Five Dock Town Centre Strategy

PREPARED FOR

City of Canada Bay

June, 2012

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REPORT DETAILS:

Job Ref No:	C11228
Version:	Final
Date Printed:	13/08/2012 10:33:00 AM
File Name:	C11228 - Five Dock Town Centre Strategy Final 2012

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LIST OF ABBREVIATIONS

Australian Bureau of Statistics	ABS
Bureau of Transport Statistics	BTS
Development Control Plan	DCP
NSW Department of Planning and Infrastructure	DP&I
Floor Space Ratio	FSR
Gross Floor Area	GFA
Gross Lettable Area	GLA
Hectares	Ha
Household Expenditure Survey (ABS)	HES
Journey to Work	JTW
Local Environmental Plan	LEP
Local Government Area	LGA
State Environmental Planning Policy	SEPP
Square metre	sqm
Travel Zone	TZ

DEFINITION OF TERMS

Census Collection District (CCD) – the smallest geographic area defined in the Australian Standard Geographical Classification (ASGC). It can be defined as an area which one census collector can cover delivering and collecting census forms in a specified period. On average there are about 150 - 250 dwellings per CCD.

Face rents – 'Face rents' are the rents shown on a lease document which may or may not include incentives or outgoings.

Gross Floor Area – Gross Floor Area (GFA) is Gross Lettable Area plus common mall spaces (including amenities), centre management area and plant rooms. In a typical indoor centre with at least one department store and supermarket the GLA makes up around 72% to 75% of the GFA.

Household – One or more persons that usually reside in the same private dwelling.

Journey to Work data – Comprises datasets which analyse employment distribution and trends, including commute patterns.

Travel Zone – A small geographic area used as the basis for Bureau of Transport Statistics (formerly Transport Data Centre) modelling and data analysis. Travel Zones provide a level of analysis between Census Collection District (CD) and Statistical Local Areas (SLA) as defined by the Australian Bureau of Statistics.

EXECUTIVE SUMMARY

Strategy Brief

Hill PDA was commissioned by the City of Canada Bay (Council) to prepare a Strategy for the Five Dock Town Centre (the Town Centre). The *Five Dock Town Centre Strategy* aims to build on the extensive number of initiatives already implemented for the Town Centre by identifying further actions and priorities that can enhance its vitality and viability in the future. Importantly the Strategy has an economic focus and is framed around the collaborative working of Council, local businesses and visitors to the Centre.

Characteristics of Five Dock and its Town Centre

In 2011 the suburb of Five Dock was home to approximately 10,500 residents, representing an increase of 220 people since the 2006 Census. Over the next 25 years Five Dock's population is expected to increase modestly (by approximately 900 residents) and, on average, get older. During the same period employment in Five Dock is expected to increase (by approximately 600 jobs).

A floorspace survey undertaken during the preparation of the Strategy found that as of 2012 the Town Centre provided approximately 72,400sqm of floorspace. This comprised 16,000sqm of commercial floorspace, 25,500sqm of retail, 14,700sqm of miscellaneous floorspace, 5,500sqm vacant and 10,659sqm mixed use floorspace / shop top housing.

The majority of jobs generated in the Town Centre were in retail services; healthcare and social assistance; professional scientific and technical services; accommodation and food; and, education and training. A cluster analysis performed by Hill PDA found that the Town Centre's business clusters provide it with competitive advantages in financial, legal, medical and personal services as well as speciality foods i.e. delicatessens and groceries.

Stakeholder Consultation

In order to inform the Strategy, a series of stakeholder consultation exercises were undertaken including: a survey of local businesses; a face to face survey of local shoppers; a survey of local residents; and, workshops with the Five Dock Chamber of Commerce and local businesses. In total an estimated 2,267 people have been consulted and 432 have provided their comments regarding the Town Centre.

Some of the key findings from the business survey were:

- More than half of businesses surveyed (57%) had operated in the Town Centre for more than ten years;

- During the weekdays, 38% of businesses surveyed remained open after 6pm while on Saturday and Sunday this decreased to 32% and 14% respectively;
- Restaurants, cafes, food stores and newsagents were busiest on Saturdays whilst financial services, lawyers, fitness centres, dentists and other services were busiest during the weekdays;
- Just over half of surveyed businesses estimate their average turnover for 2012/13 will be less than 2011/12;
- The most commonly cited ways in which local businesses and the Chamber of Commerce could improve the Town Centre included lobbying Council to create more parking, undertaking more marketing and encouraging shop owners to take pride in their facades, surroundings and presentation to the public; and
- Business survey respondents identified that the Town Centre would benefit most from increased variety of shops, better quality streetscape, increased marketing and advertising and public car parking.

