

Kensington, Kingsford & Randwick Junction

Economic impact of light rail: Stage 1 report

April 2016 – Final version

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Section 1 – Introduction and overview of light rail project

Introduction

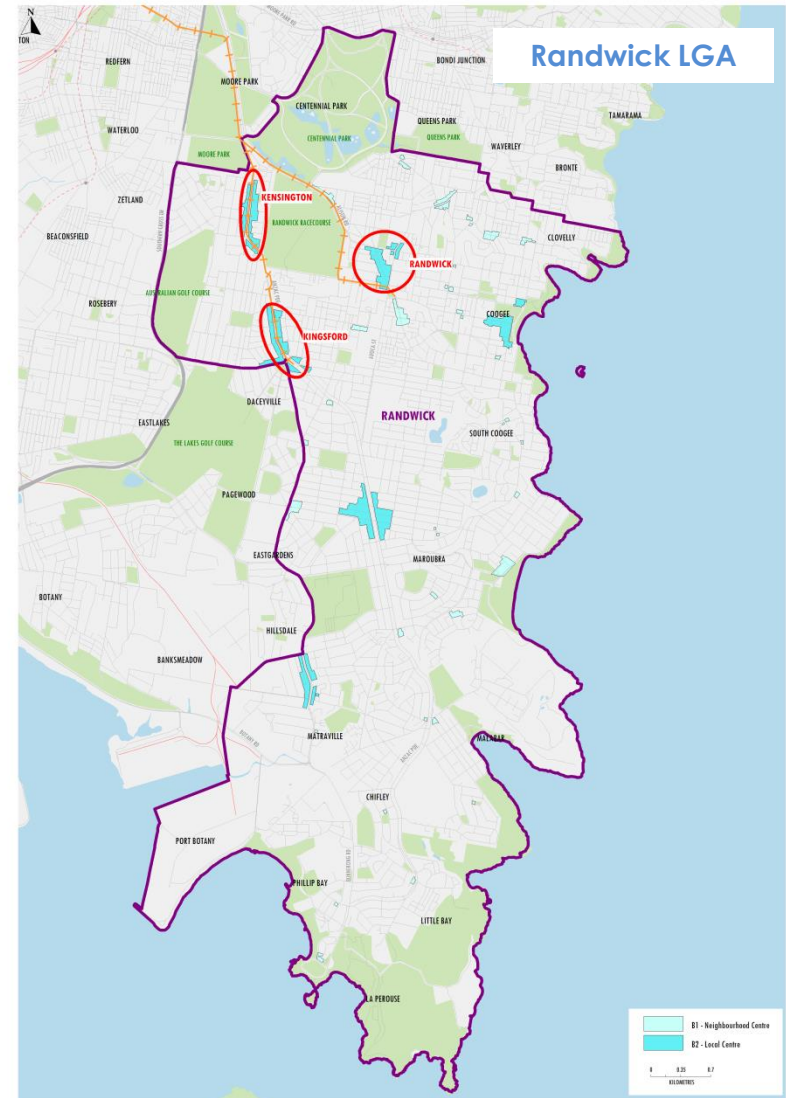
MacroPlan Dimasi has been commissioned by Randwick City Council to undertake an assessment of the economic impacts of the CBD and South East Light Rail project on three centres within the Randwick Local Government Area (LGA), namely Kensington, Kingsford and Randwick.

Our analysis is presented in two distinct stages. The first stage - this preliminary report - reviews the centres hierarchy in Randwick; provides case studies of comparable centres – particularly those with light rail infrastructure; reviews the current composition/context of the three subject centres; then provides some preliminary recommendations as to the direction for each centre following the development of light rail.

The second stage report will include a more detailed assessment, supported by quantitative analysis and is expected to include updated data from the NSW DPE in relation to dwellings and jobs targets for the LGA.

This draft stage 1 report is structured as follows:

- An overview of the planned light rail network, including identification of stations within the Randwick LGA and the estimated uplift in commuter numbers.
- A local context review of the Kensington, Kingsford and Randwick centres.
- A review of the surrounding centres hierarchy, including other centres within the Randwick LGA and centres beyond the LGA.
- A case study review including: exemplar/aspirational developments; transport orientated developments/precincts; comparable local centre precincts throughout Australia; an overview of G:link; and three international light rail examples.
- Our preliminary views and recommendations as to the appropriate focus for each identified centre post light rail.



CBD & SE Light Rail (CSELR) network overview

Linking UNSW/Kingsford and Prince of Wales Hospital /Randwick, to the CBD....

The planned CBD and South East Light Rail (CSELR) network will extend from Circular Quay in the north to Randwick and Kingsford in the south, connecting the south eastern suburbs of Sydney (i.e. Randwick LGA) with Central Station, the Sydney CBD and George Street. There are nine planned light rail stops within the Randwick LGA including:

- Three stations in Kensington (Carlton St, Todman Ave and UNSW Anzac Pde).
- Two stations in Kingsford (Strachan St and Kingsford Terminus).
- Four stations in Randwick (Royal Randwick, Wansey Rd, UNSW High St and Randwick Terminus).

To the south of the Moore Park station, the network forks into two lines; one extending to Kensington and Kingsford, and the other to Randwick.

Construction works for the CSELR network have commenced and the network is planned to be operational in 2019.

The Kensington/Kingsford line is anticipated to accommodate 3,626 boardings and 2,195 alightings during the AM peak period (7am to 9am) in 2021.

The Randwick line is estimated to accommodate 3,187 boardings and 3,052 alightings during the AM peak period in 2021.



Estimated incremental additional patronage

25 – 30% uplift in public transport patronage in morning peak...

Based on current data from the NSW Bureau of Transport Statistics (BTS), as at 2010, the Randwick LGA generated around 8,270 CBD bound bus trips in the AM peak period (i.e. 7am to 9am).

Without light rail, the NSW BTS projects that by 2021, the AM peak bus trips from Randwick LGA to the CBD would be 9,362 trips (i.e. an increase of about 7 – 8% on current levels).

With the introduction of light rail, a number of bus routes are proposed to be cancelled or modified (i.e. terminate within the eastern suburbs/don't go to the CBD, or are rerouted). The CSELR EIS document outlines a number of existing CBD bound bus routes that are planned to be modified or cancelled, although it is understood that there will be additional services and routes that are yet to be announced. We have only considered CBD bound bus routes, so as to compare like for like commuter movements (i.e. light rail and bus boardings from Randwick LGA stations in AM peak are assumed to be CBD bound commuters).

Having regard for the modifications and cancellations outlined in the CSELR EIS, we estimate that, by 2021, the number of bus trips to the CBD from the Randwick LGA will decrease to around 5,115 during the AM peak. This estimate should be considered indicative and preliminary in nature, as the exact future bus route network is not yet known. Note: this analysis does not include bus trips that then transfer to light rail.

Based upon estimates sourced from the CSELR EIS, the light rail stations within the Randwick LGA are collectively expected to accommodate 6,813 boardings during the AM peak period in 2021

Therefore, in conjunction with the 5,115 bus trips to the CBD during the AM peak period, a total of 11,928 CBD bound public transport passenger movements are estimated to be recorded during the AM peak period in 2021.

When compared with the projected Status Quo scenario, we estimate there to be an incremental uplift of 2,567 trips per AM peak period, reflecting an uplift of around 27.4%.

Current and estimated future public transport patronage (AM Peak boardings/trips only)			
	Actual 2010/11	Estimated 2015	Estimated 2021
Status Quo Scenario*			
Buses - Randwick LGA to city	8,270	8,708	9,362
Light Rail Scenario**			
Buses - Randwick LGA to city	8,270	8,708	5,115
Randwick LGA Light rail patronage***	<u>n.a.</u>	<u>n.a.</u>	<u>6,813</u>
Total	8,270	8,708	11,928
Incremental volume			2,567
Incremental uplift (%)			27.4%

Note: AM Peak refers to 7am to 9am

* Status Quo scenario is based on actual 2010/11 patronage grown at bus growth rates sourced from BTS Travel Forecasts

** Light Rail scenario bus forecasts account for the cancellation and modification of some routes through the eastern suburbs and considers buses that travel to the City only (i.e. buses that terminate at Kensington are not included). This analysis does not consider any change in public transport utilisation from unaffected bus routes to light rail.

