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FAIRFIELD CITY CENTRES STUDY



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EXECUTIVE SUMMARY

Introduction

Norling Consulting has been commissioned by Fairfield City Council (Council) to prepare a new Centres Strategy for the Fairfield Local Government Area (LGA). This Strategy reviews the current situation with regards to the planning framework and existing centres hierarchy and examines future demand for retailing and the implications for the centres network. There is a particular focus on the Fairfield City Centre and the Town Centres of Prairiewood, Bonnyrigg and Cabramatta.

The overall objective of this Study is to develop an updated Centres Study that promotes the future economic well-being of Fairfield City. Stemming from this overall objective, other objectives are to:

- formulate a retail and commercial strategy for centres, in particular, Fairfield City Centre and the Town Centres of Prairiewood, Bonnyrigg and Cabramatta;
- review the existing retail hierarchy and Council's retail/commercial centre's zoning/classification under the LEP and State/Regional policies;
- assist Council in building capacity to enable Council to confidently deal with current and future development proposals; and
- provide strategies and recommendations for specific issues identified by Council and Norling Consulting.

Planning Framework

There are a number of planning instruments that govern the role and function of the Fairfield City centres network and that are relevant towards the future direction and nature of future growth within Fairfield City. This Chapter summarises the following documents:

- A Plan for Growing Sydney (2014)
- Fairfield Local Environmental Plan 2013
- Fairfield City Retail and Commercial Centres Study (2005)
- Fairfield City Retail and Commercial Centres/Activities Policy 2006
- Draft Fairfield Residential Study 2009

A Plan for Growing Sydney (2014) identifies the development of Parramatta as a second CBD for Sydney, with Penrith, Campbelltown – Macarthur and Liverpool identified as Regional City Centres within the western corridor. The Plan also identifies a number of

Strategic Centres throughout Greater Sydney, which are priority locations for employment, retail, housing, services and mixed-uses. Strategic Centres are currently or are planned to have at least 10,000 jobs. Leppington, Bankstown and Blacktown represent the closest Strategic Centres to Fairfield.

The Fairfield City Retail and Commercial Centres Study (2005) classifies Fairfield City as having a 'System of Centres' (i.e. Sub-Regional Centres, Neighbourhood Centres, Local Centres and Specialist Centres) and identifies four Sub-Regional Centres located at Fairfield, Prairiewood, Bonnyrigg and Cabramatta.

Existing Centres Network

The existing retail network is described based upon the results of a floorspace analysis and focusing on the four subregional centres and local centres. The four subregional centres are summarised as follows:

Subregional Centre Floorspace by Category

	Retail (m ²)	Office (m ²)	Community/ Other (m ²)	Service Industry (m ²)	Vacant (m ²)	TOTAL (m ²)
Fairfield	85,000	36,900	31,900	1,700	17,100	172,600
Prairiewood	41,200	6,500	2,400	800	4,500	55,500
Bonnyrigg	23,800	1,500	18,900	2,000	800	47,000
Cabramatta	60,200	22,500	19,400	1,900	9,500	113,500
TOTAL	215,000	67,400	66,000	6,400	31,900	386,800

Source: Fairfield City Council Floorspace Survey, Norling Consulting categories

While the Retail and Commercial Centres/Activities Policy designates nine local centres, Norling Consulting's field analysis reveals there to be eleven centres currently operating at this level:

Local Centres, Retail Floorspace and Anchor Tenants

	Retail Floorspace (m ²)	Anchor Tenants
Fairfield Heights	10,000	Woolworths
Canley Heights	8,000	IGA
Fairfield West (Market Plaza)	7,000	Coles, ALDI
Smithfield	6,000	Coles
Edensor Park	5,000	Coles
Wetherill Park (Market Town)	5,000	Supa IGA
Canley Vale	5,000	-
Wakeley	3,500	Supa IGA
Horsley Park	3,500	Supa IGA
Villawood	3,500	ALDI
Greenfield Park	3,000	IGA

Source: Retail and Commercial Centres/Activities Policy, Norling Consulting Inspections

Thirty-three Neighbourhood Centres were identified within the Fairfield LGA in the Retail

Policy. Of these, Fairfield West has now been upgraded to a Local Centre with the development of the Coles and Aldi supermarkets anchored centre – Fairfield West Market Plaza. The Neighbourhood Centres average 700m² in size with 1,700m² being the largest in size. These centres provide for the convenience needs of residents living close-by including takeaway stores, grocery items, liquor outlets and other convenience needs. This order of centres serves small catchment areas.

Population and Demographic Analysis

It is estimated that there was approximately 201,500 persons living in Fairfield City as at June 2013. The population grew at an annual rate of 1.25% between 2011 and 2013 an increase from the 2006-2011 inter-censal rate of 1.09%. This rate is much healthier than that experienced between 2001 and 2006 where the population declined by 1,700 persons.

The population is projected to increase at an average growth rate of 1% between 2011 and 2031, with a slightly higher growth rate projected for between 2016 and 2026 (1.13%). A 2031 population of 239,900 is expected, resulting in an additional 43,421 people than in 2011.

Fairfield City is characterised by a high degree of ethnicity, with 58% born overseas compared to 40% in Greater Sydney and 70% speaking languages other than English. The City has a predominantly younger age profile with a significantly greater proportion of households with non-dependent children. While there were lower levels of university educational attainment, the blue collar workforce is skilled, with about half of residents attaining a Certificate/Advanced Diploma. Household incomes are significantly lower than average also.

Trade Areas have been defined for the four main centres of Fairfield, Prairiewood, Bonnyrigg and Cabramatta. Given the location and proximity of these centres to each other, there are overlaps between the trade areas. In terms of population growth, the Fairfield Trade Area is anticipated to achieve the greatest population growth to 2031, underpinned by the availability to develop high residential densities proximate to the centre, through infill development. The Cabramatta Trade Area had the largest proportion of Asian residents, with 61.9% born outside of Australia. Households within the Prairiewood Trade Area have the highest retail expenditure base of \$33,340, although this is still lower than the State average of \$33,740.

Employment Analysis

Fairfield LGA has lower rates of participation in the labour force and a higher unemployment rate in comparison to the Greater Sydney average. Participation rates have remained steady while the unemployment rate has declined over the 2001-2011 period. The resident workforce comprised 68,583 people, as at June 2011.

At the time of the 2011 Census, the most common occupations were technicians and trades, clerical and administrative workers and labourers. The most popular industry sectors included manufacturing, retail trade, property and business services and health care and social assistance.

An estimate of the net jobs balance of the LGA was made. This employment indicator represents the ratio of the total number of jobs provided within a certain area or region as a proportion of the total number of working residents who live in that same area or region. At 2011, a net jobs balance of 75% was estimated, a balance that has declined in the prior decade. Breaking down the net jobs balance by industry reveals that only three industries had a net jobs balance of greater than 100% - education and training, wholesale trade and mining. Very low net job balances were evident within the financial and insurance services and information media and telecommunications industries.

Fairfield City Centre was estimated to provide the largest amount of jobs at approximately 4,800, followed by Prairiewood (3,000), Cabramatta (2,200) and Bonnyrigg (1,800). However, these job numbers all fall short of the 8,000 minimum that has been suggested for Major Centres.

Consultation

Representatives of Norling Consulting undertook consultation with various stakeholders within Fairfield City over a week-long period in September 2014. The purpose of this consultation was to engage with key stakeholders within the community to obtain an understanding of the key issues, constraints and opportunities that may exist within Fairfield City.

Representatives of Norling Consulting met with the following stakeholders:

Stakeholder Participants

Organisation	Representative	Position
Parramatta Council	Ildi Vukovich Simon Ginn	Economic Development Manager, Transport Planning
Liverpool Council	Julie Scott Megan Munari	Manager Economic Development Senior Strategic Planner
Real Estate Agents	Vince Movizio Graham Bell Joe	Principal, Ray White Fairfield Sales Manager, Ray White Fairfield
Canley Vale Heights Chamber of Commerce	Tony Fornasier	President
Fairfield Forum	Jocelyn Marr Anastasia Lambert	Centre Manager Marketing Manager
Cabramatta Place Manager	Cheryl Bosler	Place Manager
NSW Department of Planning – Subregional Growth and Infrastructure Planning South West	Nick Johnson Suzanne Wren	Team Leader Planning Officer
Fairfield Chamber of Commerce	Vince Movizio Vincent Morizzi Sil Frassetto	President Vice President Past President, Executive Committee
Stockland Wetherill Park	Paul Davis Justin Travlos	Centre Manager Development Manager
Smithfield Square	Gary Quig	Director, Raine and Horne Commercial
Bonnyrigg Plaza	Matthew Luchich Craig Alldridge	Retail Asset Manager Retail Investment Manager
Cabramatta Business Association Inc.	The Association did not wish to provide names	

Source: Norling Consulting Stakeholder Consultation September 2014

A number of key themes were derived during the consultation process. The most apparent themes derived from the stakeholder consultation were matters relating to Council policy, strategy and decision making, building heights/densification (i.e. height restrictions, low residential densities around centres etc.) as well as shop presentation (including shopfront, fit out etc.), the commercial office market and safety/security.

External Influences

Fairfield City functions within the wider western Sydney region. Surrounding the City include a number of large centres that impact on and influence growth and development within Fairfield City. The LGA shares its boundary with the LGA's of Blacktown, Holroyd, Bankstown, Liverpool and Penrith. Within these LGA's, there are a number of centres that may influence Fairfield City and its' centres and commercial areas. The challenge for the future will be to develop and position centres within Fairfield City in such a way as to be unique and with their own 'point-of-difference' but also ensuring that they continue to complement each other and meet the needs of local residents.

The retail industry is competitive and constantly changing. New technologies, demographic changes, new retailers and improved mobility by households have all conspired to change retail formats. Future changes are inevitable, not all of which can be foreshadowed at this point in time.

It is estimated that Fairfield City has a net escape expenditure in the order of 15%. It is estimated that the gross escape expenditure is slightly above 20%. It is expected that this expenditure is being directed to:

- (a) Sydney CBD;
- (b) Parramatta Regional City;
- (c) Liverpool Regional City;
- (d) Various bulky goods centres, especially those located in Liverpool City;
- (e) Other centres located close to the place of employment of Fairfield City residents.

Whilst the City's population is more than sufficient to support a department store, the low household incomes, the relatively high proportion of cultural groups that prefer to shop at specialty stores and the presence of department stores at Parramatta and Liverpool indicate that it may be challenging for the City to attract a department store operator.

It is expected that the City will continue to experience some pressure by the major supermarket operators wishing to establish new supermarkets in the City. The City also has a significant shortfall of bulky goods retailing floorspace, estimated to be in the order of 40,000m².

Issues Identification and Analysis

A number of issues have been identified by Council and Norling Consulting that are considered critical to the future direction of the centres network of Fairfield City. The issues discussed in this Chapter include the following:

- Market environment
- Employment
- Planning for retail growth
- Centres hierarchy – Fairfield City Centre and Prairiewood, Bonnyrigg and Cabramatta Town Centres
- Floorspace caps
- WSEA and implications
- Bulky Goods

- Neighbourhood shops
- Service stations
- Commercial and retail development in industrial areas

Recommendations are listed for the above and are linked to the following Chapter.

Recommendations

The recommended centres network is set out in the following table.

Centre Hierarchy	Centre Name
Major Centre	Fairfield City Centre
Subregional Centre	Prairiewood Town Centre
	Bonnyrigg Town Centre
Specialist Centre	Cabramatta Town Centre
Local Centre	Fairfield Heights
	Canley Heights
	Fairfield West (Market Plaza)
	Smithfield
	Edensor Park
	Wetherill Park (Market Town)
	Canley Vale
	Wakeley
	Horsley Park
	Villawood
	Greenfield Park
Neighbourhood Centre	Numerous, as per FLEP 2013 zoning

Norling Consulting agrees with the previous strategy in that the four dominant centres operate as a “system of centres”. However, the differences across these four centres are considered sufficient to warrant their categorisation into three separate centre functions, as above.

This centre network is supported by detailed Roles and Functions and Evaluation Criteria (Appendix A) and Guidelines for Centre Assessment (Appendix B).

A number of more detailed recommendations have been provided in Chapter 9 including key actions that have been identified throughout the preparation of this Centres Strategy.

1 INTRODUCTION

1.1 Background

Norling Consulting has been commissioned by Fairfield City Council (Council) to prepare a new Centres Strategy for the Fairfield Local Government Area (LGA). This Strategy reviews the current situation with regards to the planning framework and existing centres hierarchy and examines future demand for retailing and the implications for the centres network. There is a particular focus on Fairfield City Centre and the Town Centres of Prairiewood, Bonnyrigg and Cabramatta.

As part of this Study, consultation was undertaken with key stakeholders to inform and assist in understanding current issues and opportunities relating to centres. The final section of this Report identifies and discusses a number of key issues before offering Council strategies and recommendations for the future with the overall aim of ensuring the economic viability of centres and the City as a whole.

The last comprehensive review of retail and commercial centres was undertaken in 2005 by Leyshon Consulting Pty Ltd. This Study identified four subregional centres including Fairfield City Centre and the Town Centres of Prairiewood, Bonnyrigg and Cabramatta. Much has occurred since 2005 both globally and within Australia and Fairfield City. In particular, at the time of writing the 2005 Report, the Australian Bureau of Statistics (ABS) reported Fairfield City as experiencing a declining population. More recent results from the 2006 and 2011 Censuses reveal population increases and Fairfield City is projected to continue to grow to 2031. The implications and demand from this growing population is analysed in this Strategy.

Norling Consulting is a specialised economic and market research consultancy for the property industry and has considerable experience in undertaking centre strategies and assessments of economic need and impacts within the retail, commercial office, industrial and childcare sectors across Queensland and New South Wales. Norling Consulting has undertaken a number of peer reviews and provided other strategic advice to Fairfield City Council over the past five years and is very familiar with the City and its surrounds. This has included several visits to the City over this period of time and inspections of many centres.

1.2 Study Objectives

The overall objective of this Study is to develop an updated Centres Study that promotes the future economic well-being of Fairfield City. Stemming from this overall objective, other objectives are to:

- formulate a new strategy for centres, in particular, Fairfield City Centre and the Town Centres of Prairiewood, Bonnyrigg and Cabramatta;
- review the existing retail hierarchy and Council's retail/commercial centre's zoning/classification under the LEP and State/Regional policies;
- assist Council in building capacity to enable Council to confidently deal with current and future development proposals; and
- provide strategies and recommendations for specific issues identified by Council and Norling Consulting.

1.3 Report Structure

This report is structured as follows:

Chapter 2: Planning Framework - This Chapter assesses the planning framework that governs the role and function of the centres network as well as other relevant documents that are pertinent towards the future direction and nature of future growth within Fairfield City.

Chapter 3: Existing Centres Network - This Chapter sets out the existing centres network through a desktop floorspace analysis undertaken by Fairfield City Council. Representatives from Norling Consulting also undertook physical inspections of all centres in September 2014. Key employment lands are also identified and relevant development applications are detailed.

Chapter 4: Population Analysis - This Chapter outlines one of the key factors that influence the demand for centre activities - population growth. The historic and projected population for the Fairfield LGA is analysed along with the City's key socio-economic and demographic characteristics.

Chapter 5: Employment Analysis - This Chapter reviews the employment profile of Fairfield City, examining both the local resident workforce and the Fairfield City workforce. Key drivers influencing employment growth in the region are also examined.

Chapter 6: Consultation - Representatives of Norling Consulting undertook consultation with various stakeholders within Fairfield City over a week-long period in September 2014. The purpose of this consultation was to engage with key stakeholders within the community to obtain an understanding of the key issues, constraints and opportunities that may exist within Fairfield City. This Chapter sets out the key findings of the consultation.

Chapter 7: External Influences - Fairfield City functions within the wider western Sydney region. Surrounding the City include a number of large centres that impact on and influence growth and development within Fairfield City. This Chapter examines the external centres that influence Fairfield City.

Chapter 8: Issues Identification and Analysis - This Chapter sets out a number of issues identified by Council and Norling Consulting that need to be discussed and addressed as part of the Strategy. Recommendations regarding each issue are also provided and again summarised in the following Chapter.

Chapter 9: Recommendations - This Chapter summarises Norling Consulting's recommendations and key actions for Fairfield's centres network, including a recommended centres network and descriptions of roles, functions and evaluation criteria.

2 PLANNING FRAMEWORK

This Chapter assesses the planning framework that governs the role and function of the centres network as well as other relevant documents that are pertinent towards the future direction and nature of future growth within Fairfield City.

2.1 Planning Framework

A Plan for Growing Sydney (2014)

A Plan for Growing Sydney (The Plan) was released in December 2014 and is intended to guide land use planning over the next 20 years for Sydney, with an emphasis placed on the fostering of growth and development opportunities particularly in Western Sydney. It replaces the Draft Metropolitan Strategy (2013). The Plan is underpinned by four main goals including *“A competitive economy with world-class services and transport; A city of housing choice, with homes that meet our needs and lifestyles; A great place to live with communities that are strong, healthy and well connected; and A sustainable and resilient city that protects the natural environment and has a balanced approach to the use of land and resources”*. A list of actions has been identified to ensure the achievement of each goal identified. The Greater Sydney Commission has been established to implement the Plan.

Housing growth is intended to be achieved through the acceleration of housing supply across Sydney through urban growth corridors as well as urban renewal of infill development to encourage the development of homes located closer to jobs, with a focus on providing more housing with a greater choice of dwelling types in well-served locations. The Plan acknowledges the extent to which many residents of Western Sydney must travel beyond the region for work, with around 28% of the resident workforce travelling to other parts of city for employment.

The Plan identifies a number of centres throughout Sydney, including Western Sydney. Most notably, the Plan identifies the development of Parramatta as a second CBD for Sydney, with Penrith, Campbelltown – Macarthur and Liverpool identified as Regional City Centres within the western corridor. Regional City Centres are intended to provide a focus of employment, services and transport connections as part of a network of strategic centres across Western Sydney. The Plan also identifies a number of Strategic Centres

throughout Greater Sydney, which are priority locations for employment, retail, housing, services and mixed-uses. Strategic Centres are currently or are planned to have at least 10,000 jobs. Leppington, Bankstown and Blacktown represent the closest Strategic Centres to Fairfield.

The Plan identifies six subregional boundaries, which aim to reflect the economic and community relationships between Local Government Areas to allow more cohesive and integrated planning. Fairfield LGA is located within the South West subregion, which also includes the LGAs of Camden, Campbelltown, Liverpool and Wollondilly. A number of priorities for the South West have been identified to implement the directions of the Plan including economic competitiveness, housing and natural environment. Priorities for Strategic Centres (Campbelltown-Macarthur, Leppington, Liverpool), transport gateways (Badgerys Creek Airport Precinct) and other locations (Camden and Wollondilly) have also been identified albeit specific priorities for Fairfield have not been identified. Existing employment lands within Fairfield have been recognised as an opportunity to strengthen the subregion's role in Sydney's manufacturing, construction and wholesale/logistics industries through the maximisation of such lands. The Plan acknowledges that further investigations are required to shape the subregional plans.

Housing supply, choice and affordability is recognised under the Plan for the South West subregion through a number of priorities including the identification of suitable locations for housing, employment and urban renewal particularly around established and new centres along key public transport corridors including the Cumberland Line. It is noted that the Fairfield, Cabramatta and Canley Vale centres encompass train centres along the Cumberland Line.

Relevantly, the terms Major Centres and Potential Major Centres have been omitted from The Plan. Likewise, The Plan makes no reference to the status of centres operating within Fairfield.

Fairfield Local Environmental Plan 2013 (FLEP 2013)

The FLEP 2013 guides land use and development within Fairfield City through zoning land, identifying allowable land uses and specifying other development standards (such as height, minimum lot sizes, etc). The FLEP 2013 applies to the entire City except the Bonnyrigg Town Centre, where FLEP 1994 will continue to apply until future policies are prepared and come into force.

Within the FLEP 2013, retail and commercial land is accommodated within the following business zones.

Table 2.1: FLEP 2013 Business Zones

Zone	Objectives	Permitted Without Consent	Permitted With Consent
B1 Neighbourhood Centre	- To provide a range of small-scale retail, business and community uses that serve the needs of people who live or work in the surrounding neighbourhood. - To provide for shop top housing that supports the business activity in the centre.	Environmental protection works; Home-based child care; Home occupations.	Boarding house; Business premises; child care centres; community facilities; food and drink premises; medical centres; neighbourhood shops; respite day care centres; roads; shop top housing; shops; Any other development not specified in 'Permitted Without Consent' and 'Prohibited' (see FLEP Land Use Table for 'Prohibited' List)
B2 Local Centre	- To provide a range of retail, business, entertainment and community uses that serve the needs of people who live in, work in and visit the local area. - To encourage employment opportunities in accessible locations. - To maximise public transport patronage and encourage walking and cycling. - To provide for shop top housing that supports local business activity. - To ensure that mixed use developments include an active street frontage by locating business, retail and community uses at ground level.	Environmental protection works; Home-based child care; Home occupations.	Boarding houses; Child care centres; Commercial premises; Community facilities; Educational establishments; Entertainment facilities; Function centres; Information and education facilities; Medical centres; Passenger transport facilities; Recreation facilities (indoor); Registered clubs; Respite day care centres; Restricted premises; Roads; Service stations; Shop top housing; Tourist and visitor accommodation; Any other development not specified in 'Permitted Without Consent' and 'Prohibited' (includes Shops) (see FLEP Land Use Table for 'Prohibited' List)
B3 Commercial Core	- To provide a wide range of retail, business, office, entertainment, community and other suitable land uses that serve the needs of the local and wider community. - To encourage appropriate employment opportunities in accessible locations. - To maximise public transport patronage and encourage walking and cycling.	Environmental protection works	Child care centres; Commercial premises; Community facilities; Educational establishments; Entertainment facilities; Function centres; Hotel or motel accommodation; Information and education facilities; Medical centres; Passenger transport facilities; Recreation facilities (indoor); Registered clubs; Respite day care centres; Restricted premises; Roads
B4 Mixed Use	- To provide a mixture of compatible land uses. - To integrate suitable business, office, residential, retail and other development in accessible locations so as to maximise public transport patronage and encourage walking and cycling. - To support the development of Prairiewood, Fairfield and Cabramatta as the principal locations for specialist cultural, retail, business, tourist and entertainment facilities and services.	Environmental protection works; Home-based child care; Home occupations.	Boarding houses; Child care centres; Commercial premises; Community facilities; Educational establishments; Entertainment facilities; Function centres; Hotel or motel accommodation; Information and education facilities; Medical centres; Passenger transport facilities; Recreation facilities (indoor); Registered clubs; Respite day care centres; Restricted premises; Roads; Seniors housing; Shop top housing; Any other development not specified in 'Permitted Without Consent' and 'Prohibited' (includes Shops) (see FLEP Land Use Table for 'Prohibited' List)

Zone	Objectives	Permitted Without Consent	Permitted With Consent
B5 Business Development	- To enable a mix of business and warehouse uses, and bulky goods premises that require a large floor area, in locations that are close to, and that support the viability of, centres. - To encourage the establishment of light industrial uses that are compatible with nearby residential areas, generate employment and contribute to the economic development of Fairfield.	Environmental protection works	Bulky goods premises; Child care centres; Funeral homes; Garden centres; Hardware and building supplies; Kiosks; Landscaping material supplies; Light industries; Passenger transport facilities; Plant nurseries; Respite day care centres; Roads; Take away food and drink premises; Timber yards; Vehicle sales or hire premises; Warehouse or distribution centres; Any other development not specified in 'Permitted Without Consent' and 'Prohibited' (includes Shops) (see FLEP Land Use Table for 'Prohibited' List)
B6 Enterprise Corridor	- To promote businesses along main roads and to encourage a mix of compatible uses. - To provide a range of employment uses (including business, office, retail and light industrial uses). - To maintain the economic strength of centres by limiting retailing activity. - To provide for residential uses, but only as part of a mixed use development.	Environmental protection works; Home-based child care; Home occupations.	Bulky goods premises; Business premises; Community facilities; Garden centres; Hardware and building supplies; Hotel or motel accommodation; Kiosks; Landscaping material supplies; Light industries; Neighbourhood shops; Passenger transport facilities; Plant nurseries; Roads; Shop top housing; Take away food and drink premises; Timber yards; Vehicle sales or hire premises; Warehouse or distribution centres; Any other development not specified in 'Permitted Without Consent' and 'Prohibited' (includes Shops) (see FLEP Land Use Table for 'Prohibited' List)

Source: FLEP 2013

Council has also adopted a number of Development Control Plans (DCPs) to provide greater detail for developments and supplementing the material provided in the LEP, including the *Fairfield City Wide DCP 2013* as well as site specific DCP's, including *Bonnyrigg Town Centre DCP*, *Cabramatta Town Centre DCP*, *Canley Corridor DCP*, *Fairfield City Centre DCP 2013*, *Fairfield Heights Town Centre DCP 2013*, *Prairiewood Town Centre Southern Precinct DCP 2013* and *Wetherill Park Market Town DCP*.

The FLEP 2013 includes building height maps which detail the maximum building heights within the City. Within the **Fairfield City Centre** building heights of 6 storeys are acceptable in the residential area surrounding the centre, with the central business area allowing between 6 and 14 storeys. Only one block allows the maximum height of 22 storeys. The **Prairiewood** centre area allows a maximum of 6 storeys over the Stockland Wetherill Park sites and up to 8 storeys on the southern site south of Restwell Road. A maximum of 3 storeys is identified for the surrounding residential area. **Cabramatta Town Centre** area predominantly allows a maximum of 3 storeys, with a small area allowing up to 5 storeys and another small area up to 8 storeys. East of Railway Parade, 4-5 storeys are allowable to the north and south of Cabramatta Road East. Within the residential surrounding the centre, up to 5 storeys is supported.

Fairfield City Retail and Commercial Centres Study (2005)

In 2004 Fairfield City Council commissioned a study into retail and commercial issues affecting Fairfield City, which included a review of its retail centres hierarchy and assessment of issues relevant to promoting the economic wellbeing of the City. This is the most recent comprehensive examination of Fairfield's business centres.

As a result of the findings and recommendations of the Study, Council subsequently prepared a Retail and Commercial Centres/Activities Policy which came into force on the 26th of July, 2006.