Some of the key findings of the shopper / visitor survey were:

- Nine out of ten shoppers surveyed lived locally and their main reasons for shopping in the Town Centre was for its convenience / proximity to their home (82%), its range and quality of food shops (57%), the provision of medical services (32%) and cafes and restaurants (31%);

- The most common way shoppers got to and from the Town Centre was walking followed by driving and 43% of surveyed shoppers visited the Town Centre every day while a further 32% visited at least once a week; and
- When asked how the Town Centre could be improved, the most frequent responses from surveyed shoppers was that it should look better, open longer, provide more choice and have more convenient parking.

Participants in the workshop facilitated by Hill PDA identified that:

- Five Dock's Italian heritage still offers a point of difference and a reputation for specialty foods is an asset that should be built upon;
- Ferragosto, while not seen to benefit all businesses, attracts many visitors and the Town Centre. Businesses need however to find ways to get these visitors retuning to the Centre more frequently; and
- A lack of competition is stifling innovation and renewal in the Town Centre and a greater diversity of retail offering is needed.

Key Strategy Findings

The following section summarises some of the key findings of the Strategy.

Retail Gap analysis

In order to better understand the retail experience of the Town Centre, the findings from the floor space survey and shopper and business surveys have been used to identify the potential gaps in the retail offer.

With consideration of the existing and emerging retail character of the Town Centre, this process of analysis has revealed it is well serviced in butchers, bakeries and fruit shops, hairdressers, beauty salons, cafes, restaurants and pharmacies. There is a current lack or absence however of supermarket floorspace, brand stores (i.e. larger fashion chains), boutique clothing stores and unique stationary, jewellery, cosmetic and gift stores.

Economic Considerations

As part of the Strategy, Hill PDA considered the factors which influence the economics of property development in the Town Centre. Market research and subsequent feasibility modelling found that in general:

- Sites (particularly those located in the central hub or southern end of the Centre) that were occupied with tenants and in a good state of repair are unlikely to be incentivised to redevelop in the short to medium term (i.e. the next 1 to 5 years) under the current planning controls;
- An increase in density would improve development feasibility, particularly in the Northern End of the Town Centre where sites are currently underperforming;
- In the case of sites with significant income or improvements with good functional utility (such as 144 Great North Road), higher densities are required to promote renewal; and
- A reduction in parking requirements translates into to significant improvements in development feasibility.

In summary, the market research and the feasibility modelling suggests that the existing planning controls are insufficient at this point in time to incentivise change on most sites in the Town Centre. Vacant sites and sites with nominal improvements particularly in the Northern End of the Town Centre present however the most immediate opportunities for redevelopment.

Importantly these economic factors have implications for the broader Town Centre Strategy. Firstly, whilst an increase in permissible floor space ratios (FSR) may have many positive impacts by stimulating redevelopment on some suitable sites in the Centre, it can also have a number of design implications by facilitating significant increases in building density and height. In this regard it is important to note that, the scale of buildings in Five Dock Town Centre was considered an important factor during community consultation. It was found that the Town

Centre – despite its challenges – retains an intimate sense of place and a human scale that appeals to the people who shop, work and visit there. It therefore follows that an increase in permissible building densities could significantly change this positive feature of the Centre and that any such change to the local planning controls for one, or a number of sites, must be carefully considered from a design and urban form perspective.

Secondly, the economic benefits of relaxing car parking controls could also have notable repercussions to the overall Centre. In this regard business consultation identified that the availability (or lack of) car parking in the Centre was a perceived challenge and deterrent for some shoppers and visitors. Accordingly the stimulation of additional development in the Centre, through a concession on car parking standards, could on the one hand attract more people to live and thereby shop in the Centre. Yet conversely it could also exacerbate existing perceived problems, deterring more people to visit and shop from outside the Centre.

Finally from an economic perspective, the designation of a commercial core or hub in the Centre would assist in maintaining more viable land values for commercial only development (by restricting residential which represents a financially 'higher and better use'). In this way the creation of an intimate business, entertainment and cultural core in the Town Centre would support its revitalisation. Moreover, the application of a zone that limits or buffers new residential development in that defined area would help to reduce future conflicts between commercial operations and local residents. This would be a particularly important consideration for the Town Centre should it seek to encourage greater night time activity (including restaurants and wine bars) that have the potential to generate noise and thereby disruptions to surrounding uses.