*** Total boardings in AM Peak only

Source: Transport NSW; BTS; MacroPlan Dimasi

Section 2 – Local context overview of each centre

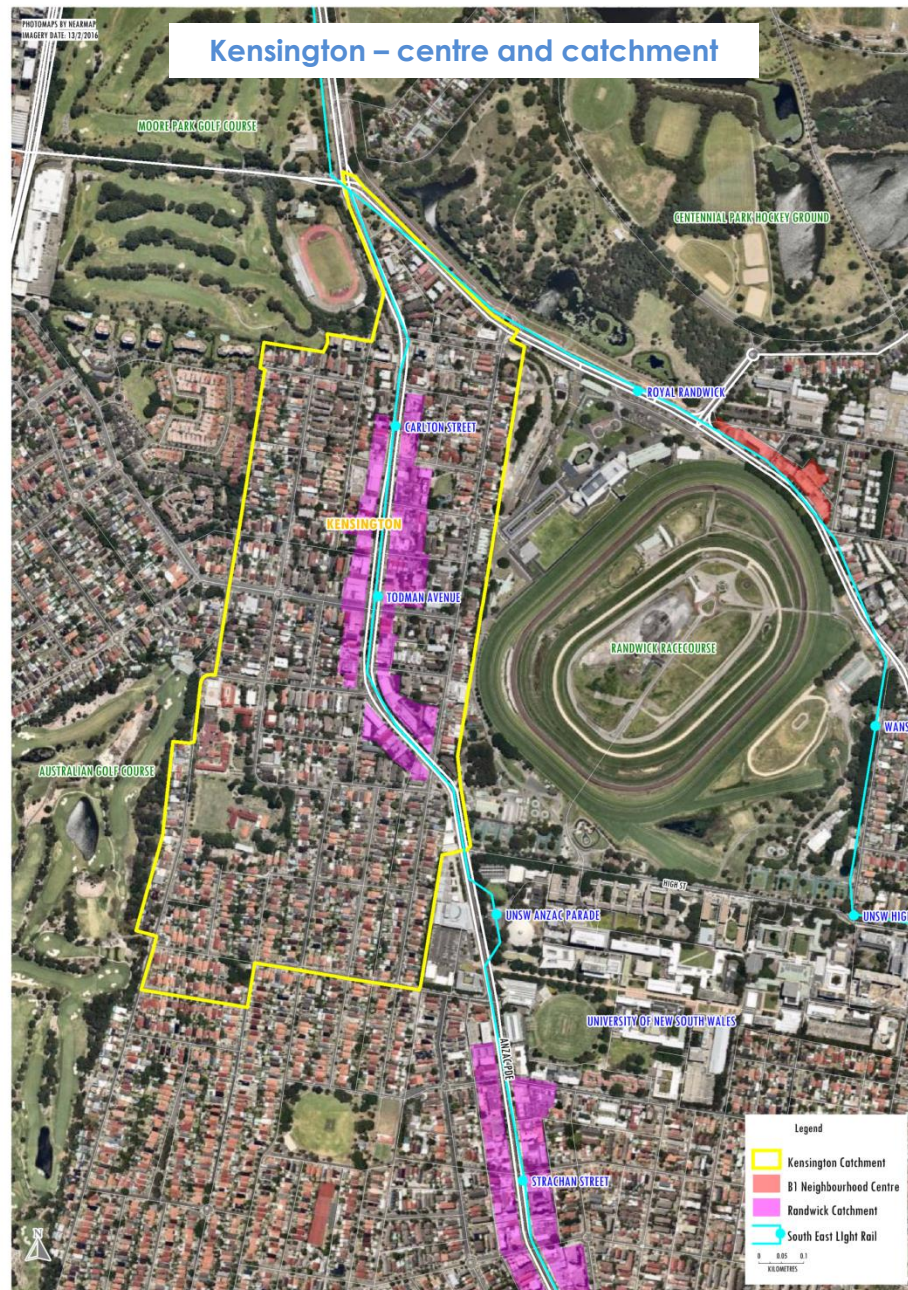
Local context – Kensington ‘Village Centre’

Evolving high density residential precinct...with local services...

- Kensington is designated as a village centre in the Randwick Economic Development Strategy (March 2009). The centre performs a localised role and function with local retail/commercial services, with some destinational/unique attractors (e.g. Peters of Kensington).
- As at June 2015, Kensington Village centre was estimated to contain an immediate resident population (in centre – purple shaded area on map overleaf) of 3,970 persons, an increase of around 2.1% per annum since the 2011 ABS Census (around 310 persons). There are around 7,500 persons in the broader surrounding area (see yellow boundary on map overleaf).
- As at the 2011 ABS Census, there were around 800 – 850 jobs in the centre, of which retail trade accounted for 26% of workers, closely followed by accommodation and food services (17%). In combination, these two industries comprised around 43% of all jobs within the centre.
- The centre accommodates a broad and dispersed range of retail and commercial uses with no real anchor or critical mass in any particular part of the centre. Key retail tenancies within Kensington include Peter's of Kensington and Auto One.
- There is no supermarket, the Foodworks (200 sq.m) is very small and performs as a convenience shop. Other retail uses include cafes, restaurants and takeaway food outlets and convenience retail/services, such as a newsagency, pharmacy and optometrist.
- Non-retail and commercial uses within Kensington include Snap Fitness, Legends Gymnasium, 7-Eleven Petrol, Australia Post and the Doncaster Hotel.
- The centre has evolved over the past 3 – 5 years with several new multi-storey residential buildings now in the centre and several developments in the pipeline. There are 190 dwellings either under construction or imminent.
- According to the 2009 SGS Randwick Economic Development Strategy, as at 2007, Kensington accommodated over 24,200 sq.m of employment floorspace, of which over 50% was attributed to retail, food and beverage and personal services.
- We estimate there to be around 5,000 sq.m of traditional retail floorspace in the centre as at February 2016 (i.e. there are around 30 – 40 retail focussed businesses). This excludes showroom retail space and non-retail uses such as gymnasiums and pubs.
- The Kensington strip has around 8-10 vacant shops as of February 2016.

Kensington employment profile		
Industry of employment	2011 worker profile	
	Kensington	Metro Sydney
Agriculture, forestry and fishing	0.0%	0.4%
Mining	0.0%	0.2%
Manufacturing	2.3%	8.8%
Electricity, gas, water and waste services	0.0%	0.9%
Construction	5.2%	5.4%
Wholesale trade	3.0%	5.5%
Retail trade	25.9%	10.1%
Accommodation and food services	17.3%	6.3%
Transport, postal and warehousing	1.8%	5.2%
Information media and telecommunications	0.4%	3.2%
Financial and insurance services	0.7%	7.0%
Rental, hiring and real estate services	1.8%	1.9%
Professional, scientific and technical services	5.5%	10.2%
Administrative and support services	1.7%	3.2%
Public administration and safety	0.7%	6.0%
Education and training	10.2%	8.0%
Health care and social assistance	8.8%	11.3%
Arts and recreation services	8.6%	1.6%
Other services	4.1%	3.7%
Inadequately described/Not stated	2.2%	1.2%
Total	100.0%	100.0%
Total workers	834	1,874,116

Note: based on workers within the immediate centre (i.e. the B zoned land)
Source: ABS Census of Population and Housing 2011; MacroPlan Dimasi



