



NSW Land and Housing Corporation Project

776, 792-794 Botany Road and 33-37 Henry Kendall Crescent, Mascot

Commercial market justification



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EXECUTIVE SUMMARY

HillPDA was commissioned by Land and Housing Corporation (LAHC) to examine the extent to which retail uses at ground level across both frontages of the subject site would be commercially viable from a market perspective.

In 2017, LAHC prepared a planning proposal for the site located at 792-794 Botany Road and Henry Kendall Crescent, Mascot. In 2018, Bayside Council provided recommendations, to which LAHC has revised the planning proposal to reflect the comments.

Since 2018, SJB Architects has updated the scheme to reflect a residential development that plans to deliver an eight-storey residential building with a mix of private and social residential dwellings. The surrounding environment is predominately residential, with fractured non-residential land uses along Botany Road. The proposed development envisages a setback that allows a range of large trees to be planted to create a buffer from the main road, allowing the frontage to be explored and enjoyed by pedestrians. This development would improve this section of Botany Road, which currently is rundown.

The ground floor commercial or retail uses are unlikely to be feasible in this location and the risk of long-term vacancies and property neglect are high. As such residential only development represents a higher and better use.

This Study has acknowledged that the planning controls have identified an active street frontage along the entire Botany Road, frontage of the subject site. The subject site may be able to accommodate a small level of activation at ground level along Botany Road with such uses as a cafe, a small convenience store and/or a hairdresser. However, the subject site does not offer the attributes where activation of the entire Botany Road, frontage would be commercially viable. A large retail anchor, such as a supermarket, could provide a destination shopping role, but is unlikely to be supported due its distance from the existing and planned retail centres in the locality. An anchor tenant at the subject site would have adverse economic impacts by drawing trade from the existing and planned retail centres at Mascot Station and Botany Road which may result in social detriment.

Based on the above, the subject site cannot accommodate a large specialty anchor, the alternative is a range of specialty stores. In our view such uses along both Botany Road and Henry Street would not be feasible because of:

- A lack of demand in the locality for such uses as demonstrated by the prevalence of smaller ground-floor retail tenancies along Botany Road and other strip retail in the local area such as Gardeners Road, Mascot.
- a lack of convenience parking and the inability to stop on Botany Road given the 'no 'stopping' zones and bus lanes / clearways immediately adjacent to the subject site and across the road
- Low levels of footfall pass the subject site which reflects the particularities of it as a traffic peninsula at the confluence of two major vehicular routes which adversely impact upon pedestrian amenity
- Competition from established centres in the locality which can offer more desirable attributes to potential operators such as proximity to a rail node, a retail anchor and/or car parking and
- The sale value for commercial/retail is likely to be lower than residential and therefore would impact and reduce LAHC funding ability to provide social housing in the LGA.

Essentially the subject site comprises a fringe location that does not present a commercially viable site for the uses which Council envisage, by virtue of its characteristics and context. Market demand for such uses is limited and the enforcement of the proposed LEP criteria would provide little contribution towards meeting community needs locally. The provision of residential uses at ground-level, which constitute the highest and best use of the land, would likely yield a greater positive impact because such uses would avoid ground-floor tenancies being vacant for extended periods, which adversely impacts the visual environment in this locality. It would further

result in a greater population in the locality to benefit existing and planned businesses in the existing centres of Mascot Village and Mascot Botany Road.

1.0 INTRODUCTION

HillPDA was engaged to undertake a Commercial Market Assessment, hereafter referred to as the Study, related to a site in Mascot. The purpose of the Study is to explore the extent to which retail or commercial uses at ground level would be viable in this location.

1.1 The subject site

The site, which is the subject of this Study, hence referred to as the subject site, is located at 776, 792-794 Botany Road and 33-37 Henry Street, Mascot. The subject site is situated on the corner of Botany Road and Henry Street. A mix of land uses surround the site, such as low-density residential uses to the north and west, two storey commercial buildings, an electrical substation, two storey terraces, and a Mascot Police Station adjacent to the site. It is located opposite Mascot Park and is approximately 1km walking distance from Mascot Railway Station and the Town Centre to the west. The Mascot local centre is also located 1km walking distance to the south of the site.

The land is currently occupied by five 2-storey buildings occupied for social housing and associated at grade car parking. The landowner is NSW Land and Housing Corporation. The site also contains the Mascot Ambulance Station, a two-story building fronting Botany Road to the north of the social housing that NSW Health owns.

