2016.

Sunshine - the heart of the Regional Rail Link!

Sunshine will become an important gateway to metropolitan Melbourne and western Victoria.

Significant rail improvements will occur at Sunshine Railway Station and the surrounding area, including:

- A new pedestrian concourse over the railway providing direct access to each platform, including ticketing facilities and amenities
- Removal of two level crossings at Anderson Road, with rail lines and roads separated
- Improved transport connections, including a new bus interchange and pedestrian bridge linking H.V. McKay Gardens to the Sunshine Town Centre
- A new platform and improvements to the Station's amenity and safety

Works at Sunshine will begin in 2012 and will be complete by early 2016

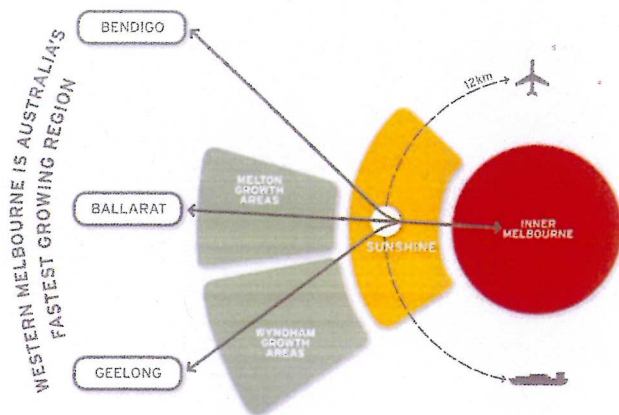


A view of the Sunshine Town Centre in the future - looking down Hampshire Road towards Sunshine Railway Station.

A catalyst for urban renewal in Sunshine!

Sunshine Town Centre is strategically positioned in the heart of Melbourne's west only 11km from the Melbourne CBD and is poised to become an important regional centre for Melbourne's growing west and regional Victoria.

Regional Rail Link will underpin significant urban renewal in the Sunshine Town Centre, building on its current attributes as a diverse and multi functional centre with large areas of underdeveloped land that provides significant employment, professional and community services, shopping - particularly fresh food and cultural retailing, education and government services and leisure and recreation facilities.



The benefits include:

More people

RRL provides the potential to bring thousands of new visitors to Sunshine. Over 12,000 commuters use Sunshine Railway Station on a daily basis and this is forecast to increase by over 30,000 passengers in the next five years as a result of additional services provided by the project.*

More jobs

The Sunshine Town Centre provides employment for more than 3000 people and is located within a major employment corridor. Improved public transport services and links will make Sunshine more attractive to future business and property development.

More investment, spending and development

The centre offers significant opportunities for higher density commercial and residential development close to public transport. The Sunshine Town Centre has many of the attributes that drive growth, including the availability of affordable and vacant land in and around an established commercial centre.

*Brimbank City Council estimates

Why invest in Sunshine?

Sunshine is changing. Brimbank City Council and the community have a shared vision for how the Town Centre will grow over the next twenty years, inviting investment and growth opportunities, whilst enhancing and preserving the features which are loved about the place today. For Sunshine this means:

- More people living in the town centre.
- More jobs.
- Expanded tertiary education and health facilities
- Better community facilities
- Greater shopping choice and diversity
- More offices and local and regional services, including education
- Improved walking, cycling and public transport facilities
- A more vibrant town centre
- New and upgraded buildings, with heritage features and residential fringes protected
- Streamlined planning controls to achieve the vision for the town centre

Significant public transport and station precinct improvements being delivered as part of the RRL project is a key cornerstone for the emergence of Sunshine as one of Melbourne's key town centres.

Brimbank City Council embraces Regional Rail Link!

Brimbank City Council acknowledges the vision and leadership that the Federal and State Government have shown by investing in the RRL.

The RRL provides important infrastructure that will support the growth of Melbourne and Victoria and provide for important rail movements that support industry, business and investment.

It provides the foundations for all tiers of Government and the private sector to collaborate in establishing Sunshine as a key link between Melbourne and Regional Victoria. The Sunshine Town Centre can service the needs of the local community, Melbourne's western suburbs and provide regional Victorians with access to capital city facilities and services efficiently and conveniently!