In addition to design, noise and parking challenges, redevelopment and urban densification in the Centre is also likely to generate additional vehicle traffic and to place increased demands on public infrastructure. A balance must therefore be struck between the potential benefits and costs of redevelopment within the Town Centre. To achieve this, investigations should be advanced into the impacts of variations to the planning controls and the identification of various measures to mitigate the same.

Based on the outcomes of such analysis, key stakeholders should agree a suitable level and locations for development in the Centre that balances the merits of additional local expenditure and activity with the implications to design, parking, traffic and infrastructure. As an initial step to help inform this debate and ultimately an agreed approach, Hill PDA recommends the preparation of a tailored urban design study for the Centre.

The Strategy Recommendations

To encourage debate amongst those that live, work and visit the Town Centre this Strategy has proposed a vision for the Town Centre:

> *"To be a **convenient** one stop shop for the day to day needs of locals, workers and visitors; an **attractive** destination that offers a personal experience by being authentic, friendly and safe; and a **vibrant** community that works together and celebrates its cultural diversity."*

The proposed vision for the Town Centre is based on the key findings from the Strategy. Firstly, the vision recognises that the Town Centre should build upon the commercial and convenience niche that differentiates it from other centres rather than trying to reinvent itself as another eat street or fashion strip. Secondly, it is well positioned to capitalise on numerous current and emerging trends. Thirdly, by improving its appearance and offering a personal experience that is authentic, friendly and safe the Town Centre can become a destination in its own right. Finally the proposed vision recognises that the Town Centre's future success will require its community to draw on its cultural strengths and its ability to work together.

Five Dock's Strengths, Challenges, Opportunities & Risks

Based on the market research, trend analysis and stakeholder consultation exercise undertaken to inform the Strategy, the following strengths, challenges, opportunities and risks for the Town Centre have been identified. These factors have in turn been used to inform the more detailed priorities and actions for the Town Centre as summarised in **Table 2**.

Table 1 - Five Dock's Strengths, Weaknesses, Opportunities and Risks

STRENGTHS	CHALLENGES	OPPORTUNITIES	RISKS
Strong sense of community – Five Dock has a strong sense of community;	***Limited resources*** – Council, the Chambers of Commerce and businesses have limited resources to design and implement events and other mechanisms to support the Centre;	***A growing and increasingly wealthy population*** – Population growth, gentrification, residential and commercial development in and around Five Dock will increase the number of consumers as well as the spending power of consumers in the Town Centre;	***Government Planning delays*** – Delays in obtaining planning approvals and amending controls could inhibit growth and investment;
Large Local Customer Base – Most of the Town Centre's customers are locals from Five Dock and surrounding suburbs who visit on a regular basis to satisfy their day to day needs;	***Low levels of business confidence*** – Many businesses in Five Dock report difficult trading conditions and are pessimistic about the Town Centre's future viability;	***A return to high street shopping*** – There is a growing preference amongst consumers for shopping in locations that have a sense of place and can offer a personal and authentic shopping experience;	***Apathy and a lack of cooperation*** – Without coordinated and sustained effort by all interested parties any new initiatives to reinvigorate the Town Centre will fail;
Ethnic mix and diversity – Five Dock is culturally diverse;	***Tired streetscape*** – Despite substantial investment by Council the streetscape looks run down and dirty;	***A growing consumer consciousness*** – Consumers growing awareness of the social, economic and environmental impacts of their purchasing decisions is resulting in greater support for local business that are community orientated and environmentally responsible;	***Fragmented Land Ownership*** – Renewal could be hindered by a lack of cooperation from land owners;
Character – The Town Centre has a sense of place and a human scale that appeals to the people who shop, work and visit there;	***Poor amenity*** – graffiti, periodic traffic congestion and poor landscaping contribute to the Town Centre having poor amenity;	***Growing environmental consciousness*** – Increasingly the importance of sustainable travel and living is being recognised by consumers which may encourage an even greater proportion of shoppers to visit the Town Centre by walking as opposed to driving thereby reducing the strain on car parking provision; and	***Out of centre development*** – Permitting out of centre development in the LGA (or in surrounding LGAs) may detrimentally impact the viability of the Town Centre; and
Accessibility and Proximity – The Town Centre is highly accessible via public transport and is in close proximity to the CBD;	***Parking perceptions*** – The overwhelming perception by businesses and shoppers is that there is inadequate levels of parking available in the Town Centre and that existing parking arrangements are inconvenient;	***The cautious consumer*** – There is a shift in consumer behaviour toward greater spending on food, cafes, restaurants, stationary, recreational goods, pharmaceuticals, cosmetics and toiletry goods.	***Competing centres*** – Consumer needs are always changing and many of Town Centre's competitors are constantly adapting to meet those needs.
Specialty food niche – The Town Centre is well known for its specialty food stores;	***Mainstream Supermarket*** – Many shoppers indicated they frequently visit competing centres to shop at Coles, Woolworths or Aldi; and		
Concentration of "my-services" – The large number of medical and personal service enterprises attract a substantial number of people to the Town Centre; and	***Limited opening hours and lack of a night-time economy*** – There is little activity in the town Centre after hours or on weekends which significantly reduces its appeal and the duration of time people visit / shop in the centre.		
Commercial and Business Hub – The presence of all major banks, a post office, numerous professional service firms and a large number of other office based businesses make the Town Centre the commercial and business hub of the local area.			