The Fairfield City Retail and Commercial Centres Study (2005) identified four major sub regional centres, located at Fairfield, Prairiewood, Bonnyrigg and Cabramatta. The Study also included an examination of three neighbourhood-scale centres at Smithfield, Canley Heights and Canley Vale. The Study classified Fairfield's City Centre and Town Centres as a "System of Centres" (i.e. Sub-Regional Centres, Neighbourhood Centres, Local Centres and Specialist Centres). Directions to help promote the sustainable economic well-being of the City was also provided. The centres network identified in the Strategy is shown in the table below:

Table 2.2: Retail and Commercial Centres Strategy

Centre Type	Centre	
Sub-Regional Centres	- Fairfield - Prairiewood - Bonnyrigg - Cabramatta	
Neighbourhood Centres	- Edensor Park - Wetherill Park - Canley Heights - Smithfield - Greenfield Park - Wakeley - Fairfield Heights - Villawood	
Local Centres	- Bonnyrigg - Hamilton Road - Harden Street - Horsley Drive - Loscoe Street - Brenan Street - Friend Way - Abbotsbury - Brown Street - Bossley Park - St John's Road - Thorney Street - Bolivia Street - Meadow Street - Elizabeth Centre - Denison Street - Cabramatta West - Tasman Parade	- Lord Street - Canley Vale - Mt Pritchard - Hassel Street - Dublin Street - Rawson Street - Sackville Street - Ferry Road - John Street - Whittaker Street - North Villawood - Fairfield Street - Lansvale - Daniel Street - Carramar - Horsley Road - St Johns Park - Fairfield West
Specialist Centres	Park 'n' Save, Villawood	

Source: *Fairfield City Retail and Commercial Centres Study (2005)*

Fairfield City Retail and Commercial Centres/Activities Policy 2006

Developed as a result of the Fairfield City Retail and Commercial Centres Study (2005), 'the Policy' provides guidance for Council when assessing retail and commercial applications.

The guidelines of the Policy were prepared on the basis of the City having a retail/commercial 'system of centres' with the highest level having a sub-regional function and including the four main town centres of Fairfield, Prairiewood, Bonnyrigg and Cabramatta. The centre's network outlined in the Policy is detailed in the table below.

Table 2.3: Centres Network – Retail and Commercial Centres/Activities Policy

Centre Type	Centre	
Sub-Regional Centres	• Fairfield • Prairiewood • Bonnyrigg • Cabramatta	
Local Centres	• Edensor Park • Greenfield Park • Wetherill Park • Wakeley • Canley Heights • Canley Vale • Fairfield Heights • Smithfield • Villawood	
Neighbourhood Centres	• Bonnyrigg • Hamilton Road • Harden Street • Horsley Drive • Loscoe Street • Brenan Street • Friend Way • Abbotsbury • Bossley Park • St John's Road • Thorney Street • Bolivia Street • Meadow Street • Elizabeth Centre • Denison Street • Cabramatta West • Tasman Parade	• Mt Pritchard • Hassel Street • Dublin Street • Rawson Street • Sackville Street • Ferry Road • John Street • Whittaker Street • North Villawood • Fairfield Street • Lansvale • Daniel Street • Carramar • Horsley Road • St Johns Park • Fairfield West
Specialist Centre	• Park 'n' Save, Villawood	

Source: Retail & Commercial Centres/Activities Policy No.1-203

The Retail and Commercial Centres/Activities Policy effectively adopted a very similar centres hierarchy to the Retail and Commercial Centres Strategy with the exception of interchanging the terms Neighbourhood Centre and Local Centre and reducing the number of Neighbourhood Centres by three with Brown Street, Lord Street omitted and Canley Vale upgraded to a Local Centre.

Section 5.2 of the Policy describes the Role of Centres, which are detailed below:

Table 2.4: Role of Centres

Centre Hierarchy	Centre Name	Characteristics
Sub-regional Centres	Fairfield Prairiewood Bonnyrigg Cabramatta	- the provision of retail and commercial services to a sub-region within Fairfield LGA (usually about 50,000 persons) - the presence of one (or more) Discount Department Stores (DDS) and one (or more) full-line supermarket - their location on major public transport networks - generally containing between 20,000-80,000m² of retail floor space together with a wide range of non-retail services including cinemas, community services and office space - providing for higher order and comparison goods shopping as well as the provision of specialist, professional and personal services serving the sub-region population.
Local Centres	Canley Heights Canley Vale Edensor Park Fairfield Heights Greenfield Park Smithfield Villawood Wetherill Park Wakeley	- generally containing between 5,000-10,000m² of retail floor space and providing retail services to one or more suburbs - the presence of a medium scale to full-line supermarket (1,000 to 3,000m²) - providing for the major weekly food shopping and convenience retail needs of the population of more than one suburb providing a range of non-retail professional and personal services - possibly including ancillary services such as a tavern, hardware store, community facilities and post office.
Neighbourhood Centres	Refer to Table 2.4	- generally containing 5,000m² of retail floor space - providing convenience retail services to the residents of the neighbourhood or suburb in which it is located and may contain a small grocery/supermarket store- usually of <500m² - providing a limited range of non-retail services such as a medical practice or hairdresser.
Specialist Centres	Villawood Park 'N'Save	- centres primarily providing bulky goods and homewares-style retailing - centres that contain a significant component of non-retail services.

Source: Retail & Commercial Centres/Activities Policy No.1-203

Draft Fairfield Residential Study 2009

This Study established the framework to ensure that the Fairfield LGA can accommodate the additional dwelling growth (24,000 dwellings) identified in the draft West Central Sub Regional Strategy to 2031. The Draft RDS focuses on the eastern centres of the City, in particular Fairfield, Cabramatta, Canley Vale, Canley Heights, Fairfield Heights and Villawood, as these areas would accommodate the majority of the dwelling target given their proximity to transport nodes. The Draft RDS identifies significant capacity for growth mainly in the existing medium-high density zones in the eastern half of the City and recommends a number of upzonings to accommodate the additional density (14,000 dwellings) to be carried out as part of Council's new Comprehensive LEP. It is expected that the remaining 9,600 dwellings will be accommodated in the western half of the City and will be determined as part of the next phase of the Residential Strategy. Once the

next stage of the Study is complete, additional investigations may be required to determine retail needs in areas where densities have increased significantly.

3 EXISTING CENTRES NETWORK

This Chapter sets out the existing centres network through a desktop floorspace analysis undertaken by Fairfield City Council (based upon detailed land use surveys previously undertaken by Council. Representatives from Norling Consulting also undertook physical inspections of centres in September 2014. Key employment lands are also identified and relevant development applications are detailed.

Figure 3.1 (appended) shows the location of the Sub-Regional and Local Centres described below.

3.1 Centre Changes

The 2005 strategy identified four Sub-Regional Centres as the highest order centres in the City. These four centres are summarised in the below table, with further details following. The Table below shows the total estimated floorspace for each of the categories including retail, office, community/other, services industry, vacant floorspace and the total floorspace.

Table 3.1: Sub-Regional Centre Floorspace by Category

City/Town Centre	Retail (m ²)	Office (m ²)	Community/ Other (m ²)	Service Industry (m ²)	Vacant (m ²)	TOTAL (m ²)
Fairfield	85,000	36,900	31,900	1,700	17,100	172,600
Prairiewood	41,200	6,500	2,400	800	4,500	55,500
Bonnyrigg	23,800	1,500	18,900	2,000	800	47,000
Cabramatta	60,200	22,500	19,400	1,900	9,500	113,500
TOTAL	215,000	67,400	66,000	6,400	31,900	386,800

Source: Fairfield City Council Floorspace Survey, Norling Consulting categories

Fairfield City Centre

Fairfield City Centre provides the greatest concentration of total floorspace at 173,000m². Its development is located on the northern side of the railway line and is supported by a large area of land zoned for high density residential purposes but which has been developed predominantly for medium density housing. The vacancy rate across this commercial centre is 9%, which is considered to be high and evidence of some landlords and businesses experiencing levels of financial stress. The office vacancy is a higher 11%. Fairfield City Centre contains an estimated 85,000m² of retail floorspace. It includes two

enclosed shopping centres, Fairfield Forum and Neeta City Shopping Centre, along with approximately 43,000m² of strip based retailing.

Neeta City Shopping Centre provides 24,400m² of retail floorspace and is anchored by a Big W discount department store and Woolworths supermarket and also provides 53 specialty stores.

Fairfield Forum is anchored by a Kmart discount department store and Coles supermarket and provides a total of 17,800m² of retail floorspace.

The remainder of the City Centre includes a range of local, independent specialised tenants. There is significant land fragmentation and small premises under individual ownership, making amalgamation for redevelopment opportunities difficult and costly.

The City Centre includes a Commercial Core (B3 zone) which is surrounded by Mixed Use (B4) zoned land and an Enterprise Corridor (B6 zone) on the opposite side of The Horsley Drive.

There has been very little retail floorspace added in the City Centre over the past two decades, with recent development comprising high density residential.

While the City Centre has a high vacancy rate and many tenancies are in need of refurbishment, overall, the Centre does appear to be improving in terms of its vibrancy and vitality.

Prairiewood Town Centre

The Prairiewood Town Centre provides 55,000m² of commercial space, of which 41,000m² comprises retail. The Town Centre is dominated by a major shopping centre (Stockland Wetherill Park) with a community centre, library, education and health facilities located nearby. The centre is located along the Parramatta-Liverpool T-Way. Located in the western part of the City, its development is more modern, with the majority of retail space contained within a modern suburban shopping centre.

There are also two undeveloped sites zoned B4 Mixed Use on the southern side of Restwell Road. The Prairiewood Town Centre Southern Precinct DCP applies to this land and states that the precinct should form a dense urban environment that takes advantage of its close proximity and good access to public transport. The DCP also states that ground

floor retail and commercial development is envisaged with apartment-style dwellings located above and a local club facility above the ground floor plane is also suitable. It is agreed that this precinct should act as a transition site between the Stockland centre to its north and surrounding residential and community uses. Such uses could include office, medical, educational, entertainment, residential, community, etc, however, it is recommended that core retailing be concentrated to the north of Restwell Road.

Stockland Wetherill Park is anchored by two discount department stores (Big W and Target) cinemas and a Woolworths supermarket. The centre is currently undergoing redevelopment involving the development of a new Coles supermarket, a new dining precinct and specialty stores. To be redeveloped in two stages, Stage 1 includes the increase of 11,039m² (GLAR) comprising a gymnasium, three mini-majors and specialty tenants. Stage 2 includes the addition of 5,664m² (GLAR) and comprising two mini-majors (including Harris Scarfe) and additional specialty stores.

Bonnyrigg Town Centre

The Bonnyrigg Town Centre provides total commercial floorspace of 47,000m², of which 23,800m² comprises retail floorspace. It is the smallest of the four Sub-Regional Centres. Located along the Parramatta-Liverpool T-Way and in the western part of the City, it does not possess the age and amalgamation difficulties of the older Sub-Regional Centres. Consequently, the vacancy rate is only 2%. The Bonnyrigg Town Centre is anchored by the enclosed shopping centre Bonnyrigg Plaza.

Bonnyrigg Plaza provides the major tenants of Big W discount department store, Woolworths and Supa IGA supermarkets, and includes 39 specialty stores. In total the centre provides 23,147m² of floorspace. A Bunnings hardware store (8,000m²) is located adjacent to the centre and there is also approximately 2,300m² of retail and commercial floorspace located along Edensor Road and fresh food markets of around 1,000m² along Smithfield Road.

There are several deferred/lapsed proposals to extend Bonnyrigg Plaza and for a new Bonnyrigg Shopping Centre, as identified in the development applications section of this Chapter. There is also a proposal for the relocation of Bunnings Warehouse to the adjoining site, also outlined in Section 3.3. If the Bunnings relocation proceeds, it is recommended that the vacated site continues to provide for bulky goods or other activities supported within the B6 zone.

Cabramatta Town Centre

Cabramatta Town Centre provides the second largest concentration of commercial floorspace at 113,500m². It is an older centre having development around the Cabramatta railway station and having a large number of small allotments owned by a large number of landlords. Following a decline in the performance of this Centre some years ago, a strong Asian influence developed amongst the shopkeepers, such that it now functions as a specialist centre catering to the needs of Vietnamese, Cambodian and other Asian cultures. Overall vacancy rates are at 8%, however office vacancies are at 12% whilst retail vacancies are at a more manageable 6%.

The Cabramatta Town Centre provides an estimated 60,000m² of retail floorspace, the second greatest concentration in the City. The centre is very popular and attracts customers from a wide catchment. The Cabramatta railway station dissects the centre, with the majority of the centre being located to its west. With limited vacancies when inspected by Norling Consulting, the centre is a vibrant and thriving hub of activity.

A Woolworths supermarket is located at 180 Railway Place Parade within Cabramatta Plaza. There are no other full-line supermarkets or discount department stores at Cabramatta.

The zoning of the Cabramatta Town Centre includes predominantly B4 – Mixed Use land located north of Cabramatta Road and a small area to the south of Cabramatta Road and west of the railway line. There is also a small ribbon strip of B6 – Enterprise Corridor zoned land south of Cabramatta Road.

The high degree of fragmentation of land ownership would mean redevelopment opportunities are limited and costly.

The centre is surrounded by land zoned predominantly for high density purposes (potentially up to 6 storeys) however is currently dominated by older 3-storey walk-up apartment buildings.

Local Centres

The Retail and Commercial Centres/Activities Policy designates nine Local Centres – Edensor Park, Greenfield Park, Wetherill Park, Wakeley, Canley Heights, Canley Vale, Fairfield Heights, Smithfield and Villawood. However, Norling Consulting's field analysis reveals eleven centres that appear to be operating at levels significantly above the

remaining Neighbourhood Centres. This includes the addition of Fairfield West (Market Plaza) and Horsley Park. A summary of the eleven centres is provided below:

Table 3.2: Local Centres, Retail Floorspace and Anchor Tenants

	Retail Floorspace (m ²)	Anchor Tenants
Fairfield Heights	10,000	Woolworths
Canley Heights	8,000	IGA
Fairfield West (Market Plaza)	7,000	Coles, ALDI
Smithfield	6,000	Coles
Edensor Park	5,000	Coles
Wetherill Park (Market Town)	5,000	Supa IGA
Canley Vale	5,000	-
Wakeley	3,500	Supa IGA
Horsley Park	3,500	Supa IGA
Villawood	3,500	ALDI
Greenfield Park	3,000	IGA

Source: Retail and Commercial Centres/Activities Policy, Norling Consulting Inspections

Although the combined floor space of retail uses at the neighbourhood centre located at Bonnyrigg (Elizabeth Drive) (2,400m² and anchored by Aldi supermarket) is commensurate with the retail classification of this centre as a local centre, it is questionable whether the limited mix of retail uses within the centre, proximity to public transport and capacity for residential development, provides the necessary strategic context for the centre to operate as a local centre. For these reasons, Council has retained the classification of this centre as a neighbourhood centre.

Since 2005, the following significant changes have occurred within the above centres:

- Fairfield West Market Plaza, is anchored by Coles and Aldi supermarkets, has been developed;
- A new centre anchored by a Supa IGA has been developed at Horsley Park;
- A new Woolworths supermarket (3,464m²) has replaced a previous Food For Less supermarket at Fairfield Heights;
- Supa IGA has replaced a previous Franklins supermarket at Market Town in Wetherill Park; and
- IGA has replaced a previous Franklins supermarket at Greenfield Park.

Other centres have experienced limited growth in terms of additional floorspace.

Neighbourhood Centres

Thirty-three Neighbourhood Centres were identified within the Fairfield LGA in the Retail Policy. Of these, Fairfield West has now been upgraded to a Local Centre with the

development of the Coles and Aldi supermarkets anchored centre – Fairfield West Market Plaza. The Neighbourhood Centres average 700m² in size with 2,400m² being the largest in size. These centres provide for the convenience needs of residents living close-by including takeaway stores, grocery items, liquor outlets and other convenience needs. This order of centres serves small catchment areas.

3.2 Infrastructure and Employment Lands

The **Transitway (T-way)** and **Western Sydney Orbital (Westlink M7)** has greatly improved access to the western part of Fairfield City. Greater levels of accessibility have created new opportunities and increased pressure for changes in land use to accommodate new business and activities. On a local scale, there is speculation over the possibility of increasing residential densities (ahead of the next stage of the Residential Strategy) in proximity to T-way stops. It is acknowledged that while certain locations along the T-way may be suited to increased residential densities, further investigation needs to be carried out to determine whether these areas may also be suited to the creation of retail/commercial nodes to service the needs of the increased population around these nodes.

Increased infrastructure in the western side of the City has also led to planning for the Broader Western Sydney Employment Area (WSEA) and the development of the Western Sydney Employment Hub (which includes part of the Fairfield LGA just south of the pipeline).

Broader Western Sydney Employment Area (WSEA)

Identified in the draft Metropolitan Strategy as one of nine key ‘city shaping projects’ critical to Sydney’s growth, the WSEA is located 50kilometres from the Sydney CBD. Once fully development, the WSEA will stretch from the intersection of the M4 and M7 at Eastern Creek to Bringelly in the south and will be the single largest new employment space in New South Wales. The WSEA will comprise land for industrial and commercial uses, including transport and logistics, warehousing and office space. The land is also proximate to the planned new airport site at Badgerys Creek. The Commonwealth Government confirmed the site of Sydney’s second airport in April 2014. There is a current proposal to extend the WSEA boundary south to Elizabeth Drive and to the west of the airport site, bordering with the new airport site. If approved, the WSEA will allow businesses greater levels of connection with the new airport and an additional 4,537 hectares of employment land. The Department of Planning and Environment projects the

WSEA to provide more than 57,000 jobs over the next thirty years and 212,000 jobs in the longer term. Improvements to transport links will be required with funding secured to improve roads in western Sydney.

While the nature of business will be different to those that would traditionally be located in a city or town centre, it is likely that a number of smaller centres will be developed to serve local employment needs and will therefore also provide a range of retail and commercial uses. Accordingly, with the proximate location of the WSEA along the fringe of Fairfield's rural lands in Horsley Park, the development of these smaller centres may also potentially have adverse impacts on the viability of the existing Horsley Park Village.

Greystanes Southern Employment Lands

Covering the Local Government Areas of Fairfield City Council, Holroyd City Council and Blacktown City Council, Boral has received concept plan approval for the redevelopment of an unused quarry into an industrial precinct of 156 hectares, comprising 76 lots. The approval encompasses a maximum of 97,500m² for business park uses, a maximum of 6,500m² for service retail uses (2,500m² for tavern and restaurants, 2,000m² for a supermarket and 2,000m² for other service retail uses) and a maximum of 5,000m² to be developed for hotel accommodation purposes. The site is located on the eastern edge of the Western Sydney Employment Hub lands, identified in the NSW Government's Metropolitan Strategy as being of regional and state significance for employment and investment. The redevelopment is expected to generate up to 2,700 construction jobs and up to 8,000 operational jobs.

Western Sydney Parkland Business Hubs

Western Sydney Parklands comprises 5,280 hectares stretching from Blacktown in the north to Leppington in the south across the LGAs of Blacktown, Fairfield and Liverpool and sits outside the planning controls of the LEPs of these LGAs. It is also adjacent to the north west and south west growth centres. A self-funded government agency, the Western Sydney Parklands Trust seeks to derive revenue by developing 2% of the Parklands into business hub facilities. This income will enable the Trust to manage the remainder of the Parklands while also providing employment opportunities in western Sydney. It is anticipated that approximately 8,800 jobs could be provided in total. Planning is now underway for development of the Bringelly Road Business Hub, a site located on the southern periphery of the Parklands between Stuart Road and the soon to be upgraded Bringelly Road at Leppington. Large format retail, bulky goods and light industrial premises have been deemed to be the most suitable uses for the site.

3.3 Development Applications

We have been advised of a number of relevant approved and proposed development applications, as outlined below:

Stockland Wetherill Park Redevelopment

The redevelopment of Stockland Wetherill Park is underway with the development adding **15,000m²** of new retail space and including a new Coles supermarket, new food court and other specialties. Stage 1 is due to be completed in March 2015 with Stage 2 due for a March 2016 completion. Stage 2 includes the introduction of the Coles supermarket, JB Hi-Fi, Fit and Fast and Amart All Sports.

Bonnyrigg Plaza

Consent was granted on 8 July 2008 for the partial demolition of existing structures and alterations and additions to the existing Bonnyrigg Plaza shopping centre. An additional **6,200m²** of retail floor space was proposed. This consent has since lapsed on 8 July 2012. A modification application (S96) was submitted to amend this Consent to facilitate the construction of the shopping centre over two stages. Stage A related to redevelopment works proposed to occur on the eastern side of the site and Stage B related to redevelopment works proposed to occur on the western side of the site. However this modification application was withdrawn on 2 December 2011. A change in ownership occurred late in 2013.

Bonnyrigg - Edensor Park

An application for the construction of a shopping centre including a supermarket, discount department store, retail shops, medical centres and associated uses has been proposed for Smithfield Road, Edensor Park. Submitted in 2003, the total retail floor space proposed in the application is approximately **17,000m²**. The application also proposes to divert and re-align Clear Paddock Creek to the rear of the site and adjacent to the T-way, construction of a “new civic plaza” located on Council land comprising an elevated forecourt and pedestrian entrance way to the shopping centre. This application has not yet been determined.

Bonnyrigg – Bunnings Redevelopment

In February 2015, an application was lodged with Council for the relocation of the Bunnings Warehouse currently located at 21 Bonnyrigg Avenue, Bonnyrigg, to the adjoining site at 1-19 Bonnyrigg Avenue, Bonnyrigg. This application will be determined

by a Joint Regional Planning Panel due to the capital investment value of the DA exceeding \$20 million. The application involves the construction of a bulky goods warehouse including hardware and building supplies, timber trade sales, outdoor plant nursery and bagged goods with a total retail area of 15,370m². The application also proposes vehicular access via a new round-about on Bonnyrigg Avenue and a left only exit provision to Elizabeth Drive.

Greenway Supacentre Complex

Consent was granted in 24 April 2014 for the use of Units 7 and 8 of the Greenway Supacentre Complex for the purpose of a medical centre and private hospital. The proposal included fit-out and conversion of the existing approved bulky goods retail floor space within the specified Units including construction of a mezzanine level, into a one-stop medical centre complex incorporating a Day Surgery, Medical Imaging, Medical Suites, Dental Clinic, Sleep Clinic, Pathology and private hospital.

4 POPULATION AND DEMOGRAPHIC ANALYSIS

This Chapter outlines one of the key factors that influences the demand for centre activities - population growth. The historic and projected population for the Fairfield LGA is analysed along with the City's key socio-economic and demographic characteristics.

4.1 Fairfield City Population Estimates and Projections

Table 4.1 details the estimated resident population for Fairfield City between 2001 and 2013 based upon the results of the 2001, 2006 and 2011 Australian Bureau of Statistics (ABS) Population and Household Censuses and Estimated Resident Populations. Estimates are for June of the respective year.

Table 4.1: Fairfield LGA: Estimated Resident Population

	2001	Inc. p.a.	2006	Inc. p.a.	2011	Inc. p.a.	2013
Fairfield City							
ERP	187,825	-0.18%	186,117	1.09%	196,479	1.25%	201,427
Dwellings	57,615	219	58,712	732	62,374	1,093	64,560
PPH	3.26		3.17		3.15		3.12

Source: 2001, 2006 & 2011 ABS Population and Household Censuses, Norling Consulting

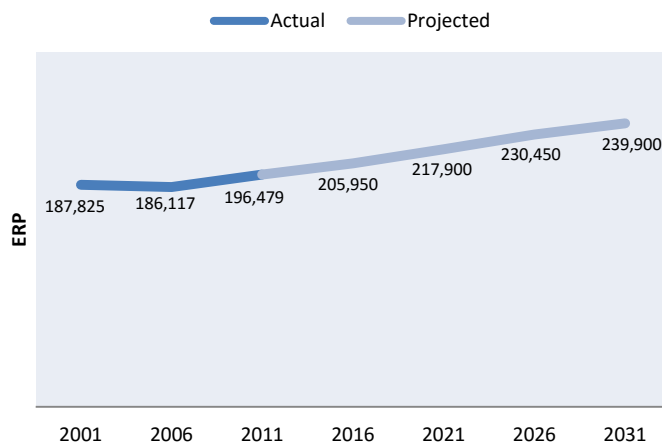
Fairfield City experienced a population decline between 2001 and 2006 of 1,708 persons before increasing by an average of 1.09% per annum to 196,479 persons in 2011 and increasing at a slightly higher annual average of 1.25% to reach an estimated population of 201,427 persons in 2013.

Projected population estimates have been sourced from the NSW Government's Department of Planning and Environment to 2031 and are summarised below:

Table 4.2: Fairfield LGA: Population Projections

	2011	2013	2016	2021	2026	2031	2011-2031 inc. p.a.
Fairfield City							
ERP	196,479	201,427	205,950	217,900	230,450	239,900	1.0%
Dwellings	62,374	64,560	66,700	71,450	76,250	79,950	
PPH	3.15	3.12	3.09	3.05	3.02	3.00	

Source: Dept. of Planning & Environment, Norling Consulting

Figure 4.1: Fairfield LGA Estimated Resident Population

The population of Fairfield City is projected to increase at an average growth rate of 1% between 2011 and 2031 with a slightly higher growth rate projected for between 2016 and 2026 (1.13%). A 2031 population of 239,900 is expected, resulting in an additional 43,421 people than in 2011.

Source: Dept. of Planning & Environment, Norling Consulting

The population distribution of Fairfield City is characterised by a concentration of population in the eastern part of the LGA (Fairfield and Cabramatta) and fewer people and lower densities in the western part of the LGA. With limited Greenfield land available, the majority of future growth will comprise infill development.

The State Government and Fairfield City Council has a long term plan of allowing more people to live around town centres and areas that have good public transport and are close to railway stations. This is encouraged in the current Sydney Metropolitan Plan – *A Plan for Growing Sydney*. Within the Fairfield LGA, the next stage of the Fairfield Residential Strategy is currently being implemented which will identify areas to accommodate increased residential densities.