To discover more on the benefits of investing and being located in the Sunshine Town Centre, please contact the Sunshine Rising team on telephone 9249 4355 or visit <http://www.brimbank.vic.gov.au/sunshinerising>

For further information contact the RRL Footscray – Deer Park project team on telephone 1800 107 925 or visit <http://www.transport.vic.gov.au/projects/pt/rrl>

Activity Centre	Objection Rate to Special Rate Renewal for 2011-16	Variation to Objection Rate for Special Rate Renewal for 2007-11
Chapel Street Prahran	42.6%	+13.71%
Glenferrie Road Malvern	29.0%	+7.52%
High Street Armadale	39.2%	+8.5%
Toorak Road South Yarra	28.6%	+6.03%
Toorak Village	24.4%	-8.32%

Council has a very mature approach and tolerates a level of objection up to about 40%. In the case of Chapel Street where the objection level was above that threshold, Council negotiated successfully with the Streets Ahead organisation during its decision making process to achieve a reduction in the total special rate from the originally advertised \$ 945,000 to \$ 650,000 (excluding the amount to be obtained from the Forrest Hill properties) so as to make the ultimate approval of the scheme by Council more acceptable to businesses and property owners.

Although the objection level appears to be high, there were no appeals to VCAT for any of the five schemes. This is a strong testament to the processes used by Council, the business associations and centre coordinators. Council has demonstrated its very strong commitment to these programs including effective partnership arrangements with the business associations. They in turn are developing more innovative programs with a proven track record. The coordinators also are increasingly working closely with businesses on the street to get them more engaged in the programs. There also seems to be a real buy-in on some of the major projects that have been established such as the sculptor exhibitions and the websites that have become very smart and informative. One of the effects of these efforts is that, in the most recent renewal, businesses outside particular programs were asking to have the geographic area changed so that they could be included in the scheme.

The Stonnington special rates model is worth noting for its ongoing development and expansion over the last 15 years, its streamlined processes and its effective renewals. For more information about the program, contact Robert Wolff at the City of Stonnington on 8290 1225 or rwolff@stonnington.vic.gov.au



The Key - by Peter McNabb

Stonnington's Successful Special Rates Programs

The City of Stonnington has one of the most longstanding and successful programs of special rate schemes in Melbourne for the marketing, business development and management of its strip centres.

The program began in the early 1990's when the former City of Prahran established in 1992 a pioneering 10 year special rate for Chapel Street. The former City of Malvern followed in 1994 with a four year combined special rate for High Street Armadale and Glenferrie Road Malvern. In 1995, the new City of Stonnington introduced a five year special rate for Toorak Village and in 1997 a three year scheme for Toorak Road South Yarra.

The special levies have been renewed at regular intervals. No scheme has ever been abandoned or failed to get up. This has meant that all of the City's five major activity centres have had a scheme in place for at least the last 15 years.

The initial schemes raised a total of approximately \$ 460,000 per annum. Now they raise over \$ 1.4 million each year. The special rates have been supplemented by sponsorships from media and other organisations, and by promotional and infrastructure dollars provided directly by Council. The cumulative effect of all of these funds and their multiplier effects has been a significant boost to business and community activity in the five precincts over an extended period of time. They have helped the centres become more dynamic destinations and more resilient in facing financial crises and downturns in retail activity.

Each of the centres has developed its own niche. Each has expanded its geographical area and/or range of activities to more accurately reflect the changing boundaries of the centres and to meet the diverse and increasing expectations of its stakeholders.

Toorak Road South Yarra is a key example. Its rateable property base has increased over 150% from 193 in 1997-98 to 496 in 2012-13 to encompass a larger part of Toorak Road and adjacent side streets as well as to accommodate new developments in the precinct. There also has been a 325% increase in the special rate revenue from \$ 44,000 in 1997-98 to over \$ 187,000 this year.

The Streets Ahead Program in Chapel Street has increased its rateable property base by 25% from 960 in 1992-93 to 1202 today, particularly to include the developing new Forrest Hill area at the north-western end of the centre. Similarly, the amount raised by the special rate has increased over 270% from \$ 199,000 in 1992-93 to over \$ 750,000 this financial year.

High Street Armadale has experienced similar changes. The rateable property base has increased over 26% from 284 in 1994-95 to 360 in 2012-13 to accommodate redevelopments within the centre and new properties off High Street. There also has been a 210% increase in the special rate revenue from \$ 64,000 in 1994-95 to \$ 201,000 this year.