Table 2 - Summary of Key Priorities, Strategies and Actions for Five Dock Town Centre

Strategy		Action	Responsibility	Timescale & Priority
Look Better....				
Strategy 1	Encourage redevelopment and quality urban design	1. Prepare an Urban Design Study for the Town Centre	Council	
Strategy 2	Improve the appearance and amenity of the public domain	2. Initiate planning and budgeting for a public domain upgrade, including a concept plan, which should be a component of an Urban Design Study	Council in consultation with local businesses	
Strategy 3	Improve the appearance of shopfronts	3. Undertake an audit of building exteriors in the Town Centre to identify which buildings are most in need of upgrading	Chamber of Commerce with support from Council	
		4. Provide advice to building owners on the benefits of upgrading and maintaining their buildings and how it can be done cost effectively	Chamber of Commerce with support from Council	
		5. Establish a regular maintenance program for exteriors	Building owners	
		6. Ensure signage is clean, updated frequently, visible and legible	Business tenants and property owners	
		7. Undertake an audit of signage in Town Centre to identify where signage is cluttered, dirty, redundant, misleading and insufficient and work with businesses to make improvements	Chamber of Commerce and Council	
		8. Review planning controls for signage to ensure they are appropriate in relation to the size, location and number of signs permitted	Council	
		9. Undertake an audit into the quality of shopfront displays in Town Centre and work with businesses to make improvements	Chamber of Commerce with support from Council	
		10. Organise visual merchandising advice / training opportunities for businesses	Chamber of Commerce	
		11. Work with landlords and landowners to reduce vacancy rates and improve appearance of vacant shopfronts	Chamber of Commerce with support from Council	
Greater choice....				
Strategy 4	Provide an additional anchor supermarket	12. Engage with supermarket providers to better understand what opportunities may exist to develop a second supermarket in the Town Centre	Council	
Strategy 5	Provide the right mix of retail and commercial services	13. Prepare and implement a Targeted Tenancy Plan for the Town Centre	Chamber of Commerce with support from Council's Economic Development Team	
Strategy 6	Enhance the night time economy	14. Facilitate businesses extending their trading hours by permitting amendments to existing development consents	Council	

Strategy	Action	Responsibility	Timescale & Priority
	15. Permit extended retail hours (when appropriate) for new businesses	Council	
	16. Encourage retailers to trade progressively later to test demand and build awareness amongst shoppers	Chamber of Commerce and Council	
	17. Create spaces for evening buskers and performers and utilise Council's library for cultural events that minimise disruptions to residents living in the Town Centre	Council	
	18. Investigate opportunities for holding a family orientated market on Friday nights	Chamber of Commerce with support from other businesses and Council	
	19. Support the creation of small bars in the Town Centre	Council with support from the Chamber of Commerce and other businesses	
	20. Review and improve street lighting in the Town Centre's key areas, streets, lane ways and car parks	Council	
	21. Work with property owners to install attractive and functional lighting in shopfronts	Chamber of Commerce and Council	
More convenience....			
Strategy 7 Improve parking provision and accessibility	22. Review parking arrangements to ensure that it responds to shoppers needs	Council	
	23. Negotiate additional parking in new developments where viable in the Town Centre and provide additional public car parking where possible in Council's own developments	Council	
	24. Continue to improve provision of parking 'availability' signs and enhance the public domain to promote walking / cycling to and from the Centre	Council	
	25. Encourage store employees to park away from the store or use alternative modes of transport	Chamber of Commerce, Great North Road Committee and other businesses	
Strategy 8 Create a family friendly environment	26. Make all businesses aware of the needs and benefits of a family friendly environment	Chamber of Commerce and Great North Road Committee	
	27. Review and improve the current provision of public toilets, baby change facilities, parent parking and children's play spaces in both the public and provide domain	Council	
	28. Provide easy access, baby chairs and flexible arrangements for tables and chairs in restaurants and cafes	Businesses	
	29. Organise family days in the Town Centre	Council, Chamber of Commerce and Great North	

