Table 2.2

Canley Heights main trade area - socio-demographic profile, 2011

Census item	Primary sector	Secondary sectors East	Secondary sectors South	Secondary sectors West	Main TA	Syd Metro avg.	Aust. avg.
Per capita income	$19,872	$17,341	$18,395	$24,247	$19,307	$37,441	$34,467
Var. from Syd Metro benchmark	*-46.9%*	*-53.7%*	*-50.9%*	*-35.2%*	*-48.4%*		
Avg. household income	$67,980	$45,975	$58,241	$81,703	$61,919	$101,090	$88,205
Var. from Syd Metro benchmark	*-32.8%*	*-54.5%*	*-42.4%*	*-19.2%*	*-38.7%*		
Avg. household size	3.4	2.7	3.2	3.4	3.2	2.7	2.6
Age distribution (% of population)							
Aged 0-14	21.2%	21.2%	21.2%	19.7%	21.1%	19.2%	19.3%
Aged 15-19	8.2%	5.9%	7.7%	7.4%	7.7%	6.3%	6.5%
Aged 20-29	14.2%	13.5%	13.4%	13.0%	13.6%	14.8%	13.8%
Aged 30-39	13.0%	14.9%	13.3%	13.7%	13.4%	15.3%	13.8%
Aged 40-49	15.0%	15.4%	15.6%	13.1%	15.1%	14.3%	14.2%
Aged 50-59	12.5%	12.7%	12.1%	14.5%	12.5%	12.2%	12.8%
Aged 60+	16.1%	16.3%	16.7%	18.6%	16.6%	18.0%	19.6%
Average age	35.7	36.7	36.4	37.4	36.3	37.1	37.9
Housing status (% of households)							
Owner (total)	67.9%	49.6%	59.4%	79.8%	63.2%	66.8%	68.7%
• Owner (outright)	34.5%	21.6%	30.3%	46.0%	32.2%	31.1%	32.9%
• Owner (with mortgage)	33.4%	28.0%	29.1%	33.8%	30.9%	35.7%	35.8%
Renter	31.2%	49.9%	39.8%	20.2%	36.1%	32.4%	30.4%
Other	0.9%	0.6%	0.8%	0.0%	0.8%	0.8%	0.9%
Birthplace (% of population)							
Australian born	42.1%	31.7%	36.4%	43.3%	38.6%	63.6%	74.0%
Overseas born	57.9%	68.3%	63.6%	56.7%	61.4%	36.4%	26.0%
• Asia	42.6%	46.1%	50.2%	30.5%	45.4%	15.5%	8.6%
• Europe	6.5%	8.8%	7.4%	12.5%	7.6%	10.6%	10.5%
• Other	8.8%	13.5%	6.0%	13.7%	8.4%	10.3%	7.0%
Family type (% of households)							
Couple with dep't children	48.4%	43.6%	45.6%	47.8%	46.5%	48.2%	45.3%
Couple with non-dep't child.	10.3%	5.9%	9.0%	15.9%	9.6%	9.1%	7.7%
Couple without children	13.7%	13.4%	13.1%	15.6%	13.5%	20.1%	23.0%
One parent with dep't child.	16.4%	17.6%	17.6%	9.9%	16.6%	8.5%	9.2%
One parent w non-dep't child.	5.7%	7.3%	6.8%	6.2%	6.5%	3.9%	3.5%
Other family	1.6%	2.3%	1.8%	1.5%	1.8%	1.2%	1.1%
Lone person	3.8%	10.0%	6.1%	3.0%	5.5%	9.0%	10.2%

Source: ABS Census of Population & Housing, 2011; MacroPlan Dimasi

2.4 Retail demand

We have examined the current and future retail demand generated by the Canley Heights main trade area population in Table 2.3 below. We have assessed demand as follows:

- Estimated current population and future growth in this population in the primary sector and main trade area from 2014 to 2026.
- Applied retail floorspace provision of 2.2 sq.m per capita, which is the estimated current average per capita provision across Australia.
- Multiplied retail provision per capita by the trade area population to estimate current retail floorspace demand of 70,600 sq.m, including 25,760 sq.m in the key primary sector.
- Estimated growth in retail floorspace demand of 4,400 sq.m by 2026, or about 365 sq.m per year, including growth in the primary sector of 1,100 sq.m.
- The proposed small scale retail development will help to meet some of this future demand growth as well as satisfying the significant existing retail floorspace demand generated by the main trade area population.