Glenferrie Road's rateable property base has been augmented to a lesser degree from 426 in 1994-95 to 458 in 2012-13 to take account of a smaller number of redevelopments within and on the edge of the centre. Its special rate revenue also has had a smaller increase from \$ 96,000 in 1994-95 to \$ 168,000 in 2012-13. Although the rateable property base in Toorak Village has declined from 211 to 195, the special rate raised has more than doubled from \$ 56,000 in 1995-96 to over \$ 116,000 in 2012-13.

In recent years, Stonnington Council has adopted a more streamlined approach to the renewal of its schemes. Rather than having renewals occur at different times, the Council has moved increasingly since 2004 to have all the special rates renewed in the same financial year and for the same time period. This came fully into effect for the first time in 2011 when all five schemes were renewed successfully for a four year period.

To make this work smoothly, Council has adopted an agreed process with the business associations and centre coordinators, and sticks to a firm timetable. A key part of the process is the development, adoption and selling of a four year Strategic Business Plan by each business association to its members a few months in advance of the statutory renewal process. The notices of intention to declare the five schemes are then considered by Council at the same meeting and advertised simultaneously. Council monitors the level of objections to each proposed scheme and compares this to the degree of objections at the previous renewal. The chart below shows the results from the most recent renewal.

Perth Retail Strip Precinct Assessment

Lease Equity
&
Property Council of Australia (WA)

Final Report
January, 2013



LEASE EQUITY

4. Retail Success Factors

The key retail planning principles which are considered to underpin the success of a 'Main Street' shopping environment are as follows:

- **Flexibility to Change:** The retail environment is extremely dynamic, constantly evolving and changing to remain competitive and to meet the expectations of sophisticated and fickle consumers. These changes are both supply and demand led. A fundamental consideration for any planned retail precinct is therefore its ability to accommodate continuous change;
- **Nodes:** As a general rule both retail and non-retail uses can be categorised as either "core" or "peripheral" uses within an activity centre. Core uses include:
 - o Significant activity generators (e.g. supermarkets, specialty retail, cinemas); or
 - o Achieve high turnover volumes and average trading levels; or
 - o Rely upon foot traffic flow; or
 - o Tend to be regularly used; and
 - o Tend to have cross-usage association with other uses;

Some key nodes within the various precincts examined include Subiaco Station and the Royal Theatre in Subiaco, Claremont Quarter and The Mezz.

- Sometimes **similar individual activities can be co-located** so as to create another form of node or strong 'precinct', such as a cluster of restaurants and cafes within a street environment that together can create a strong presence if there is sufficient 'critical mass' and a high degree of quality and choice in the combined offer (e.g. Darling Harbour in Sydney and Southbank in Melbourne). Particular examples of this co-location of activities includes several pubs and bars in Leederville, strong restaurant and café offer along Beaufort Street in Mt Lawley and fashion boutiques in Subiaco.
- **Connectivity:** The degree of connectivity with surrounding uses, both pedestrian and vehicular, is an important issue relating to access, convenience, exposure, identification and the benefits of synergy. Linkages (both physical and visual) are therefore important to the optimal functioning of the centre and fundamental to the design. The fewer impediments the better and by preference, upper level retailing (particularly greater than two levels) should be used only sparingly. Cottesloe is one particular precinct which overall could be considered to have poor connectivity. The Stirling Highway creates a major barrier between Cottesloe Central and the retail offer to the west of the highway. Furthermore, the layout of retail along both Napoleon and Station Street does not encourage cross-shopping.
- **Continuity:** A continuous and consistent retail offer is paramount to ensuring good pedestrian flows throughout a precinct. Retail offers punctuated by commercial uses, at-grade parking, pad sites and other non-retail uses (e.g. car dealerships) discourage pedestrian movement. The effect of a continuous retail offer is a concentration of pedestrian traffic which helps drive retail sales through exposure and accessibility; Victoria Park is a particular precinct which suffers from a lack of continuity. Numerous car yards and light industrial premises create a segmented retail offer and therefore reduce the ability of shoppers to navigate to different shops along the Albany Highway.
- **Street Engagement:** Retail shop fronts which engage directly with the footpath help to create activity and vibrancy. Common examples of this are footpath alfresco dining and shop fronts with doors / windows that can be removed for greater open air exposure. Retail shop fronts which are set back from the street behind dedicated at-grade parking should be discouraged as they cause greater conflicts between pedestrian and vehicles, impair sightlines and disrupt the continuity of street facing retail. Leederville and Mt Lawley provide the best examples of tenancies which take advantage of their street exposure. Unsurprisingly, they would also represent some of the more successful food and beverage destinations within Perth.