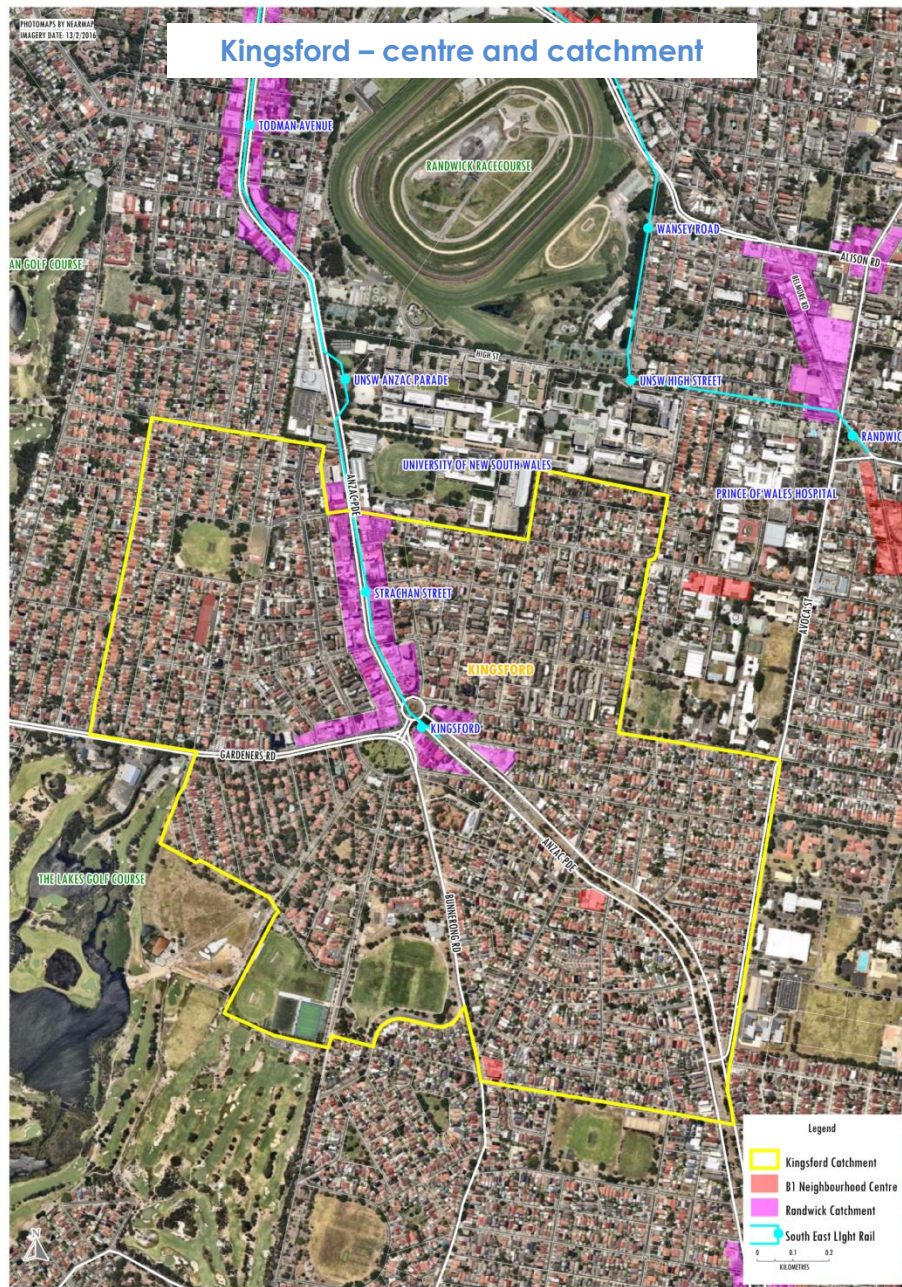
Local context – Kingsford ‘Village Centre’

Popular student precinct with vibrant dining/eating scene, strong medical/services offer and medium density residential.

- Kingsford is designated as a village centre in the Randwick Economic Development Strategy (March 2009). The centre performs a localised role and function with local retail/commercial services, and is very popular with students from nearby UNSW. Indeed, we understand some businesses in the local centre close/reduce trading hours during the university break.
- As at June 2015, Kingsford village centre was estimated to contain an immediate resident population (in centre – purple shaded area on map overleaf) of 4,771 persons, an increase of around 0.7% per annum since the 2011 ABS Census. There are around 16,500 – 17,000 persons in the broader surrounding area (see yellow boundary on map overleaf).
- As at the 2011 ABS Census, there were around 1,350 – 1,400 jobs in the centre of which retail trade and accommodation and food services accounted for around 33-34% of jobs. Health care and social assistance accounted for around 15% of all jobs.
- The Kingsford strip does not contain any major retail anchor tenant or major shopping centre. There is only a small IGA supermarket (approx. 400 sq.m) and several small Asian supermarkets. The supports a significant and vibrant provision of food catering (i.e. cafes, restaurants and takeaway food), with a focus on Asian cuisines. Other retail uses include retail services (e.g. hairdressers, beauty, optometrists etc).
- Non-retail and commercial uses include medical and allied health facilities, real estate agencies, banks and pubs.
- According to the 2009 SGS Randwick Economic Development Strategy, as at 2007, Kingsford accommodated over 38,000 sq.m of employment floorspace, with retail trade, cafes and restaurants and personal services accounting for over 40% of total floorspace.
- We estimate there to be around 10,000 sq.m of traditional retail floorspace in the centre as at February 2016 (i.e. there are around 90 – 100 retail focussed businesses). This excludes showroom retail space and non-retail uses such as gymnasiums and pubs. The Kingsford strip is well tenanted and there are only a handful of vacant shops as at February 2016.

Kingsford employment profile		
Industry of employment	2011 worker profile	
	Kingsford	Metro Sydney
Agriculture, forestry and fishing	0.7%	0.4%
Mining	0.0%	0.2%
Manufacturing	2.6%	8.8%
Electricity, gas, water and waste services	0.2%	0.9%
Construction	5.8%	5.4%
Wholesale trade	2.0%	5.5%
Retail trade	11.5%	10.1%
Accommodation and food services	22.1%	6.3%
Transport, postal and warehousing	1.3%	5.2%
Information media and telecommunications	1.3%	3.2%
Financial and insurance services	3.3%	7.0%
Rental, hiring and real estate services	5.7%	1.9%
Professional, scientific and technical services	8.7%	10.2%
Administrative and support services	3.3%	3.2%
Public administration and safety	1.5%	6.0%
Education and training	5.4%	8.0%
Health care and social assistance	14.7%	11.3%
Arts and recreation services	1.6%	1.6%
Other services	6.6%	3.7%
Inadequately described/Not stated	1.7%	1.2%
Total	100.0%	100.0%
Total workers	1,380	1,874,116

Note: based on workers within the immediate centre (i.e. the B zoned land)
Source: ABS Census of Population and Housing 2011; MacroPlan Dimasi



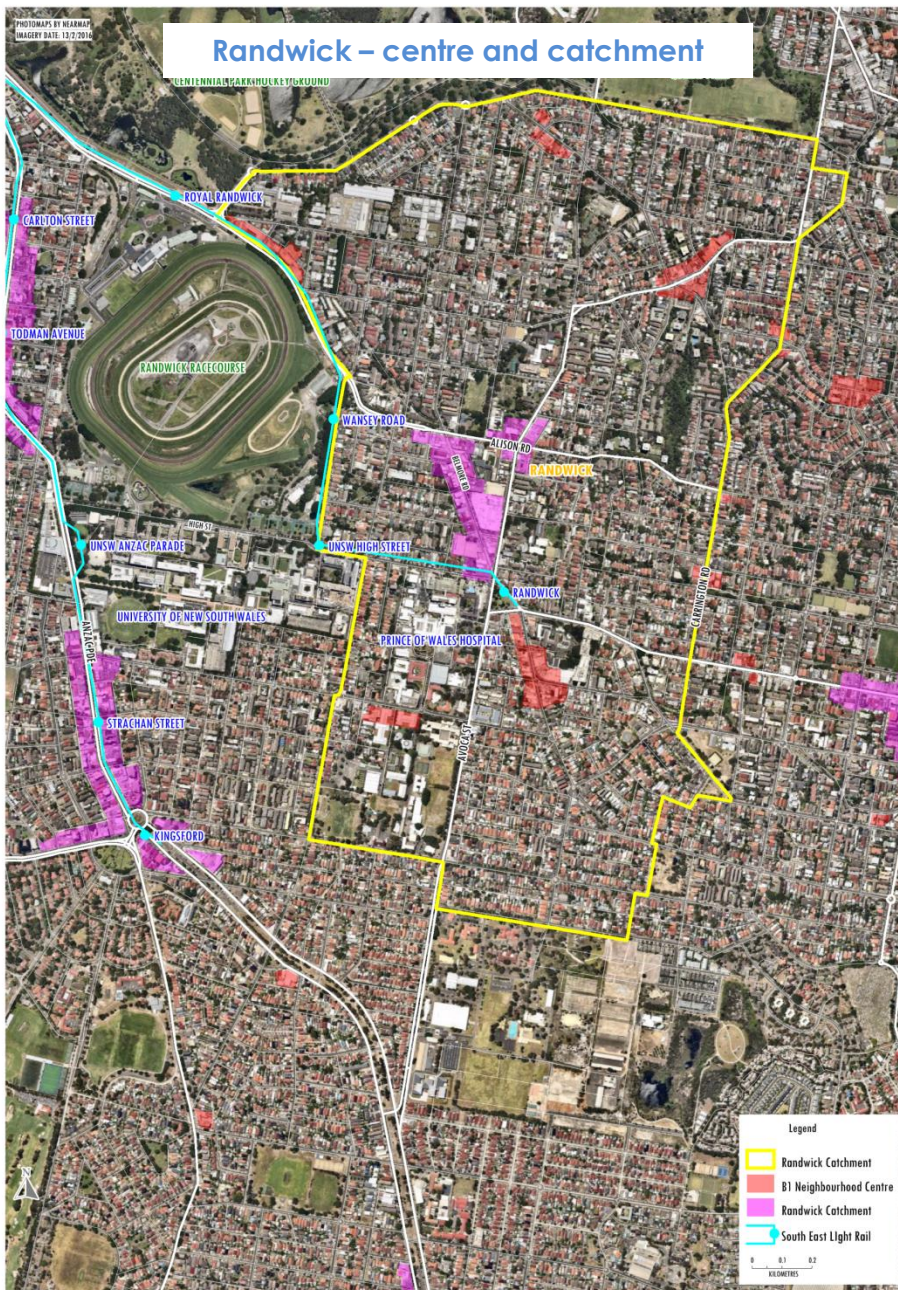
Local context – Randwick ‘Town Centre’

Vibrant, functional town centre providing key supermarket services to residents in north Randwick LGA and important overflow/support precinct for Prince of Wales Hospital precinct...