Table 2.3

Canley Heights - main trade area retail floorspace demand

Factor	2014	2016	2021	2026	Grwth 2014-2026
Primary sector population	11,710	11,770	12,020	12,220	510
Main trade area population	32,100	32,440	33,290	34,090	1,990
Retail floorspace demand (sq.m)					
Total retail sq.m per capita (Aust. Avg.)*	2.2	2.2	2.2	2.2	2.2
Primary sector retail floorspace demand	25,762	25,894	26,444	26,884	1,122
Main trade area retail floorspace demand	70,620	71,368	73,238	74,998	4,378

** Assumes no growth in retail provision per capita*
Source: MacroPlan Dimasi

Section 3: Retail hierarchy

This section of the report reviews the current composition of the Canley Heights Local Centre and reviews the broader surrounding retail hierarchy across the Fairfield LGA.

The Fairfield LGA retail/centres hierarchy consists of:

- 4 x sub-regional centres
- 9 x neighbourhood centres
- 37 x local centres

3.1 Sub-regional centres

There are four sub-regional centres within the Fairfield LGA; Fairfield, Cabramatta, Prairiewood and Bonnyrigg.

The **Fairfield Town Centre** contains an estimated 58,000 sq.m of retail floorspace. It is anchored by two enclosed sub-regional scale shopping centres, namely Neeta City and Fairfield Forum, and includes approximately 16,000 sq.m of strip based retailing across several streets.

The **Cabramatta Town Centre** contains an estimated 35,000 sq.m of retail floorspace including a Woolworths supermarket at Cabramatta Plaza. The centre exhibits strong Vietnamese and other Asian influences, accommodated in a large number of small shops and commercial businesses, which as a whole create quite a significant activity centre.

The town centre is very popular, and is congested at most times of the day. The centre is well located around the Cabramatta railway station. In the future it will be expected to accommodate increased residential density.

The **Prairiewood Town Centre** is a multi-functional commercial centre supporting a range of uses including Stockland Wetherill Park, a community centre, library, schools, health facilities and is located along the Parramatta-Liverpool T Way. Prairiewood is designated as a 'potential Major Centre' under the Sydney Metropolitan Strategy, due to its existing critical mass, mix of uses, key anchors, public transport accessibility and co-location with residential uses.

The Prairiewood Town Centre is anchored by the sub-regional Stockland Wetherill Park shopping centre. This centre supports about 37,000 sq.m of retail floorspace, and is currently undergoing a major refurbishment that will result in the centre supporting about 50,000 sq.m of retail floorspace upon completion, including a new Coles supermarket and a new dining/community precinct.

The **Bonnyrigg Town Centre** is anchored by the enclosed sub-regional shopping centre Bonnyrigg Plaza (20,700 sq.m) and a Bunnings hardware store of about 8,000 sq.m, and supports a further 2,000-2,500 sq.m of retail and commercial floorspace along Edensor Road and fresh food markets along Smithfield Road. Excluding the Bunnings, the Bonnyrigg Town Centre is estimated to comprise about 25,000 sq.m of retail floorspace.

Bonnyrigg Plaza currently includes some 21,000 sq.m of retail floorspace and is anchored by a Big W discount department store and Woolworths and Franklins supermarkets. A DA approval exists for a 10,400 sq.m expansion to the centre, including the addition of further supermarket and retail specialty stores.

Bonnyrigg Shopping Centre is a proposed development, for which a DA was initially lodged in 2005. An amended DA has since been submitted and still awaits an official decision notice. This centre is proposed to include a Kmart discount department store, a Coles supermarket and supporting specialty retail, totalling approximately 18,800 sq.m.