- **Car Parking:** Another fundamental 'success factor' to creating a strong retail precinct is the careful location and access to and from public car parking. A well-considered traffic strategy that delivers convenient, safe and legible public car parking directly to strategic locations will help strengthen the commercial viability and performance of the retail as well as alleviate traffic congestion throughout the street network. Public car parking should also provide a critical mass of car spaces as dictated by a detailed traffic and parking analysis and should ideally be located either in a basement situation beneath the core retail precincts or as a decked parking structure located behind a veneer of street retail. Leederville provides a good example of successful car park positioning. The location of car parks to the rear does not disrupt the movement of pedestrians along the strip and continual retail offer. Furthermore, their strategic location at three points around the precinct reduces the potential for 'dead' spots to emerge.
- **Anchor Tenants:** The importance of large, quality anchor stores in generating foot traffic cannot be overstated. Major tenants should therefore be located in key positions to ensure they have convenient access from key activity generators (such as train and bus stations) whilst also maximising the amount of high intensity specialty space en-route. Anchor stores should be located strategically so that pedestrian traffic is driven between them, and that the physical distance between anchor stores is utilised to provide the maximum opportunity to capture the foot traffic generated between anchor stores;
- **Broad Offer:** Create the broadest retail 'offer' possible so as to satisfy a range of consumer needs in one location, maximise reasons for visit, length of stay, frequency of visit and amount spent. This includes the provision of traditional merchandise retail offers such as fashion, jewellery and accessories, books and music, sporting goods, electronics, gifts, homewares and other 'lifestyle' offers etc., balanced with food and beverage, services and other convenience retail offers such as banks, ATM's, utility and other service providers (phone, internet, health insurance, travel agencies etc.). Subiaco is a good example of a retail destination that benefits from its critical mass of retailers which drives benefits to the entire precinct. Shoppers can satisfy all their particular retail needs in a single trip within a relatively compact destination. It is this same principle which has been a driving force behind the emergence of the shopping centre as a retail destination.
- **Central Control:** With respect to newly established town centre or master planned strip precincts, maintaining control of a retail precinct can have a major effect on the performance of a centre as a more effective leasing, marketing and management strategy can be implemented. Strata titling and selling off individual retail premises (i.e. shops) can make this very difficult to achieve.
- **Attractive environment:** The environment of a precinct is also important in attracting business. As well as an aesthetically nice environment, micro climatic conditions also influence whether people feel comfortable in any space. Security, wind and sun protection are all important considerations. The level of street scape amenity varies considerably across the Victoria Park precinct, with poor aesthetics towards the southern end of the Albany Highway (and consequently a perceived poorer quality tenant mix) compared to the nicer environment around Centro Victoria Park.

Address	Area	Year	Value	Value/m ²
100 Albany Hwy	100	2000	100,000	1,000
101 Albany Hwy	100	2000	100,000	1,000
102 Albany Hwy	100	2000	100,000	1,000
103 Albany Hwy	100	2000	100,000	1,000
104 Albany Hwy	100	2000	100,000	1,000
105 Albany Hwy	100	2000	100,000	1,000
106 Albany Hwy	100	2000	100,000	1,000
107 Albany Hwy	100	2000	100,000	1,000
108 Albany Hwy	100	2000	100,000	1,000
109 Albany Hwy	100	2000	100,000	1,000
110 Albany Hwy	100	2000	100,000	1,000

The state of the retail strip varies considerably depending on the extent of foot traffic and the quality of the surrounding environment. The strip is generally more vibrant and active in the northern part of the strip, where there is a higher density of anchor stores and a better quality of street scape. The southern part of the strip, particularly towards the Albany Highway, is perceived to have a poorer quality tenant mix and a less attractive environment. This is due to a number of factors, including the lack of anchor stores, the presence of parking lots, and the overall appearance of the strip. The assessment highlights the need for a strategic approach to the development and management of the retail strip, focusing on the provision of a broad range of retail offers, the creation of an attractive environment, and the implementation of a central control strategy to ensure the long-term success of the precinct.