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Strategy		Action	Responsibility	Timescale & Priority
			Road Committee	
		30. Promote the Town Centre as a family friendly environment.	Council	
Work together....				
Strategy 9	Reduce red tape	31. Streamline development approval process by encouraging pre-development application discussions with businesses	Council	
		32. Prepare a brochure that explains to tenants and landlords what improvements can be made to the physical nature of their building with / without the need for planning consent	Council	
		33. Ensure LEP and DCP planning controls are updated to create an investment ready planning framework.	Council	
Strategy 10	Build business capacity	34. Regularly provide up to date information on the local economy and broader retail trends	Chamber of Commerce	
		35. Regularly provide best practice examples of retail offerings from other comparative centres	Chamber of Commerce	
		36. Introduce tailored retail training programs	Chamber of Commerce with support from Council	
		37. Maintain an accurate business directory that is readily available online	Chamber of Commerce and Council	
		38. Create a business resource centre	Chamber of Commerce and Council	
Strategy 11	Town Centre Management	39. Investigate whether the current arrangements are the most effective organisational and funding model to deliver the initiatives required to revitalise the Town Centre	Chamber of Commerce, Great Northern Road Committee and Council	
Attract People....				
Strategy 12	Support and Promote Events	40. Continue to support Ferragosto	Chamber of Commerce and Council	
		41. Investigate the benefits of holding complementary events or festivals throughout the year. Market these events through new means of social media that appeal to younger consumers	Chamber of Commerce	

High priority action requiring implementation in next 12 months

Lower priority action requiring implementation in next 5 years

1. INTRODUCTION

The following Strategy explores the economic factors that influence and define Five Dock Town Centre (the Town Centre). The Strategy aims to build on the extensive number of initiatives already implemented for the Town Centre by identifying further actions and priorities that can enhance its vitality and viability in the future. Importantly this Strategy has an economic focus and is framed around the collaborative working of Council, local businesses and visitors to the Town Centre.

To inform the Strategy a series of market research and consultation exercises were undertaken including meetings with the local Chamber of Commerce, local businesses, interviews with shoppers and visitors to the centre, as well as surveys of local businesses and a review of existing research, local studies and plans. Based on this research an outcome of the Strategy has been recommendations for realistic strategies and actions that together form a bespoke and current Strategy for the Town Centre. The Strategy includes short and long term actions, responsible organisations and phasings to achieve positive and sustainable change.

1.1 Structure of the Strategy

For ease of reading, the Strategy has been structured into three distinct sections as follows:

Part A – Setting the Scene: this part of the Strategy profiles the location of Five Dock, its composition of land uses, businesses and the demographic characteristics of the Town Centre and the broader suburb. It also provides context to the Strategy by establishing the relevant policy context that guides development in the Town Centre as well as prior initiatives and studies conducted to support its success. Also identified are the gaps in the Town Centre's retail provision and economic factors that could be altered to encourage development.

Part B – Stakeholder Consultation: this part summarises the key findings of the stakeholder consultation programme undertaken to inform the Strategy.

Part C – The Strategy: this part of the Strategy investigates the strengths, weaknesses, opportunities and risks for the Town Centre. It also draws together the findings of the Strategy to produce a set of priorities, strategies and actions to revitalise the Town Centre over the next 5 to 10 years.

PART A – SETTING THE SCENE

This part of the Strategy profiles the location of Five Dock, its composition of land uses, businesses and the demographic characteristics of the Town Centre and the broader suburb. It also provides context to the Strategy by establishing the relevant policy context that guides development in the Centre as well as prior initiatives and studies conducted to support the Centre's success. Also identified are the gaps in the Town Centre's retail provision and economic factors that could be altered to encourage development.