4.2 Socio-Economic and Demographic Characteristics

The following Table 4.3 provides a summary of the key demographic and socioeconomic characteristics of the Fairfield City Local Government Area (LGA), with comparisons drawn to Greater Sydney and New South Wales. These results have been derived from the 2011 Australian Bureau of Statistics Population and Household Census.

Table 4.3: Key Demographic and Socioeconomic Characteristics – Fairfield LGA

	Fairfield City	Greater Sydney	New South Wales
Age Distribution (%)			
0 - 4	6.6%	6.8%	6.6%
5 - 9	6.7%	6.3%	6.3%
10 - 19	14.7%	12.4%	12.9%
20 - 29	14.4%	14.7%	13.8%
30 - 49	27.0%	29.5%	28.0%
50 - 64	18.6%	17.4%	18.4%
65+	12.1%	12.9%	14.0%
Household Composition (%)			
Couple only	40.8%	45.4%	45.9%
Single Parent	6.2%	4.4%	4.5%
Parents with children under 15 years	20.4%	19.5%	19.6%
Parents with dependent students	7.6%	5.8%	5.1%
Parents with non-dependent children	11.4%	7.3%	6.2%
Group Household	1.4%	3.6%	3.6%
Lone Persons	4.8%	8.4%	9.5%
Other	7.3%	5.5%	5.5%
Highest Qualification Achieved (%)			
Post graduate qualification	2.7%	9.4%	6.5%
Bachelor degree	19.7%	28.4%	24.1%
Certificate/Advanced diploma	50.1%	43.2%	49.7%
Occupation of the Workforce (%)			
Managers/Professionals	20.6%	38.8%	34.2%
Technicians and Trades	15.8%	12.2%	14.2%
Community, personal services, admin and sales	33.3%	34.0%	33.8%
Machine operators, drivers and labourers	27.3%	13.1%	16.0%
Nature of Occupied Dwellings (%)			
Owned outright	32.6%	30.4%	32.1%
Mortgage committed	32.4%	34.8%	34.9%
Rented	30.7%	31.6%	29.6%
Structure of Occupied Dwellings (%)			
Separate house	74.1%	60.9%	75.6%
Semi-detached row/terrace/townhouse	13.5%	12.8%	9.9%
Flat/unit	12.0%	25.8%	13.6%
Number of Motor Vehicles per Dwelling (%)			
No vehicle	12.0%	12.1%	8.6%
1 vehicle	33.9%	38.4%	35.8%
2+ vehicles	49.8%	46.5%	52.6%
Annual Household Income (\$)	68,540	91,010	80,160

Source: AnySite, Australian Bureau of Statistics 2011 Population and Household Census, Norling Consulting's Analysis

The following provides a brief analysis of the key demographic and socioeconomic characteristics of the Fairfield City LGA in comparison to Greater Sydney at the time of the 2011 Census.

- Fairfield City exhibited a relatively comparable age profile to the Greater Sydney benchmark, with a higher than average proportion of persons aged 10 to 29 years (29.1%) compared to Greater Sydney (27.1%);

- Interestingly, Fairfield City exhibited a significantly greater proportion of households with non-dependent children reflective of the higher than average proportion of persons aged 10 to 29 years in this corridor;
- Fairfield City exhibited low levels of university educational attainment with 22.4% achieving a Bachelor degree or higher compared to 37.8% in Greater Sydney.
- Conversely, Fairfield is characterised by a skilled blue collar workforce with about half of residents attaining a Certificate/Advanced Diploma (50.1% c.f. 43.2% Greater Sydney);
- Dwelling ownership within Fairfield City is relatively comparable to the Greater Sydney benchmark average, with a slightly higher than average proportion of outright owner occupiers (32.6% c.f. 30.4% Greater Sydney); and
- Fairfield City exhibited significantly lower than average annual household incomes in comparison to Greater Sydney (\$68,540 c.f. \$91,010 Greater Sydney) at the time of the 2011 Census.

Fairfield City also exhibits a high degree of ethnicity, with 58% born overseas compared to 40% in Greater Sydney and 70% speaking languages other than English compared to 32% in Greater Sydney. At the time of the 2011 Census, behind Australia, the most common country of birth was Vietnam (14.6% of residents), followed by Iraq (7.8%), Cambodia (3.7%), Italy (2.2%) and China (2.1%). In total, more than half the resident population (52.5%) was born outside of Australia.

Of the persons born overseas, only 8.4% speak only English, with the majority (57.4%) speaking English very well or well. A significant 33.1% consider that they do not speak English well or not at all.

It is noted that employment characteristics have been excluded from this section with a detailed employment analysis provided in the following Chapter 7 of this Report.

4.3 Relevant Trade Areas

4.3.1 Trade Area Definition

A Trade Area is a theoretical construct from which a centre is likely to draw its custom from. Norling Consulting has defined a Trade Area for each of the four main centres within Fairfield City, namely, Fairfield, Prairiewood, Bonnyrigg and Cabramatta. It is noted that given the location and proximity of these centres to each other, the defined Trade Areas

are likely to overlap. Furthermore, it is acknowledged that these centres may also draw trade from beyond the Fairfield City area.

The Trade Areas for each of the four main centres have been defined having regard to:

- (a) The location of each centre in relation to the other centres within Fairfield City;
- (b) The existing and intended future role and function of each centre;
- (c) The role and function of higher order centres located beyond Fairfield City such as Parramatta and Liverpool;
- (d) Discussions with centre managers in relation to the residential origins of their customers;
- (e) The existing road network and connectivity between centres;
- (f) The accessibility and visibility of each centre for residents within the Fairfield City Local Government Area;
- (g) Natural and engineered boundaries such as the Hume Highway and Western Sydney Parklands, which may hinder residents' perceptions of convenience and accessibility; and
- (h) The Australian Statistical Geography Standard (ASGS) boundaries of Statistical Area – Level 1, which are the smallest units for which census data is available.

The Trade Area for each centre has been defined as the Fairfield, Prairiewood, Bonnyrigg and Cabramatta, Trade Areas as follows:

The **Fairfield Trade Area** extends east to Woodville Road, north to Prospect Creek, south to Orphan School Creek and west towards Smithfield Road. The Fairfield Trade Area predominantly comprises the residential communities of Fairfield, Fairfield Heights, Fairfield West, Fairfield East, Smithfield and Old Guildford. Figure 4.2 illustrates the Fairfield Trade Area.

The **Prairiewood Trade Area** encompasses the residential communities of Horsley Park, Wetherill Park, Prairiewood, Abbotsbury, Edensor Park, Bonnyrigg, Fairfield West, Fairfield Heights, Smithfield, Greenfield Park, St Johns Park and Wakeley. The Prairiewood Trade Area extends north to Prospect Creek, west to Old Walgrove Road, south to North Liverpool Road and east to Sackville Street. Figure 4.3 illustrates the Prairiewood Trade Area.

The **Bonnyrigg Trade Area** extends south to North Liverpool Road, west to Cowpasture Road, north to Orphan School Creek and east to the Cumberland Highway. It encompasses the residential communities of Bonnyrigg, Bonnyrigg Heights, Edensor Park,

St Johns Park, Wakeley, Mount Pritchard and Cabramatta West. Figure 4.4 illustrates the Bonnyrigg Trade Area.

The **Cabramatta Trade Area** is characterised by the immediate residential community surrounding Cabramatta and extends south to Cabramatta Creek, west to Green Valley Creek, north Orphan School Creek and east to Prospect Creek. The Cabramatta Trade Area comprises the residential communities of Lansvale, Canley Vale, Canley Heights, Cabramatta, Cabramatta West and Mount Pritchard. Whilst anecdotal evidence suggests that Cabramatta services a much broader population base given the specialist nature of this centre, for the purposes of this Report, Norling Consulting has defined the Trade Area to reflect the role and function Cabramatta serves to local Fairfield City residents. Figure 4.5 illustrates the Cabramatta Fairfield Trade Area.

Whilst all Trade Areas are contained within Fairfield City, they are not mutually exclusive. They should not be added together, due to the extent of overlapping of the Trade Areas, with the extent of overlap comprising 44% of the City's population.

4.3.2 Trade Area Population and Household Growth

The following Table 4.4 summarises the estimated resident population (ERP) for each of the defined Trade Areas between 2001 and 2013 based upon the results of the 2001, 2006 and 2011 ABS Population and Household Censuses. Estimates are for June of the respective years.

Table 4.4: Estimated Resident Population by Centre Trade Area

Trade Area	2001	Inc. p.a.	2006	Inc. p.a.	2011	Inc. p.a.	2013
Fairfield							
ERP	73,417	0.2%	74,243	1.8%	81,170	1.6%	83,745
Dwellings	22,590	151	23,347	517	25,933	411	26,756
PPH	3.25		3.18		3.13		3.13
Prairiewood							
ERP	85,046	-0.3%	83,874	0.8%	87,084	1.0%	88,921
Dwellings	24,299	74	24,669	265	25,995	274	26,544
PPH	3.50		3.40		3.35		3.35
Bonnyrigg							
ERP	53,164	-0.6%	51,706	0.5%	53,119	1.3%	54,469
Dwellings	14,447	40	14,648	168	15,487	197	15,880
PPH	3.68		3.53		3.43		3.43
Cabramatta							
ERP	58,470	-0.3%	57,526	1.2%	61,035	1.3%	62,622
Dwellings	17,611	51	17,865	290	19,315	251	19,817
PPH	3.32		3.22		3.16		3.16

Source: 2001, 2006 & 2011 ABS Population and Household Censuses, Norling Consulting

With the exception of Fairfield, all of the Trade Areas experienced a population decline between 2001 and 2006, with the Bonnyrigg Trade Area recording the largest decline of 1,458 persons during this period. Conversely, the Fairfield Trade Area experienced a marginal increase in population of 826 persons between 2001 and 2006. The Fairfield Trade Area enjoyed the largest population growth in the twelve year period to 2013, representing 76% of the LGA's population increase.

Projected population estimates have been derived from the NSW Government's Department of Planning and Environment to 2031, building approvals, residential zonings and Norling Consulting's analysis and are summarised below in Table 4.5.

Table 4.5: Population Projections by Centre Trade Area

Trade Area	2011	2013	2016	2021	2026	2031	2011-2031 inc. p.a.
Fairfield							
ERP	81,170	83,745	85,746	91,056	95,930	99,562	1.0%
Dwellings	25,933	26,756	27,660	29,660	31,660	33,410	
PPH	3.13	3.13	3.10	3.07	3.03	2.98	
Prairiewood							
ERP	87,084	88,921	90,802	94,094	96,496	98,031	0.5%
Dwellings	25,995	26,544	27,350	28,600	29,600	30,031	
PPH	3.35	3.35	3.32	3.29	3.26	3.23	
Bonnyrigg							
ERP	53,119	54,469	56,032	58,733	60,159	60,873	0.5%
Dwellings	15,487	15,880	16,480	17,480	18,230	18,730	
PPH	3.43	3.43	3.40	3.36	3.30	3.25	
Cabramatta							
ERP	61,035	62,622	63,055	66,311	68,952	70,791	0.6%
Dwellings	19,315	19,817	20,210	21,460	22,460	23,210	
PPH	3.16	3.16	3.12	3.09	3.07	3.05	

Source: NSW Dept. of Planning & Environment, ABS Building Approvals, Norling Consulting

The Fairfield Trade Area is anticipated to achieve the greatest population growth to 2031, underpinned by the potential to develop high residential densities proximate to the centre, albeit through infill development. By 2031, the Fairfield Trade Area is anticipated to comprise some 99,500 persons, equating to an average population growth rate of 1% per annum between 2011 and 2031.

The remaining three Trade Areas are expected to achieve average annual growth rates in the order of 0.5% per annum.

4.3.3 Demographic and Socioeconomic Characteristics by Centre Trade Area

The following Tables 4.6 and 4.7 summarise the key socioeconomic and demographic characteristics of each of the defined Trade Areas for the Fairfield, Prairiewood, Bonnyrigg and Cabramatta centres with comparisons drawn to the Fairfield City LGA, Greater Sydney and New South Wales averages based on the results of the 2011 ABS Population and Household Census.

Table 4.6: Key Demographic and Socioeconomic Characteristics by Centre Trade Area

	Fairfield	Prairiewood	Bonnyrigg	Cabramatta	Fairfield LGA	Greater Sydney	New South Wales
Age Distribution (%)							
0 - 4	7.2%	6.1%	6.2%	6.8%	6.6%	6.8%	6.6%
5 - 9	6.9%	6.4%	6.7%	6.9%	6.7%	6.3%	6.3%
10 - 19	14.3%	15.1%	15.7%	14.7%	14.7%	12.4%	12.9%
20 - 29	14.2%	14.4%	14.7%	14.0%	14.4%	14.7%	13.8%
30 - 49	27.4%	26.3%	26.4%	28.0%	27.0%	29.5%	28.0%
50 - 64	16.9%	19.9%	19.5%	17.3%	18.6%	17.4%	18.4%
65+	13.0%	11.8%	10.8%	12.3%	12.1%	12.9%	14.0%
Household Composition (%)							
Couple only	39.1%	43.5%	41.4%	37.7%	40.8%	45.4%	45.9%
Single Parent	6.5%	5.4%	6.2%	7.5%	6.2%	4.4%	4.5%
Parents with children <15 yrs	21.1%	19.5%	20.4%	21.0%	20.4%	19.5%	19.6%
Parents with dependent students	7.3%	8.0%	8.2%	7.0%	7.6%	5.8%	5.1%
Parents with non-dependent children	10.5%	12.9%	12.5%	9.6%	11.4%	7.3%	6.2%
Group Household	1.6%	0.9%	0.9%	2.3%	1.4%	3.6%	3.6%
Lone Persons	6.2%	3.6%	3.5%	5.6%	4.8%	8.4%	9.5%
Other	7.7%	6.1%	6.9%	9.3%	7.3%	5.5%	5.5%
Workforce Status (%)							
Male workforce participation rate	58.4%	65.4%	64.9%	60.6%	62.4%	72.2%	71.2%
Female workforce participation rate	40.6%	49.1%	48.3%	42.7%	45.2%	59.3%	59.2%
Total participation rate	49.2%	57.1%	56.3%	51.3%	53.6%	65.6%	65.0%
Unemployment rate	11.3%	7.8%	8.9%	12.1%	9.7%	5.7%	5.6%
Highest Qualification Achieved (%)							
Post graduate qualification	2.9%	2.8%	2.5%	2.1%	2.7%	9.4%	6.5%
Bachelor degree	19.4%	20.2%	20.5%	18.5%	19.7%	28.4%	24.1%
Certificate/Advanced diploma	48.5%	53.2%	51.8%	45.3%	50.1%	43.2%	49.7%
Occupation of the Workforce (%)							
Managers/Professionals	18.4%	22.5%	21.6%	17.6%	20.6%	38.8%	34.2%
Technicians and Trades	15.6%	16.3%	16.0%	14.6%	15.8%	12.2%	14.2%
Community, personal services, admin & sales	32.5%	35.0%	33.4%	30.1%	33.3%	34.0%	33.8%
Machine operators, drivers & labourers	29.7%	23.5%	26.4%	33.8%	27.3%	13.1%	16.0%

Source: AnySite, Australian Bureau of Statistics 2011 Population and Household Census, Norling Consulting's Analysis

Table 4.7: Key Demographic and Socioeconomic Characteristics by Centre Trade Area

	Fairfield	Prairiewood	Bonnyrigg	Cabramatta	Fairfield LGA	Greater Sydney	New South Wales
Industry of the Workforce (%)							
Agriculture, forestry and fishing	0.3%	0.5%	0.5%	0.6%	0.5%	0.4%	2.5%
Mining	0.0%	0.1%	0.1%	0.1%	0.1%	0.2%	1.8%
Manufacturing, transport, postal and warehouse	25.9%	22.5%	23.4%	28.7%	24.6%	13.8%	13.7%
Electricity, gas, water and water services	0.8%	0.8%	0.8%	0.7%	0.8%	0.9%	1.1%
Construction	8.1%	9.1%	9.1%	7.5%	8.5%	7.0%	8.2%
Wholesale and retail trade	16.4%	17.0%	17.1%	16.7%	16.9%	15.1%	14.5%
Accommodation and food services	6.4%	5.7%	5.9%	7.2%	6.2%	6.2%	6.5%
Finance and insurance, property and business	10.9%	11.2%	11.1%	9.6%	10.8%	14.8%	10.3%
Community, health, safety and recreation	17.4%	19.6%	18.9%	15.0%	18.1%	25.7%	28.0%
Other	8.6%	9.5%	9.5%	8.5%	9.1%	13.2%	11.0%
Nature of Occupied Dwellings (%)							
Owned outright	28.8%	36.8%	34.9%	30.6%	32.6%	30.4%	32.1%
Mortgage committed	29.2%	36.1%	36.9%	30.1%	32.4%	34.8%	34.9%
Rented	37.3%	23.3%	24.4%	34.2%	30.7%	31.6%	29.6%
Median weekly rent (\$)	280	320	278	256	279	364	286
Median mortgage monthly repayment (\$)	1,753	1,952	1,894	1,581	1,796	2,203	1,804
Structure of Occupied Dwellings (%)							
Separate house	66.4%	88.2%	87.4%	62.9%	74.1%	60.9%	75.6%
Semi-detached row/terrace/townhouse	16.4%	9.9%	11.3%	18.0%	13.5%	12.8%	9.9%
Flat/unit	16.6%	1.4%	1.0%	18.8%	12.0%	25.8%	13.6%

Source: AnySite, Australian Bureau of Statistics 2011 Population and Household Census, Norling Consulting's Analysis

The following provides a brief analysis of the key demographic and socioeconomic characteristics of each of the defined Trade Areas in comparison to Greater Sydney at the time of the 2011 Census.

Fairfield

At the time of the 2011 Census, the Fairfield Trade Area population exhibited a:

- higher proportion of children aged 0 to 4 years (7.2% c.f. 6.8% Greater Sydney) as well as persons aged 10 to 19 years (14.3% c.f. 12.4% Greater Sydney);
- higher proportion of single parent households, households with children under 15 years, parents with dependent students and non-dependent children compared to the Greater Sydney benchmark average;
- significantly lower workforce participation rates (49.2% c.f. 65.6% Greater Sydney) coupled with significantly higher unemployment levels (11.3% c.f. 5.7% Greater Sydney);
- skilled workforce with a higher proportion of residents attaining a Certificate/Advanced Diploma compared to the Greater Sydney benchmark average (48.5% c.f. 43.2% Greater Sydney);
- significantly higher proportion of residents employed as machine operators, drivers and labourers (29.7% c.f. 13.1% Greater Sydney);
- significantly higher proportion of persons employed within the manufacturing,

transport, postal and warehouse industry sector compared to the Greater Sydney benchmark average (25.9% c.f. 13.8% Greater Sydney);

- higher proportion of rental dwellings;
- higher proportion of households without a motor vehicle compared to the Greater Sydney benchmark average (14.9% c.f. 12.1% Greater Sydney) suggesting this community has good access to public transport; and
- significantly lower than average annual household incomes, reflective of the low workforce participation rates and high unemployment levels recorded in this area at the time of the 2011 Census (\$60,930 c.f. \$91,010 Greater Sydney).

Outside Australia, the most common country of birth was Vietnam (14.4%), followed by Iraq (10.5%), Cambodia (3.3%), China (2.5%) and Lebanon (1.9%). Significantly, 60.1% of residents within the Fairfield Trade Area were born outside of Australia compared with 40.1% in Greater Sydney.

Prairiewood

At the time of the 2011 Census, the Prairiewood Trade Area exhibited a:

- higher proportion of persons aged 10 to 19 years (15.1% c.f. 12.4% Greater Sydney) and 50 to 64 years (19.9% c.f. 17.4% Greater Sydney);
- higher proportion of households with single parents, parents with dependent students and parents with non-dependent children compared to the Greater Sydney average;
- lower workforce participation rates (57.1% c.f. 65.6% Greater Sydney) and higher unemployment levels (7.8% c.f. 5.7% Greater Sydney);
- significantly higher proportion of residents who have attained a Certificate/Advanced Diploma (53.2% c.f. 43.2% Greater Sydney);
- significantly higher proportion of persons employed as machine operators, drivers and labourers compared to the Greater Sydney average (23.5% c.f. 13.1% Greater Sydney);
- higher proportion of persons employed in the manufacturing, transport, postal and warehouse industry sector;
- higher proportion of owner occupier households (36.8% c.f. 30.4% Greater Sydney) and mortgage committed households (36.1% c.f. 34.8% Greater Sydney);
- significantly higher proportion of households with two or more vehicles (60.2% c.f. 46.5% Greater Sydney) reflective of this communities need to travel to access services and facilities such as shopping, schooling and employment; and

- a lower than average annual household income (\$78,300) compared to the Greater Sydney average (\$91,010) at the time of the 2011 Census.

Outside Australia, the most common country of birth was Iraq (9.8%), followed by Vietnam (8.8%), Italy (3.1%) and Cambodia (2.5%). Interestingly, 53.7% of residents within the Prairiewood Trade Area were born outside of Australia compared with 40.1% in Greater Sydney.

Bonnyrigg

At the time of the 2011 Census, the Bonnyrigg Trade Area population exhibited a:

- higher proportion of persons aged 10 to 19 years (15.7% c.f. 12.4% Greater Sydney) and 50 to 64 years (19.5% c.f. 17.4% Greater Sydney) compared to the Greater Sydney benchmark average;
- significantly high proportion of families with dependent students (8.2% c.f. 5.8% Greater Sydney) and non-dependent children (12.5% c.f. 7.3% Greater Sydney);
- higher proportion of single parent households (6.2% c.f. 4.4% Greater Sydney);
- higher unemployment rate (8.9% c.f. 5.7% Greater Sydney) and significantly lower workforce participation rates (56.3% c.f. 65.6% Greater Sydney);
- higher level of educational attainment with over half (51.8%) of residents attaining a Certificate/Advanced diploma (c.f. 43.2% Greater Sydney);
- a higher proportion of persons employed as machine operators, drivers and labourers with a higher proportion of persons employed within the manufacturing, transport, postal and warehouse industry sectors;
- a higher proportion of owner occupiers and mortgagee households compared to the Greater Sydney benchmark;
- a higher level of households with 2 or more vehicles reflecting this community's need to travel to access services and facilities such as shopping, schooling and employment; and
- a lower than average annual household income compared to the Greater Sydney benchmark average (\$75,800 c.f. \$91,010), reflective of low workforce participation rates and high unemployment levels experienced at the time of the 2011 Census.

Like most suburbs within Fairfield LGA, Bonnyrigg is a culturally diverse area with the most common country of birth, behind Australia, being Vietnam (14.6% of residents), followed by Iraq (5.5%), Cambodia (3.8%), Italy (2.2%) and Croatia (2.0%). Interestingly, 54.5% of the Bonnyrigg resident population was born outside Australia compared with 40.1% in Greater Sydney.

Cabramatta

At the time of the 2011 Census, Cabramatta exhibited a:

- higher proportion of persons aged 10 to 19 years (14.7%) compared to the benchmark average (12.4%);
- higher proportion of households with dependent students (7.0% c.f. 5.8% Greater Sydney) and non-dependent children (9.6% c.f. 7.3%). Single parent households were also more prevalent when compared to the Greater Sydney benchmark (7.5% c.f. 4.4% Greater Sydney);
- significantly lower workforce participation rate (51.3% c.f. 65.6% Greater Sydney) and significantly greater unemployment rate (12.1% c.f. 5.7% Greater Sydney) compared to Greater Sydney;
- significantly higher proportion of persons employed as machine operators, drivers and labourers (33.8% c.f. 13.1% Greater Sydney);
- significantly higher proportion of residents employed within the manufacturing, transport, postal and warehouse industry sector (28.7% c.f. 13.8% Greater Sydney);
- higher proportion of rental dwellings compared to the Greater Sydney benchmark average (34.2% c.f. 31.6% Greater Sydney);
- significantly higher proportion of households without a vehicle (15.9% c.f. 12.1% Greater Sydney) reflective of a community with good access to public transport such as bus and rail services; and
- significantly lower than average annual household income levels (\$59,430 c.f. \$91,010 Greater Sydney) reflective of this community's low workforce participation rates and high unemployment levels at the time of the 2011 Census.

Unsurprisingly, this Trade Area had the largest proportion of Asians. Outside Australia, the most common country of birth was Vietnam (26.2%), followed by Cambodia (6.7%) and China (3.3%). Significantly, 61.8% of residents within the Cabramatta Trade Area were born outside of Australia compared with 40.1% in Greater Sydney.

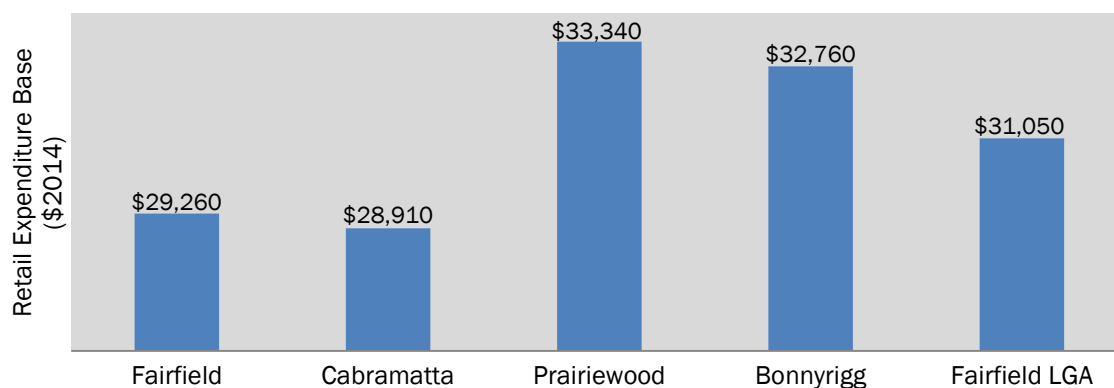
4.3.4 Retail Expenditure Base

The retail expenditure base is an estimate of that proportion of household expenditure directed towards retail facilities. The level and direction of this expenditure is dependent on a multitude of factors including the demographic and socioeconomic characteristics of

the population, as well as the location and mix of retail facilities available to the community.