5. Retail Strip Precinct Assessment

Individual profiles of each of the eight retail strip precincts are contained within Appendix A of this report. These profiles detail some of the trade area characteristics of each centre, some of the key layout and parking considerations and also some of the key lessons related to successful retail planning. This section contains a brief summary of these profiles.

5.1 Strip Precinct Composition

A summary of the key retail precinct characteristics is presented in Table 5.1. Some of the key points to note from this table are:

- In addition to traditional strip retail shop fronts, the majority of the retail precincts also incorporate enclosed retail centres into their offer. How each of these centres interacts with the street (and nearby strip retail) plays an important role in the success of the entire precinct. For example, Victoria Park has two enclosed shopping centres located along the Albany Highway. The Park Centre is set well back from Albany Highway with a large at-grade car park fronting the centre. By contrast, Centro Victoria Park is located directly on the Albany Highway with direct pedestrian access from the centre onto the street. Several of the centre's tenants front the Albany Highway. Dedicated parking is located to the rear.

With respect to creating a vibrant and walkable retail precinct the design of Centro Victoria Park is preferable. This centre directly engages with the road and allows easy cross-shopping between the centre itself and external retail. The Park Centre on the other hand is a large internalized retail destination which provides little activation for the wider retail precinct. Its presence along the Albany Highway is highly competitive to all other external retail as opposed to Centro Victoria Park which has a complementary aspect as shoppers can easily move between the two different offers;

Table 5.1: Composition of Study Area Precincts

Centre	Strip GLA (sqm)	Total GLA (sqm)	Tenant Mix Focus / Theme	Centres / Anchors	Activity/Generators
Leederville	9,700	9,700	Food Catering, Youth	IGA Supermarket	Leederville Station
Mt Hawthorn	7,300	14,000	35+ year market	The Mezz Shopping Centre	n/a
Mt Lawley	13,500	13,500	Food Catering	n/a	n/a
Maylands	5,200	5,200	Food Retail, Convenience	n/a	Maylands Station
Subiaco	18,400	27,800	Apparel, General / Leisure, Mid to High	Subiaco Square Coles	Subiaco Station Patersons Stadium Office ACE cinemas
Cottesloe	6,900	6,900	Apparel, General	Cottesloe Central	Cottesloe Station
Claremont	11,200	35,500	Apparel, General, Mid to High	Claremont Quarter	Claremont Station
Victoria Park	24,600	44,100	Food Catering, Non-Retail, Low to Mid	The Park Centre Centro Victoria Park	n/a

Source: AECgroup

- The scale of the retail offer varies considerably depending on where each of these precincts sits within the activity centre hierarchy. Whilst not having the largest retail offer Subiaco fulfils a key regional role. It does however have the largest concentrated strip retail offer (Victoria Park is largely segregated into several areas by the presence of a large number of car dealerships). It has high proportion of national and international brand tenants targeted towards the discretionary market

segments (i.e. clothing, accessories, cafes and restaurants). In addition it comprises a good mix of non-retail uses which helps drive day and night pedestrian activity. By contrast a small centre such as Maylands performs a large local convenience role with its tenant mix comprising largely independent stores and a stronger focus towards the every-day convenience needs of local residents.

5.2 Functionality

Some of the key design and functionality lessons from the retail precincts reviewed include:

- **Critical mass, accessibility and navigability** are three key elements to a successful strip retail offer. The most functional way to successfully achieve all three is continuity of retail offer. That is, retail shop fronts which directly engage with the footpath and which are of a similar size and scale. Victoria Park provides a good example of a retail strip which fails to apply these principles. The retail offer along the Albany Highway is consistently punctuated by large non-retail uses such as car dealerships and commercial uses. This effectively segregates the offer into a number of smaller destinations and discourages pedestrian movement. Dedicated parking for retail which is set back from the road also has the same effect of hindering pedestrian flows due to the conflict between pedestrian and car areas;
- The **location of at-grade parking** that services strip retail is an important consideration to the overall functionality. Ideally parking should be located to the rear of the retail tenancies so as not to disrupt the continuity of retail shopfront along the street. Furthermore, parking options should be strategic located around the precinct to ensure that pedestrians have convenient access to all areas, thereby reducing the potential for 'dead' spots to emerge. As is common elsewhere in Australia, the introduction of paid parking along the strip itself should be avoided wherever possible.
- A key advantage that many strip centres possess over enclosed centres is their **accessibility to public transport**. Subiaco, Leederville, Maylands, Cottesloe and Claremont all lay along Perth's train network which is vitally important in not only reinforcing the status of the precinct as an activity centre but also helping to drive pedestrian traffic. The integration of bus interchanges can also help play a similar role. The proposed development of Perth's light rail network will also help encourage the development of strip retail particularly around key interchanges and intersections. Convenience retailers generally derive the greatest benefit from the activity generated by public transport nodes.
- One of the keys to Mt Lawley's success as a retail strip destination is the design of **the retail shopfronts and their relationship with the street**. The use of street awnings for weather protection combined with footpath dining and or the ability to open the tenancy to the street (large doors or windows) is paramount to this success. This use of public space encourages a more concentrated atmosphere and adds to the overall vibrancy of the street. Retail tenancies with dedicated parking at front do not have this ability to directly engage with the street and help create a level of vibrancy which typically people are attracted to. The strong food offering provided by Beaufort Street has helped sustain the popularity of the strip as a destination despite the lack of an anchor or mini-major tenant;
- The **retail layout** of Cottesloe means this precinct will be highly susceptible to any increased retail competition in the future. Most of this concern relates to retail along Station Street which is dominated by strip centres which have very little integration to the street itself due to the front at-grade parking. Furthermore, retail along Station Street is largely confined to one side of the street and offers poor sightlines to the wider retail offer. Pedestrian activity is noticeably lower in Station Street relative to Napoleon Street and there is a noticeable absence of national brands retailers, which is generally a good indication of well performing centres. Over the medium term if a number of vacancies emerge within this area of the precinct, it will lower the entire profile of the centres. A dying retail centre can be very difficult situation to arrest because as the number of vacancies increase it reduces the destination appeal of the remaining retailers and ultimately put greater pressure on their ability to sustain turnover;

- The recently completed development at 70 Eighth Street in Maylands comprises approximately 10 ground floor tenancies and first floor apartments. This development is a very good example of a **town-centre development** which fully engages with the main street and also helps to increase the overall amenity of the strip through the continued and consistent retail shopfront offer and the additional density provided by the second level residential. This new development has lifted the overall profile of the strip as it has attracted some quality independent tenants who have invested in fit-out and stock presentation;
- An important component of Leederville's success is the several pubs and bars that (particularly around Newcastle Street) that helps establish the precinct as an **evening entertainment destination**. In addition to the trade these establishments generate they also assist nearby restaurants and cafes through the critical mass of dining options, thereby giving Leederville much greater destination appeal than other similar sized retail precincts that are predominately day time destinations.
- In addition to pubs and bars which can raise the profile of a precinct through the appeal to multiple market segments and trading periods, **cultural options also help broaden the appeal of a precinct**. Subiaco is a particular example of a precinct which provides a variety of cultural and entertainment uses such as cinemas and the Royal Theatre. These types of uses help are invariably accompanied by a range of food and beverage tenants which leverage off the appeal of the cultural tenant as people like to combine their visit to one location with others. Popular sporting arenas can also have a similar impact. The entire Subiaco precinct benefits from the proximity to Patersons Stadium, and if this stadium is demolished (as has been proposed) in the future it will undoubtedly have a negative impact on the area despite medium density residential a possibility to replace it.
- Scarborough Beach Road which runs through Mt Hawthorn is a two lane road through the retail section and expands to a dual carriageway just beyond the western boundary of the retail precinct. Whilst this can cause congestion due to the parallel parking it does help pedestrian movement around the strip as shoppers can cross relatively easily. **Excessively wide roads can create a barrier to pedestrian movement** and effectively segment each side of the road, reducing amenity and precinct vibrancy; and
- A large proportion of Claremont's strip retail offer is actually part of Claremont Quarter. This relationship provides an interesting study as to the **benefit of central control across a retail precinct**. Most retail precincts are strata titled and therefore it is almost impossible to control the tenancy mix. However, as Hawaiian (the owner of Claremont Quarter) is able to dictate which tenants it wishes to position with external street front it also has a large role determining the success of the entire precinct. The effect of this central control is evident through the clustering of particular tenants which in many cases is to the ultimate benefit of other nearby tenants. For example, the external facing tenants along St Quentin Avenue are predominately apparel retailers. This clustering of similar Claremont Quarter tenants has resulted in many independent tenants also locating along this road to benefit from the critical mass appeal created. Whilst these retailers are all competing with each other, ultimately their combined appeal is to their benefit as consumers appreciate the ability to comparison shop.
- The concepts of central control and flexibility to change are two central reasons why shopping centres have been so successful at gradually capturing market share from the CBD and suburban strip retail precincts. The often aggressive expansion plans of suburban shopping centres is a difficult process to halt, however if the population targets outlined within Direction 2031 are realised, the **benefits of this infill population growth will be largely directed to existing strip precincts** provided existing shopping centres (such as The Park Centre or Centro Victoria Park) do not sufficiently upgrade their offering.
- **Unique tenancy mixes are another way of providing a precinct with a marketable identity**. Leederville has elements of a youth focus with a number of edgy boutiques and cafes. Brunswick Street in Melbourne is an excellent example of an 'alternative' strip offer that through its critical mass of independent retailers has been able to create a tourist attraction in its own right.