2. Setting the Scene – Five Dock Today

The following Chapter sets the scene for the Strategy by describing Five Dock's geographic location and by providing an overview of Five Dock's residential and employee demographic characteristics. A profile of existing land uses and businesses within the Centre is also given along with a discussion as to how the Town Centre's composition of floorspace and businesses differ from other comparable centres in Sydney. This Chapter provides context for latter sections that investigate Strategies for the how the Centre could grow and be enhanced. A more detailed analysis of demographic characteristics and policies is provided in Appendices 1 and 2.

2.1 Where is Five Dock?

The suburb of Five Dock is located 10 kilometres west of the Sydney CBD and falls within the Canada Bay Local Government Area (LGA). The Town Centre is divided by Great North Road and bounded by Lyons Road to the north, Queens Road to the south, Jersey Lane and Fairlight Street to the east and East Street and Garfield Street to the west (Figure 1).

Figure 1 - Aerial Image of Five Dock Town Centre

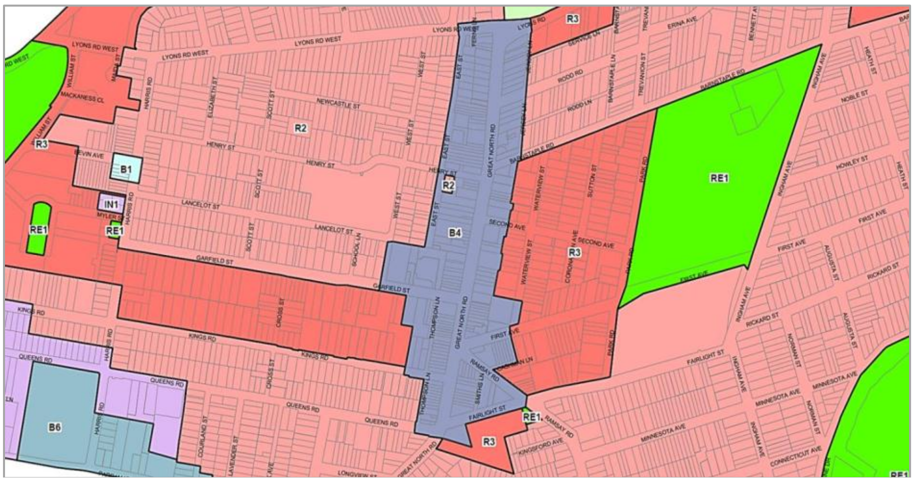
Source: Hill PDA 2012

The Town Centre is predominately made up of one and two storey buildings with ground floor retail and commercial or residential on the upper floors. The surrounding development is single storey detached, town house and medium density residential development.

The Town Centre (from Barnstaple Road to Lyons Road) forms part of the Heritage Convict Trail which is a heritage and tourism feature. The 240km trail follows the road built by convicts between Sydney and the Hunter Valley between 1826 and 1836.

Under Canada Bay LEP 2008 Five Dock Town Centre is zoned B4 Mixed Use (Figure 2). The overarching objective of the zone is "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". The Town Centre retains a B4 Mixed Use zone under the draft Canada Bay LEP 2011 which is currently on exhibition.

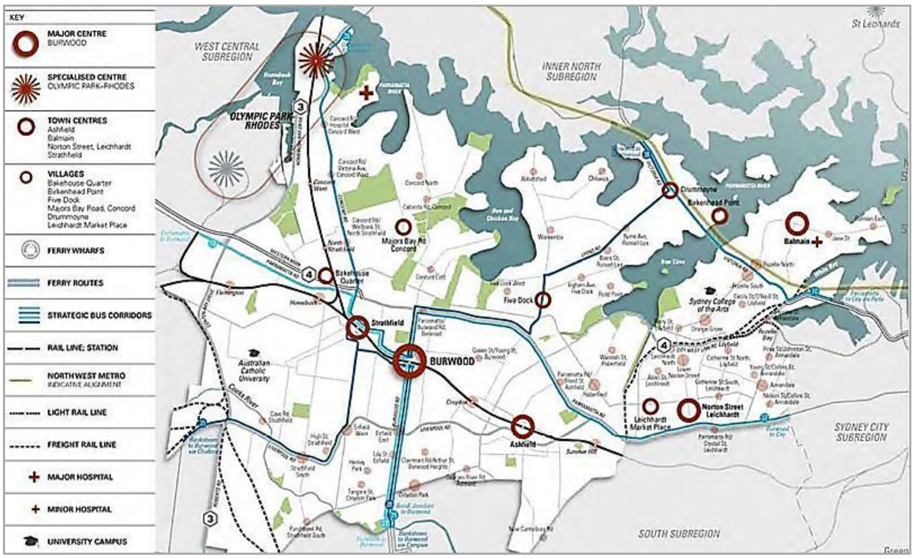
Figure 2 - Plan of B4 Mixed Use Zone (shown purple) within the Five Dock Town Centre