The extent of the subject site is depicted in Figure 1 below.

Figure 2: Existing property improvements



Source: HillPDA 2021

The subject site is zoned for B2 Local Centre in the Bayside Council Local Environmental Plan (LEP) 2021.

1.2 The purpose of the study

The purpose of this Study is to examine the extent to which commercial and/ or retail uses at ground level on Botany Road would be commercially viable from a market perspective. The conclusion is that the ground floor commercial or retail uses are unlikely to be viable in this location and the risks of long-term vacancies and property neglect are high. As such, the retention of the subject site for residential uses or allow greater flexibility to the ground floor uses, which may include residential to at least one of the frontages, represents a higher and better use.

1.3 Surrounding land uses

The subject site adjoins a residential area to the north. To the east is the Mascot Police Station, some old-style two storey commercial buildings and residential cottages and terraces. Coward Street to the south of the subject site comprises a busy vehicular road that form physical barriers. To the south of Coward Street is Mascot Park. To the west of the subject site are low-density residential dwellings.

The surrounding area's character is predominantly residential with some old-style commercial, and industrial land uses along Botany Road.

Figure 3: Bayside Council LEP Map



Source: Bayside Council Local Environmental Plan (2021)

1.4 Out of centre location

The subject site is half a kilometre to the north of Botany Local Centre and 800m east of Mascot Station and a kilometre from the new retail centre at Mascot Station, including the Woolworths supermarket. The subject site has limited ability to provide a retail anchor or attract any high-profile tenants given its out-of-centre" location. Retailers will have a stronger preference to locate at the train station or in the prime retail main street area half a kilometre to the south. Moreover, additional retail on the subject site would merely duplicate retail services in the existing and future designated centres and hence undermine the viability of competing stores in the established centres.

1.5 Transportation and access

The subject site is located at Botany Road, Coward Street, and Henry Kendall Crescent. This location has excellent vehicular access to the local and broader area. Both Henry Kendall Crescent and Coward Street connect to Botany Road, a major arterial road within the locality. Bus routes operating within the vicinity of the subject site and the Mascot Train Station on Bourke Street¹ approximately 1 km walking distance from the site.

For commercial purposes the subject site is immediately adversely impacted by access and parking constraints. On street parking is limited by 'no 'stopping' on Botany Road immediately adjacent to the site, 'no 'stopping' for eight hours during the day on Coward Street and bus lane / clearway across Botany Road. Any commercial use on the subject site would rely on onsite parking. Right turning movements would also be problematic. Therefore, the subject site lacks the necessary attributes to provide convenient services and would be competitively disadvantaged.

2.0 THE PROPOSED DEVELOPMENT

This Chapter explores the development proposed for the subject site and its potential yield.

The development comprises of the following:

Table 1: Proposed development

Built form	A residential development over 3 to 8 storeys
Floor space ratio	2:1
Height	28m
Potential yield	152 dwellings
Key Elements identified by SJB Architects	<p>Based on the strategic merit identified by Council, this proposes additional height to achieve a better design outcome for the existing FSR control of 2:1.</p> <p>The design ensures the protection of the trees which will minimise the impact of the overall scale from street level. On Henry Kendall Crescent, an additional 14m upper-level setback has been incorporated into the building fronting the corner of Coward Street, reducing the impact of visual bulk on Henry Kendall Crescent.</p> <p>The proposed building further north establishes a three-storey built form with a ground level setback that parallels the neighbouring development.</p>



3.0 COMPETITIVE CENTRES

This Chapter undertakes an analysis of the existing and planned commercial centres hierarchy in the area around the subject site. This is important in understanding the competitive context of any retail floorspace on the subject site.

3.1 Centres hierarchy

The commercial centres hierarchy in the area around the subject site is shown in the table below. The centres identified are explored on an individual basis subsequently for the remainder of this Chapter.

Table 2: Commercial Centres Hierarchy

Centre Typology	Characteristics	Centres
Town centre	Town Centres have one or two supermarkets, community facilities, medical centre, schools, etc. Usually, a residential origin than an employment destination.	Eastlakes
Village	A small strip of shops and adjacent residential area within a 5-to-10-minute walk contains a small supermarket, hairdresser, take-away food shops. ' Woolworths's supermarket centre and specialty stores near the Mascot station	Mascot Mascot Station
Small village	A small strip of shops and adjacent residential area within a 5-to-10-minute walk.	Botany Road, Rosebery Gardeners Road, Rosebery

Source: HillPDA research

3.2 Eastlakes town centre

BKK Eastlakes Shopping Centre dates from the 1960's and provides 10,200sqm² leasable retail floorspace. It is a double-supermarket shopping centre some 1.5km east of the subject site and is anchored by a full-line Woolworths (3,132sqm) and an ALDI Foodstore (1,389sqm)³. The residual floorspace comprises 53 specialities⁴.