- Large shopping centres throughout Australia have traditionally been dominated by national and International chains, as it is these retailers with their efficient supply chains and stronger brand awareness are able to support the turnovers demanded by shopping centre owners. However, as population densities continue to rise and scarcity of quality strip retail locations increases, it is likely that the **homogenisation of strip retail centres may also increase**. A number of strip retail precincts in Melbourne and Sydney are progressively losing their unique characters as national and International chain retailers progressively expand their presence. This trend has largely yet to emerge in Perth, however it is likely to become more evident if the ambitions of Directions 2031 (doubling of population densities around key activity centres) becomes reality.

5.3 Next Steps

This report has examined a number of the key design, layout and success factors related to strip retail both within Perth and more broadly in Australia. The individual retail strip precinct profiles examined the particular characteristics of each strip centre including an assessment of the catchment area, relationship of the retail offer to the broader retail environment and some layout and design issues.

From here some key topics that the PCA may want to investigate in the future include:

- The economics behind the development of strip retail centres versus enclosed centres. Part of the reason that new emerging suburbs are predominately dominated by enclosed centre type retail is that turnover levels are higher within this format, developers / owners can maintain control of an asset for ongoing income thereby providing higher yields and this is the format that consumers prefer. But do these assumptions hold and if so how much more feasible is enclosed format retail relative to strip retail?
- The contribution of strip retail to economic development, local innovation and diversity. Enclosed retail centres tend to be dominated by major chain stores. Strip retail provides opportunity for new businesses and concepts to establish and innovate, free from strict tenancy conditions;
- What are some examples of successful town centre or hybrid type developments in Australia and how can we encourage more of this type of development?; and
- What measures are required to encourage the growth of existing strip retail precincts?

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COTTESLOE



Estimated GLA:	- 6,900 sqm
Specialty Vacancy Rate	- ~2%
Market Position	- Mid-market
Layout	- Strala street facing retail located Napoleon Street. Approx. strip length 150 metres - Secondary retail located in individual external facing centres along Station Street
Major Tenants	- No major tenants - Cottesloe Central is located directly across the Stirling Highway
Activity Generators (Indicated in green)	- Cottesloe Station located directly east of Station Street anchor precinct. - Stirling Highway provides easy access for passing traffic - Cottesloe Central contains a Woolworths and Harvey Norman located across Stirling Highway
Parking (Indicated in purple)	- Station Street retail developments each provide approximately 20 spaces. - Council car park with 50 spaces also located on Station Street - Large amount of street parking available on Railway Street which largely serves commuter needs

Trade Area Assessment

Key Socio-Economic Characteristics of Catchment Area Population

Characteristic	Catchment Area	Perth Average
Population – 2006	8,648	1,445,076
Population – 2011	8,927	1,728,867
Average Age	39.7	37.0
Proportion Australian Born	67.2%	59.6%
Ave Per Capita Income	\$59,439	\$43,680
Income Variation to Perth Average	36.1%	n/a
Car Ownership (% of Hhold)	95.9%	93.7%