The retail expenditure base for New South Wales has been derived from the results of the 2009/10 ABS Household Expenditure Survey, as inflated by subsequent changes in retail turnover per household to 2014 dollar values. It is estimated that the average retail expenditure base for New South Wales is \$33,740 in 2014 dollar values. Based on the demographic and socioeconomic characteristics of the Trade Area population, the average household retail expenditure for the defined Trade Areas is provided in the following Figure 4.6.

Figure 4.6: Retail Expenditure Base by Centre Trade Area



Multiplication of the average household expenditure by the number of households or spending units within the Trade Area (as summarised in Tables 4.4 and 4.5) provides an estimate of the total available retail expenditure. Table 4.7 summarises the results in 2014 dollar values.

Table 4.8: Total Available Retail Expenditure by Centre Trade Area

Trade Area	2013 (\$M)	2016 (\$M)	2021 (\$M)	2026 (\$M)	2031 (\$M)	Growth 2013 – 2031 (\$M)
Fairfield	782.9	821.1	899.8	978.8	1,051.1	268.2
Prairiewood	885.0	925.1	989.5	1,046.2	1,095.0	210.0
Bonnyrigg	520.2	547.7	593.8	632.0	662.5	142.3
Cabramatta	572.9	592.9	643.7	687.7	724.8	151.9
Fairfield City LGA	2,004.6	2,101.3	2,300.1	2,501.8	2,670.7	666.2

Note: Due to the overlapping Trade Areas, this Table is not additive.

Source: ABS 2009/10 Household Expenditure Survey, ABS Retail Trade, Norling Consulting

A real expenditure increase of 0.5% per annum has been applied and added to the population growth generated expenditure. No allowance for inflation has been made (as inflation does not create demand).

Between 2013 and 2031, it is projected that the Fairfield City LGA would experience an increase in its retail expenditure base by around \$666.2 million to a total retail expenditure base of nearly \$2.7 billion. The largest growth in retail expenditure (40% of the City's growth) is expected to be derived by the Fairfield Trade Area, whereas the largest retail expenditure base over this projection period will be the Prairiewood Trade Area, substantially influenced by higher retail expenditure per household.

5 EMPLOYMENT ANALYSIS

This Chapter reviews the employment profile of Fairfield City, examining both the local resident workforce and the Fairfield City workforce. Key drivers influencing employment growth in the region are also examined.

5.1 Local Employment Profile

Employment statistics are an important indicator of the strength and structure of an economy. The age profile, labour force participation rate and unemployment rates are all important elements of an area's employment profile. The following table summarises these key statistics for Fairfield City from the 2001, 2006 and 2011 ABS Household and Population Census.

Table 5.1: Fairfield LGA Employment Profile

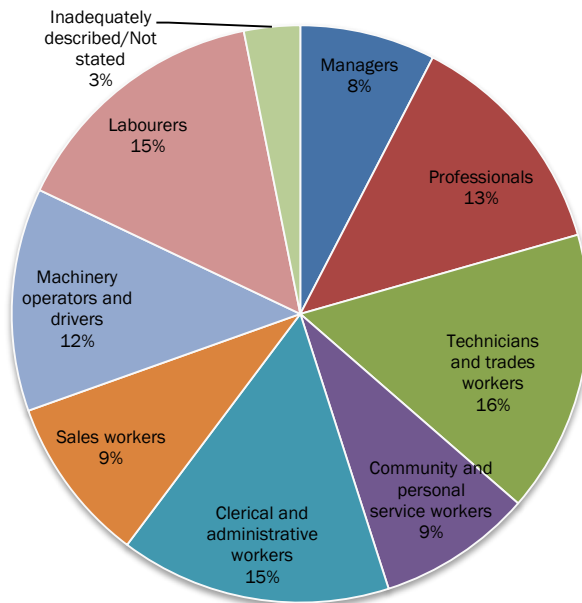
Fairfield (C) LGA	2001	2006	2011
Estimated Resident Population (No.)	187,825	186,117	196,479
Age Profile			
0 - 14 years (%)	21.8	20.7	20.4
65 years and above (%)	9.5	10.7	12.0
15 - 64 years (No.)	129,036	127,676	132,820
Labour Force Participation (%)	57.6	57.4	57.2
Labour Force Participation (No.)	74,369	73,269	75,950
Unemployment Rate (%)	12.7	10.5	9.7
Unemployment (No.)	9,445	7,693	7,367
Resident Workforce (No.)	64,924	65,576	68,583

Source: 2001, 2006 & 2011 ABS Population and Household Censuses, Norling Consulting

The labour force participation rate is the proportion of persons aged 15 years and over who are employed or actively looking for work. Labour force participation rates have remained steady over the 2001 – 2011 decade although are significantly lower than the Greater Sydney average (65.6% in 2011). The unemployment rate has been higher than the Greater Sydney average (5.7% in 2011, compared with 9.7% in Fairfield LGA), but has declined over the 2001 – 2011 decade. The resident workforce comprised 68,583 people, as at June 2011, representing a 4.6% increase from the 2006 estimate of 65,576.

The following charts detail the occupations and industries of the resident workforce, as at 2011.

Figure 5.1: Occupation of Resident Workers, Fairfield LGA 2011 (usual residence)

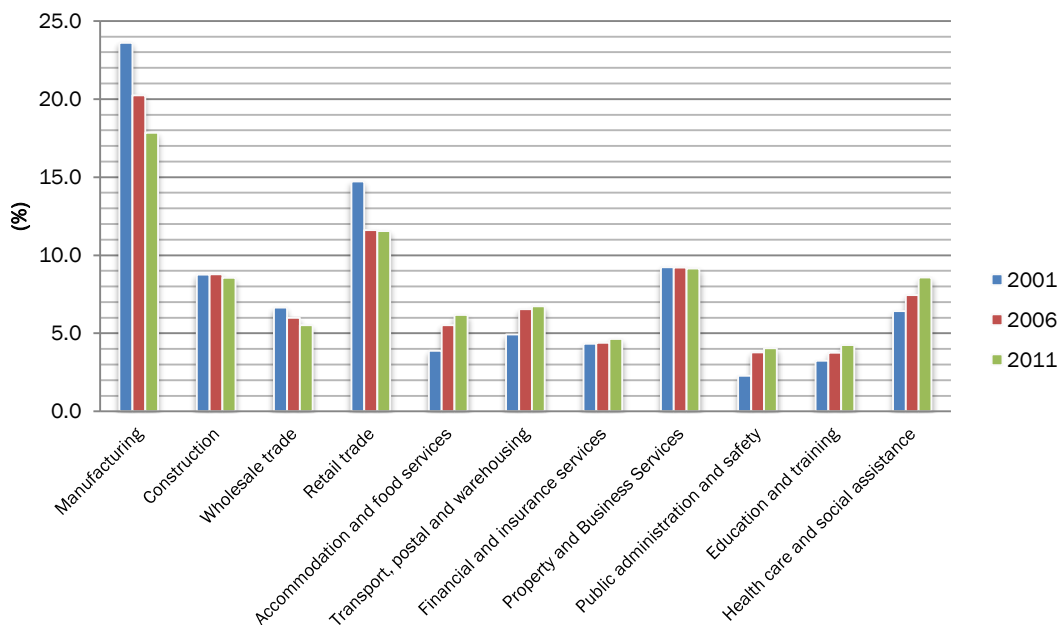


Analysis of the occupations held by Fairfield City residents reveal the most popular occupations included *technicians and trades* (16%), *clerical and administrative workers* (15%) and *labourers* (15%).

In comparison to the Greater Sydney average, there were significantly fewer *managers* and *professionals* combined (20.6% within Fairfield LGA & 38.8% within Greater Sydney) and a considerably greater proportion of *labourers* and *machinery operators and drivers* (27.3% and 13.1% for Greater Sydney).

Source: 2011 ABS Population and Household Census, Norling Consulting

Figure 5.2: Resident Workforce Industries, Fairfield LGA, 2001, 2006 & 2011 (usual residence)



Source: 2011 ABS Population and Household Census, Norling Consulting

Of the jobs held by the resident population of Fairfield City, the most popular industry sectors were:

- *Manufacturing* (12,234 people or 17.8%);

- *Retail trade* (7,923 people or 11.5%);
- *Property and business services* (6,283 people or 9.2%) (incorporating the sectors of *rental hiring and real estate services, professional, scientific and technical services* and *administrative and support services*); and
- *Health care and social assistance* (5,883 people or 8.6%).

Between 2006 and 2011, there was a significant loss of *manufacturing* jobs (1,034, or by 7.8%). Over the same period there were also small declines in job numbers within the *wholesale trade* (-144, -3.7%), *information media and telecommunications* (-45, -3.8%) industries and *mining* (-5, -11.1%). All other industries increased in size.

The most significant increases occurred within the:

- *Health care and social assistance* (+1,002 jobs, or by a 20.5% increase);
- *Accommodation and food services* (+626 jobs, or by 17.3%);
- *Education and training* (+443 jobs, or by 18.0%);
- *Other services* (+364 jobs, or by 13.2%); and
- *Transport, postal and warehousing* (+335 jobs, or by 7.8%).

To put the Fairfield LGA's results into context, the following table shows the comparison to Greater Sydney of the 2011 Census industries of employment:

Table 5.2: Industries of Employment – Fairfield LGA and Greater Sydney Statistical Area

	Fairfield LGA (%)	Greater Sydney (%)	Difference - Fairfield LGA
Agriculture, forestry and fishing	0.5	0.4	+40.0%
Mining	0.1	0.2	-72.4%
Manufacturing	17.8	8.5	+109.9%
Electricity, gas, water and waste services	0.8	0.9	-16.1%
Construction	8.5	7.1	+21.2%
Wholesale trade	5.5	5.3	+4.9%
Retail trade	11.5	9.8	+17.5%
Accommodation and food services	6.2	6.2	-0.3%
Transport, postal and warehousing	6.7	5.3	+27.1%
Information media and telecommunications	1.7	3.0	-44.0%
Financial and insurance services	4.6	6.6	-29.2%
Property and Business Services	9.2	14.8	-38.3%
Public administration and safety	4.0	5.6	-27.9%
Education and training	4.2	7.6	-44.1%
Health care and social assistance	8.6	10.9	-21.3%
Arts and recreation services	1.0	1.6	-35.4%
Other services	4.5	3.7	+24.3%
Inadequately described/Not stated	4.4	2.6	+66.6%
Total	100.0	100.0	

Source: ABS 2011 Census, Norling Consulting Calculations

In particular, there was a greater representation of jobs (in terms of proportion) within manufacturing, transport, postal and warehousing, construction, other services and retail trade. Significantly, there was a much lower incidence of professional and commercial office-based jobs. This reflects the relative availability of industrial employment in this part of Sydney compared to white collar employment.

While the above section detailed the resident workers, i.e. employed residents living within Fairfield City, it is also relevant to analyse the workforce population. The workforce population comprises all workers within Fairfield City, including those residents who live and work within Fairfield City, but also those who work in Fairfield City but may reside outside the Fairfield LGA.

The following table illustrates the historical and estimated breakdown of the workforce within Fairfield City between 2001 and 2011. It has been derived on the basis of ABS Census information, in consideration of the dynamic changes in labour force participation, unemployment rates and the aging population.

Table 5.3: Jobs Growth, Fairfield LGA, 2001 to 2011

Fairfield (C) LGA	2001	2006	2011
Estimated Resident Population (No.)	187,825	186,117	196,479
Age Profile			
0 - 14 years	21.8%	20.7%	20.4%
65 years and above	9.5%	10.7%	12.0%
15 - 64 years (No.)	129,036	127,676	132,820
Labour Force Participation (%)	57.6%	57.4%	57.2%
Labour Force Participation (No.)	74,369	73,269	75,950
Unemployment Rate (%)	12.7%	10.5%	9.7%
Unemployment (No.)	9,445	7,693	7,367
Resident Workforce (No.)	64,924	65,576	68,583
Local Jobs* (No.)	51,618	50,710	51,425
Net Jobs Balance	79.5%	77.3%	75.0%

Source: Australian Bureau of Statistics, Census of Population and Housing 2001, 2006 & 2011, Norling Consulting Calculations

*Note: Local job figures have been derived on the basis of the Working Population data and have been 'uplifted' due to the under-reporting of the ABS Census employment data. This includes the differences between Total Persons recorded on Census Night and the ERP; the unaccounted persons not stated within the labour force, as well as the unhinging of employment results in 2006 between the Basic Community and Working Population Profiles.

The above table identifies Fairfield City's net jobs balance. This employment indicator represents the ratio of the total number of jobs provided within a certain area or region as a proportion of the total number of working residents who live in that same area or region. For example, these results indicate that Fairfield City achieved a net jobs balance of 75% in 2011, meaning that for every 100 working residents living within Fairfield City, 75 local jobs were being provided within the local government area.

The net jobs balance has been declining over this decade, indicating that jobs growth within the City has not kept pace with the growth in the resident workforce.

In comparison to surrounding LGA's, in 2011, Fairfield City had a higher net jobs balance than Blacktown and Penrith, and a lower net jobs balance than Bankstown, Liverpool, Holroyd and Parramatta. The LGA of Sydney has been included in the table for comparative and illustrative purposes, showing the highest net jobs balance at 509%:

Table 5.4: Net Jobs Balance – Surrounding LGA's

Local Government Area	Net Jobs Balance
Fairfield	75%
Blacktown	68%
Bankstown	87%
Liverpool	81%
Holroyd	77%
Parramatta	141%
Penrith	69%
Sydney	509%

Source: Australian Bureau of Statistics, Census of Population and Housing 2011, Norling Consulting Calculations

A closer look at the net jobs balance by industries of employment are much more revealing in terms of what types of jobs are actually located within the Fairfield LGA compared to the resident workforce.

Table 5.5: Net Jobs Balance by Industry – Fairfield LGA

	2011 Working Population (persons)	2011 Resident Population (persons)	Net Jobs Balance
Agriculture, forestry and fishing	217	363	59.9%
Mining	41	40	101.6%
Manufacturing	11,138	12,230	91.1%
Electricity, gas, water and waste services	324	517	62.7%
Construction	2,966	5,863	50.6%
Wholesale trade	4,521	3,785	119.4%
Retail trade	5,961	7,920	75.3%
Accommodation and food services	3,712	4,238	87.6%
Transport, postal and warehousing	2,949	4,619	63.8%
Information media and telecommunications	304	1,151	26.4%
Financial and insurance services	797	3,181	25.1%
Property and Business Services	3,489	6,281	55.6%
Public administration and safety	2,091	2,769	75.5%
Education and training	4,657	2,909	160.1%
Health care and social assistance	4,851	5,881	82.5%
Arts and recreation services	422	712	59.3%
Other services	2,257	3,115	72.5%
Inadequately described/not stated	727	3,011	24.1%
TOTAL	51,425	68,583	75.0%

Source: Australian Bureau of Statistics, Census of Population and Housing 2011, Norling Consulting Calculations

There were only three industries that had a net jobs balance of greater than 100% in 2011, meaning that these industries were attracting more workers living outside of Fairfield LGA than resident workers leaving the Fairfield LGA – education and training (160.1%), wholesale trade (119.4%) and mining (101.6%, although provides only a very small amount of jobs). There was also a high net jobs balance of 91% within the Manufacturing industry. Very low net job balances were evident within the financial and insurance services (25.1%) and information media and telecommunications (26.4%), with the majority of workers within these industries travelling to other LGA's for work.

A review of Tables 5.2 and 5.5 reveals that Fairfield LGA provides very low numbers of white-collar jobs, within the LGA containing low proportions of resident workers and low net jobs balances in the following industries: information media and telecommunications, financial and insurance services, property and business services and public administration and safety.

Importantly, only 26.3% of Fairfield City residents work within Fairfield City, with the remaining residents travelling to a place of work elsewhere, as shown below in Table 5.6:

Table 5.6: Employment Location of Residents

Fairfield City		2011	
Status	Number	%	
Live and work in the area	18,074	26.3	
Live and work in the same SLA	12,670	18.5	
Live in the area and work in different SLA	5,404	7.9	
Live in the area, but work outside	38,378	55.9	
Work location unknown	12,161	17.7	
Total employed residents	68,613	100.0	

Source: Australian Bureau of Statistics, Census of Population and Housing 2011

The following Table 5.7 details where Fairfield LGA resident workers are travelling for work (by LGA or Statistical Local Area [SLA] where stated) as follows:

Table 5.7: Top Employment Location of Fairfield LGA Residents by LGA

Place of Work – LGA	No. of jobs	%
Fairfield	18,074	26.3
Liverpool	5,583	8.1
Sydney	5,518	8.0
Parramatta	4,051	5.9
Bankstown	3,666	5.3
Holroyd	3,060	4.5
Auburn	2,238	3.3
Blacktown	2,651	3.9
Campbelltown	1,226	1.8

*Please Note: The following are excluded from above – State/Territory undefined (NSW) (4,129), Not Stated (3,413), No Fixed Address (2,655), Capital City undefined (Greater Sydney) (1,905).
Source: ABS*

The method of travel statistics reveal that the majority of workers (49,621) travelled by private vehicle (car, motorbike or truck), while 9,342 people caught public transport.

A large proportion of jobs within Fairfield City are provided within the four main centres of Fairfield City Centre and Prairiewood, Bonnyrigg and Cabramatta Town Centres. An analysis of the employment statistics of the respective SA2 that each centre is located within (and as adjusted by excluding employment generators located outside of the centre area) reveals the following estimated number of jobs within each centre, as at 2011:

Table 5.8: Estimated Number of Jobs within Major Centres

Centre	No. of Jobs
Fairfield City Centre	4,800
Prairiewood Town Centre	3,000
Cabramatta Town Centre	2,200
Bonnyrigg Town Centre	1,800

Source: Australian Bureau of Statistics, Census of Population and Housing 2011, Norling Consulting Estimates

These job numbers fall significantly short of the 8,000 minimum that has been suggested for Major Centres in the Metropolitan Plan.

5.2 Key Drivers Influencing Employment Growth

The structure of Australia's economy in recent decades has shifted away from agriculture and manufacturing towards value adding service industries. Australia's competitiveness in South East Asia and globally is in highly skilled industries: tourism, services and the resources sector. It is likely that the trend away from low and medium skilled

manufacturing sectors will continue, with Australia's export oriented manufacturing industry becoming limited to niche, high-technology operations.

The vast majority of Australia's gross domestic product (GDP) is created from service industries. In the 2013/2014 financial year, only 28.9% of the nation's GDP emanated from goods industries made up of *manufacturing* (6.5% of GDP), *construction* (7.6%), *mining* (10.4%), *agriculture* (2.1%) and *utilities* (2.3%). Consumer demand for more services, coupled with the ever-falling real prices of goods, is reflected in the changing mixture of the Australian economy towards service industries.

Similarly, the industry distribution of the labour is changing. As discussed by the Australian Department of Employment in its *Australian Jobs 2014* Report, more than a decade ago *manufacturing* was Australia's largest employer, however, now it is fourth (at 8% of workforce) behind *health care and social assistance* (12% of workforce), *retail trade* (11%) and *construction* (9%).

The Report found that over the five years to November 2013, approximately 712,900 new jobs were created, with the majority being within the following industries:

- ↑ *Health care and social assistance* (up by 270,200)
- ↑ *Professional, scientific and technical services* (106,200)
- ↑ *Public administration and safety* (102,800)

Over the same period, employment fell in five industries. These were:

- ↓ *Manufacturing* (down by 99,000)
- ↓ *Agriculture, forestry and fishing* (47,200)
- ↓ *Information, media and telecommunications* (33,200)
- ↓ *Transport, postal and warehousing* (9,600)
- ↓ *Rental, hiring and real estate services* (3,400).

The Report also provided an industry outlook for the next five years (to November 2018). Sixteen of the nineteen industries are projected to grow in terms of their employment. *Health care and social assistance* is expected to provide the greatest number of new jobs (by 229,400), followed by *education and training* and *retail trade* (approximately 229,400 combined). Together, these three industries are forecast to provide half of all new jobs. In terms of percentage growth, the following employment growth is projected:

- ↑ *Health care and social assistance* (25.7%);
- ↑ *Education and training* (13.3%);

- ↑ *Retail trade* (11%);
- ↑ *Professional, scientific and technical services* (9.9%);
- ↑ *Construction* (9.3%);
- ↑ *Accommodation and food services* (6.2%);
- ↑ *Public administration and safety* (5.4%);
- ↑ *Administrative and support services* (4.2%); and
- ↑ *Other* (15%).

Further declines are projected for *manufacturing* (down by 40,300), *mining* (12,300) and *agriculture, forestry and fishing* (2,800).

As detailed in the previous Chapter, within Fairfield there is a greater representation of jobs within the *manufacturing, transport, postal and warehousing, construction, other services* and *retail trade* industries. There is a much lower incidence of professional and commercial office-based jobs. The resident workforce reflects a similar skew.

The Draft Metropolitan Strategy for Sydney to 2031 outlines the following points that may have potential impacts on employment and the economy:

- Planning is for 625,000 new jobs by 2031. Most new jobs will be located in key centres and specialised employment precincts. Certain types of industries including health, education, manufacturing and creative services should be located in the same areas to allow greater levels of efficiency.
- Minimum targets for jobs growth have been set for all six subregions across Sydney and once finalised, the Department will work with councils and communities on Subregional Delivery Plans. These will help decide where the jobs growth will occur and the infrastructure needed to support them. Within the South West subregion, the target of 134,000 additional jobs to 2031 has been set (no estimates are provided at the LGA level).
- One of the Metropolitan priorities for the South West subregion is to “*recognise and intensify the subregion’s role in Sydney’s manufacturing, construction and wholesale/logistics, particularly in Fairfield, Bankstown and Liverpool and, in the future, through WSEA*”;

- The WSEA is identified as one of nine key ‘city shapers’ of the Draft Metropolitan Strategy to play an important role in shaping future growth. The Strategy states *“we will investigate opportunities in an area of around 10,000 hectares between the M4 and the M7 to support jobs growth in manufacturing and new technology. We will also improve important connections to the M4 and M7 for Sydney’s freight and logistics network”* (pg 7).

It is likely that Fairfield LGA will continue to provide an above average proportion of jobs within the manufacturing, construction, wholesale and logistics industries, with the WSEA able to accommodate any growth in these industries due to the maturity of Fairfield’s industrial areas. The following Chapter discusses the difficulty Fairfield City faces in attracting commercial office space.

6 CONSULTATION

This Chapter summarises the key themes of the stakeholder consultation undertaken by Norling Consulting in preparing this Study. Representatives of Norling Consulting undertook consultation with various stakeholders within Fairfield City over a week-long period in September 2014, with one organisation consulted by teleconference in November 2014. The purpose of this consultation was to engage with key stakeholders within the community to obtain an understanding of the key issues, constraints and opportunities that may exist within Fairfield City. This Chapter sets out the key findings of the consultation.

6.1 Stakeholders

A total of 15 stakeholders were contacted with 12 stakeholders agreeing to meet with Norling Consulting. It is noted that three stakeholders had previously agreed to participate, albeit Norling Consulting was unable to meet with these stakeholders at the time of completing this Report. The following Table 5.1 summarises those stakeholders who participated in this consultation.

Table 6.1: Stakeholder Consultation Participants

Organisation	Representative	Position
Parramatta Council	Ildi Vukovich Simon Ginn	Economic Development Manager, Transport Planning
Liverpool Council	Julie Scott Megan Munari	Manager Economic Development Senior Strategic Planner
Real Estate Agents	Vince Movizio Graham Bell Joe	Principal, Ray White Fairfield Sales Manager, Ray White Fairfield
Canley Vale Heights Chamber of Commerce	Tony Fornasier	President
Fairfield Forum	Jocelyn Marr Anastasia Lambert	Centre Manager Marketing Manager
Cabramatta Place Manager	Cheryl Bosler	Place Manager
NSW Department of Planning – Subregional Growth and Infrastructure Planning South West	Nick Johnson Suzanne Wren	Team Leader Planning Officer
Fairfield Chamber of Commerce	Vince Movizio Vincent Morizzi Sil Frassetto	President Vice President Past President, Executive Committee
Stockland Wetherill Park	Paul Davis Justin Travlos	Centre Manager Development Manager
Smithfield Square	Gary Quig	Director, Raine and Horne Commercial
Bonnyrigg Plaza	Matthew Luchich Craig Alldridge	Retail Asset Manager Retail Investment Manager
Cabramatta Business Association Inc.	The Association did not wish to provide names.	

Source: Norling Consulting Stakeholder Consultation September 2014

It is noted that Norling Consulting met with representatives of Bonnyrigg Plaza, however, this meeting was requested to remain confidential. For purposes of confidentiality, the outcomes of this meeting have not been included in this discussion. Representatives of the Cabramatta Business Association requested that their names remain confidential.

Representatives from the Cabramatta Chamber of Commerce, Neeta City and Canley Vale Restaurant Committee had previously agreed to participate in this consultation, but subsequently cancelled those meetings.

6.2 Key Themes

A number of key themes were derived during the consultation process. The most apparent themes derived from the stakeholder consultation were matters relating to Council policy, strategy and decision making, building heights/densification (i.e. height restrictions, low residential densities around centres etc.) as well as shop presentation (including shopfront, fit out etc.), the commercial office market and safety/security. The following Table 6.2 summarises these key themes identified as part of the stakeholder consultation. It is acknowledged that the views expressed are not necessarily representative of each individual interviewed as part of the consultation process, albeit it outlines the general trends and themes expressed during these discussions.