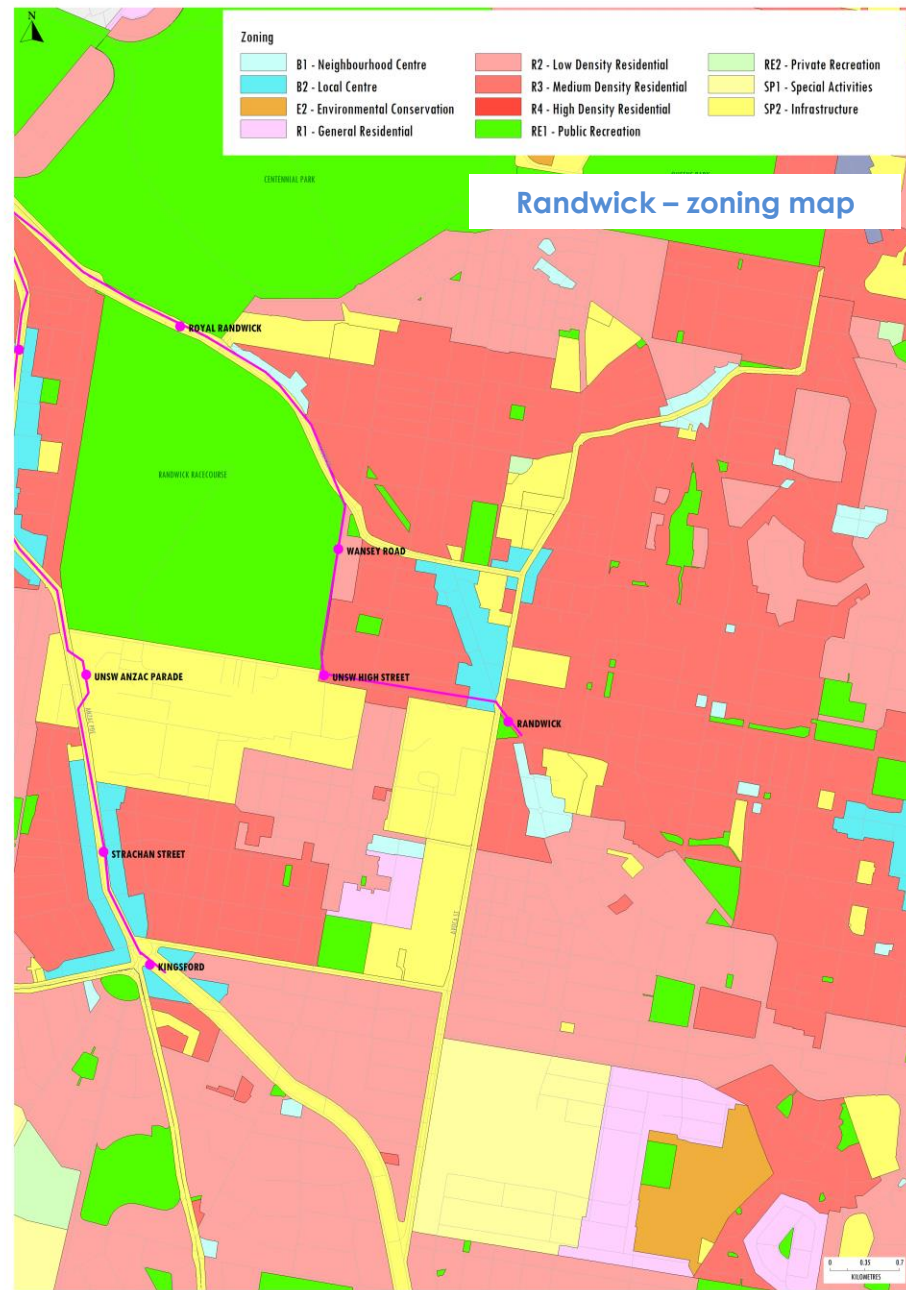
- Randwick is designated as a town centre in the Randwick Economic Development Strategy (March 2009). The centre performs a sub-regional role and function as it contains supermarket/shopping centre facilities and an extensive strip retail/commercial offer – which combine with nearby schools, civic uses and a major hospital precinct (i.e. Prince of Wales Hospital, Prince of Wales Private Hospital, Royal Hospital for Women, and Sydney Children’s Hospital).
- As at June 2015, Randwick town centre was estimated to contain an immediate resident population (in centre – purple shaded area on map overleaf) of 1,875 persons, a population which has been virtually flat since the 2011 ABS Census. There are around 28,500 – 29,000 persons in the broader surrounding area (see yellow boundary on map overleaf).
- As at the 2011 ABS Census, there were around 2,700 – 2,800 jobs in the centre, of which retail trade and accommodation and food services accounted for around 29% of jobs. Health care and social assistance accounted for around 22% of all jobs – driven by the nearby hospital precinct (which is not included in these numbers) and 19% of jobs were in education (i.e. surrounding schools).
- The key retail features within Randwick include Royal Randwick, a Woolworths anchored (1,400 sq.m) shopping centre which accommodates over 9,000 sq.m of retail floorspace and Randwick Plaza, which provides around 4,400 sq.m of retail floorspace, including a Coles supermarket of 3,080 sq.m. Other retail uses within the Randwick centre include catered food, convenience retailing, retail services and boutiques. There is also an extensive provision of non-retail uses – particularly medical related uses (e.g. specialist consulting, medical centres, allied health etc).
- According to the 2009 SGS Randwick Economic Development Strategy Randwick accommodated around 78,000 sq.m of employment floorspace, of which over 50% was attributed to retail trade, cafes and restaurants and personal services.
- We estimate there to be around 20,000 – 25,000 sq.m of traditional retail floorspace in the centre as at February 2016 (i.e. around 150 – 175 retail focussed businesses). This excludes showroom retail space and non-retail uses such as gymnasiums and pubs. Randwick contains around 8-10 vacant shops as of February 2016.

Randwick employment profile		
Industry of employment	2011 worker profile	
	Randwick	Metro Sydney
Agriculture, forestry and fishing	0.1%	0.4%
Mining	0.0%	0.2%
Manufacturing	0.6%	8.8%
Electricity, gas, water and waste services	0.0%	0.9%
Construction	2.3%	5.4%
Wholesale trade	0.3%	5.5%
Retail trade	16.1%	10.1%
Accommodation and food services	13.1%	6.3%
Transport, postal and warehousing	0.7%	5.2%
Information media and telecommunications	0.4%	3.2%
Financial and insurance services	3.4%	7.0%
Rental, hiring and real estate services	3.3%	1.9%
Professional, scientific and technical services	5.6%	10.2%
Administrative and support services	2.5%	3.2%
Public administration and safety	0.6%	6.0%
Education and training	19.2%	8.0%
Health care and social assistance	22.1%	11.3%
Arts and recreation services	3.5%	1.6%
Other services	4.1%	3.7%
Inadequately described/Not stated	2.0%	1.2%
Total	100.0%	100.0%
Total workers	2,754	1,874,116
Note: based on workers within the immediate centre (i.e. the B zoned land)		
Source: ABS Census of Population and Housing 2011; MacroPlan Dimasi		