Additional retail floorspace is provided in a freestanding strip of retail units north of the Eastlakes Shopping Centre, fronting Gardeners Road's southern side. This provides a further 1,500sqm of retail floorspace⁵. In total ' Eastlake's centre provides approximately 12,000sqm GLA of retail floorspace.

3.3 Mascot village

Mascot is defined as a Village Centre and is situated approximately 0.5km south of the subject site. Retail provision is focused on Botany Road and the centre contains an IGA supermarket of some 700sqm GFA⁶ in addition to strip retail serving localised shopping needs. It contains several bank branches, a range of personal services, take-away and fast-food outlets, cafes, comparison goods stores and convenience stores (liquor stores, newsagencies, butchers, bakeries etc.). Anecdotally the centre appears to be trading satisfactorily.

² Source: Property Council of Australia Shopping Centre Directory

³ Source: Property Council of Australia Shopping Centre Directory

⁴ Source: Part 3A Request for Director General's Environmental Assessment Requirements for Eastlakes Shopping Centre, JBA Planning 18th February 2011

⁵ Source: Near map

⁶ Source: Near map

3.4 Mascot station

Mascot Station, Small Village Centre, is located around 800m⁷ west of the subject site. The centre includes a recently developed shopping centre of 5,000sqm GLAR with a full line Woolworths supermarket and 17 specialty stores.

Mascot Station is as a transit-orientated activity centre serving the surrounding residential population and local workers.

3.5 Other centres

3.5.1 Botany Road, Rosebery

This Small Village Centre at the intersection of Gardeners Road and Botany Road comprises services and some limited convenience and comparison goods retail stores for a localised catchment.

3.5.2 Gardeners Road, Rosebery

Gardeners Road, Rosebery Small Village Centre is located one kilometre northeast of the subject site. Retail provision in this centre is located on the southern side of Gardeners Road. The centre provides a small convenience offer including butcheries, bakeries, and a fruit market. It also contains a small Woolworths convenience store of 210sqm⁸ located in a Caltex petrol filling station.

3.5.3 Alexandria Homemaker Centre

In addition to the centres above, the Alexandria Homemaker Centre is situated at 49-59 O'Riordan Street some 1.2km north of the subject site. This comprises 22,000sqm of bulky goods floorspace anchored by The Good Guys (3,490sqm), Taste Living (3,130sqm) Oz Design Furniture (2,250sqm), Bing Lee (1,980sqm), Brescia Furniture (1,500sqm) and Sydney's Baby Kingdom (1,170sqm)⁹. Other bulky goods floorspace is in the vicinity along 'O'Riordan Street, including Harvey Norman, My Baby Warehouse, Alexandria Officeworks and Domayne Alexandria.

3.6 Centre market insights

The subject site is not identified as an existing centre, is located within the trade areas of several existing centres and within 500m to 1km walking distance of two centres (Mascot Station and Botany Rd, Rosebery). Mascot Station is anchored by large or major retailers such as supermarkets and benefits from being adjacent to a major rail node (Mascot Station) or other major attractors. There is no major attractor on the subject site or in the surrounding area which would attract people to it and offer a competitive edge over other retail centres or outlets locally.

⁷ Source: Google Maps

⁸ Source: Near map

⁹ Source: Property Council of Australia NSW/ ACT Shopping Centre Directory 2014/15

4.0 SUCCESSFUL COMMERCIAL LOCATION REQUIREMENTS

Based on our industry experience in advising on commercial and shopfront locations over the last 30 years, we consider the determining factors or attributes required for successful ground floor shop front commercial premises to include the following:

- Provision of anchor(s)
- Public Transport
- Pedestrian traffic
- Convenience and Parking
- Competing facilities
- Proximity to expenditure sources; and
- Commercial office potential.

At this point it should be recognised that not all successful centres have all the above attributes. For example, there are some well performing centres which have poor levels of public transport (e.g., St Ives). But the mix of strong attributes more than outweighs that one deficiency. Other centres (e.g., Potts Point) have poor provision of car parking but are successful due to high levels of public transport, retail mix, anchors, and high residential densities in proximity. So, if a centre is deficient in one or two of the above attributes it can still succeed. However, where a location has very few strong attributes then commercial success cannot be expected.