Table 6.2: Stakeholder Consultation Key Themes

Key Theme	Issues/Concerns/Constraints/Opportunities Raised
Council Policy/ Strategies/ Decision Making	There was a common theme amongst stakeholders that there was a lack of clarity and direction provided by existing Council Policies/Strategies (such as the LEP, existing centres strategy etc) with existing documents deemed to be too restrictive and failing to provide sensible flexibility to encourage development. Concern was also raised that some of Council's existing policies/strategies (such as the existing centres strategy) relied upon old information that failed to recognise demographic/population changes that occurred more recently (e.g. population within Fairfield City was previously declining, however more recently the City has experienced growth). Discussions with stakeholders also raised concerns about Council's decision making process not only for development applications but also in finalising strategies etc that are intended to provide some direction for future development (e.g. some Council strategies/announcements have yet to be finalised/adopted despite being announced/undertaken some years ago such as the Cabramatta DCP). Particular concerns were raised with regard to the length of time and lack of rationale adopted in deciding development applications that ultimately result in a significant cost of time and money. Furthermore, stakeholders raised concerns that such processes inadvertently discouraged developers from doing business in Fairfield City as it becomes "too hard" (due to length of time waiting for a decision and inability to have a rational and logical discussion about a proposal to reach some form of compromise between both parties) and a waste of time and money particularly in comparison to more positive experiences with the adjoining Liverpool and Parramatta Councils.
Building Heights/ Density	A number of stakeholders considered that the existing building heights particularly around existing centres such as Fairfield CBD, Canley Vale and Cabramatta were too restrictive and did not provide any real opportunity for densification. Concerns were also raised that the building heights particularly within the Fairfield CBD did not allow for the opportunity to establish a critical mass of people or activity to create a vibrant CBD suggesting that building heights needed to be more flexible. This is believed to be further exacerbated by the difficulties associated with site amalgamations (which are generally strata titled and an expensive option to undertake). Opportunities for transit oriented development were also raised particularly in regards to the Fairfield CBD and Canley Vale given these centre's locational advantages and connectivity with existing train stations.
Site Constraints/ Amalgamations	Throughout the stakeholder consultation process a number of concerns were raised with regards to the site constraints particularly given the limited availability of Greenfield sites within Fairfield City for various uses such as residential, retail, commercial etc. • Difficult to amalgamate sites due to current uses particularly within the Fairfield CBD frame, which is characterised by 3 storey residential blocks • Strata title issues make amalgamation difficult and an expensive exercise that is generally not a feasible option

Key Theme	Issues/Concerns/Constraints/Opportunities Raised
Shop Appearance/ Presentation	There was a general consensus that shop presentation throughout Fairfield City was generally of poor standard particularly within retail strips. Existing shops generally appear run down, old and weathered with very little pride shown in shopfront presentation or fit out with a vast difference in appearance noted between shopping centres (such as Fairfield Forum, Neeta City etc) and the surrounding retail strip tenants. It was considered that existing retail strips were not appealing despite some streetscaping having been undertaken in some areas (e.g. strip retailing around the Fairfield train station is generally of poor quality despite extensive streetscaping having been undertaken in this area). Stakeholders considered that there was a lack of onus on business owners to provide a well presented shopfront to enhance and revitalise existing retail strips. It was considered that this was due to a lack of incentive for individual shop owners/tenants to revitalise their own premises and a failure to see the overall benefits. It was suggested that Council should introduce some sort of incentive to encourage shop owners/tenants to refurbish their premises to contribute to an overall revitalisation of existing centres particularly the Fairfield CBD.
Commercial Office Market	Discussions highlighted the weakness of the commercial office market within the Fairfield CBD, with existing commercial office stock being poor quality, run down, weathered and very difficult to tenant with a number of examples of commercial office space remaining vacant for a number of years. Existing commercial office stock was generally first floor office above run down retail strip tenants, making it difficult to attract new tenants to the city. It was also raised by a number of stakeholders that it was difficult to convince prospective commercial office tenants to locate to the Fairfield CBD when the city's own Council did not have their own offices within the CBD. It was considered that the Fairfield CBD needed local/state/federal commitment to assist in stimulating demand for commercial office stock within the CBD. Notwithstanding, it was acknowledged that it was difficult for the Fairfield City commercial office market to compete with other more established commercial office markets such as Parramatta and Penrith given its location and proximity to such centres. It was considered that it would be very difficult to attract commercial office tenants to Fairfield in comparison to the larger centres, particularly Parramatta.
Safety/ Security/ Reputation	On numerous occasions during the stakeholder consultation, concerns were raised about the safety and security at various centres throughout the city. Factors such as the poor appearance of strip retailing (run down, weathered, dated etc) did not provide a sense of safety or security. It was also considered that Fairfield City still had a number of negative connotations associated with it in terms of crime and safety. Despite crime levels having subsided there was a sense of feeling unsafe.

Source: Norling Consulting Stakeholder Consultation September 2014

6.3 Centre Consultation

Discussions were held with existing centres (Fairfield Forum, Smithfield Square, Stockland Wetherill Park) as well as the Cabramatta Place Manager, Cabramatta Business Association, Fairfield Chamber of Commerce and Canley Vale Chamber of Commerce to obtain an understanding of the centres' roles and functions, issues/opportunities, development intentions etc. facing each centre. The following Table 6.3 provides a brief summary of the key points raised in regards to each of the identified centres.

Table 6.3: Centre Stakeholder Consultation

Centre	Issues/Concerns/Opportunities Raised
Fairfield	- The main focus for Fairfield Forum currently is to refurbish and revitalise the centre. - Fairfield Forum has a convenience focus with an emphasis on fresh food. - Fairfield CBD has a significant opportunity for redevelopment given the poor quality of existing shops and a large quantum of underutilised uses within the CBD. - The Fairfield CBD needs a critical mass of people to help revitalise and stimulate investment and activity. - Lacks a number of major anchor tenants to stimulate activity within the CBD.
Prairiewood	- The Prairiewood Town Centre operates in a different role and function to the Fairfield CBD. - Recognise that this centre has a greater ability to expand compared to other centres due to lower site constraints. - Significant expansions are currently under construction which will see the introduction of Coles and a number of new specialty stores and a refurbished centre. Stage 1 expansion is anticipated to be completed by March 2015. - The centre has the potential to become a Major Centre given the availability of land and mix of uses already established in this corridor.
Cabramatta	- Operates as a specialised centre that services a very large catchment, with evidence of people frequenting from the broader greater Sydney region and beyond. - Has a strong emphasis on food and health services with the potential to increase night time trade, which is not really existent at present particularly in comparison to Canley Heights. - Rents are a key issue within Cabramatta with rents significantly high and constantly increasing making business sustainability difficult. - Very strong opposition to Council's planned Dutton Lane redevelopment. - Need to widen the range of services offered beyond retail. - Need to improve the quantum and standard of public open space. - Need to stay ahead of competing Asian-themed centres. - Want to become the Asian centre of business and tourism in Australia.
Smithfield Square	- This centre operates as a secondary shopping precinct with the centre and surrounding retail strip remaining relatively the same over time. The centre is located at the periphery of the Fairfield City boundary and nestled between residential and industrial. - The biggest challenge facing the centre is the configuration of the centre and its ability to integrate with the surrounding retail strip. - This centre has a convenience role and function aimed at providing easy access and convenience to shoppers. - The centre needs a consolidation of shops to create a true retail precinct with more carparking and streetscaping to assist in revitalising the retail strip.
Canley Vale	- There is an insufficient quantum of commercial zoned land within Canley Vale with much of current commercial zoned land already utilised. - Canley Vale has seen very little new development and has remained relatively static and in need of revitalisation. - This centre functions differently to other centres and has more of a convenience role and function.

Source: Norling Consulting Stakeholder Consultation September 2014

As previously indicated, Norling Consulting had attempted to meet with representatives of the Neeta City Shopping Centre, albeit no discussions eventuated. Conversely, Norling Consulting met with representatives of the Bonnyrigg Plaza shopping centre, however as requested, these discussions are to remain confidential.

6.4 State Agency/Council Consultation

Discussions were also held with the NSW Department of Planning and Environment – Subregional and Infrastructure Planning South West division to obtain an understanding of the state's interests and intent for the South West subregion (which Fairfield City currently forms part of) under the draft Metropolitan Strategy. It is understood that a draft sub-regional strategy is currently being prepared and is anticipated to be released for public consultation some time in 2015. The key factors raised as part of this discussion are summarised as follows:

- The Strategy is intended to not only focus on centre development but have more of a focus on employment in particular creating new employment opportunities for the region. The Smithfield/Wetherill Park industrial area is acknowledged as an important employment area, which is likely to be supported. Employment generation is both an issue and a driver particularly within the South West subregion and the Strategy is intended to preserve this element.
- Bankstown, Bankstown Airport, Liverpool and Campbelltown have been identified as key centres with each having significant competitive advantages e.g. Liverpool has a very large hospital and has a competitive advantage to other areas with the potential to become a significant health precinct with allied health providers. Fairfield needs to identify its own competitive advantage that may have been overlooked. If Fairfield is to be developed as a Major Centre, it needs to be able to establish itself with a point of difference rather than competing with other centres.
- Acknowledged that both Prairiewood and Fairfield are identified as potential Major Centres under the draft Metropolitan Strategy, however, there would need to be a level of differentiation between the two for both to become Major Centres, rather than a duplication of each other. There is not necessarily any set criteria to determine what constitutes a Major Centre.
- Would like to promote the ability for residents within this corridor to work closer to home.
- Generally supportive of increased residential densities around train stations.

Given Fairfield City's location between Parramatta and Liverpool, Norling Consulting in conjunction with Fairfield City Council representatives, also held discussions with representatives of the Parramatta and Liverpool City Councils to obtain an understanding of the intent of their centres and the potential impacts and challenges that Fairfield City may face. The key factors raised during this discussion are summarised as follows:

Parramatta Council

- Considerable commitments and strong interest have been shown within Parramatta with Council's Parramatta Square receiving strong developer interest.
- Significant state investment has been placed in Parramatta with the state government announcing a major redevelopment of the Westmead Hospital (which is expected to provide an additional 6,000 to 7,000 jobs) and additional funds invested in progressing a light rail feasibility study for the area (which is canvassing possible additional routes).
- There is strong developer interest in high density residential projects within and close to the Parramatta CBD.
- Council does not have a bulky goods precinct, although there is a sprinkling of bulky goods retailers within the CBD frame.
- Parramatta has a large quantum of B, C and D grade office buildings with C and D grade office buildings comprising high vacancy rates and facing increasing pressure to upgrade.
- There have been no new office buildings constructed within Parramatta since the start of the Global Financial Crisis (GFC), with no A grade office buildings identified in the pipeline.

Liverpool Council

- Liverpool lacks quality commercial offices with very limited A and B grade office stock. The commercial office market has been declining whilst the residential market in Liverpool has been growing significantly with a number of new residential towers currently under construction within the CBD Frame.
- Residential development is not intended within the commercial core, albeit there is pressure to relax this intent to allow future residential development, with the CBD in need of revitalisation.
- Liverpool benefits from a relatively strong public transport service with connection to the rail line and the T-way bus network connecting Liverpool to Parramatta.

- Council faces conflicting pressure for ‘out-of-centre’ centre development and the challenges Council faces in revitalising and strengthening the Liverpool CBD.
- Focus of growth for Liverpool City is towards the south/south west in Edmondson Park, which is intended to provide a more localised role and function servicing a large catchment to the north. This area is intended to comprise 25,000m² retail/commercial floorspace.

7 EXTERNAL INFLUENCES

Fairfield City functions within the wider western Sydney region. There are a number of large centres that impact on and influence growth and development within Fairfield City. This Chapter examines those external centres that may impact upon Fairfield City.

7.1 External Centres Impacting on Fairfield City

The Fairfield LGA shares its boundary with the LGA's of Blacktown, Holroyd, Bankstown, Liverpool and Penrith. Within these LGA's, there are a number of centres that may influence Fairfield City and its centres and commercial areas.

Liverpool

Identified as a Regional City by the current and draft Metropolitan Strategy, the metropolitan priorities for the Liverpool Regional City are to:

- *“enhance its role as the subregion’s main centre for commercial, retail, service and entertainment;*
- *utilise the Liverpool Hospital precinct for ancillary business clusters;*
- *increase housing opportunities around Liverpool CBD;*
- *improve transit connectivity with Penrith, Bankstown, Parramatta and the South West Growth Centre/Leppington;*
- *provide capacity for at least 9,000 additional jobs to 2031”.* (draft Metropolitan Strategy)

Given its Regional City status, Liverpool is therefore expected to continue to attract investment and development.

Westfield Liverpool is the key anchor of the Liverpool Central Business District (CBD) providing 85,500m² of retail floorspace and including a Myer Department Store, Big W and Target discount department stores and Coles and Woolworths supermarkets. This centre is located 4km south of Cabramatta.

While the commercial office market has been declining within Liverpool, the residential market has been growing significantly with a number of new residential towers currently under construction within the CBD frame. Liverpool benefits from a strong public

transport service within connection to the rail line and the T-way bus network connecting Liverpool to Parramatta.

Parramatta

Parramatta is also identified as a Regional City and as one of nine key 'city shapers' that will play an important role in shaping Sydney's future growth. It is recognised as Sydney's second CBD and the premier regional city serving Western Sydney. The Draft Metropolitan Plan states that there will be 21,000 jobs in the Parramatta CBD by 2031.

Given its Regional City status, Parramatta is also expected to continue to attract investment and development.

Westfield Parramatta anchors the CBD, containing nearly 134,000m² of retail floorspace. Key tenants of this shopping centre include David Jones and Myer department stores, Kmart and Target discount department stores and Coles and Woolworths supermarkets.

There has been significant state investment in Parramatta to date with the state government recently announcing a major redevelopment of the Westmead Hospital (expected to provide an additional 6,000 – 7,000 jobs) and additional funds invested in progressing a light rail feasibility study for the area (canvassing possible additional routes).

Bankstown

The relevant metropolitan priorities (within the draft Metropolitan Strategy) for Bankstown Major Centre are as follows:

- *"continue the focus for office, retail, entertainment, cultural, public administration, services, mixed use and residential development.*
- *Provide capacity for at least 3,000 more jobs to 2031".*

The Bankstown Airport/Milperra is identified as a Specialised Precinct with the intention to be promoted as an aviation centre for Sydney, to support other specialised clusters associated with the Airport and Milperra industrial lands and to provide at least 2,000 additional jobs to 2031. Given its specialised nature (space, aeronautical and defense industries), this is not expected to impact on tenants within Fairfield LGA.

Bankstown Central is located within the Bankstown CBD and provides approximately 80,000m² of retail floorspace. Its major tenants include Myer department store, Kmart,

Target and Big W discount department stores as well as Woolworths and Supa IGA supermarkets.

Other Retailing

There are several small supermarket based centres situated just beyond the borders of Fairfield LGA that would attract residents living within Fairfield City, such as Cecil Park Marketplace located within 1km of the Fairfield LGA boundary. There are also a number of bulky goods precincts also located outside the bounds of Fairfield City, such as Megacentre Liverpool.

Figure 7.1 illustrates the location of the major centres located beyond the Fairfield LGA while the following Table 7.1 provides further details of the composition and size of the centres.

Figure 7.1: Major Centres Located Outside Fairfield LGA

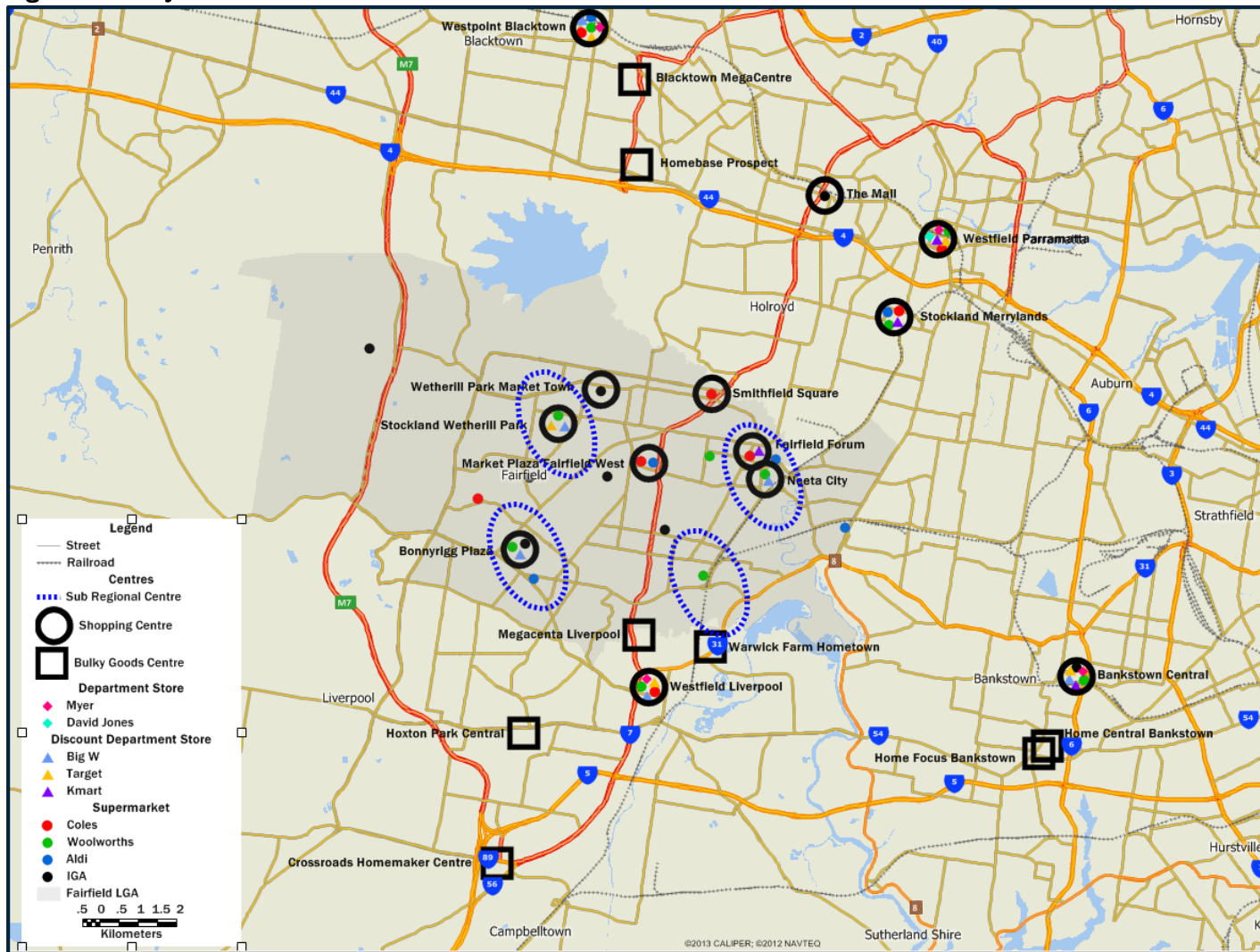


Table 7.1: Major Centres Located Outside Fairfield LGA

LGA	Draft Metropolitan Classification	Major Shopping/Bulky Goods Centres	Major Tenants
Liverpool	Regional City	Westfield Liverpool , Macquarie Street (85,527m ²)	Myer, Target, Big W, Coles, Woolworths, Greater Union Cinema
		Crossroads Homemaker Centre , cnr Beech Road & Camden Valley Way (51,264m ²)	Bunnings, Flower Power, The Good Guys, Freedom Furniture, Bing Lee
		Megacentra Liverpool , 2-18 Orange Grove Road (30,102m ²)	Harvey Norman, Domayne, Heaps Cheap Furniture, Bing Lee
		Warwick Farm Hometown , 1 Sappho Road, cnr Hume Highway (14,502m ²)	Sam's Warehouse, Fantastic Furniture, Lincraft
		Hoxton Park Central , 2 Lyn Parade (27,051m ²)	Bunnings, Kennards Hire, Officeworks
Bankstown	Major City	Bankstown Central , North Terrace (79,611m ²)	Myer, Big W, Kmart, Target, Woolworths, Supa IGA
		Bass Hill Plaza , 753 Hume Highway (20,129m ²)	Kmart, Woolworths, Aldi
		Home Central Bankstown , 9-67 Chapel Road South (17,058m ²)	Toys 'R' Us, The Good Guys
		Home Focus , Bankstown, 173 Canterbury Road (17,800m ²)	Freedom Furniture, Dick Smith, Fantastic Furniture
Holroyd	-	Stockland Merrylands , McFarlane St	Kmart, Woolworths, Coles, Aldi
		The Mall, Wentworthville , 42-44 Dunmore Street, Wentworthville (7,450m ²)	Supa IGA
Parramatta	Regional City	Westfield Parramatta , 159-175 Church Street (133,805m ²)	Myer, David Jones, Target, Kmart, Woolworths, Coles, Event Cinemas
Blacktown	Major City	Westpoint Blacktown , Patrick Street (84,898m ²)	Myer, Big W, Target, Woolworths, Coles, Aldi, Hoyts Cinema, AMF Bowling
		Blacktown MegaCentre , Blacktown Road (26,031m ²)	Harvey Norman, Bing Lee
		Homebase Prospect , 19 Stoddart Road (25,913m ²)	Fantastic Furniture, Paul's Warehouse

Source: Property Council of Australia, NSW Shopping Centre Directory 2011/12

The challenge for the future will be to develop and position centres within Fairfield City in such a way as to be unique and with their own 'point-of-difference' but also ensuring that they continue to complement each other and meet the needs of local residents.

7.2 Retail Gap Analysis

This section attempts to estimate the likely future growth in retail floorspace within Fairfield City.

It is also relevant to note that the planning risk involved in projecting retail floorspace is the failure to plan for sufficient growth. That is, it is preferable that planning documents can accommodate more growth than is actually required than less growth than occurs. Consequently, it is considered appropriate that this section adopts assumptions that err on the optimistic side than the conservative side.

This section estimates the current level of escape retail expenditure and identifies the current and likely future gaps in the provision of retail facilities. This is achieved through a comparison of the current stock of retail floorspace with the floorspace expected to be supported by the retail expenditure base of the City and by a comparison between the anchor stores present in the City with established benchmarks.

This analysis has had regard to reported turnovers of City shopping centres. However, as less than 30% of the City's floorspace publicly reports turnovers, reliance has been placed upon turnover estimates based upon floorspace surveys and physical inspections of shopping centres to estimate general performance levels. Whilst such an approach is considered appropriate in the circumstances, it is acknowledged that it is unlikely to yield an accurate result.

It is estimated that there is net escape expenditure in the order of 15% from Fairfield City. That is, the total turnover of all City retail outlets (about \$2.3billion) is about 15% less than the City population's retail expenditure base (\$2.7billion). Given that a proportion of the City's retail turnover is derived from persons residing outside the City (of which Cabramatta is considered the largest recipient of this expenditure), it is estimated that the gross escape expenditure is slightly above 20%. It is expected that this escape expenditure is being directed to:

- (a) Sydney CBD;
- (b) Parramatta Regional City;
- (c) Liverpool Regional City;
- (d) Various bulky goods centres, especially those located in Liverpool City; and

- (e) Other centres located close to the places of employment of Fairfield City residents.

Whilst some developers may argue that the City should plan to reduce the net escape expenditure level to 0% in order to create more employment and economic activity in the City, Norling Consulting considers that this scenario cannot be achieved due to the City functioning as part of a larger economic region and the relative attractiveness of higher order centres located outside the City (i.e. Liverpool and Parramatta) continuing to attract a retail expenditure from Fairfield City residents. For planning purposes it is considered appropriate to assume that the net escape expenditure falls below 10%.

Table 7.2 sets out a gap analysis of the major anchor stores within the City (utilising standard benchmarks as adjusted by lower retail expenditures of City households), showing that the City is presently lacking one department store, seven major supermarkets and one discount supermarket.

Table 7.2: Fairfield LGA Gap Analysis

	Expected (No.)	Existing (No.)	Gap (No.)
Department Store	1	0	1
Discount Department Store	5	5	0
Major Supermarket	20	13	7
Discount Supermarket (ALDI)	5	4	1
TOTAL	31	22	9

Source: Norling Consulting Pty Ltd

Whilst the City's population is more than sufficient to support a department store, the low household incomes, the relatively high proportion of cultural groups that prefer to shop at specialty stores and the presence of department stores at nearby Parramatta and Liverpool indicate it would be challenging for the City to attract a department store operator.

The significant shortfall in the presence of major supermarkets in the City is due to the difficulty of obtaining large sites within or adjoining existing mature centres and due to the City having a high proportion of several ethnic groups that prefer to undertake their food shopping at specialty food retailers (such as those located in Cabramatta) rather than in a major supermarket.

It is therefore expected that the City will continue to experience some pressure by the major supermarket operators wishing to establish new supermarkets in the City. This pressure may become stronger in the longer term if younger generations of the City's

population demonstrate stronger preferences to undertake their food shopping in supermarkets rather than specialty food stores.

The City also has a significant shortfall of bulky goods retailing floorspace, estimated to be in the order of 40,000m². This can be attributed to a lack of vacant appropriately zoned sites and the more recent development of several bulky goods centres outside the City, especially within Liverpool City. Future opportunities may present along the Hume Highway should existing older industrial businesses elect to relocate. It is noted that the City has extensive lands contained within the B5 zone, most of which, however, is occupied by industrial activities.

With respect to the quantum of additional retail floorspace to be demanded within Fairfield City between 2013 and 2031, the following estimates are provided:

Table 7.3: Retail Floorspace Demand 2013 to 2031

Detail	Retail Floorspace Estimate (m ²)
2013 Floorspace Demanded by Fairfield City Residents	400,000
2013/14 Actual Floorspace Provided within Fairfield City	340,000
Gap	60,000 (or approximately 15%)
Additional retail floorspace generated from population growth to 2031	76,000
Additional retail floorspace generated from real growth to 2031 (at 0.5% p.a.)	34,000
Additional retail floorspace through improvement in escape expenditure	20,000
TOTAL additional to 2031	130,000

Source: Norling Consulting Estimates

Table 7.3 can also be explained in an alternative fashion:

- (a) The current provision of retail floorspace is 1.67m² per capita compared to 1.97m² per capita required to satisfy demand, resulting in a net leakage of retail expenditure out of the City of 15%.
- (b) By 2031, the retail provision to satisfy demand is expected to increase to 2.14m² per capita.
- (c) It is appropriate to plan for a reduction in the net leakage of retail expenditure in order to improve the range of retail facilities and employment locally.
- (d) This Study recommends planning for a 2031 retail provision of 1.96m² per capita, which would result in a net leakage reducing to 9%.

A total additional retail floorspace demand of 130,000m² is estimated to be required within Fairfield City by 2031. This additional floorspace should be directed to different levels within the centres network, such as follows:

Table 7.4: Additional Retail Floorspace Allocation

Centre	Percentage Allocated	Retail Floorspace
Sub-Regional	50%	65,000
Local	20%	26,000
Neighbourhood	10%	13,000
Bulky Goods	20%	26,000
TOTAL	100%	130,000

Source: Norling Consulting Estimates

7.3 Retail Trends

Retailing involves the sale of goods to households. It is competitive and constantly changing. New technologies, demographic changes, new retailers and improved mobility by households have all conspired to change retail formats. Future changes are inevitable, not all of which can be foreshadowed at this point in time. This section summarises the key features of a number of trends that are likely to affect retailing in the City.