Randwick – centre and catchment

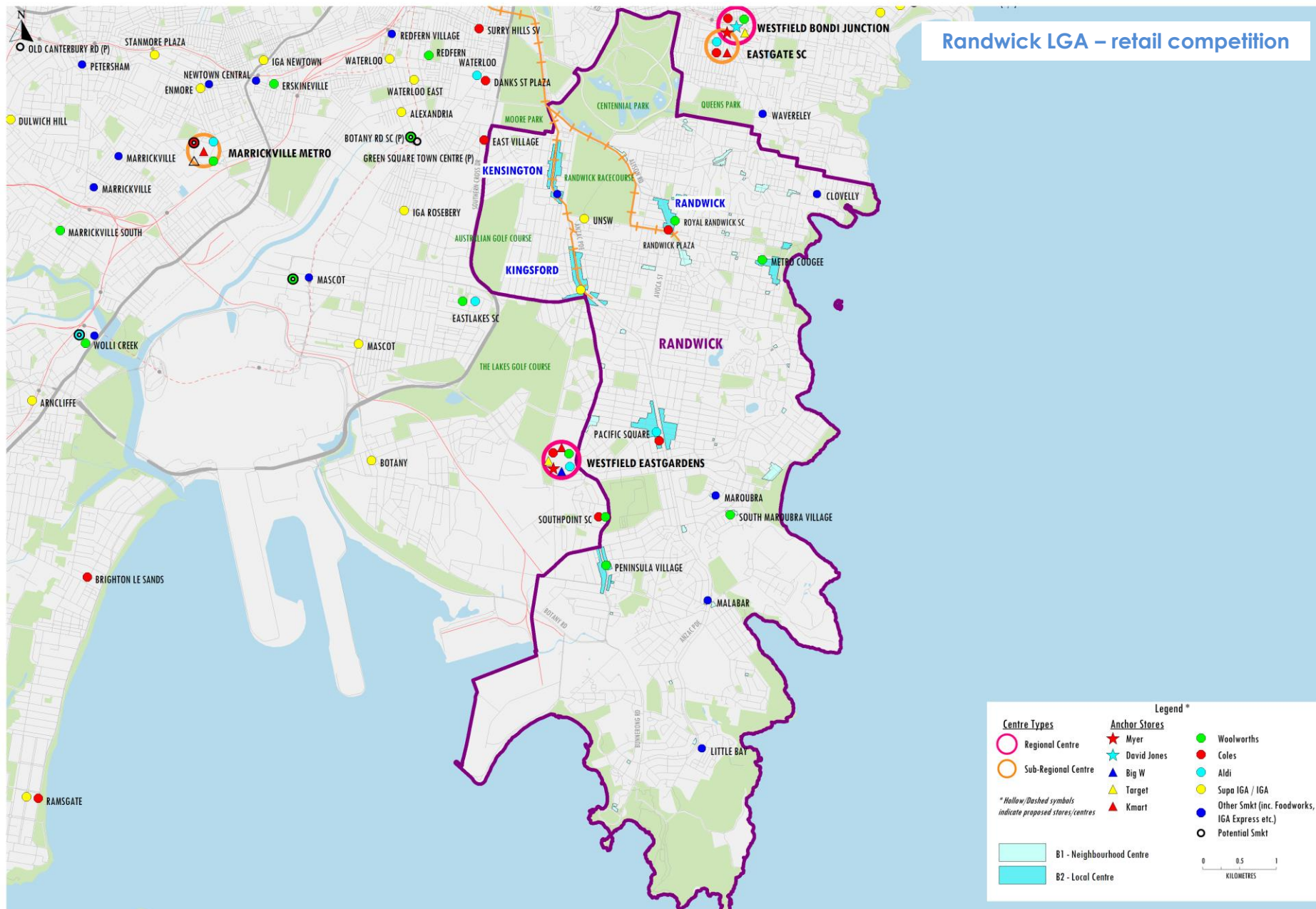


Randwick – zoning map



Section 3 – Surrounding centres hierarchy

Randwick LGA – retail competition



Surrounding centres hierarchy

Randwick LGA

The Randwick, Kingsford and Kensington centres are three important commercial/retail centres in the Randwick LGA. In addition to these are two other significant centres, namely Maroubra Town Centre and Coogee Village Centre.

Maroubra Town Centre

Like Randwick, Maroubra is designated as a Town Centre in the Economic Development Strategy. Unlike Randwick though, Maroubra accommodates a significant number of high density residential developments.

Maroubra contains an extensive retail/commercial offer generally distributed around Anzac Pde. The main retail anchor in the centre is Pacific Square, a very strongly performing neighbourhood shopping centre which accommodates over 10,000 sq.m of retail floorspace, including a full-line Coles supermarket of 3,600 sq.m and an Aldi supermarket of around 1,400 sq.m, around 50 specialty shops and a range of non-retail uses, such as Fitness First and medical facilities. The centre is integrated with a multi-storey residential tower above.

Maroubra Plaza located opposite Pacific Square contains a boutique fresh food/market called The Greener Grocer as well as a small provision of specialty space. In total we estimate there to be around 17,500 sq.m of retail floorspace within the town centre.

Coogee

Like Kensington and Kingsford, Coogee is designated as a Village Centre in the Economic Development Strategy. The centre performs a unique role in the LGA serving local residents as well as being a destinational centre – due to its beachside location, which allows it to attract visitors from across metropolitan Sydney and tourists.

Coogee provides an extensive café, restaurant and bar offer (inc. Coogee Pavilion/Coogee Bay Hotel), as well as a range of convenience orientated and general retail stores and localised services. Coogee contains a small 900 sq.m metro style Woolworths supermarket, meaning Randwick provides the closest large supermarkets.

Other small centres

Small village centres include Matraville, Malabar, Maroubra Bay, Maroubra South, The Spot, Clovelly and Frenchmans Road. Matraville (Peninsula Village) and Maroubra South (Maroubra South Village) both accommodate Woolworths anchored convenience based shopping centres, while Malabar, Little Bay and Clovelly accommodate small independent foodstores.

Furthermore, UNSW accommodates a small IGA foodstore, as well as a range of cafes and takeaway outlets, although these facilities are primarily orientated towards the student and university worker markets.

Surrounding LGAs

Beyond Randwick LGA

There are a number of higher order centres located beyond the Randwick LGA, including major centres at Bondi Junction and Eastgardens, which both accommodate regional shopping centres with department stores, discount department stores and supermarkets and a significant provision of specialty stores and entertainment uses (e.g. cinemas).

Bondi Junction contains a sizeable office market, major high density residential apartment buildings and is a significant transport interchange – serviced by the Eastern suburbs rail line. Eastgardens provides little more than the stand-alone Westfield Eastgardens shopping centre.

The Sydney CBD fringe (inc. Surry Hills) contains a vibrant mix of retail/dining strips (e.g. Crown Street), convenience retail shopping and a sizeable and growing office market – with a good provision of creative industries, design/architecture type businesses.

The most relevant convenient orientated centres located beyond the Randwick LGA include Zetland (i.e. East Village) and the Eastlakes Shopping Centre which contains Woolworths and Aldi supermarkets.

Surrounding centres hierarchy – key metrics

Surrounding retail hierarchy								
Suburb/Centre	Residential population		Worker population		Retail GLA (sq.m)	Notable tenants/assets	Strengths	Weaknesses
	2015	2026	2015	2026				
<u>Randwick LGA</u>								
Kensington*	7,603	9,572	1,527	1,707	5,000	Peter's of Kensington	Undergoing transformation (i.e. increasing res. density)	Relatively dispersed retail offer
Kingsford*	13,558	15,235	2,762	3,120	10,000	IGA	Significant catered food offer. Popular with students	Little differentiation in offer
Randwick Junction*	7,880	10,221	12,189	14,383	23,000	Coles, Woolworths	Strong convenience offer and strong worker market	Little scope to expand retail offer
Coogee**	12,830	13,223	2,190	2,448	10,000	Woolworths	Popular tourist destination. Vibrant F&B	Accessibility/parking.
Maroubra**	8,810	10,647	3,150	3,498	17,500	Coles, Aldi	Pacific Square (incl. largest smkt in Randwick LGA)	Modest retail strip
<u>Other LGAs**</u>								
Zetland/East Village	5,944	12,502	1,710	1,850	10,000	Coles	Significant population growth. Excellent parking.	Accessibility. Limited worker market
Green Square	Up to 61,000 res. and 21,000 workers		p. 16,000-17,000			Supermarket (p)	Significant future population growth	Constrained. Limited parking expected
Eastgardens	3,240	5,534	4,320	5,218	72,700	Myer, Big W, Kmart, Target, Coles, Woolworths, Aldi	Critical mass. Parking.	Limited immediate catchment
Bondi Junction	12,390	13,886	14,610	16,762	130,000	David Jones, Myer, Target, Kmart, Coles (2), Woolworths, Aldi	Leading regional centre. Parking.	Congestion and accessibility
Moore Park/Ent. Quarter	2,410	2,798	2,900	3,226	5,500	Strike Bowling, Hoyts Cinemas	Popular entertainment precinct. Broad catchment.	Limited immediate catchment
*Based off defined catcmnts in Section 2								
**Catchment defined as a 500m radius								
Source: ABS; MacroPlan Dimasi								

Section 4 – Case studies

Case studies overview

Light rail/trams support good urban outcomes and inner-ring local centres should support density...