Source: City of Canada Bay LEP 2008

The Town Centre is identified by the draft Inner West Subregional Strategy (2008) as a village, which is defined as "a strip of shops and surrounding residential area within a 5 to 10 minute walk and contains between 2,100 and 5,500 dwellings". Figure 3 illustrates the centres hierarchy adopted by the draft Inner West Subregional Strategy.

Figure 3 - Centres Hierarchy

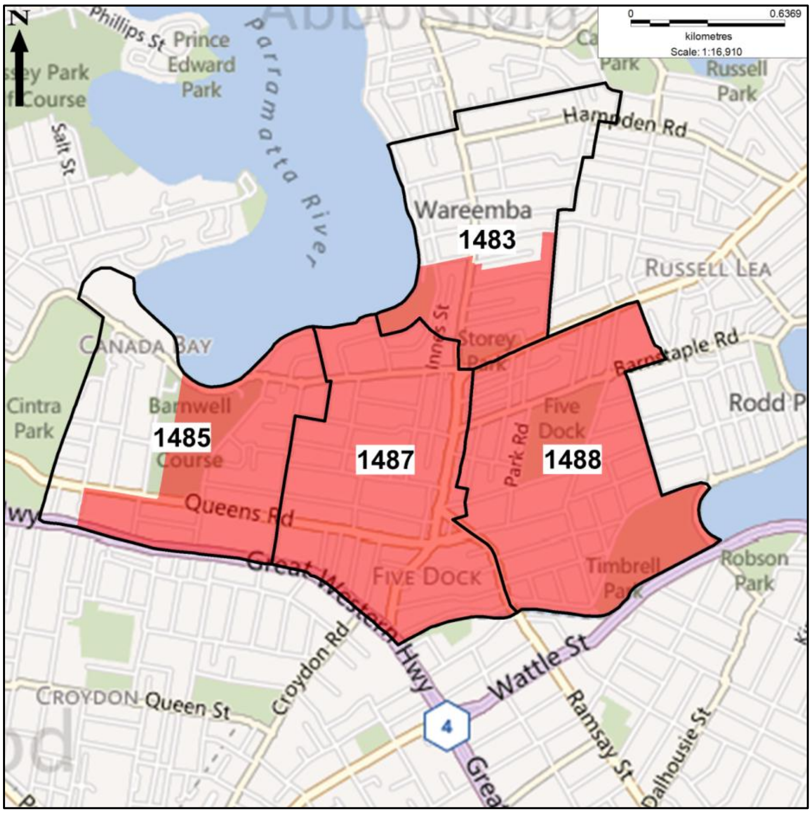


Source: Department of Planning & Infrastructure, 2008, Draft Inner West Subregional Strategy

2.2 Who lives in Five Dock?

In 2011 the broader suburb of Five Dock was estimated to be home to approximately 10,500 residents, which represents an increase of 220 people or 2.1% since the 2006 Census[1] (Figure 4 defines the suburb of Five Dock for the purposes of this Strategy). This growth trend is forecast to continue. Over the next 25 years Five Dock's population is expected to increase by 890 residents or 6.4%, which on average equates to 36 additional people per year. This growth will generate economic activity and demand for additional expenditure for goods and services, much of which could be captured by Town Centre.

Figure 4 - The Suburb of Five Dock



Source: Hill PDA, MapInfo 11.0 software and Microsoft Bing © 2011 Microsoft Corporation

In 2006 the resident population of Five Dock suburb was slightly older than that of Canada Bay LGA and NSW with proportionally fewer residents aged below 30 years of age and more aged between 30 to 44 years and over 60 years. Consistent with national and NSW trends, Five Dock's population is forecast to age over the next 25 years. Responding to the needs of an aging population will present a challenge for Council and opportunities for local businesses.