Supermarkets

- Rationalisation of the supermarket sector, combined with an aggressive expansion strategy, has resulted in Coles and Woolworths dominating this sector, accounting for a market share of almost 75%.
- This has resulted in a declining market share by the smaller independent convenience stores and larger independent supermarkets (such as Supa IGA).
- This duopoly has been eroded with the more recent entry of the discount supermarket operator ALDI, which has obtained a market share of 7% on the east coast. Its differentiation and popularity, combined with an aggressive store opening strategy is likely to see ALDI continue to increase its market share.
- The ALDI entry strategy has been based upon establishing small stand-alone stores, independent of other supermarkets, resulting in a disconnect for those shoppers who appreciate the ALDI offer, but who also need to patronise a full-line supermarket in order to complete their grocery shopping trip.
- The size of full-line supermarkets has generally been increasing over time, with a small decline experienced in the 2000s. There is some evidence that the size is once again on the increase.
- Supermarkets have generally performed well in recent years, in comparison to other

retail store types. Neighbourhood centres anchored by major supermarkets have also generally performed well in comparison to many of the larger centres.

- Shopping at supermarkets has become more frequent, with the traditional weekly or fortnightly grocery shopping trip being replaced by several smaller shops per week. Well located supermarkets providing a convenience shopping trip have benefited from this change to the detriment of the smaller convenience stores.
- Consequently, the typical trade area for a full-line supermarket has fallen from about 10,000 persons to about 8,000 persons.
- There has been a strong expansion by both major operators into the fuel retailing sector, which has largely been achieved to date.
- One could expect that supermarkets would expand into other markets (such as newsagencies and pharmacies) if federal laws were to permit.
- Coles and Woolworths have in recent years expanded their online capabilities significantly. The online retail sales category of groceries and liquor has been a key growth area and is estimated to comprise 15% of total online sales.
- The strong preference by some ethnic groups within the City to purchase food from food specialty shops rather than from full-line supermarkets has resulted in a strong fresh food sector in the City, such as has been established at Cabramatta. Over time, there is a question mark over whether the younger generations of these ethnic groups may continue to demonstrate that same preference.
- The strength of the three supermarket operators, their competitiveness and the difficulty of obtaining new sites indicates that it would be very difficult for a new supermarket operator to enter the market.
- Rationalisation of the fuel industry, together with the competitiveness of the retail fuel sector and the demand by customers for convenience, has resulted in fuel retailers also performing a valuable convenience retail function.
- There is little evidence to suggest that there will be strong interest in the opening of new small independent convenience stores.

Department Stores

- There are only two major department store operators in Australia – David Jones and Myer. They typically service catchments of greater than 150,000 persons of middle to higher income levels.
- Department stores have generally performed poorly in recent years as a result of strong competition from a variety of sources and a declining middle class, suffering declining sales, profits and severe financial pressures. There have been talks of a possible merger between the two operators, which would have huge ramifications on

the store network.

- Whilst there has been recent evidence of each operator wanting to open in the same regional centres as the other operator, it is more likely that Australia will witness more department store closures in the future than openings.
- It is considered unlikely that a department store operator would commit to a Fairfield City site in the foreseeable future, despite it being a welcome addition to the City's retail offer.

Large Format Retailing

- Following the popular roll out of discount department stores, various retailers have sought to operate larger stores that specialise in particular categories of retail goods, referred to variously as big box retailing, category killers or large format retailing. Operators have included Toys"R"Us, Harvey Norman, Freedom, Ikea, Amart Sports, BCF, Bunnings Warehouse and, more recently, Costco Wholesale. Each time a new entrant is established, there is a difficult scramble to obtain suitable sites.
- Initially operating independently in older commercial and industrial sites, they performed particularly well in planned dedicated centres offering large car parks (typically called bulky goods centres, such as Megacentre Liverpool), becoming very popular with the shopping public. However, many older planning schemes have not properly identified where such large centres can be established.
- There has been a push for a range of non-bulky goods stores to locate in bulky goods centres (such as The Warehouse, Trade Secret and fast food establishments), with varying levels of success and depending upon the precise wording of relevant planning schemes. Whilst the incidence of this seems to have waned, there is an established trend of retailers trying to push the boundaries of planning approvals.
- The introduction of new large format retailers should be expected. Whilst the natural attrition of older large format retailers will free up some tenancies, competition for tenancies and the specific requirements of desired formats will necessitate the demand for sites able to accommodate them (both physically and in a planning sense).

Regional Centres

- There has been an overall trend for two types of traditional centres being successful; the smaller food-based centres anchored by full-line supermarkets and offering convenience; and the largest of the regional centres offering an extensive range of anchor and specialty stores.
- Consequently, the larger regional centres are getting larger and the mid-sized regional

and sub-regional centres have not performed as well. The largest regional centres typically have better access to capital funds, are successful with a waiting list of strong potential tenants and offer an aspirational shopping trip that cannot be replicated by the smaller centres.

- The larger regional centres, by providing a more comprehensive food and entertainment offer, are able to better insulate their businesses from further encroachment by the online retail sector.
- It is therefore more likely than not, that Westfield Parramatta and Westfield Liverpool would seek further expansion in the future, extending their reach over residents of Fairfield City.

Brand Direct Retailing

- The growth of brand direct retailing was a phenomenon experienced in Australia over the past decade or two in response to retailers seeking different means to sell products, shoppers looking for bargains and the actions of two retail developers seeking to capitalise upon these trends.
- The growth of brand direct retailing in Australia has largely slowed in response to a recognition that there is a limit on the number of these centre types able to be supported by communities (they obtain a small market share from a very large catchment) and the global financial crisis.
- There are plans for a former brand direct retail centre in Liverpool to reopen within the next year. Approximately 60 stores are to be developed at Orange Grove, at the current Liverpool Markets site at 5 Viscount Place, Warwick Farm. This is likely to be the only change to this retail sector in this region over the next decade.
- It is therefore unlikely that an opportunity would emerge in Fairfield for a brand direct retail centre.

Online Retailing

- Fairfield City has lower rates of internet connectivity compared to Greater Sydney. At the time of the 2011 Census, 27% of dwellings did not have an internet connection, compared to only 17% within Greater Sydney. The National Broadband Network (NBN) roll out is not expected to significantly improve this differential.
- Until only this last year, online retailing in Australia has been enjoying double digit annual growth, although from a very low base. It is now estimated to command a market share of 6.5%, although a much higher share in the categories of books, music, games, computers and other technologies.

- This market share has been projected to reach in the order of 12% by 2020. However, in the face of continued strong growth by the online sector, it is still expected that retail floorspace will continue to increase. This is due to the growth of online retailing expected to be less than 50% of total growth in the retail sector and due to an expected increase in online retailing by the bricks and mortar sector. Whilst Australian bricks and mortar retailers have been slow in embracing online retailing channels, evidence from overseas demonstrates that online retailing can be developed by bricks and mortar retailers and delivered through shopfronts.
- The continued growth of the online sector could be expected to place continuing pressure on the composition of shopping centres and the way in which retailers undertake their marketing and business operations. However, this sector is not expected to result in a decline in shopping centre floorspace.

Other Development Issues

The **global financial crisis** (GFC) had its origins overseas (particularly the USA) at several points during the early- to mid-2000s. It started to affect foreign financial markets during 2007, with additional warnings appearing in early 2008. However, it was the collapse of Lehman Brothers in September 2008 that shocked the world and significantly affected sentiment and activities in Australia. Financial lending practices changed dramatically. Consumer confidence suffered a large hit. Households moved rapidly towards a net saving position, resulting in a fall in expenditure. Commercial development was severely curtailed. Economic growth fell. Households' and businesses' appetite for risk was lost.

Six years after its commencement, some of our global trading partners are still suffering from subdued economic growth, Australia continues to record below-par economic growth, lending practices have not returned to pre-GFC levels, the commercial development sector has not recovered, Australians are still net savers and retail expenditure growth continues at below-par levels. The exception to this malaise is that the residential sector has returned to much stronger levels and house and unit prices have generally improved.

It is expected that whilst economic conditions should generally improve, it is unlikely that Australia would return to the boom conditions that existed in the 15 years prior to the GFC. The GFC is expected to continue to have a lingering and dampening effect on developers' appetite for risk, the development of office buildings and on the speculative development of industrial and other commercial buildings.

Property development is subject to a range of macroeconomic and microeconomic factors. Whilst macroeconomic settings (such as interest rates and the GFC) have a broadly similar effect upon all sectors of the property market, the supply and demand factors for each of those markets typically result in the residential, office, industrial and other markets being out of synch with each other. This places a large bearing on the timing of property development and especially upon the feasibility of mixed-use developments.

Typically, the residential sector has a shorter property cycle than the office and industrial sector. Sydney is currently experiencing a strong resurgence in its residential market (typified by the very large number of residential towers under construction in Liverpool). In contrast, the office and tourist sector has been weak during the period of the GFC and the industrial market has been weak to moderate.

In the future, it can be expected that the residential market will cool (particularly in Liverpool with a potential oversupply) and the office and other sectors may strengthen. It will be a rare occurrence when all markets are in a boom such that a major mixed use development (such as residential and offices) would be built in one line (in the absence of substantial tenant pre-commitment).

The decentralisation of Sydney's office market to Parramatta was initially driven by the relocation of public sector offices from the CBD. Given the present funding difficulties facing the public sector, the move by some businesses back towards a centralized office network, improvements in telecommunications and the desire of some employees to work at home, it is considered unlikely that another major decentralisation movement would occur again in the short to medium term. Consequently, the prospective development of significant office buildings outside the established network of major office precincts is considered remote.

8 ISSUES IDENTIFICATION AND ANALYSIS

This Chapter sets out a number of issues identified by Council and Norling Consulting that are considered critical to the future direction of the centres network of Fairfield City. Recommendations regarding each issue are also provided and again summarised in the following Chapter.

8.1 Market Environment

The following overall market conditions have been identified:

- Fairfield City has an effective public transport system linking it to larger centres in Sydney;
- Fairfield LGA is primarily characterised by established and mature residential communities. As a result there are many buildings that are aged and in need of refurbishment/redevelopment;
- The City has missed the early 2000's residential boom as well as the 2013-14 boom;
- The height differentials between actual and potential is insufficient to attract development interest in medium to high density residential areas;
- There are signs of residential and commercial development activity bypassing Fairfield LGA to Parramatta and Liverpool;
- There are complaints of an inflexible regulatory planning regime within Fairfield LGA;
- Small lots and fragmented ownership persists in most centres;
- Many commercial and other buildings within centres have not been sufficiently maintained or renovated;
- Cabramatta Town Centre public spaces need improvement; and
- Development cycles are normal and economic benefits accrue from construction activity and from the ensuing operational employment and new residents attracted to the LGA.

Recommendations

1. The centres strategy and FLEP should be enabling, facilitating and encouraging the rejuvenation of older mature building structures and their uses to allow for the constantly evolving retail environment and expectations of residents. (short term)

2. Improve the timely decision-making for development assessment. (short term)
3. Increased building heights should be given serious consideration for medium to high density residential precincts located in close proximity to centres and public transport systems, especially Fairfield and Canley Vale. (short term)
4. Fairfield City Council should work with property owners to renovate building frontages and develop a vacancy action plan. (short term)
5. The LEP should incentivise site amalgamation within centres such as by offering greater height limits for larger allotments. (short term)
6. Maintain efforts to improve safety and security at major centres. (short, medium and long term)
7. Develop and implement a staged plan to improve public spaces within all major centres, particularly the Cabramatta Town Centre. (short, medium and long term)

8.2 Employment

In 2011, the net jobs balance within Fairfield City was estimated at 75%, meaning for every 100 working residents, there are 75 local jobs. However, only 26.3% of Fairfield City residents work within Fairfield City, with the remaining residents travelling to a place of work elsewhere. The net jobs balance has been declining over the 2001-2011 decade, indicating that jobs growth has not kept pace with population growth (and resident workforce growth).

Fairfield LGA is not an isolated community and operates as part of a broader economic region. It is also surrounded by the larger regional cities of Parramatta and Liverpool and is within commuting distance to the Sydney CBD. It is therefore considered unreasonable to expect the net jobs balance to increase to 100%. However, that is not to say that efforts cannot be made to increase the net jobs balance and therefore the self-sufficiency of the City.

In relation to future employment opportunities:

- Fairfield LGA needs to be perceived to be an attractive place to work;
- Amenity is crucial for employment creation;
- Industrial areas of Fairfield LGA are likely to miss out on the current trend of converting employment lands to high density residential within inner-city industrial areas;

- The adjoining Western Sydney Employment Area is expected to attract much of the new investment in industrial premises;
- The health sector (including allied health) and community services employment in conjunction with culture and the aging profile need to be considered – especially for Fairfield City Centre. This is expected to be a significant growth sector; and
- An opportunity is seen for CBD located small-scale food manufacturing with onsite viewing, onsite retailing and online wholesaling.

In relation to commercial office space development:

- Within the Fairfield LGA, Fairfield City Centre has the greatest quantum of commercial office space (more than the combined total provided at Prairiewood, Cabramatta and Bonnyrigg Town Centres);
- Developers of office buildings seek locations within established office precincts so as to tap into the pool of available office tenants. This will result in the majority of office development continuing to bypass Fairfield LGA in favour of Parramatta and Liverpool. It also indicates that Fairfield City Centre has a stronger potential to attract additional office developments than Prairiewood, Cabramatta and Bonnyrigg Town Centres;
- It is noted that Fairfield Council offices are not located in a centre and that public sector tenants are strong catalytic agents to stimulate growth of the office sector within a centre; and
- It should be ensured that those State Government assets that are currently located in the centre remain, such as Roads and Maritime Services, Court House and Medicare.

It is therefore important to note that industrial and office space growth are not likely to be major sources of economic growth within the Fairfield LGA. Rather, residential growth, especially in locations adjoining centres is likely to provide a significant stimulatory effect to centre growth.

Recommendations

8. Focus on attracting high density residential development through redevelopment of older sites in the area surrounding Fairfield City Centre. This can be achieved through increasing the building heights to ensure that redevelopment is financially viable (within the R4 zone). (short term)
9. A small to modest area within the Fairfield City Centre core be protected from residential development to create an opportunity for office buildings to be located in

- the future. (short term)
10. Fairfield City Council should investigate the long term possibility of relocating to Fairfield City Centre. (long term)
 11. In the medium to long term there may be potential to attract commercial tenants from Liverpool and Parramatta as the C and D grade office tenants are pushed out. (medium and long term)
 12. Nominate those streets with high pedestrian activity for the potential to maintain active street frontages and increase densities. (short term)

8.3 Planning For Retail Growth

Section 7.2 assesses the future retail growth prospects for the City.

Recommendations

13. Future retail growth can and should be accommodated within existing centre boundaries, with the focus being on the redevelopment and consolidation of existing centres. (short term)
14. The City has extensive B5 lands. Council should expect and encourage the conversion of lower order industrial uses fronting major roads to higher order showrooms and similar developments. (short, medium and long term)
15. Fairfield City Council needs to create and/or update the Footpath Management Policy including (but not limited to) policies on the following: (short and medium term)
 - a. Busking policy
 - b. Charitable collection policy
 - c. Use of public places
 - d. Streetscaping
 - e. Outdoor dining
16. Fairfield City Council needs to create and/or update management and operational policies relating to (but not limited to): (short and medium term)
 - a. Night time economies
 - b. Function centres
 - c. Entertainment facilities
 - d. Internet café, etc.

8.4 Centres Hierarchy – Fairfield City Centre and Prairiewood, Bonnyrigg and Cabramatta Town Centres

Centres that are controlled by a single (or at least a dominant) owner are more likely to expand than traditional centres that have very small allotment sizes and multiple owners. Within Fairfield, there are two subregional centres falling into the first category and two subregional centres falling into the second category. It is therefore logical that, over time, it is likely that there will be increased development pressure on the retail expansion of Prairiewood and Bonnyrigg than of Fairfield and Cabramatta. If all of these four subregional centres are to operate at the same level in the hierarchy, this could lead to problems in the longer term.

Both Fairfield City Centre and Cabramatta are physically constrained and fragmented, with opportunities for major new developments limited. These centres would benefit from the consolidation of retail space and increased residential densities. There is unlikely to be demand for additional commercial office space at Cabramatta and this should therefore be concentrated within Fairfield City Centre.

Whilst the four centres have been kept at the same level in the hierarchy for some years and all have good spatial separation across the LGA, they have each developed different features, as summarised below:

Table 8.1: Features of Fairfield, Prairiewood, Cabramatta and Bonnyrigg Town Centres

<u>Fairfield</u> • Largest concentration of commercial and retail floorspace • Widest range of uses • Fragmented ownership • Supported by rail	<u>Prairiewood</u> • Single owner of retail • Supported by T-Way • Serves more affluent community • Retail dominant, although also some health and education uses
<u>Cabramatta</u> • Fragmented ownership • Retail dominant • Operating as a specialised centre • Constrained • Supported by rail • Lacks traditional anchor stores • Attracts trade from wide catchment • Known for fresh food, cultural experiences, cultural specialist foods and cultural medicine.	<u>Bonnyrigg</u> • Single owner of retail • Supported by T-Way • Retail dominant • Potential to draw trade from Liverpool LGA

Source: Norling Consulting Pty Ltd

There are several options available in terms of applying a centres hierarchy: maintain the status quo, where the four centres are at the same level in the hierarchy; or recognise their differences by allocating different levels. Both the Metropolitan Plan for Sydney 2036 and Draft Metropolitan Strategy (2013) opted for the latter approach, by identifying Fairfield City Centre and Prairiewood as 'Potential Major Centres', elevating these two centres above Bonnyrigg and Cabramatta (A Plan for Growing Sydney (2014) is silent on this issue). This leads to the question of whether Fairfield City Council should designate one or two Major Centres in their policy and planning framework.

It is Norling Consulting's view that it will be difficult for Fairfield City to support two Major Centres either now or in the near future. To further understand the existing role and function of the four centres, a checklist was made of typical major centre characteristics to identify the current status of the four centres and to assist in determining which centre has the most potential to become a Major Centre.

Table 8.2: Major Centre Characteristics

		Centre				Comments
		Fairfield	Prairiewood	Bonnyrigg	Cabramatta	
Current Retail & Office Floorspace and Catchment Area						
	Retail Floorspace (m²)	85,000	41,200	23,800	60,200	
	Office Floorspace (m²)	37,000	6,500	1,500	22,500	
	Approx Catchment Size (persons)	84,000	89,000	55,000	63,000	
Major Centre Characteristics						
Retail	Department Store	x	x	x	x	
Retail	Discount Department Store	✓	✓	✓	x	
Retail	Service station	✓	✓	✓	✓	
Civic	Local Government Offices	x	x	x	x	Located at Wakeley
Civic	Local Government Administration	x	x	x	x	Located at Wakeley
Civic	Court House	✓	x	x	x	
Civic	State/Federal Government Branches	✓	x	x	✓	Medicare, Centrelink
Health	Public Hospital	x	✓	x	x	
Health	Private Hospital	x	x	x	x	
Community	Museum	x	x	x	x	Museum and Gallery located at Smithfield. There is local history at Cabramatta Library.
Community	Central Library	x	x	x	✓	Branches at Fairfield & Bonnyrigg
Community	Art Gallery	x	x	x	x	Museum and Gallery - Smithfield
Community	Performing Arts/Exhibition/Convention Centre (1,000+)	x	x	x	x	
Community	Community Centre/Hall	✓	✓	✓	✓	
Community	Cultural Centre	✓	x	x	x	
Community	Youth Centre	✓	✓	✓	x	Fairfield Youth Centre under construction
Community	Senior Citizens Centre	x	x	x	✓	
Hospitality/Entertainment	Short Term Accommodation	✓	x	x	x	
Hospitality/Entertainment	Cinema Complex	x	✓	x	x	
Residential	Medium density residential	✓	x	x	✓	
Public Transport	Public transport Interchange	✓	✓	✓	✓	
Education	TAFE Facility	x	x	x	x	Located at Wetherill Park
Education	University	x	x	x	x	
Education	Fairfield School of Arts	✓	x	x	x	
Public Services	Post office	✓	✓	✓	✓	
Public Services	Police station	✓	✓	x	✓	
Public Services	Fire station	✓	x	x	x	
Public Services	Ambulance	x	x	x	x	Located at Carramar
	TOTAL	14/28	9/28	6/28	9/28	

		Centre				Comments
		Fairfield	Prairiewood	Bonnyrigg	Cabramatta	
Rating (out of 10)						
	Retail	7	7	7	3	
	Civic	5	0	0	3	
	Health	0	5	0	0	
	Education	3	0	0	0	
	Community	3	2	2	3	
	Hospitality/Entertainment	5	5	0	0	
	Residential	10	0	0	10	
	Public Transport	10	10	10	10	
	Public Services	7.5	5	2.5	5	
	TOTAL	51	34	21.5	34	

Source: Norling Consulting, internet searches

The above checklist reveals that Fairfield City Centre has the most characteristics of a Major Centre (14 out of 28), well above the other three centres, and therefore has the widest range of facilities, consistent with its ability to function as a Major Centre. Prairiewood and Cabramatta have the next highest number of characteristics (9) boosted by the adjacent hospital and cinemas at Prairiewood and Cabramatta's civic and community facilities. Bonnyrigg Town Centre contains only six of the listed characteristics.

On a rating system (also set out in Table 8.2), Fairfield City Centre achieves the highest score, followed by Prairiewood and Cabramatta Town Centres.

The current nomenclature of Local and Neighbourhood Centres sitting below the higher order centres should be expended to twelve: Fairfield Heights, Canley Heights, Fairfield West (Market Plaza), Smithfield, Edensor Park, Wetherill Park (Market Town), Canley Vale, Wakeley, Horsley Park, Villawood, Glenfield Park and Bonnyrigg (Elizabeth Drive).

Recommendations

17. Fairfield City Centre should be designated a Major Centre and promoted as accommodating the widest range of uses, the greatest concentration of office space and no retail cap. From an economic perspective, height limits should be increased. Fairfield City Centre also has an emerging cultural medical services specialisation, function room concentration and a vision for an 'eat street'. (short term)
18. Prairiewood Town Centre should remain a Subregional Centre and continue to provide a popular suburban shopping centre surrounded by education, health and other civic uses. The addition of other civic uses should be encouraged, as well as the establishment of higher density residential development. Retail floorspace should generally be capped in order to encourage further development at Fairfield City Centre, unless it can be demonstrated that proposed elements cannot be accommodated in Fairfield City Centre. (short term)
19. Bonnyrigg Town Centre should remain a Subregional Centre and continue to provide a popular suburban shopping centre surrounded by a range of civic uses. Expansion to provide two full-line supermarkets is supported. Expansion to provide a second discount department store is also supported. A single centre is preferred over two competing centres. If there are to be two centres, integration opportunities should be maximised. (short term)
20. Cabramatta Town Centre should be designated a Specialist Centre to reflect its unique ethnic theme and character, its wide catchment area and its limited range of non-retail uses. (short term)

21. All of the above centres should aim to increase housing density surrounding the centre and improve their accessibility to pedestrians. (short and medium term)
22. Maintain the centre designations of Local and Neighbourhood Centres. (short, medium and long term)
23. Adopt the attached Roles and Functions and Evaluation Criteria for each centre type in the hierarchy (Appendix A). (short term).

8.5 Floorspace Caps

Floorspace caps are a common tool used by Councils to control centre growth and ensure the desired centres hierarchy is achieved/maintained. They can also be used to trigger new infrastructure commitments and/or contributions from developers. They have also been applied on a precinct basis where there has been a desire by Council to limit development within one centre precinct in order to encourage the further development of another precinct within the same centre in order to achieve a more balanced development outcome of that centre for the broader community. The following floorspace caps for the four major centres are outlined below.

From an economic perspective, Norling Consulting considers that floorspace caps should only be applied to achieve specific goals. They may not be an appropriate tool to apply to some centres.

Fairfield City Centre

With Fairfield City Centre identified as the highest order centre in the City, it is our view that there should be no floorspace caps allocated to this centre. Additional growth should be encouraged to occur within the existing centre boundary, through redevelopment and consolidation of existing facilities.

With Fairfield City Centre now recognised and recommended as being designated the highest order centre in the City, its current and future envisaged role and function must be protected to ensure it is not undermined by other centres. It is therefore considered appropriate to set floorspace caps for the town centres of Prairiewood and Bonnyrigg.

Prairiewood Town Centre

It is recommended that the current FSR for the Town Centre is maintained for the next five years in order to encourage expansion and redevelopment at the Fairfield City Centre. Future development should occur within centre zoned land to consolidate the centre

within the existing boundary. It should be noted that the Evaluation Criteria provides relevant tests should a developer wish to exceed the FSR in the intervening period.

Bonnyrigg Town Centre

This Town Centre poses less of a threat to Fairfield City Centre due to its location and current small scale. It is recommended that a floorspace cap of 50,000m² (excluding showrooms and bulky goods premises) applies within the town centre area. This should allow for the development of two full-line supermarkets and a second discount department store, as well as creating an active street frontage along Bonnyrigg Avenue. A single centre is preferred over two competing centres. If there are to be two centres, integration opportunities should be maximised. This floorspace cap is considered appropriate for the life of the current scheme, however, it should be reviewed again in the future (perhaps in ten years' time).

Cabramatta Town Centre

The specialist ethnic theming of retail and other facilities at Cabramatta should be protected, maintained and enhanced. The Cabramatta Town Centre attracts day trippers from outside of Fairfield LGA, providing an important economic stimulus to the local economy. Further development should occur within the existing town centre boundary.

Recommendations

24. No floorspace cap for Fairfield City Centre. (short term)
25. The current FSR at the Prairiewood Town Centre should be maintained for the next five years. (short term)
26. A floorspace cap of 50,000m² (excluding showrooms and bulky goods premises) should be applied to the Bonnyrigg Town Centre. (short term)
27. No floorspace cap should be applied to the Cabramatta Town Centre. (short term)

8.6 WSEA and Implications

Council seeks guidance on potential retail/commercial needs for the Horsley Park Village having regard to the current levels of service provision provided by the centre, the likely future influence of the WSEA and possible land use scenarios for the rural area to be identified by Council officers. Development of the WSEA is likely to result in the development of a number of small business centres providing a range of retail and

commercial uses to serve local employment needs. This may result in potential adverse impacts on the viability of the existing Horsley Park Village.