We have prepared a set of case studies that cover a range of precincts/locations with varying degrees of public transport integration/infrastructure. These examples include:

- **A review of the Gold Coast light rail system (i.e. G:link)** – which is the only recent example in Australia of a new light rail system being developed in an established urban environment.
- **International examples of new light rail systems in established urban environments** – including Croydon (UK); Portland (US) and Nantes (France).
- **Examples of local centres on the Melbourne tram network** – from which we have drawn inspiration around mix, scale, integration with stops/stations.
- **Examples of specific mixed-use/high-density developments** – that we consider to be reference points to the type of development projects that should be encouraged in some of the centres.
- **Examples of comparable inner-ring local centres** – that we consider provide a good reference point in relation to scale, mix and density.
- **Examples of uses surrounding major hospitals/health precincts** – to provide some insight into the scale, mix of ancillary uses around major hospitals. (Note: TBC in final draft)



Case study examples: Gold Coast – G:Link

Catalyst for major redevelopment and significant uplift in allowable densities near corridor and key stations...

The Gold Coast light rail network, G:Link, has been in operation since mid 2014 and connects the Gold Coast health and knowledge precinct (Griffith University and Gold Coast University Hospital) in the north to Broadbeach in the south (terminating at Pacific Fair). The network was added to transport network that was heavily congested and relatively poorly serviced by bus infrastructure.

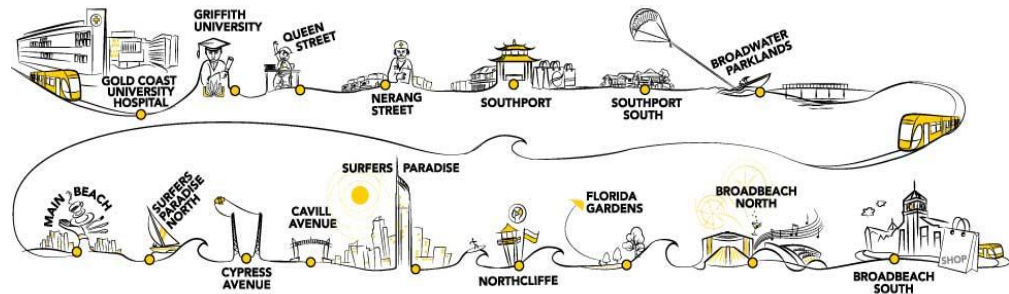
It is reported that the G:Link network accommodated over 6.1 million trips in its first year of operation, reflecting around 18,200 trips per day, which was about 7% above pre-development estimates of 5.7 million trips in its first year.

In the new Gold Coast City Plan, which commenced in February 2015, a number of planning provisions were allowed for in the areas surrounding G:Link stations and generally much greater density is encouraged along the entire corridor. These planning provisions were reactive to the light rail project.

In particular, the City Plan identified a **light rail urban renewal area**, which provides for a mix of small scale retail and commercial uses, as well as a mix of types and intensity of housing, including medium-rise and high-rise. The primary focus areas include Southport, Surfers Paradise and Broadbeach, and these areas allow for the highest concentration of activity, commerce and intensity. Indeed, Southport CBD was identified as a priority development area (PDA) – which essentially enables expedited development.

A number of major developments have been completed or are underway along the G:Link route, including the Gold Coast University Hospital and a major the redevelopment of Pacific Fair (which relies heavily on the tourist market with most accommodation in Surfers Paradise), and several projects in the Southport CBD. While some of these developments would likely have occurred without G:Link they have been planned for in the context of the new G:Link and leverage from/connect with nearby stations.

A key observation during the construction of the light rail was that many street based/strip retailers suffered a significant decline in sales turnover during the construction of the project, particular those around Surfers Paradise. Since the opening these street/strip based precincts have rebounded. Some owners upgraded their assets around this time or just after opening (e.g. Chevron Renaissance) and new tenants emerged (e.g. Cotton on Mega 1,000 sq.m flagship store in Cavill Mall).



Case study examples: International examples

Croydon Tramlink, London, UK

A retrospective report was prepared that examined the impacts of the Croydon Tramlink, which opened in 2000, titled: *"Economic and regeneration impacts of Croydon Tramlink, J. Siraut – Urban Transport X (2004)*. The following key points are noted:

- Tramlink carried some 16 million passengers a year, of which around 20% was transferred from cars.
- Property prices in areas served by the tram rose by 4% more than those not served by the tram, both during construction and after opening.
- There was an observed increase in young professionals living in the area.
- The retail sector was negatively impacted during the construction period, although once complete Tramlink patronage helped drive footfall during major retail redevelopments which occurred post-Tramlink.
- The introduction of light rail has not resulted in a drift of shoppers/business to Croydon at the expense of other centres along the route (i.e. a net benefit).



Kensington, Kingsford & Randwick Junction
Economic impact of light rail: Stage 1 report
March 2016

Portland Streetcar, Portland (Oregon) USA

A retrospective report was prepared titled: *"Portland streetcar development oriented transit – Office of Transportation and Portland Streetcar, Inc (2008)"*. The original streetcar alignment was identified in 1997, and the streetcar has been operational from 2001. Between 1997 and 2008, the following has occurred within two blocks of the alignment:

- The streetcar carried around 4.6 million passengers in the year 2014/15.
- \$3.5 billion USD has been invested within two blocks of the streetcar alignment.
- Redevelopment of the historic and abandoned Blitz Weinhard Brewery (Near NW 11TH and Couch) – Portland's largest single development involving commercial, residential and retail uses.
- 10,212 new housing units and 500,000 sq.m of office, institutional, retail and hotel development has occurred.
- 55% of all CBD developments since 1997 have occurred within 1 block of the streetcar. Prior to 1997, land located within 1 block of the alignment captured only 19% of development.
- Properties located closest to the streetcar line tend to maximise zoned density potential better than properties situated far away.
- Developers are building new residential buildings with significantly lower parking ratios than anywhere else in the region.



DRAFT

Nantes Tramway, Nantes, France

Several retrospective reports have been prepared including :

- *Integrated public transport, Nantes, France (2013)*
- *Urban transport development: a complex issue (2005)*

Nantes was the first French city to reintroduce a modern tramway in 1985 and now has the longest tramway in France. The following key points are noted:

- The total ridership along the Tramway accounts for 57% of the total 114 million annual trips made by public transport.
- Tramway stops are colocated with high quality express bus lines and park & ride areas, which creates effective transport integration across the city.
- About 25% of all new offices built in Nantes to 2005 were located along the rail line.
- Resulted in an increase in city centre shoppers of 10%.
- Houses around tramway stops in Nantes are slightly more expensive than other houses in Nantes (i.e. Accessibility to the city centre via public transport is said to have a non-negligible role in house prices within Nantes).



Case study examples: Melbourne tram network

Swan Street, Richmond (Vic)

- Richmond rail station (ranked 11th of 207 stations in regards to station entries) is located at the western end of Swan Street, with tram route 70 (Docklands-Wattle Grove) running along Swan Street (5.4 million trips annually).
- Epworth Hospital is located 1.1 km north of Richmond rail station. Swan Street is also located proximate to sporting and entertainment facilities including Melbourne Cricket Ground, AMII Park, Rod Laver and Hisense Arenas.
- Recently opened 3,500 sq.m Coles supermarket at Richmond Icon is part of mixed use development including around 100 residential townhouses and apartments as well as offices in the heritage listed Dimmey's building.
- The retail strip comprises mainly cafes, restaurants, fast food/take-away outlets as well as convenience and general retail.
- Non-retail uses include a TAB, car showrooms (Audi Centre and Zagame Automotive – Ferrari/Maserati, Fiat/Alfa Romeo and Skoda) and building suppliers and showrooms.



Bridge Road, Richmond (Vic)

- Two busy tram lines route 48 (Docklands-North Balwyn) and 75 (Docklands-Vermont South) pass through centre/precinct, with 7.5 million annual trips and 9.3 million trips respectively.
- Epworth Hospital and supporting medical facilities are located at the western end of Bridge Road.
- The retail speciality mix is predominantly comprised of cafes, restaurants, fast food/take-away outlets, apparel and furniture/ homewares, as well as some general and convenience retail.
- Richmond Plaza is anchored by a 3,500 sq.m GLA Coles supermarket, specialty retail, offices and a gym has been purchased by Coles Property Development Group. The redevelopment will include a new full-line supermarket, specialties, cafes, offices, gym, a childcare centre and around 300 apartments.
- Non-retail uses include banks, real estate agents, post office. Some commercial and light industrial uses.
- Accommodation facilities including the Amora Riverwalk Hotel (111 rooms) at the eastern end of Bridge Road, and Adara Richmond (76 apartments) near the hospital.