Each of these attributes will now be explored in the context of the subject site to determine the potential success of this location for commercial and retail uses.

4.1 Provision of anchor(s)

Successful retail destinations require a main anchor or anchors. The nature of these anchors varies depending upon location and scale of a centre but can include:

- Full line supermarket
- Department or Discount Department Store
- Niche retail offering such as an eat-street theme, high end, or alternative fashion specialty retail
- The provision of civic services such as a school, library, medical centre, or Council office and/or
- A tourist attractor (e.g., Bondi Beach)

The essential role of main anchors is to attract shoppers into an area. All speciality retailers benefit from the nexus relationship with the anchor(s). Without a key anchor to attract trade, commercial centres can struggle.

The subject site has limited ability to provide a retail anchor given its out-of-centre location, with any anchor tenants likely to locate at the designated local centre.

It has limited ability to provide a niche retail offer such as an eat-street hub or high-end fashion focus due to the limited size of the subject site and the uninviting pedestrian environment that prevails (discussed later). Successful specialty hubs require a high number of specialty retailers of all types to be provided which would not be possible on the subject site.

There is currently a stronger, more easily accessible retail offer provided adjacent to Mascot Station to cater for the residents and commuters. This location would also be more suitable location for any future retail and commercial tenancies as it would benefit from passing trade and ancillary uses.

Whilst the subject site would benefit from users of Mascot Park, this would not generate sufficient trade particularly when the development will be competing with a significantly stronger retail offer located less than 400m from Mascot Park along Botany Road.

Lastly, if an anchor tenant, such as a supermarket, was proposed on the subject site then the impacts of it on the retail hierarchy and on retail centres would need to be considered. Such a proposal may not be supported by Council due to adverse economic impacts.

4.2 Public transport

Like major retail anchors, major transport nodes are attractors of people and lead to a high frequency of pedestrian movements in the local area which supports commercial viability. This is reflected in the distribution of commercial centres across Sydney such as Newtown and the Green Square Centre which are often located on major transport nodes. The presence of a transport node also allows shoppers and workers to easily access commercial provision.

The subject site is not located adjacent to any major transport nodes with Mascot rail station being 800m to the west and separated by Botany Road four lane way road which is a pedestrian unfriendly barrier to movement. The area is serviced by buses but this adjacent to the site and would not create a high level of foot fall. We are of the opinion that any retail facilities on the subject site cannot rely on public transport to derive any trade thereby undermining commercial viability.

The subject site does not offer any other attractors of people. It has no tourist or quasi-tourist role (such as Bondi Beach). On this basis, we believe that the subject site represents limited potential to benefit from any attractors in the immediate locality thereby undermining commercial viability.

4.3 Pedestrian traffic

A high volume of footfall means there is a high level of passing trade from which these businesses can capture expenditure. High footfall is also indicative of convenience, with more people likely to shop at a given location if they walk through it, or past it, on a frequent basis.

The subject site is not well connected to surrounding areas and represents an intimidating environment for pedestrians. Botany Road is a pedestrian-unfriendly barrier on the western boundary of the subject site. Pedestrian connectivity is therefore highly constrained. The market potential for commercial uses on the subject site would be restricted as a result.

The subject site would benefit from additional footfall resulting from the development's residential component (which will include over 152 units). However, 304 new residents are insufficient to support the viability of ground floor retail along both Botany Road, Coward Road and Henry Kendall Crescent, Mascot

4.4 Convenience and parking

The nature of vehicular movement within and around a locality can support or adversely impact commercial viability. Commercial retail facilities rely on vehicular accessibility and the convenience of parking to attract trade. The presence of traffic clearways impedes the ability of customers to conveniently park and access shopping facilities and therefore prejudices the vitality and viability of strip shop front premises. Coward Road is subject to clearway restrictions of 6am to 7am Monday to Friday on both sides of the street and 9am to 6pm Saturday to Sunday. Botany Road is a four-lane arterial road.

The high vacancies and poor performance of shop front premises along main roads such as Parramatta Road and Canterbury Road which are subjected to clearways is testimony of these impacts.