Horsley Park Village currently provides a convenience function to the rural residential community of Horsley Park, anchored by a Supa IGA and tavern. It is well located to service this community and, provided that further consolidation of this retail strip occurs, should be well positioned to withstand any likely impacts from proposed WSEA business centres.

While Council has limited control over what happens external to Fairfield LGA, Council is encouraged to participate in discussions over applications made proximate to the LGA boundary. Council should continue to monitor the development of employment lands external to Fairfield LGA. Additionally, Norling Consulting has developed a checklist for Council to assist in responding to external applications (Appendix B).

Recommendations

28. Council to monitor the development of employment lands external to Fairfield LGA. (medium and long term)

29. Council to apply a checklist for evaluating development applications external to the Fairfield LGA. (Appendix B). (short term)

8.7 Bulky Goods

Within Fairfield City, the majority of bulky goods development is located on land zoned B5 Business Development within the Wetherill Park industrial area. There are other significant areas of the City which are zoned B5, including along the Hume Highway at Cabramatta and Woodville Road, Fairfield East, however these areas do not currently include the scale of bulky goods retailing that exists in Wetherill Park. The Wetherill Park industrial area provides manufacturing, wholesale and bulky goods and large format retailing, however, there are many overlapping businesses that don't fit neatly into any particular category. There is an estimated 60,000m² of floorspace provided within this industrial area.

The criteria for assessment of bulky goods development set out in the 2006 Policy is as follows:

1. The development must comply with the definition contained within the Fairfield LEP and be a permitted use in the zone relevant to a site.

2. The development must generally take the form of a large single self contained floor space area (i.e. not individual tenancies). Smaller tenancies should not occupy more than 5% of total floor space in a development.
3. The development must require and provide for direct vehicular access to the site and include loading dock areas for transfer of goods and loading of items,
4. Whether the development is for the purpose of selling by retail goods in the following categories (being goods which are considered to constitute bulky goods):
 - Furniture
 - Large electrical goods
 - Whitegoods
 - Outdoor products (e.g. barbeques, seating)
 - Hardware
 - Floor coverings
 - Automotive parts/accessories
 - Lighting
 - Antiques/second hand goods
 - Kitchen/bathroom showrooms
 - Tiles (floor, ceiling, walls)
 - Plant nurseries

Recommendations

30. Replace criteria number 2 of the 2006 Policy with the following:

“2. Encourage the co-location of multiple bulky goods stores within a single planned centre.” (short term)

31. Recognise that there is potential for retail showroom development to occur on B5 lands along the Hume Highway as older industrial premises are redeveloped. (short, medium and long term)

8.8 Neighbourhood Shops

Under the FLEP 2013 a neighbourhood shop is defined as: *“premises used for the purposes of selling general merchandise such as foodstuffs, personal care products, newspapers and the like to provide for the day-to-day needs of people who live or work in the local area, and may include ancillary services such as a post office, bank or dry cleaning, but does not include restricted premises”.*

The maximum retail floor area for a neighbourhood shop is 80m² [FLEP 2013 Clause 5.4(7)] and are permissible in the following zones:

- R1 General Residential
- R3 Medium Density Residential
- R4 High Density Residential
- B1 Neighbourhood Centre
- B2 Local Centre
- B3 Commercial Core
- B6 Enterprise Corridor
- IN1 General Industrial

The Fairfield City Wide DCP restricts the maximum number of neighbourhood shops per allotment to one. Furthermore a development site that is strata sub-divided or proposed to be strata subdivided will not be permitted to develop a neighbourhood shop per strata as the development site as a whole will be permitted one neighbourhood shop only.

Council holds a concern over the possible proliferation of these smaller neighbourhood shops and the potential to impact upon the retail network. It is our view that there is currently little demand for this form of small retail shops. Increasing competition through extended trading hours, increasing provision of major chain supermarkets in convenient locations and changing demographics have eroded the performance of the traditional smaller convenience stores (or 'corner store'). As a result there has been a decline in the use of these smaller convenience stores by shoppers with the result that many have been converted to non-retail uses. This is likely to continue in the short and medium term.

However, there is a risk (albeit low) that multiple neighbourhood shops could be developed on multiple adjoining sites to create a convenience shopping strip in a location not supported by the LEP.

Recommendations

32. New neighbourhood shops should not be located within 1km of another neighbourhood shop or other shops on the same side of the road. Council may consider an exception to this, if the proposal involves adding a convenience store function to a service station, which lies within 1km of an existing shop and is designed to ensure the long-term viability of the service station. (short term)

8.9 Service Stations

In the FLEP 2013 service stations are permissible within the following zones:

- RU5 Village
- B2 Local Centre
- B3 Commercial Core
- B4 Mixed Use
- Business Development
- B6 Enterprise Corridor
- IN1 General Industrial

It is noted that service stations are prohibited within B1 Neighbourhood Centre. This may be due to Neighbourhood Centre zoning typically being located proximate to residential zonings and the risk posed to residents by service stations.

Norling Consulting supports the development of service stations within centre zones where they meet the required criteria. Service stations located within centres provide economic efficiencies, convenience to shoppers and minimise the commercial/residential interface. The growth of convenience stores as part of the service station offer has been successful and favourably received by consumers. The offer of fuel discounts to shoppers of allied major supermarkets has enhanced the service station offer. They provide a vital, convenient and accessible service to our motor vehicle dominated society. Many service stations offer extended trading hours.

Recommendations

33. Recognise the importance of service stations to society and the economic and convenience benefits of this location within centres and their co-location with fast food and convenience stores. (short term)

8.10 Commercial and Retail Development in Industrial Areas

At the time of preparing the previous Policy, Council had been receiving proposals for the establishment of commercial/retail development in the industrial areas of the City, particularly in Wetherill Park. A moratorium on spot rezoning was put into place until an employment lands study was completed.

In February 2008, Council adopted the Fairfield Employment Lands Strategy which informed decisions on industrial land in the preparation of the FLEP 2013. The Strategy recommended that bulky goods should not be permitted within the IN1 – General Industrial and IN2 – Light Industrial and that retailing in industrial areas should only be allowed where it is ancillary to industrial uses. Neighbourhood shops (small shops that service the industrial area such as a corner store) only are recommended for industrial areas. These recommendations are reflected in the FLEP 2013, which lists neighbourhood shops and take away food and drinks premises as ‘Permitted with Consent’ under the IN1 and IN2 land uses.

It is considered that all existing industrial areas are adequately serviced by existing centres (Greenway Plaza, Victoria Street Business Centre, etc) and no additional centre zoned land is required to service the local industrial workforce. It is also noted that a significant quantum of older industrial lands fronting major roads are contained within the B5 zone. This zone allows for the development of showrooms and similar uses.

9 RECOMMENDATIONS

This Chapter sets out the centres hierarchy and consolidates the recommendations provided in the previous chapter.

9.1 Centres Hierarchy

The tight definition of the centre hierarchy and centres provides for a robust retail hierarchy. This together with the requirement of an Economic Impact Assessment when a development activates the trigger is a clear and open approach for both developers and Council officers. Of equal importance is the subsequent step of zoning sufficient land to accommodate existing and projected demand within the life of the LEP.

Fairfield City has a current retail network that is not dominated by a single centre, although this was not always the case. A Business Centres Study prepared in 1991 described Fairfield City as having one sub-regional centre (Fairfield City Centre) and three district centres (Cabramatta, Bonnyrigg and Prairiewood). There have been numerous changes since this time with the three district centres improving their status and Fairfield City Centre subsequently declining in importance as the dominant retail destination. The 2005 Strategy confirmed these changes by adopting a “system of centres”, including four subregional centres (Fairfield, Prairiewood, Cabramatta and Bonnyrigg).

The previous and Draft Metropolitan Study has named Fairfield and Prairiewood as ‘Potential Major Centres’. Norling Consulting agrees that the four dominant centres operate as a “system of centres”. However, the differences across these four centres is considered sufficient to warrant their categorisation into three separate centre functions.

Table 9.1 outlines the recommended centres hierarchy for Fairfield City. This is also illustrated in Figure 9.1 (appended).

Table 9.1: Recommended Centres Network

Centre Hierarchy	Centre Name
Major Centre	Fairfield City Centre
Subregional Centre	Prairiewood Town Centre
	Bonnyrigg Town Centre
Specialist Centre	Cabramatta Town Centre
Local Centre	Fairfield Heights
	Canley Heights
	Fairfield West (Market Plaza)
	Smithfield
	Edensor Park
	Wetherill Park (Market Town)
	Canley Vale
	Wakeley
	Horsley Park
	Villawood
	Greenfield Park
Neighbourhood Centre	Numerous, as per FLEP 2013 zoning

Source: Norling Consulting Pty Ltd

The new Retail Policy should identify clearly the role and function of each centre within Fairfield City's centres network. Norling Consulting's recommended descriptions for each centre are provided in Appendix A. It is noted that the descriptions are not intended to confer development rights on existing centres.

Guidelines have also been produced to assist Council in assessing centre applications it receives and centre applications located external to Fairfield LGA but may impact upon Fairfield LGA centres. These are provided in Appendix B.

9.2 Recommended Actions

The following Table 9.2 summarises the key actions that have been identified throughout the preparation of this Centres Strategy:

Table 9.2: Recommendations and Actions Required

No.	Recommendation	Timeframe			Division Responsible	Policy/Plan/Process
		Short	Medium	Long		
1	The centres strategy and FLEP should be enabling, facilitating and encouraging the rejuvenation of older mature building structures and their uses to allow for the constantly evolving retail environment and expectations of residents.	✓			Strategic Land Use Planning	FCC Retail and Commercial Centres Study 2015
2	Improve the timely decision-making for development assessment.	✓			Development Assessment Team	DA Fast Track Process
3	Increased building heights should be given serious consideration for medium to high density residential precincts located in close proximity to centres and public transport systems, especially Fairfield and Canley Vale with the priority on Fairfield City Centre.	✓	✓	✓	Strategic Land Use Planning	Review LEP Height Controls around Centres
4	Fairfield City Council should work with property owners to renovate building frontages and develop a vacancy action plan	✓	✓		Place Management Team and Economic Development Officer	Develop Vacancy Action Plan
5	The LEP should incentivise site amalgamation within centres such as by offering greater height limits for larger allotments.	✓	✓	✓	Strategic Land Use Planning	Fairfield Local Environmental Plan 2013 and relevant DCP controls
6	Maintain efforts to improve safety and security at major centres	✓	✓	✓	Place Management and Community Safety Officer	Review and Update Crime Prevention Strategy
7	Develop (or revise existing) and implement a staged plan to improve public spaces within all major centres, particularly the Cabramatta Town Centre.	✓	✓	✓	Place Management	Develop Public Domain Framework for the centres of Fairfield, Prairiewood, Bonnyrigg and Cabramatta
8	Focus on attracting high density residential development through redevelopment of older sites in the area surrounding Fairfield City Centre. This can be achieved through increasing the building heights to ensure that redevelopment is financially viable (within the R4 zone).	✓	✓	✓	Strategic Land Use Planning	Review building heights in areas directly surrounding centres to determine feasibility of increasing building heights in R4 zones
9	A small to modest area within the Fairfield City Centre core be protected from residential development to create an opportunity for office buildings to be located in the future.	✓			Strategic Land Use Planning	Maintain B3 Commercial Core zoning in Fairfield Town Centre
10	Fairfield City Council should investigate the long term possibility of relocating to Fairfield City Centre.			✓	Strategic Land Use Planning	N/a
11	In the medium to long term there may be potential to attract commercial tenants from Liverpool and Parramatta as the C and D grade office tenants are pushed out.		✓	✓	Economic Development	Develop a business attraction strategy for Fairfield City Centre
12	Nominate those streets with high pedestrian activity for the potential to maintain active street frontages and increase densities. (refer to item 7)	✓			Place Management	Develop Public Domain Framework for the centres of Fairfield, Prairiewood, Bonnyrigg and Cabramatta

No.	Recommendation	Timeframe			Division Responsible	Policy/Plan/Process
		Short	Medium	Long		
13	Future retail growth can and should be accommodated within existing centre boundaries, with the focus being on the redevelopment and consolidation of existing centres	✓	✓	✓	Strategic Land Use Planning	FCC Retail and Commercial Centres Study 2015
14	The City has extensive B5 lands. Council should expect and encourage the conversion of lower order industrial uses fronting major roads to higher order showrooms and similar developments.	✓	✓	✓	Strategic Land Use Planning, Place Management and Economic Development Team	Fairfield Local Environmental Plan 2013. Develop a corridors strategy that includes appropriate business attraction.
15	Fairfield City Council needs to create and/or update a Footpath Management Policy including (but not limited to) policies on the following: (a) Busking (b) Streetscaping (c) Outdoor dining (d) Charitable collection bins (e) Use of public places, etc	✓	✓		Strategic Land Use Planning, Place Management and Economic Development Team	Develop or update existing policy – Footpath Management Policy
16	Fairfield City Council needs to create and/or update management and operational policies including (but not limited to) policies on the following: (a) Night time economies (b) Function centres (c) Entertainment facilities (d) Internet cafes, etc.	✓	✓		Strategic Land Use Planning, Place Management and Economic Development Team	Develop or update existing policies
17	Fairfield City Centre should be designated a Major Centre and promoted as accommodating the widest range of uses, the greatest concentration of office space and no retail cap. From an economic perspective, height limits should be increased. Fairfield City Centre also has an emerging cultural medical services specialisation, function room concentration and a vision for an 'eat street' that needs to be managed and developed.	✓	✓	✓	Strategic Land Use Planning, Place Management and Economic Development Team	FCC Retail and Commercial Centres Study, Fairfield Town Centre DCP Review, Branding or Marketing Strategies consistent with the recommended business attraction strategy in item 11.
18	Prairiewood Town Centre should remain a Subregional Centre and continue to provide a popular suburban shopping centre surrounded by education, health and other civic uses. The addition of other civic uses should be encouraged, as well as the establishment of higher density residential development. Retail floorspace should generally be capped in order to encourage further development at Fairfield City Centre, unless it can be demonstrated that proposed elements cannot be accommodated in Fairfield City Centre.	✓	✓	✓	Strategic Land Use Planning	FCC Retail and Commercial Centres Study 2015
19	Bonnyrigg Town Centre should remain a Subregional Centre and continue to provide a popular suburban shopping centre surrounded by a range of civic uses. Expansion to provide two full-line supermarkets is supported. Expansion to provide a second discount department store is also supported. A single centre is preferred over two competing centres. If there are to be two centres, integration opportunities should be maximised.	✓	✓	✓	Strategic Land Use Planning	FCC Retail and Commercial Centres Study 2015
20	Cabramatta Town Centre should be designated a Specialist Centre to reflect its unique ethnic theme and character, its wide catchment area and its limited range of non-retail uses.	✓	✓	✓	Strategic Land Use Planning	FCC Retail and Commercial Centres Study 2015

No.	Recommendation	Timeframe			Division Responsible	Policy/Plan/Process
		Short	Medium	Long		
21	All of the four main centres should aim to increase housing density surrounding the centre and improve their accessibility to pedestrians with Fairfield City Centre as the first priority for action.	✓	✓	✓	Strategic Land Use Planning	Review of Residential Development Strategy
22	Maintain the centre designations of Local and Neighbourhood Centres.	✓	✓	✓	Strategic Land Use Planning	Fairfield Local Environmental Plan 2013
23	Adopt the attached Roles and Functions and Evaluation Criteria for each centre type in the hierarchy (Appendix A).	✓			Strategic Land Use Planning	FCC Retail and Commercial Centres Study 2015
24	No floorspace cap for Fairfield City Centre	✓	✓	✓	Strategic Land Use Planning	Fairfield Local Environmental Plan 2013
25	The current FSR at the Prairiewood Town Centre should be maintained for the next five years.	✓	✓	✓	Strategic Land Use Planning	Fairfield Local Environmental Plan 2013
26	A floorspace cap of 50,000m ² should be applied to the Bonnyrigg Town Centre	✓	✓	✓	Strategic Land Use Planning	Review of Bonnyrigg Town Centre Planning Controls
27	No floorspace cap should be applied to the Cabramatta Town Centre.	✓	✓	✓	Strategic Land Use Planning	Fairfield Local Environmental Plan 2013
28	Council to monitor the development of employment lands external to Fairfield LGA		✓	✓	Strategic Land Use Planning and Economic Development Officer	Assess external applications in accordance with checklist contained in Appendix B
29	Council to apply a checklist for evaluating development applications external to the Fairfield LGA.	✓			Strategic Land Use Planning and Economic Development Officer	Assess external applications in accordance with checklist contained in Appendix B
30	Replace criteria number 2 of the 2006 Policy with the following: <i>"2. Encourage the co-location of multiple bulky goods stores within a single planned centre."</i>	✓			Strategic Land Use Planning	Prepare updated Retail Policy based on findings of FCC Centres Study 2015
31	Recognise that there is potential for retail showroom development to occur on B5 lands along the Hume Highway as older industrial premises are redeveloped.	✓	✓	✓	Strategic Land Use Planning, Place Management and Economic Development Team	Fairfield Local Environmental Plan 2013 and Corridors Study (refer to item 14)
32	New neighbourhood shops should not be located within 1km of another neighbourhood shop or other shops on the same side of the road. Council may consider an exception to this, if the proposal involves adding a convenience store function to a service station, which lies within 1km of an existing shop and is designed to ensure the long-term viability of the service station.	✓			Strategic Land Use Planning Team	Amend DCP provisions relating to neighbourhood shops
33	Recognise the importance of service stations to society and the economic and convenience benefits of this location within centres and their co-location with fast food and convenience stores	✓			Strategic Land Use Planning	FCC Centres Study 2015
34	Council to develop internal processes to keep a working total of floorspace to assess future DA's against.	✓			Strategic Land Use Planning, Place Management and Economic Development Team	Floorspace Register