Glenferrie Roads, Hawthorn (Vic)

- Glenferrie rail station (ranked 10th of 207 stations) is located just north of Burwood Road, with tram route 16 (Melbourne University-Kew via St Kilda Beach) also running along Glenferrie Road (8.2m trips annually).
- Less than 500 metres from Swinburne University, with around 32,000 local and international students (2014).
- The retail strip predominantly includes cafes, restaurants and fast food/take-away outlets, as well as convenience, general and some apparel retail. There is also a 1,600 sq.m Coles supermarket and a 1,930 sq.m Woolworths supermarket (inc. BWS liquor) located in the precinct.
- The strips includes accommodation (Quest Hawthorn with 119 apartments), and offices at the north and south ends.
- Non-retail uses include Australia Post, travel agents, banks, a medical centre and Lido Cinemas (8 screens), as well as Hawthorn Community Precinct and Library.
- High density residential is located near the corner of Glenferrie and Burwood Roads (closest to the university), with a few mixed-use developments along the strip.



Case study examples: specific developments

Peninsula Village, Matraville

- Mixed use development in Matraville featuring 3,800 sq.m of ground floor retail, including a 3,000 sq.m Woolworths supermarket.
- Opened/developed in 2014 and forms the foundation for future rejuvenation of the Matraville strip.
- Retail specialty stores include a pharmacy, bottle shop, café, restaurant and massage/beauty clinic.
- The development also accommodates 111 residential apartments across six levels.
- Is the only enclosed, consolidated shopping centre offer within the Matraville retail strip, providing an important anchor supporting other retailers in the strip.
- Around 125 underground carparking spaces provided.
- Good/active street frontage, encourages pedestrian accessibility.



Pacific Square, Maroubra

- Mixed use development in the Maroubra Town Centre, which accommodates 13,700 sq.m of gross lettable area (GLA) including around 10,400 sq.m of retail floorspace.
- The centre is anchored by a large Coles supermarket and a medium sized Aldi supermarket.
- Very strong convenience offer, including fresh food and services, as well as small apparel and leisure offer.
- The development accommodates a total of 557 residential units, as well as commercial office space.
- Key focal point within the Maroubra Town Centre.
- Basement parking for 620 vehicles.
- Public square, surrounded by substantial casual dining offer, enhances the interface with Anzac Parade.
- Major northbound bus stop located adjacent to public square.



East Village, Zetland

- Relatively new mixed use development in Zetland, accommodating around 10,000 sq.m of retail floorspace.
- The centre is anchored by a large 3,800 sq.m Coles supermarket, and includes a strong convenience orientated retail specialty offer. In particular the fresh food (butcher, baker, seafood, fruit & vege) and catered food (cafes, restaurant and bar) offer is very strong.
- Non-retail uses include the prominent Audi Centre and Virgin Active gymnasium, as well as a childcare centre, medical centre.
- The development accommodates 206 residential units
- Creates a point of difference through excellent design, relaxed spaces, and a functional/relevant retail offer.
- Modern design, with a mix of external, street facing tenancies and enclosed mall.
- Multi-level basement parking for 700 vehicles with Park Assist.



Case study examples: specific developments

Revesby Village Centre, Revesby

- The centre provides convenience retail facilities at ground level, medical facilities at level 1 and entertainment facilities at level 2.
- The ground floor accommodates a large, modern Coles supermarket, Liquorland, two food catering outlets, hairdressing and beauty salons, as well as a bank.
- The first floor accommodates a consolidated medical and allied health precinct, including a medical centre, physiotherapist, hearing centre, pathology clinic, chemist and psychologist.
- The second level includes an AMF bowling complex and children's entertainment centre.
- The centre is integrated with the existing Revesby Workers Club and represents an excel mixed-use development providing important local convenience services within a vibrant local centre, adjacent to a train station.



Central at Central Park, Chippendale

- Central shopping centre is a multi-level vertical mall, also known as "The Living Mall", near Central Station and opposite the University of Technology Sydney (UTS) campus within the Central Park urban renewal precinct.
- Central is anchored by a Woolworths of approximately 2,000 sq.m, includes 2 x mini-majors (Daiso and Glue), and contains a vibrant mix of national and independent retailers, restaurants, bars and food stalls.
- There are approximately 40 specialty stores in the centre, with around 65% of these food catering related tenancies.
- There is a medical centre, and some allied health uses on the lower ground level.
- The retail asset is located beneath the award-winning multi-storey 'green' residential tower which has won numerous design/green building awards.
- The retail asset is serviced by no dedicated car-parking.



Chatswood Interchange, Chatswood

- New retail/food asset that is fully integrated with Chatswood railway station and bus interchange.
- Development is anchored by a Woolworths supermarket (2,100 sq.m) on a middle level.
- The ground floor railway concourse features a range of takeaway food outlets, retail services, convenience retail and non-retail facilities – which leverage off the significant daily commuter movements.
- On the top level, The District, which is a large dining precinct/food court, accommodates around 15 restaurants and takeaway food outlets, with a strong Asian focus. Iconic tenants (e.g. Tim Ho Won) attract customers.
- Even in a highly competitive location, inc. Victoria Ave strip, Chatswood Chase, Westfield Chatswood etc, the precinct is generally popular – although some tenants appear to be much more popular than others.



Case study examples: Inner ring precincts

Gabba Central, Brisbane

- Mixed use development at the intersection of two major routes through Woolloongabba, adjacent to major bus interchange (noting Brisbane's bus system acts somewhat like trams/rail – with dedicated lanes).
- Development is located within 750 metres of a major private hospital and within 1.5 km of Griffith University Southbank campus (only a short-distance further to CBD which includes QUT campus).
- Ground floor retail offer includes a 2,500 sq.m Coles supermarket and a supporting convenience offer, including takeaway food, bottle shop, Asian supermarket and a bakery.
- Non-retail uses at the centre include Australia Post, a gymnasium and a pub.
- Dedicated car-parking at centre but good interface/active street frontage encourages pedestrian access.
- The development contains around 280 residential apartments, and also accommodates serviced apartments.



King St, Newtown

- The King Street precinct accommodates approximately 35,000 sq.m of retail floorspace and is one of the best-known retail strip precincts in Sydney.
- The retail strip contains 200 – 300 retail specialty stores, in particular cafes, restaurants and apparel boutiques, as well as a small scale general and convenience retail.
- A small convenience orientated retail asset called Newtown Central, which is anchored by a 1,000 sq.m Foodworks supermarket and contains a Fitness First gym is integrated with Newtown train station.
- King Street is a major bus route throughout the inner-western suburbs of Sydney, and is serviced by the Newtown train station, which records almost 14,000 daily passenger movements.
- The University of Sydney is situated to the northern end of King Street, and the Royal Prince Alfred (RPA) Hospital is located several hundred metres north.
- While King Street doesn't accommodate much significant high rise residential development, the immediate surrounding area is densely populated, with the region undergoing continual densification. In conjunction with significant daily workforce, student population and commuter activity, the King Street precinct is a vibrant and very active precinct most times of the day.



Crows Nest/St Leonards, Sydney

- Crows Nest and St Leonards accommodate a wide range of uses, including high density commercial/office space; low, medium and high density residential product; strip retail/transit oriented retail; and community facilities.
- Willoughby Road is the main road through Crows Nest, and accommodates an extensive retail offer, including cafes, restaurants, boutiques and convenience retail. A large Woolworths supermarket is currently being developed and there are plans for additional supermarket facilities in the short to medium term in the locality.
- The Pacific Highway (which is a major bus route through the lower north shore of Sydney), features some run-down/vacant retail space and low quality showroom retailers. This area, however, is undergoing massive urban renewal and with the new metro rail station recently announced, we expect significant increases in residential density and street level retail/commercial activation.
- St Leonards contains a major office precinct and a major train station/bus interchange, which is integrated with a very popular retail asset called St Leonards Forum.



Section 5 – Preliminary recommendations

Preliminary advice – Kensington

Opportunities / Strengths

- Already undergoing an organic transformation to higher density, with several recently completed multi-storey apartment developments and more than 190 apartments proposed or underway within the Kensington centre.
- Located within 12 – 15min from Central Station, close to CBD and proximate to UNSW and major parks. Highly desirable residential destination.
- Resident mix will include a skew towards working professionals (with jobs in CBD and jobs in Randwick) and students (attending UNSW) – generally younger demographic which can survive without cars.
- Constrained sites/lots is an issue for major retail development but much less so for residential development.
- Retail mix, which is tired/low quality could be revitalised through redevelopment of sites within local centre. Iconic tenant Peter's of Kensington provides an identity to the precinct.