There is the option of providing on-site parking to serve the retail provision at the subject site. However, there are challenges with both options, described as follows:

- It requires parking control management
- There is limited on-street car parking which will limit the number of retail customers, in turn affecting a business's viability and turnover.
- On-site car parking would not be visible to passing traffic which is a major deterrent for the success of the retail provision. The on-site car-parking would either be located behind the retail offer and, not visible or in basement levels undermining convenience and increasing costs.

4.5 Competing facilities

The nature, size, role, and function of existing and planned/ proposed commercial centres within an area will have implications for potential new commercial operations. This is because the potential market share, offer, and ultimately the success of such businesses will depend upon the amount of competition it will have and its strength.

The subject site falls within the planned Mascot Station Town Centre. Despite this the subject site is a 1km walking distance from the retail offer adjacent to the train station. Mascot centre is anchored by a major supermarket and stronger provision of retail as well as benefiting from being adjacent to a major railway node and as such benefiting from the commuter market. These facilities are better located to meet the needs of residents and ensure the viability of the retail floor space compared to the subject site.

For the reasons previously mentioned above, the subject site would struggle to attract a main retail anchor and will be subject to strong competition from nearby centres. The commercial potential of the subject site will be reduced as a result. It would need to provide a retail offer which is strong enough to compete with these larger centres or which is substantially differentiated from that offer to be successful. This is likely to be challenging in the context of the modest size of the subject site, the lack of a major retail anchor or transport node, low pedestrian movement and restricted vehicular access.

On the other hand, the additional retail at subject site may also undermine the viability of the existing new and future retail provision currently provided and planned at the designated centre.

4.6 Proximity to expenditure sources

Retail facilities derive their trade from the expenditure. Expenditure to support such facilities is generated by households which is generally directed towards retail facilities located either close to their place of residence or to their place of employment. Significant concentrations of employment or residential uses, therefore, support the market potential of commercial locations.

The subject site is located near a vital employment precinct to the west; however, it is not well related to it by foot or by car. Mascot Station Town Centre, which is located 1km walking distance from the subject site will serve the convenience-based needs of workers in the locality and therefore, the potential for any significant component on the subject site is expected to be limited. The centre cannot rely on any meaningful proportion of retail expenditure from workers in this area being captured.

In terms of residential expenditure sources, future residential uses on the subject site and in the surrounding area generate demand for retail floorspace. Notwithstanding this potential capture in this location is likely to be limited by:

- Restrictions preventing the provision of a medium or large supermarket from acting as an anchor
- Lack of a major (or minor) transport node adjacent to the subject site

- Low pedestrian footfall; and
- Competition with larger centres in the locality such as the planned Mascot Station Town Centre which will provide a more substantial, more attractive retail offer.

At best only a small level of convenience retail could be supported. Our discussion with agents in Section 5 have confirmed that this is not a desired area for retailers.

5.0 RETAIL MARKET CONDITIONS

This Chapter outlines the existing retail market in the Mascot area and the proposed development sites. We have spoken with industry professionals to confirm the area's retail demand and the likelihood of new retail space being leased on the subject site.

5.1 Retail market overview

HillPDA's research and discussions with leasing agents indicate that the COVID-19 pandemic has greatly impacted the retail market in Mascot. Although ground floor retail has performed better in surrounding centres particularly around Mascot Station, north of Gardeners Road and South Botany Road, the subject site sits in isolation from these centres. Leasing agents indicated that prior to COVID there was demand for ground floor retail tenancies with incentives of around 8%-12%, however this has increased to around 20%-25%, with limited activity. Multiple agents noted the lack of retail leasing uptakes since the onset of COVID in 2021.

Considering the uncertainties of the pandemic and isolation from other surrounding retail centres, the research indicates that the retail market for new retail developments risk long periods of vacancy.