3.2 Neighbourhood centres

The commercial/retail district at Canley Heights is classified as a neighbourhood centre according to the Fairfield Retail/Centres Policy, although it is zoned B2 – Local Centre under the Fairfield LEP 2014.

The **Canley Heights Local Centre** includes a substantial provision of convenience based retail facilities, restaurants, cafes and take-away food shops, business services like banks, real estate agents, accountants and lawyers, as well as medical/health related facilities – primarily oriented around Canley Vale Road.

The Canley Heights Local Centre contains about 100 retail/commercial tenants along Canley Vale Road (and side streets), totalling between 13,000-14,000 sq.m of retail/commercial floorspace, including a 900 sq.m IGA supermarket, as well as a 750 sq.m Asian supermarket called Khiem Thanh supermarket.

The centre is popular for convenience shopping, dining and local business services, and at present is a vibrant and functional local centre. Additional council car-parking has been provided in recent times, and new developments such as the major commercial building near the intersection of the Cumberland Highway – including a large fitness/health centre – have rejuvenated and revitalised the centre. Arguably it is much more convenient destination than Cabramatta given the congestion and parking difficulties associated with that centre.

As at June 2014, there were only four vacancies in the main street. Two of which are only vacant due to the recent expansion/relocation of the Khiem Thanh supermarket, and one of which forms part of the new multi-storey residential development at the far eastern end of the commercial strip – which has only recently been completed.

Under the Fairfield Development Control Plan (DCP), the maximum allowable amount of retail/commercial floorspace that could be accommodated within the Canley Heights Local Centre is about 37,000 sq.m (i.e. assuming that the centre is developed to its floorspace ratio (FSR) limits.

The **Canley Vale neighbourhood centre** includes the commercial/retail precinct around the Canley Vale train station. This precinct generally includes a similar mix of tenancies to those present in Canley Heights, although this centre is of a smaller scale, does not include a supermarket and includes several vacancies. This centre would serve the immediate local residential catchment as well as commuters utilising the train station.

Other **neighbourhood centres** across the LGA include:

- Smithfield
- Canley Heights
- Greenfield
- Wakeley
- Villawood
- Edensor Park
- Wetherill Park (Marketown)
- Fairfield Heights

These centres are generally some distance from Canley Heights, servicing the immediate residential catchments in their locality and would be unaffected by the small scale expansion to the business zoned land at Canley Heights.

The closest supermarket anchored facilities to the Canley Heights neighbourhood centre are located Cabramatta (Woolworths) and Fairfield (which includes a Coles and Aldi supermarket).

3.3 Local centres

There are 37 'local centres' across the Fairfield LGA ranging from small sets of shops, up to centres with 2,000 sq.m of retail floorspace such as the retail node around Horsley Park. In general these centres provide convenience based take-home food, groceries and packaged liquor and food catering tenancies such as cafes, take-away stores.

Section 4: Economic impacts

This section of the report examines the potential economic and net community benefits that could potentially result from the proposed development.

4.1 Fairfield Retail/Centres Policy – evaluation criteria

According to the Fairfield Retail/Centres Policy 2006, the following evaluation criteria apply to neighbourhood centres (i.e. Canley Heights), when examining development proposals or rezoning proposals.

- **That any expansion proposal not alter the role of the neighbourhood centre within Fairfield's retail system.**

The proposed development is very small scale in comparison to the overall retail/commercial offer currently present in the Canley Heights Local Centre (i.e. 13,000-14,000 sq.m). The proposed development concept associated with the rezoning is for 1,060 sq.m, with ground floor retail floorspace of about 530 sq.m and upper-level commercial floorspace of about 530 sq.m.

- **That any expansion proposal not unacceptably affect the range of services available in nearby sub-regional centres or local shop groups.**

A small scale retail component of 530 sq.m, would augment the Canley Heights Local Centre, providing additional retail options to serve the current and future residents of the trade area. We expect that the very minor trading impacts experienced by this retail addition will be broadly distributed across the Canley Heights Local Centre businesses, equating to less than 5% of overall annual sales (assuming it trades at a similar level to the Canley Heights retailers on average), with virtually no impacts expected to be absorbed by other centres in the centre hierarchy. The Canley Heights main trade area population will continue to shop at sub-regional and regional shopping centres (i.e. beyond the Fairfield LGA) for higher order retail and entertainment purposes.