Risks / Constraints / Issues

- Light rail is not expected to invoke a significant uplift in localised activity within the precinct, given the precinct is already well serviced by buses and is mainly a point of origin precinct (i.e. not a major job precinct). However, increased east-west bus movements via Todman Avenue could enhance localised potential.
- Lack of retail anchor tenants is an issue and is likely to remain an issue due to the lot depth issues on both sides, particularly the western side of Anzac Avenue. Ultimately means that precinct will struggle to attract much visitation from beyond its immediate catchment (excepting the iconic Peter's of Kensington).
- Under-developed nature of precinct means significant potential to absorb future residential dwelling growth, to meet dwelling targets.
- Loss of street car-parking will be an issue for retailers. Presently there are AM/PM clearways but a complete removal of street parking will affect retailers/businesses at all times of day (i.e. non-peak and weekends). Commuter activity will be generally around AM/PM peak.
- Unlikely to support any multi-storey commercial/office development (single use building) as such uses tend to cluster around existing nodes with critical mass (e.g. CBD, city fringe, Bondi Junction), near complementary businesses (e.g. business parks) or will go to new nodes (e.g. Green Square TC).

Recommendations

- Should accommodate medium/high density residential growth with some rejuvenated localised ground level retail/commercial development.
- Due to constraints in Randwick and lack of major employment critical mass we recommend the Kensington precinct becomes a key residential node that contributes to absorbing a good portion the future dwelling target for the Randwick LGA.
- Increased residential capacity will help to drive localised activity within the precinct to help support local businesses which will suffer from reduced visitation from car-based visitors during the day-time. Increased residential activity will also help to drive night-time activation.
- No overwhelming indication that additional commercial/business zoned land, in an aggregate sense, is required. If anything, a consolidation of retail/commercial sprawl could be considered. Although we recommend investigating potential for larger sites to enable supermarket/other anchors as part of mixed use developments.
- Todman Avenue and Carlton Street will be key point of origin stations. Ground level retail activation should be encouraged around these nodes to support local residents (i.e. small/medium supermarket, convenience retail/take-away food/dining). Key examples include Peninsula Plaza; Newtown Central; Richmond (Melbourne) examples.

Preliminary advice – Kingsford

Opportunities / Strengths

- Effectively just as accessible as Kensington, located within 15 min from Central Station, and proximate to UNSW. Highly desirable residential destination.
- Very popular residential location for UNSW students as well as nearby workers (at UNSW / Hospital precinct) and CBD workers.
- Critical mass of localised street level retail/dining and business/medical services. Vibrant/active precinct driven by student/staff population. UNSW has more than 53,000 student enrolments and a staff of around 7,000 workers.
- Resident mix expected to continue being skewed towards students (attending UNSW) and workers (with jobs nearby) professionals (with jobs in CBD and jobs in Randwick). Generally younger demographic which can survive without cars.
- Already contains many high density residential apartment blocks and student housing. Excellent location for additional student housing development – if sites permit.
- Excellent centralised location to accommodate full-scale supermarket facilities/retail anchors. If not possible, small/medium supermarket/convenience opportunities around key light rail stops.
- Potential for small scale/boutique office space for entrepreneurial firms/creative industries businesses.

Risks / Constraints / Issues

- Light rail is expected to result in an uplift in localised activity within the precinct – particularly given this precinct contains a key terminus/interchange with bus services.
- Already contains high density apartment developments, some of which are aged/dated. Limits future potential – to some extent.
- Extensive street/strip retail environment with multiple ownership. Site amalgamation appears more difficult than in Kensington precinct where sites/buildings are more dispersed/low density.
- Loss of street car-parking will be an issue for retailers. Presently there are AM/PM clearways but a complete removal of street parking will affect retailers/businesses at all times of day (i.e. non-peak and weekends).
- Unlikely to support any multi-storey commercial/office development (single use building) as such uses tend to cluster around existing nodes (e.g. CBD, city fringe, Bondi Junction) or will go to new nodes (e.g. Green Square TC). Little evidence of major multi-storey commercial office space (single use building) being taken near University campuses generally such product exists because University happens to be near major CBDs or business parks. Although there is a shift towards universities taking office space in CBDs/office precincts e.g. UWS has taken 20,000 sq.m of office space for a new vertical campus in the Parramatta CBD.

Recommendations

- Will continue to play important role in providing accommodation and local retail/business/community services for UNSW students and staff.
- Kensington will not be able to provide all new dwelling capacity and Randwick is constrained. Similar to Kensington, we support further greater residential densification within the centre (with ground level activation). This would be consistent with the shift in consumer preferences towards multi-storey apartment living in the inner/middle ring suburbs, particularly where there is enhanced public transport infrastructure and is likely to be direction that NSW DPE intends for this centre – given the major investment.
- Student accommodation facilities (which tend to provide little or no car-parking) should be encouraged to add diversity to precinct and to maximise the benefits of light rail.
- High density redevelopment may allow some parts of the centre to rejuvenate and new/modern retail/commercial services to be provided at ground level.
- Large supermarket facilities should be encouraged (as part of mixed-use developments), given the lack of such facilities north of Maroubra and west of Randwick. New dining/F&B concepts should be supported/encouraged (e.g. Asian focussed F&B concept/s at Chatswood and Central Park). Asian focus is part of the centre's character, and this should generally be preserved.
- While the planning scheme currently allows multi-level podium development, this format is not highly prevalent in the centre (i.e. only ground level non-residential). We consider a reduction in car parking requirements for non-residential space could potentially encourage greater non-residential development as part of mixed-use developments, as well as potentially single use commercial buildings..
- Braddon in inner-Canberra is another good example where residential, commercial, retail outcomes are achieved.

Preliminary advice – Randwick

Opportunities / Strengths

- Already a vibrant, functional retail/commercial precinct with a diverse mix of convenience retail (inc. supermarkets), dining/take-away shops, ancillary medical services, allied health, localised commercial/business services.
- Only activity centre in northern Randwick LGA to contain large supermarket and enclosed shopping centres. Royal Randwick and Randwick Plaza are major retail anchors which drive activity through the day and through the weekend and serve a sub-regional catchment.
- Key employment anchors and regional attractors located adjacent to town centre, i.e. Hospital precinct; Randwick Council; UNSW; and several schools nearby.
- Opportunity to enhance the medical/health oriented offer around the POW health precinct. Additional medical consulting facilities, hotels/temporary accommodation, staff/student accommodation facilities would be appropriate.

Risks / Constraints / Issues

- Some heritage issues and height constraints. Centre is already at/close to its theoretical maximum capacity of floorspace.
- Loss of street carparking will be an issue for street oriented retailers. Presently there are AM/PM clearways but a complete removal of street parking will affect retailers/businesses at all times of day (i.e. non-peak and weekends). This is less of an issue for the enclosed shopping centres provide their own dedicated car-parking.
- There is limited opportunity for new medical related businesses and other commercial businesses to establish within the existing Local Centre zone. Considerable observed demand for ancillary medical suites/premises being met by non-preferred buildings (i.e. residential dwellings within and outside the zoned B2 – Local Centre).
- Limited short-term/temporary accommodation facilities in immediate vicinity of POW hospital. There are no facilities with more than 60 rooms within the area – Medina Classic at Randwick and stock is mainly small/independent operators. The closest large facilities are located at Coogee.
- Congestion is still expected to be a major issue at peak times around Belmore Road and Avoca Street

Recommendations

- Randwick Local Centre should be considered for expansion to enable multiplier benefits to be realised from two major economic activity generators in the LGA (i.e. UNSW/Hospital).
- The area south and west of Belmore Road with frontage to High Street appears to be the most logical area for extension to the Local Centre zoning, given the light rail passes by this area.
- An expanded area would enable the development of purpose built medical premises with dedicated car-parking, potentially integrated with temp. accommodation and student/staff housing, or standard residential. New retail opportunities would be presented at ground level. Mixed-use, podium development could support community uses (e.g. childcare) on upper –levels.
- It is possible that new medical research facilities (with linkages to UNSW and hospital precinct) could be accommodated within this area, particularly if UNSW continues to acquire sites in this area.
- Moderate scale mixed-use development is recommended for Belmore Road to preserve character (i.e. the existing Local Centre area should not become a high-density residential precinct). Possibility that higher density residential development could be achieved in newly identified areas.