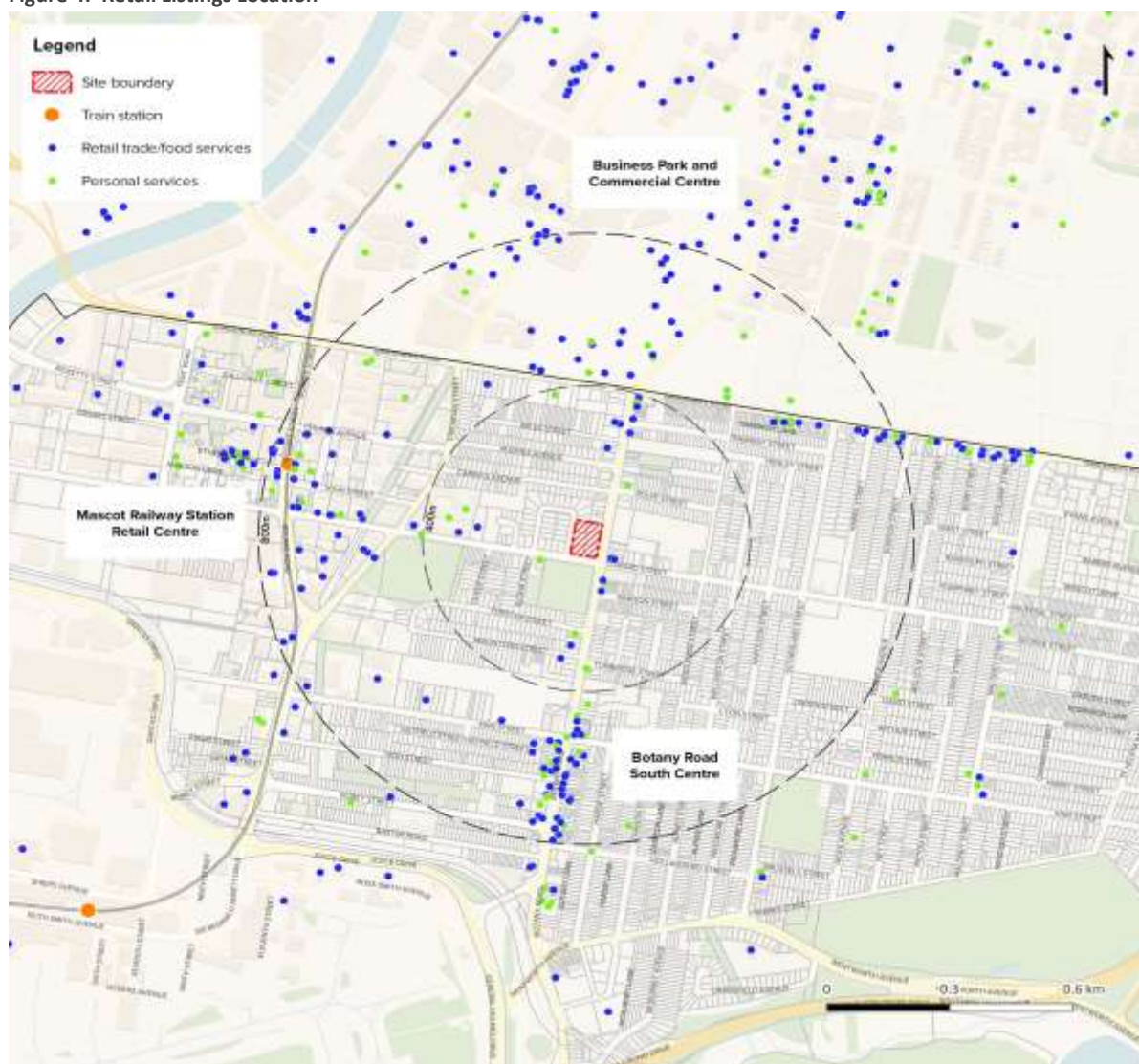
Real commercial shows multiple retail vacancy listings on and around Botany Road, with two being new mixed use residential/retail developments at 19-25 Robey Street, Mascot (South of site) and 620 Botany Road (north of site). The leasing agent for 620 Botany Road, North of Gardeners Road has indicated that the tenancy has been listed for 4-5 months. With 2 tenancies sold, 1 under contract and 1 currently vacant. It was noted that the proximity to Sydney Corporate Park and the surrounding centre north of Gardeners Road was essential for the relative success of the retail tenancies. The subject site is isolated from the three main centres with multiple vacancies in surrounding sites.

The agent for 19-25 Robey Street indicated that there was generally little retail leasing activity in the area since COVID19, noting the difficulty to find tenants for developments further from the existing centres. Additionally, there have been increases in incentives by 10-15% from before the onset of the pandemic.

The retail market in Mascot around Botany Road has been impacted by the pandemic with several vacancies along the street fronts surrounding the subject site. Agents noted that any new developments with ground floor shopfronts south of Gardeners Road on Botany Road and north of the southern retail centre would likely struggle due to isolation from existing centres like Mascot Railway station and Sydney Corporate Park and the Botany Road southern cluster. The uncertainty around COVID19 has led to increased risk of vacancy for ground floor retail shop fronts particularly in areas with primarily residential uses, away from the main existing centres.