Appended Figures

Figure 3.1: Fairfield LGA Existing Centres Network

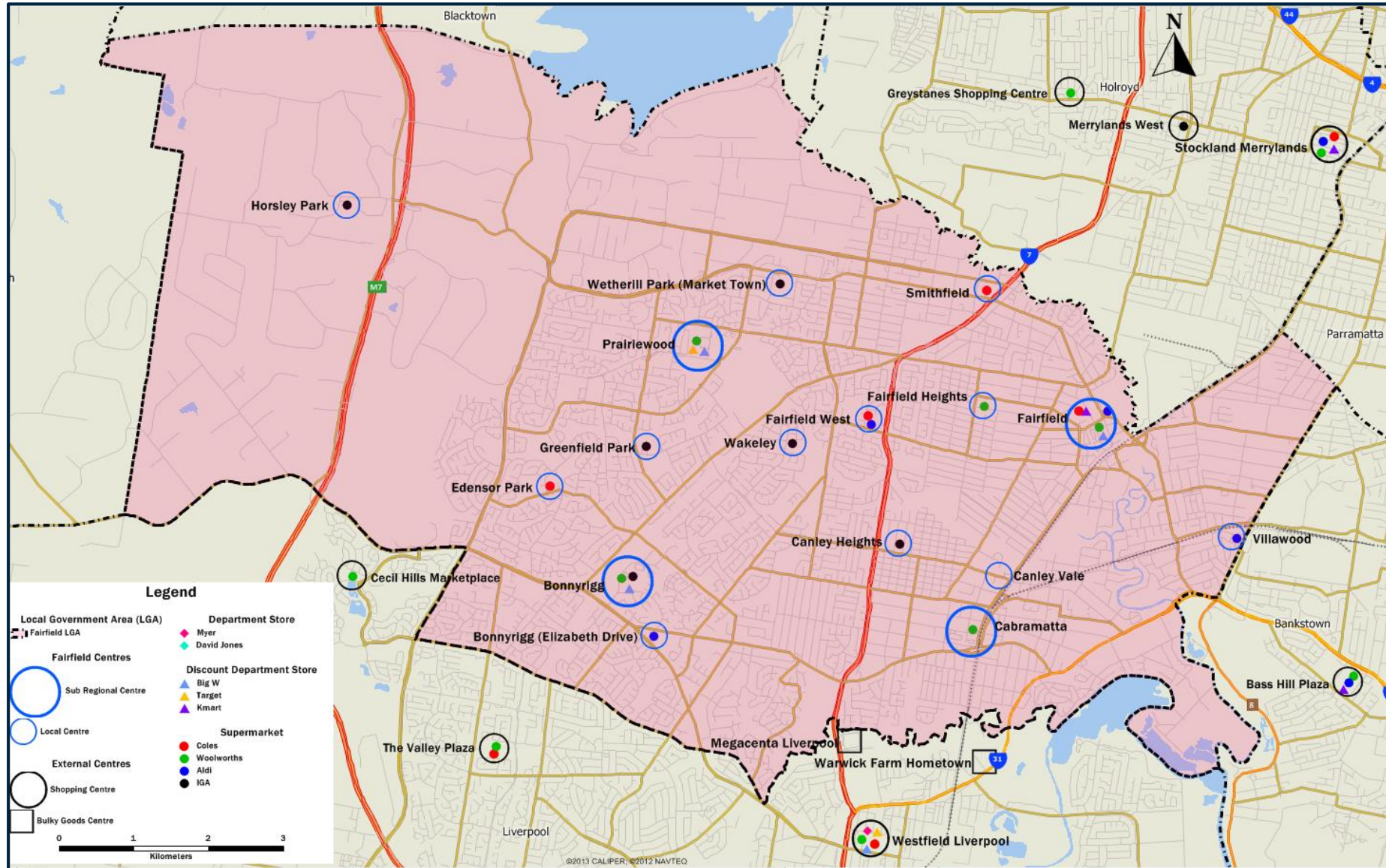


Figure 4.2: Fairfield Trade Area

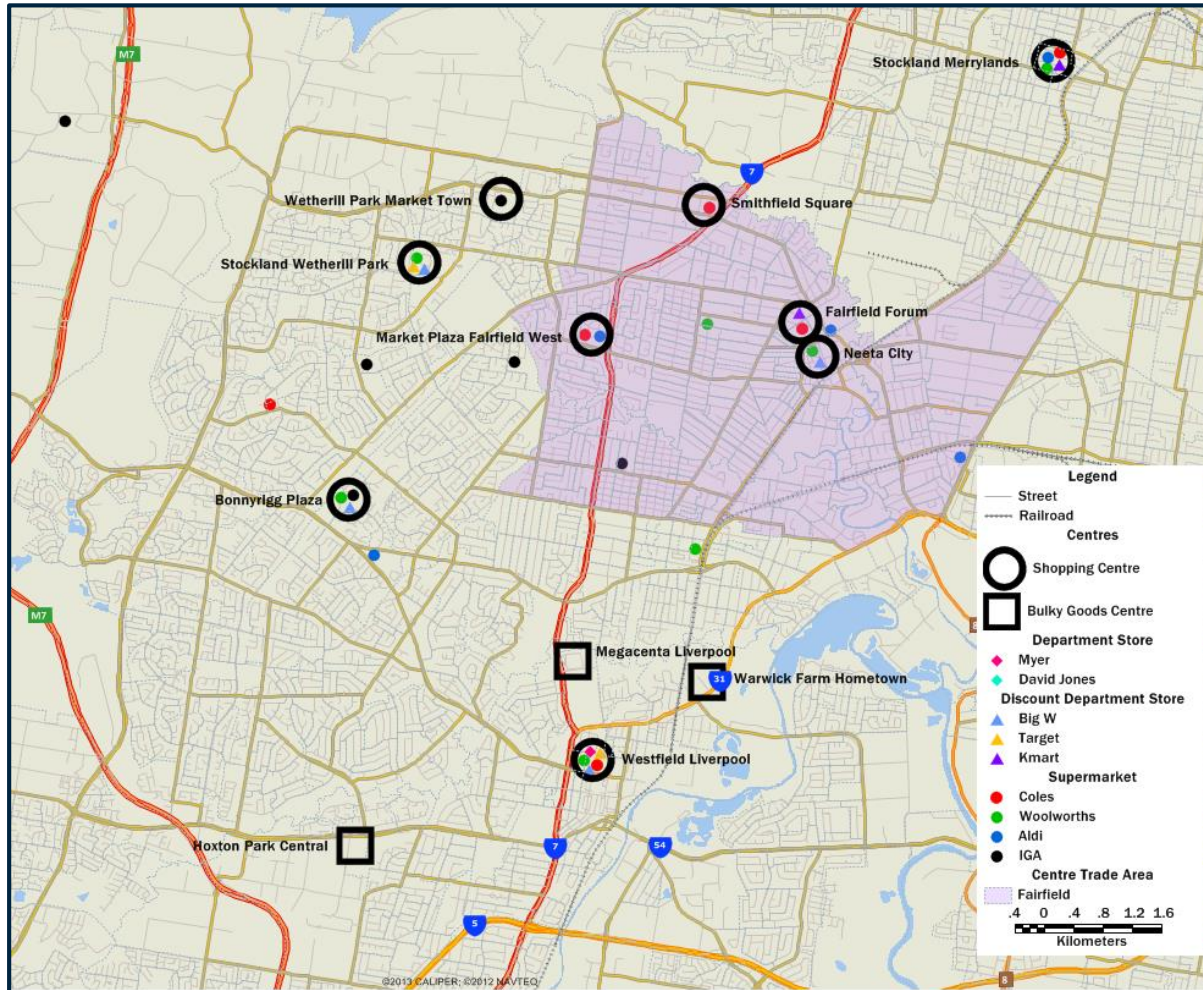


Figure 4.3: Prairiewood Trade Area

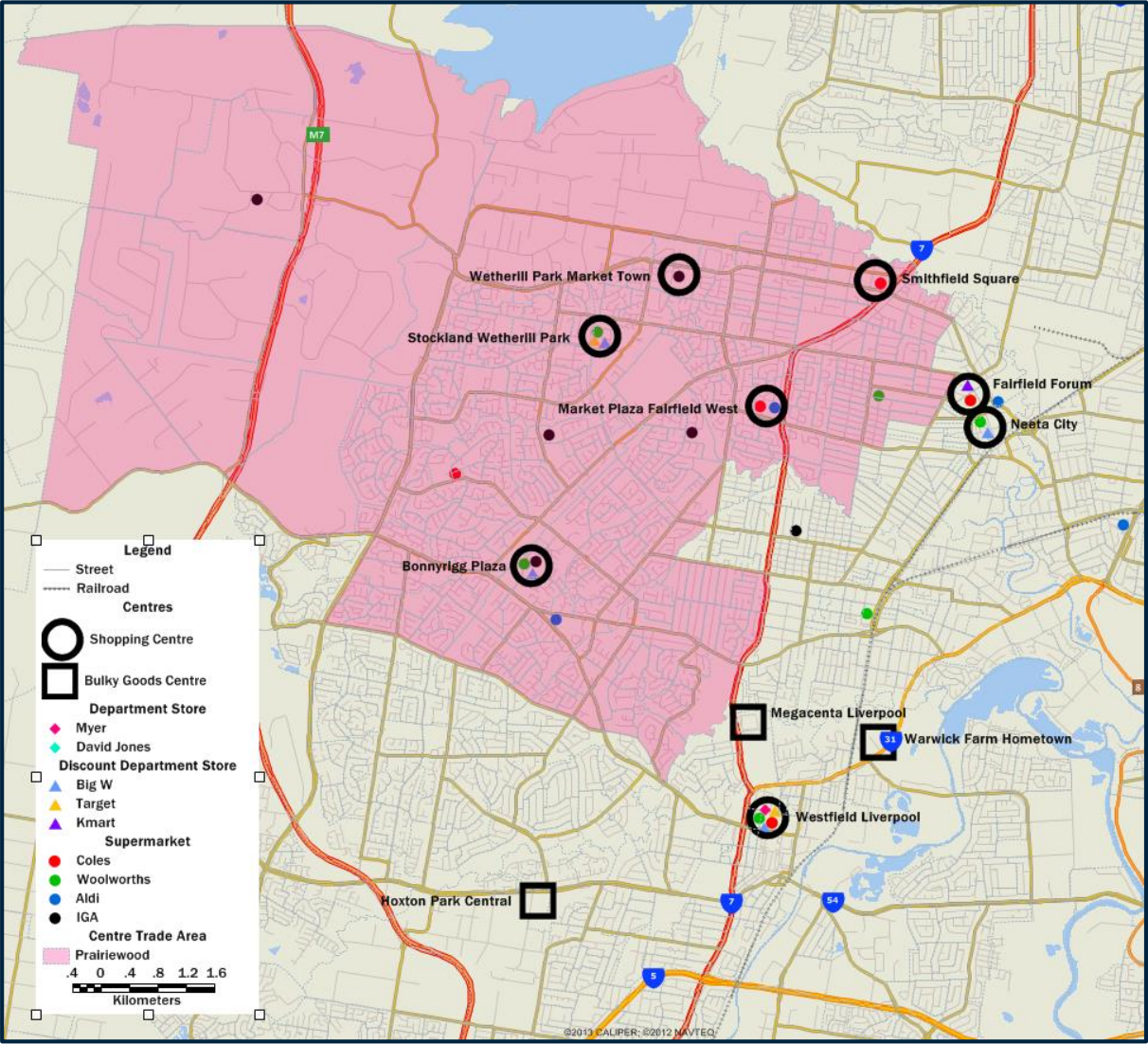


Figure 4.4: Bonnyrigg Trade Area

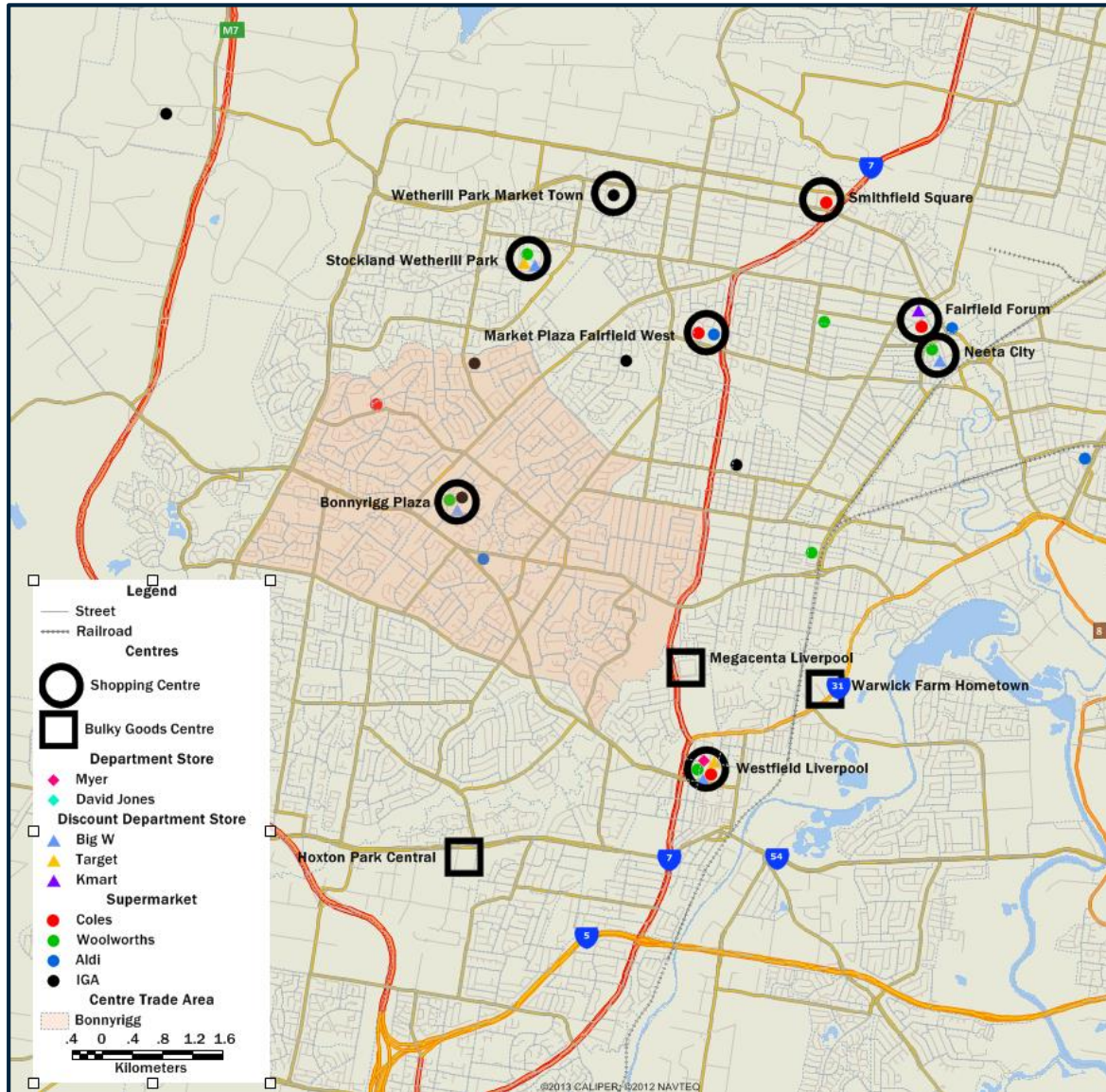


Figure 4.5: Cabramatta Trade Area

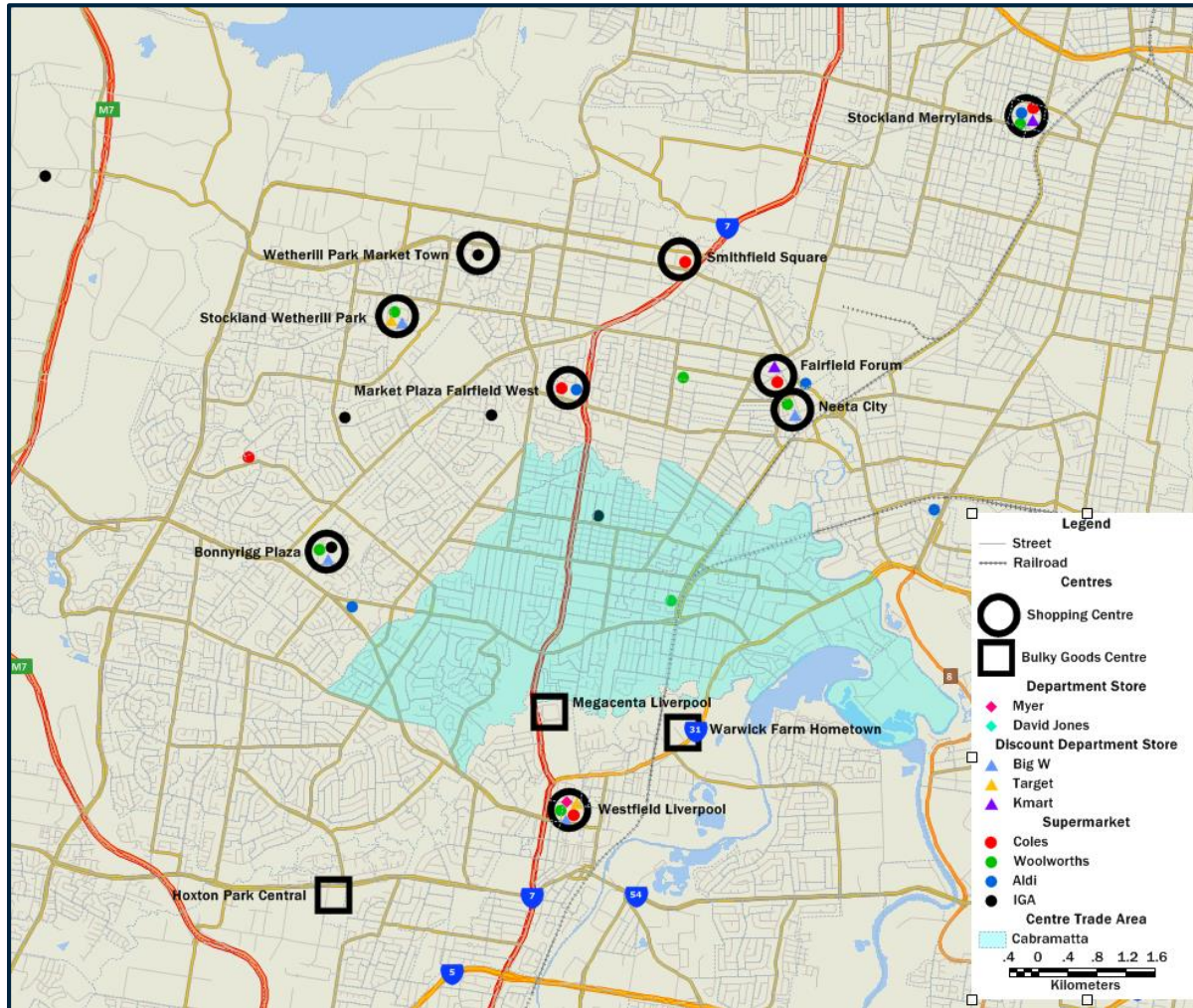
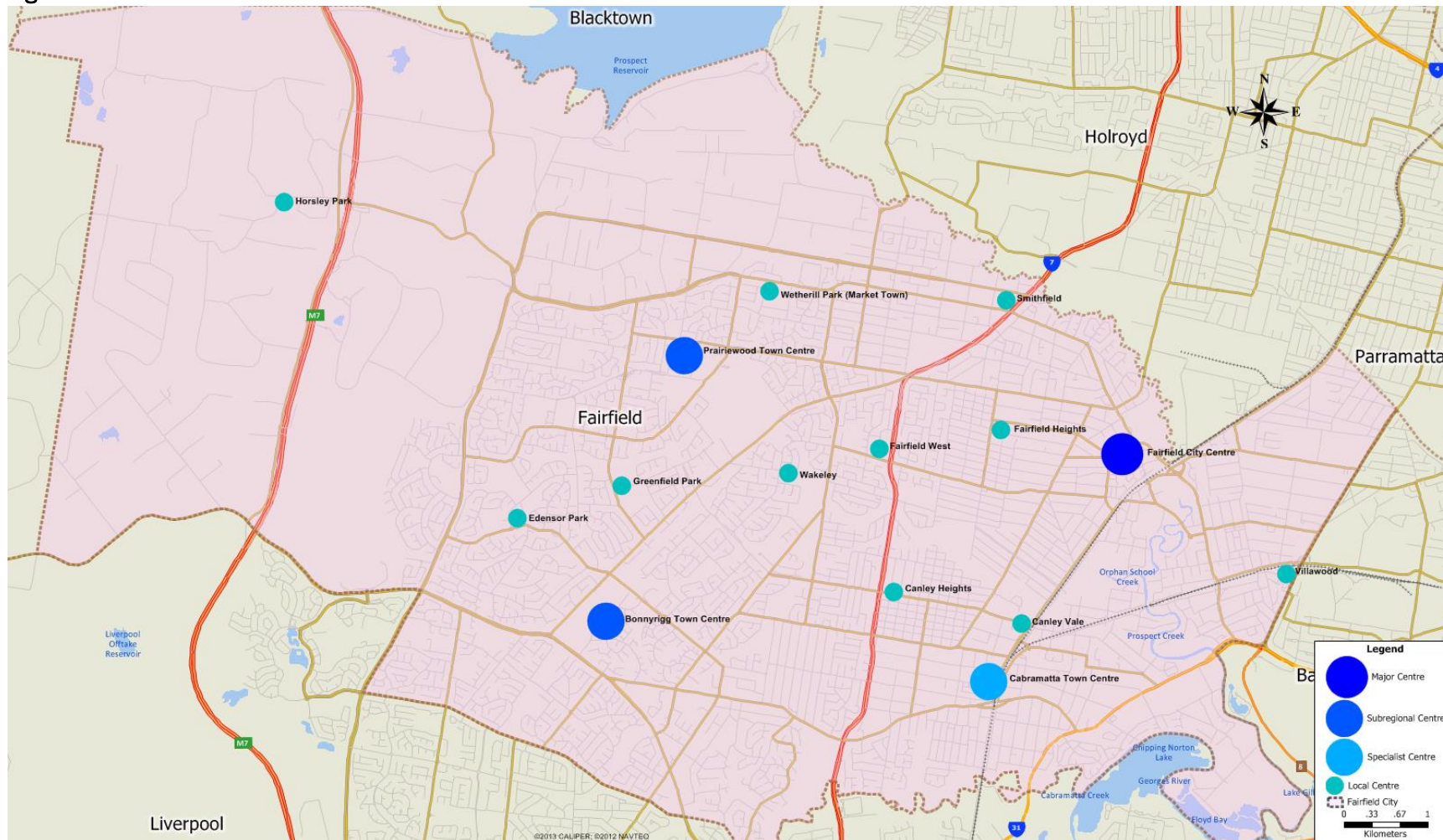


Figure 9.1: Recommended Centres Network



Appendices

Appendix A: Centre Role and Function and Evaluation Criteria

Major Centre

(Fairfield City Centre)

Role & Function

The Major Centre is characterised by:

- The provision of the widest range of retail, commercial and community services to the regional population of Fairfield LGA
- The presence of the highest order of retail facilities including a Department Store, multiple Discount Department Stores (DDSs), multiple full-line supermarkets and the widest range of specialty shops
- Its location on the City's major public transport interchange
- Containing in excess of 100,000m² of retail floor space together with the widest range of non-retail services including cinemas, office space, community services, health facilities, education services and state and local government agencies
- Providing for higher order and comparison good shopping as well as the provision of specialist, professional and personal services serving the regional population
- Containing the largest concentration of white collar workers
- A revitalised City Centre through continued investment by the private and public sectors

Evaluation Criteria

Evaluation criteria applying to development proposals within the Major Centre:

- Whether the proposal is consistent with the Role and Function of the Major Centre
- Whether the development proposal would introduce types of retail services likely to reduce escape spending from Fairfield LGA
- Whether the proposal involves the redevelopment of older premises
- Whether the development proposal delivers a net community benefit
- Whether the proposal would broaden the range of services offered by the Major Centre

Sub-Regional Centres

(Prairiewood and Bonnyrigg Town Centres)

Role & Function

Sub-Regional centres are characterised by:

- The provision of a wide range of retail and commercial services to a sub-region within Fairfield LGA (usually about 100,000 persons)
- The presence of multiple Discount Department Stores (DDSs), multiple full-line supermarkets and a wide range of specialty shops
- Their location on major public transport networks
- Generally containing between 40,000-60,000m² of retail floor space (excluding showrooms) together with a wide range of non-retail services including office space, community services, health facilities and education services
- Providing for comparison and grocery shopping trips serving sub-regional populations
- Improved connectivity to the public transport network

Evaluation Criteria

Evaluation criteria applying to development proposals in Sub-Regional Centres:

- Whether the proposal is consistent with the Role and Function of a Sub-Regional Centre
- Whether the development proposal would result in an unacceptable level of impact on the range of services provided in the Major Centre or other Sub-Regional centre in Fairfield LGA
- Whether the development proposal would result in a reduction in the range of services provided in nearby Local Centres
- Whether the development proposal would introduce types of retail services likely to reduce escape spending from Fairfield LGA
- Whether the proposal would improve the viability of the Sub-Regional Centre by strengthening key retail functions- for example, the provision of or upgrading of Discount Department Stores and Supermarkets
- Whether the development proposal demonstrates that a net community benefit will flow from the proposal expansion of retail floor space
- Whether the proposal would broaden the range of services offered
- Whether the anchor retail tenancies can be accommodated within the Major Centre

Specialised Centre

(Cabramatta Town Centre)

Role & Function

Specialised centres are characterised by:

- The provision of a wide range of retail and commercial services to a large Asian community
- The presence of the widest range of specialty shops targeting the needs of the Asian community
- Its location on a major public transport network
- Generally containing in the order of 60,000m² of retail floor space together with a wide range of non-retail services including office space, community services, health facilities and education services targeting the Asian community
- Providing for specialist shopping needs of the Asian community
- Its ability to attract large numbers of daytrippers from outside Fairfield LGA seeking a special shopping and cultural experience

Evaluation Criteria

Evaluation criteria applying to development proposals in the Specialised Centre:

- Whether the proposal is consistent with the Role and Function of the Specialised Centre
- Whether the proposal strengthens the specialised role of the Specialised Centre in satisfying a wide range of needs of the Asian community
- Whether the development proposal would result in an unacceptable level of impact on the range of services provided in the Major Centre and Sub-Regional Centres in Fairfield LGA
- Whether the development proposal would result in a reduction in the range of services provided in nearby Local Centres
- Whether the proposal involves the redevelopment of older premises
- Whether the development proposal demonstrates that a net community benefit will flow from the proposed expansion of retail floor space

Local Centres

Role & Function

Local Centres are characterised by:

- The provision of retail and commercial services to one or more suburbs within Fairfield LGA (usually about 20,000 persons)
- Generally containing between 5,000 – 10,000m² of retail floor space and providing retail services to one or more suburbs
- The presence of a medium scale to full-line supermarket (1,000 to 4,000m²)
- Providing for the major weekly food shopping and convenience retail needs of the population of more than one suburb providing a range of non-retail professional and personal services
- Possibly including ancillary services such as a tavern, professional and health services, community facilities, post office and service station

Centres in Fairfield within this category are: Canley Heights, Canley Vale, Edensor Park, Fairfield Heights, Greenfield Park, Smithfield, Villawood, Wetherill Park, Wakeley, Horsley Park, Fairfield West, Bonnyrigg (Elizabeth Drive).

Evaluation Criteria

Evaluation criteria applying to development proposals in Local Centres:

- Whether the proposal is consistent with the Role and Function of Local Centres
- Whether the proposal would unacceptably affect the range of services available in nearby Major, Sub-Regional, Specialised or Local Centres
- Whether the proposed development does relies upon an expansion of the existing trade area of a Local Centre for its viability
- Whether the development proposal would strengthen the viability of a Centre, particularly its core function of providing for the grocery shopping trip

Neighbourhood Centres

Role & Function

Neighbourhood Centres are characterised by:

- The provision of retail and commercial services to the surrounding neighbourhood or suburb within Fairfield LGA (usually up to 10,000 persons)
- Generally containing <2,000m² of retail floor space
- Providing convenience retail services to the residents of the neighbourhood or suburb in which it is located and may contain a small grocery/supermarket store- usually of <500m²
- Providing a limited range of non-retail services such as a medical practice or post office

Evaluation Criteria

Evaluation criteria applying to development proposals in Neighbourhood Centres:

- Whether the proposal is consistent with the Role and Function of Neighbourhood Centres
- If a supermarket having floor space of >500m² is proposed it must not unacceptably affect the range of goods and services available in adjacent Major, Sub-Regional or Local Centres
- Demonstrate that the economic viability of the proposed expansion does not rely upon an expansion of the existing trade area of a Neighbourhood Centre.

Bulky Goods Centres

Role & Function

Bulky Goods Centre is the term applying to those centres that accommodate bulky goods showrooms, for example:

- Facilities concentrated along the Hume Highway
- Greenway SupaCentre

The FLEP 2013 defines bulky goods premises as a type of retail premises with the following definition: *“a building or place the principal purpose of which is the sale, hire or display of bulky goods, being goods that are of such size or weight as to require:*

- a) A large area for handling, display or storage, and;*
- b) Direct vehicular access to the site of the building or place by members of the public for the purpose of loading or unloading such goods into or from their vehicles after purchase or hire, and including goods such as flour and window supplies, furniture, household electrical goods, equestrian supplies and swimming pools, but does not include a building or place used for the sale of foodstuffs or clothing unless their sale is ancillary to the sale or hire or display of bulky goods.”*

Evaluation Criteria

Evaluation criteria applying to bulky goods centres:

- The development must comply with the definition contained within the Fairfield LEP and be a permitted use in the zone relevant to a site.
- The co-location of multiple bulky goods stores within a single planned centre should be encouraged.
- The development must require and provide for direct vehicular access to the site and include loading dock areas for transfer of goods and loading of items,
- Whether the development is for the purpose of selling by retail goods in the following categories (being goods which are considered to constitute bulky goods):
 - o Furniture
 - o Large electrical goods
 - o Whitegoods
 - o Outdoor products (e.g. barbeques, seating)
 - o Hardware

- Floor coverings
- Automotive parts/accessories
- Lighting
- Antiques/second hand goods
- Kitchen/bathroom showrooms
- Tiles (floor, ceiling, walls)
- Plant nurseries
- Whether the proposal is consistent with the Role of the Bulky Goods Centre
- Whether the development proposal would result in an unacceptable level of impact on the range of services provided in other existing bulky goods centres in Fairfield
- Whether there is a demonstrated need for the proposed development
- Whether the proposal can be accommodated within existing designated centres
- whether the development proposal would introduce types of retail services likely to reduce escape spending from Fairfield LGA
- Whether the development proposal would unreasonably undermine Major or Sub-Regional Centres

Appendix B: Application Assessment Guidelines

Development Assessment Team – Centre Applications

The following questions should be addressed by the Development Assessment Team in the assessment of an application for a new centre or to extend an existing centre, with negative answers indicating more scrutiny is required and positive answers indicating less scrutiny is required.

The Development Assessment Team is to undertake the initial review of the Economic Impact Assessment, with more than two negative answers requiring a review by the Senior Policy Advisor Economic Development and more than four negative answers likely to require an independent Peer Review, to be determined by the Senior Policy Advisor Economic Development.

1. If the Application involves the development of a new centre or an extension to an existing centre, then an Economic Impact Assessment should accompany the Application, addressing the relevant Evaluation Criteria identified in the Centres Policy.
2. If the Economic Impact Assessment does not fully address each relevant Evaluation Criteria, the Applicant should be asked to revise the Economic Impact Assessment such that it does fully address each relevant Evaluation Criteria.
3. Is the Economic Impact Assessment prepared by a person or entity recognised as being independent from the Applicant and recognised as having economic skills and experience?
4. Does the methodology employed by the Economic Impact Assessment appear reasonable, such as by defining a trade area, examining population growth, detailing the supply of competitive centres in the region, projecting future demand and turnover and calculating impacts upon the competitive centres?
5. Does the Economic Impact Assessment adopt assumptions sourced from recognised sources, such as the Australian Bureau of Statistics, LEP zoning maps and the NSW Department of Planning & Environment?
6. Does the Application involve uses that are consistent with the Objectives of the current zone and/or are Permitted (with or without consent) uses within that zone?
7. Does the Application involve a total floorspace that is less than 20% of the total commercial floorspace identified for the existing centre in which it is located?

8. Does the Application involve the demolition of existing commercial floorspace such that the net additional floorspace is less than 50% of the total floorspace to be developed?
9. Does the proposed development integrate with adjoining existing commercial activities?

Strategic Planning Team – Centre Applications External to Fairfield City

The following questions should be addressed by the Strategic Planning Team in the assessment of an application for a new centre or to extend an existing centre located outside Fairfield City boundaries, with negative answers indicating more scrutiny is required and positive answers indicating less scrutiny is required.

The Strategic Planning Team is to undertake the initial review of the Economic Impact Assessment, with more than two negative answers requiring a review by the Senior Policy Advisor Economic Development and more than four negative answers likely to require an independent Peer Review, to be determined by the Senior Policy Advisor Economic Development.

1. Are centre activities proposed for a site outside a 1km radius of an existing Fairfield City Neighbourhood Centre?
2. Would the proposal result in a centre of greater than 3,000m² being located outside a 2km radius of an existing Fairfield City Local Centre?
3. Would the proposal result in a centre of greater than 20,000m² being located outside a 3km radius of an existing Fairfield Sub-Regional Centre?
4. Would the proposal result in a centre of greater than 40,000m² being located outside a 5km radius of the Fairfield City Centre Major Centre?
5. Would the proposal result in a bulky goods centre of greater than 20,000m² being located outside a 2km radius of a B5 zone within Fairfield City?
6. Is the Economic Impact Assessment prepared by a person or entity recognised as being independent from the Applicant and recognised as having economic skills and experience?
7. Does the methodology employed by the Economic Impact Assessment appear reasonable, such as by defining a trade area, examining population growth, detailing the supply of competitive centres in the region, projecting future demand and turnover and calculating impacts upon the competitive centres?
8. Does the Economic Impact Assessment adopt assumptions sourced from recognised sources, such as the Australian Bureau of Statistics, LEP zoning maps and the NSW Department of Planning & Environment?

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