- **That any proposed development does not rely on an expansion of the existing trade area of a neighbourhood centre for its viability.**

The proposed development does not rely on the expansion of the trade area served by the Canley Heights Local Centre. The small scale nature of the proposal is such that it will not alter the trade area served by this centre.

- **That a development proposal result in an outcome consistent with the current role of the centre.**

The small scale nature of the proposal is such that it will not alter the trade area served by this centre, nor alter its role and function as an important local centre serving the convenience needs of the immediate population in the Canley Heights/Canley Vale area.

- **That a development proposal will strengthen the viability of a centre, particularly its core function of providing supermarket services.**

The Canley Heights Local Centre is now a popular vibrant retail/commercial strip with minimal vacancies. The planning proposal will support increasing demand for retail/commercial floorspace by enabling additional such floorspace to be created. By extension, the planning proposal will allow the centre to 'grow' and it will continue to provide core supermarket and convenience food related services.

4.2 Employment impacts

Table 4.1 presents the estimates of employment that could potentially be supported at the subject site, were it to be rezoned to B2 - Local Centre. We have relied upon various data sources including data from retailers, the ABS and several state and local government agencies as well as 30 years of experience as consultants to the retail and property development industries to estimate the employment impacts.

Table 4.1

Canley Heights - Estimated employment levels

Type of use	Estimated employment per '000 sq.m	Canley Heights subject site GLA (sq.m)	Employment (persons)
Retail	25	530	13
Commercial	40	530	21
Total subject site		**1,060**	**34**

Source: MacroPlan Dimasi

As shown, we estimate the proposed development could potentially generate in the order of 34 jobs, including 13 retail jobs and 21 commercial/medical jobs.

Furthermore, the construction phase of the project will support employment during the period of construction as well as additional jobs through the broader economic supply chain (i.e. multiplier impacts).

Assuming an estimated construction cost of $2.1 million ($2,000 per sq.m) over a period of one year, would generate 23 jobs during the construction phase of the project, including 9 created directly and a further 14 resulting from multiplier induced effects (see Table 4.2).

As detailed previously, the proposed development could potentially support 34 retail/commercial jobs on site. Based upon ABS Input/Output multipliers for the relevant industries, we estimate this would also lead to a further 14 multiplier induced jobs across the broader economy.

Table 4.2

Canley Heights - Estimated future additional centre employment levels*

Original stimulus	Direct employment (long-term)	Direct employment (const'n period)	Multiplier employment	Total	
Retail/commercial employment[1]	34		14	48	
Construction of project ($2.1m. est. capital costs)		9	14	23	Job years[2]

** Employment totals include both full-time and part-time work*
1. Indicates the estimated number of permanent jobs as a result of the proposed development
2. Indicates the estimated number of jobs over the life of the construction project, for the equivalent of one year
Source: MacroPlan Dimasi

4.3 Other community benefits

The proposed rezoning of the subject site from R4 – High Density residential uses to B2 – Local Centre, to enable small scale retail and commercial uses, would provide a range of additional community benefits to residents of the surrounding area, including:

- Increased retail choice, convenience and business services for the population of the trade area. The retail/commercial facilities proposed to be provided at the subject site would also serve the surrounding daily workforce in the Canley Heights Local Centre.
- A retention of retail and commercial demand within the locality and a likely consequent reduction in vehicle kilometres travelled by local residents to access convenience based retail facilities.
- A reduction in travel times and distances has indirect benefits like reduced vehicle wear and tear, reduced fuel costs, reduced pollution, reduced traffic congestion, reduced risks of car-accidents, and more time can be spent either working, socialising or undertaking other activities.
- Reinforcement of the retail hierarchy across the Fairfield LGA by providing additional land for retail/commercial facilities in the vibrant/popular Canley Heights Local Centre, without reducing the level of service provision in Canley Heights, anywhere else, nor preventing any retail centres from expanding.

MacroPlanDimasi