Figure 4 provides a location map of the multiple listings discussed above that are marketing retail around Botany Road, Mascot.

Figure 4: Retail Listings Location



Source: HillPDA, google 2021

5.2 Proposed development applications

We have undertaken a search in the Mascot area to see what other developments are being proposed. The search indicates that there is a lack of new development proposed within the vicinity. Most of the development applications have either been deferred or abandoned. Two of the seven developments have been either approved or submitted.

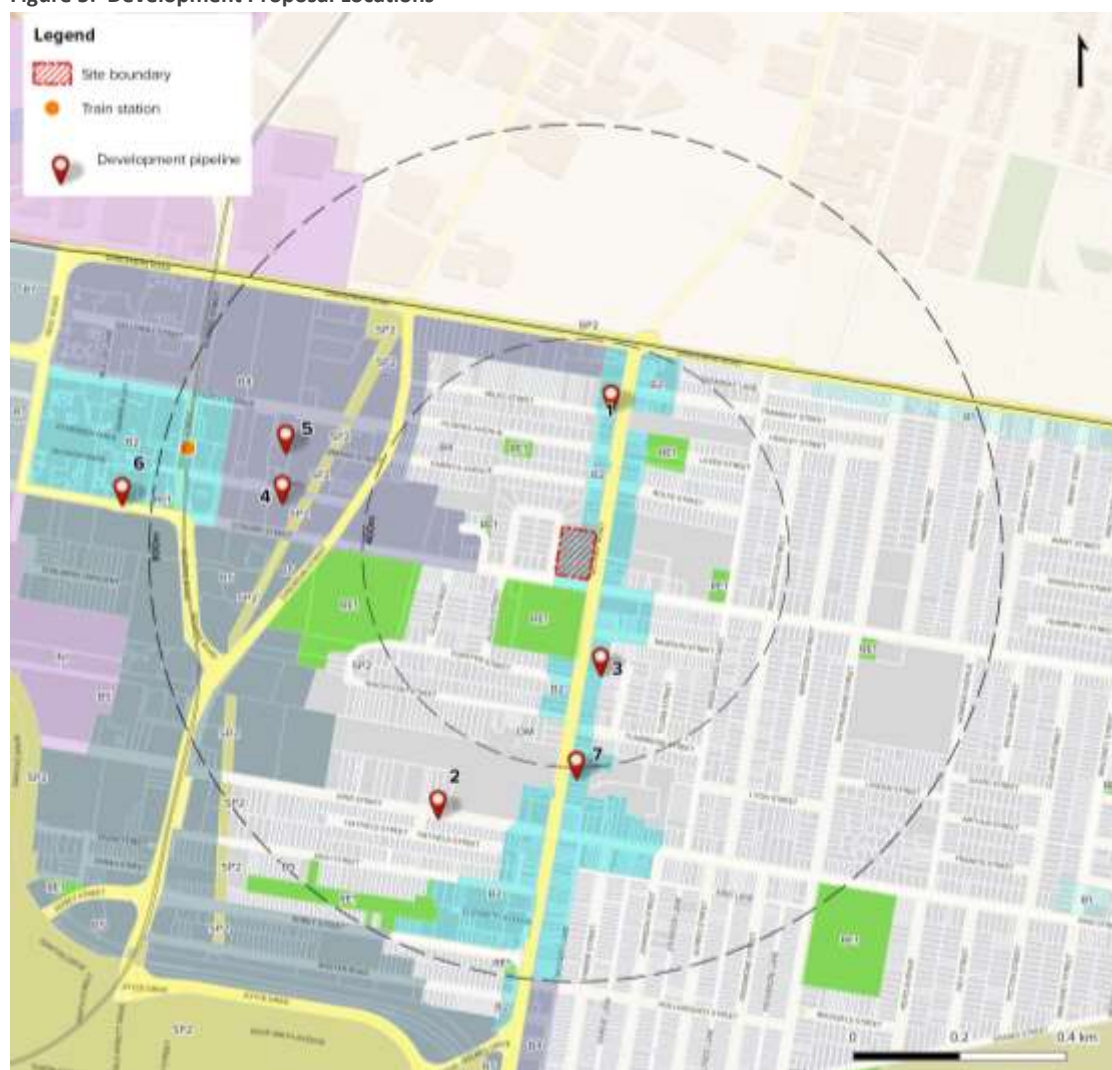
Table 3: Development pipeline

Map reference	Address	Site area	Gross floor area	Number of storeys	Number of units	Description	Completion data/status
1	702-710 Botany Road & 2 Miles Street, Mascot	2,104 sqm	3,375sqm	5	31	This development comprises of ground floor retail and 31 units over 3 and 5 storey mixed use buildings	March 2021 Abandoned
2	213 King Street, Mascot	884qm	666sqm	4	13	This development comprises part 3 and part 4 storey residential development	16/10/2024 Project deferred
3	1027-1043 Botany Road, Mascot	1,977sqm	3,872sqm	5	44	This development comprises of a 4/5 storey mixed use development	14/3/2025 Development approval by Land environment court project still deferred.
4	6-8 John Street, Mascot	1,125sqm	4,388sqm	11	52	This development is a 11-storey residential building with 52 units.	22/3/2023 Deferred
5	13A Church Avenue, Mascot	2,005sq,	8,493qm	12	80	This development a 12-storey residential building with 80 units.	14/01/2025 Site for sale with DA approval
6	256-280 Coward Street, Mascot	7,968sqm	29,988sqm	14	305	This development is a mixed-use development with shops (855sq m), a childcare centre and 305 units.	9/3/2025 Construction in progress
7	1077 Botany Road, Mascot	2,523sqm		5	53	This development comprises of 5 storey mixed use development to comprise 8 x 1 bedroom, 40 x 2 bedroom & 5 x 3-bedroom units & 180.8sq m commercial tenancy fronting Botany Road.	Development application submitted 29/07/2025

Source: Cordell Connect 2021

Figure 5 demonstrates the location of the proposed development applications. The locations are located within a more active section of the Botany Road B2 local centre zone and or closer to the Mascot Train station area.

Figure 5: Development Proposal Locations



Source: HillPDA 2021, MapInfo

5.3 Market research insights

- Pre covid incentives of 8 to 12% were offered by landlords in the Mascot area. Post COVID landlords are offering incentives of 20%-25%, with minimal activity
- Sites that are isolated from main shopping centres and transport are showing a decrease in retail market activity. Even with the assistance of the residential component general retail on ground floor has seen little uptake, leaving vacancy on the ground floor
- Limited development occurring in the vicinity of the subject site due to the area not being appealing to retailers to operate a successful business