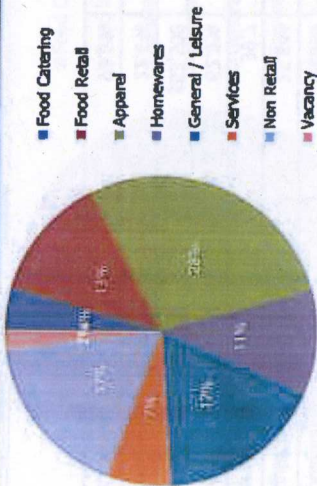
Trade Area Served

- The catchment area defined for Cottesloe roughly extends for a 1.2km radius around the precinct and includes the suburbs of Cottesloe and Peppermint Grove
- Given the relatively small retail offer and lack of a supermarket offer, the Cottesloe precinct primarily serves local residents
- Limited number of restaurants means precinct is predominately a daytime destination only
- Extent of trade area limited by coast line to both east and west
- Location between Stirling Highway and train line also reduces accessibility to broader region
- Population growth has been minimal over past 5 years. Overwhelming majority of residential in catchment is low density residential
- Incomes are well above Perth average and this income profile is reflected in quality of tenants within the precinct
- Reflecting the middle suburb status of Cottesloe car ownership levels are very high
- The age profile of the catchment is also well above the Perth average

Key Markets Served

- The proximity to the Stirling Highway means Cottesloe has the potential to attract some passing traffic, however the exposure to this traffic is inferior to Cottesloe Central which is better positioned to capitalise on this market
- Precinct forms part of a wider retail offer that comprises bog box retailers and Cottesloe Central however these different components have limited connectivity and therefore the benefits are not shared.

Tenant Mix



- Cottesloe has a very strong non-food emphasis, containing only a handful of cafes and restaurants. This lack of food offer is reflective of the limited local office worker population
- All food catering tenants are located along Napoleon Street
- Overall, the size of the speciality tenants is relatively small. There are no major anchor tenants and no speciality tenants larger than around 300 sqm
- The precinct contains only a few national brand tenants (Commonwealth Bank, Guardian Pharmacy, Collins Booksellers)
- Given Cottesloe Central is anchored by a Woolworths supermarket; it contains the majority of the regions convenience oriented retailers. The tenant mix across the precinct is more destinational, evidenced by the relatively high proportion of apparel and leisure tenants
- Whilst not included in the study area tenant mix, the majority of retailers along the Stirling Highway are all big boxes retailers which take advantage of the high level of exposure provided



Accessibility/Relationship to Adjacent Centres

- The Stirling Highway creates a very significant barrier between the Cottesloe strip precinct and Cottesloe Central. The volume of traffic carried by the Highway is a major deterrent to pedestrian movement between the two retail areas. As a consequence these two retail areas are largely competitive as opposed to complementary
- One of the key features of Cottesloe is the 45 degree parking along Napoleon Street. This parking format has its pros and cons:
 - o Pro: Easily navigable parking
 - o Pro: Ability to provide greater number of parking spaces relative to parallel arrangement
 - o Con: Creates a very car dominated atmosphere
- Strip centres along Station Street have dedicated parking at front and therefore very little engagement with the street. The retail design is actually two separate centres each in a U shape. Whilst this layout provides good sightlines within each internal development, overall the design is very inefficient and does not promote cross-shopping. Pedestrian activity is noticeably lower around Station Street relative to Napoleon Street and this would also be reflected in the rents between the two parallel retail strips



Lessons and Implications



- The poor performance of the retail along Station Street relative to Napoleon Street highlights a number of key retail principles:
 - o Retail areas must be easily navigable with good sightlines throughout the precinct
 - o One-sided street retail is generally very difficult to activate and much more reliant on the destination appeal of the particular tenants as opposed to any benefit they may receive from being part of a larger critical mass of retail
 - o Good pedestrian linkages are essential to promote cross-shopping
- Over the medium to long-term, retail along Station Street will be highly susceptible to increased retail competition (e.g. an expanded Cottesloe Central). If a number of vacancies emerge within this area of the precinct, it will lower the entire profile of the centres. A dying retail centre can be very difficult situation to arrest because as the number of vacancies increase it reduces the destination appeal of the remaining retailers and ultimately puts greater pressure on their ability to sustain turnover