- The proposed development in this area would enhance the area and act as catalyst to improve the streetscape and overall appeal.

6.0 SUMMARY AND CONCLUSIONS

This Study has acknowledged that the planning controls have identified an active street frontage along the entire Botany Road, frontage of the subject site. The subject site may be able to accommodate a small level of activation at ground level along Botany Road with such uses as a cafe, a small convenience store and/or a hairdresser. However, the subject site does not offer the attributes where activation of the entire Botany Road, frontage would be commercially viable. A large retail anchor of the type, which could act as a destination, is unlikely to be supported on the subject site due its likely impacts on existing centres. An anchor tenant, to be successful on the subject site, would need to draw trade away from the retail centres at Mascot Station and Botany Road.

Because it cannot accommodate a large specialty anchor, the alternative is a range of specialty stores. In our view such uses along both Botany Road and Henry Kendall Crescent would not be feasible because of:

- A lack of demand in the locality for such uses as demonstrated by the prevalence of smaller ground-floor retail tenancies along Botany Road and other strip retail in the local area
- Affection by clearways and lack of spaces to park
- Low levels of footfall pass the subject site which reflects the particularities of it as a traffic peninsula at the confluence of two major vehicular routes which adversely impact upon pedestrian amenity
- Competition from established centres in the locality which can offer more desirable attributes to potential operators such as proximity to a rail node, a retail anchor and/or car parking and/or
- The sale value for commercial/retail is likely to be lower than residential and therefore would impact and reduce LAHC funding ability to provide social housing in the LGA

Essentially, the subject site comprises a fringe location that does not present a commercially viable site for the uses Council envisage by virtue of its characteristics and context. Market demand for such uses is limited and the enforcement of the proposed LEP criteria would provide a limited contribution towards meeting community needs locally. The provision of residential uses at ground-level, which constitute the highest and best use of the land, would likely yield a greater positive impact as a result because such uses would avoid ground-floor tenancies being vacant for extended periods which adversely impacts upon the visual environment in this locality. It would further result in a greater population in the locality to the benefit of existing and planned businesses in the existing centres of Mascot Village and Mascot Botany Road.

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