Five Dock is home to a large number of families, however, the proportion of households comprising lone persons or couples without children is higher than occurs in Canada Bay LGA and NSW. This may be in part due to the number of professionals and elderly residents attracted to Five Dock owing to its proximity to transport, shops and services.

[1] Bureau of Transport Statistics 2009 and ABS Census 2006

A well-known strength of Five Dock is its cultural diversity with 18% of residents born in Europe and nearly 6% in Asia. Italian, Mandarin, Cantonese, Greek and Korean are the most common non-English languages spoken at home.

As of the 2006 ABS Census, Five Dock residents were more likely to live in a detached house and rent than was generally the case across the LGA, however, nearly one in three still resided in a unit. The high proportion of rental accommodation may be a reflection of Five Dock's proximity to Sydney CBD, which makes it an attractive place for professionals to live. In 2006 nearly 60% of the suburb's resident labour force was managers, professionals, clerical and administrative staff. The high proportion of white collar workers was reflected in Five Dock's median weekly household income ($1,261) which was significantly higher than the median for NSW ($1,036) yet lower (by $249) than recorded for the Canada Bay LGA. Accordingly the suburb also recorded a greater proportion of households in the bottom two income brackets $0-$349 and $400-$799 per week.

These statistics for the suburb suggest the existence of contrasting residential cohorts, each with their own particular needs and expenditure patterns. On one hand there are young mobile professionals, who have higher incomes and are more likely to spend a substantial amount of their time and money on a broad range of goods and services outside Five Dock. On the other hand there are Five Dock's less advantaged and financially resilient residents (e.g. elderly, unemployed etc.) who have lower incomes but are more likely to use services and spend money locally.

2.3 Who works in Five Dock?

According to the NSW Bureau of Transport Statistics (BTS) there were 3,573 jobs generated within the suburb of Five Dock in 2011[2]. The majority of jobs were generated were in retail services (582 jobs); healthcare and social assistance (350); professional scientific and technical services (339); accommodation and food (306); and, education and training (273). Over the next 25 years, employment in the suburb of Five Dock is expected to increase by 577 to 4,150 jobs.

A detailed look at employment growth within Five Dock reveals that the majority of new jobs will continue to be in retail trade (736); healthcare and social assistance (462); accommodation and food (405); professional scientific and technical (368); and, education and training (361).

Data from the BTS also shows that of those working Five Dock in 2006, over 36% live in the Canada Bay LGA while approximately 22% come from the adjacent LGAs of Ashfield, Auburn, Burwood, Leichhardt, Ryde and Strathfield. Interestingly, more than 60% of Five Dock's workforce drive themselves to work while only around 13% commute by bus, train or as a passenger in a car. At a high level, these figures suggest that more than 1,300 people drive to Five Dock for work[3]. This represents a substantial demand for parking in addition to that required by visitors / shoppers.

[2] BTS Travel Zones - 1485, 1487,1488

[3] (60% of 2,302)

2.4 What does Five Dock Offer?

To assist in identifying what the Town Centre has to offer, a business and floorspace survey of the Study Area was carried out by Hill PDA in February 2012.

Number and Type of Premises

In total 300 premises on both the ground and first floors of buildings were surveyed and of these 39 (13%) were vacant. The results of the survey show that at that time, 131 premises in the Town Centre were used for commercial purposes with offices, banks and medical services being the most common types of commercial use. Office tenants included accountants, lawyers, architects and engineers.

The retail sector comprised 100 premises (33%) with the most prevalent being personal services (e.g. hairdressers, dry cleaners, beauty salons), specialty food stores (e.g. bakeries, butchers and delis) and speciality non-food stores (e.g. newsagents, chemists and jewellers).

The survey also identified 30 other miscellaneous premises that included hotels, clubs and community facilities. Table 3 shows the breakdown of business types in the Town Centre at the time of Survey.

Table 3 - Premises within Five Dock Study Area

Category	Land Use	No. of Premises	%
Retail	Personal Services	31	10.3%
	Specialty Food	17	5.7%
	Specialty Non Food	15	5.0%
	Cafes & Restaurants	14	4.7%
	Clothing	8	2.7%
	Take Away Food	7	2.3%
	Domestic Appliance	3	1.0%
	Service Station Convenience	2	0.7%
	Supermarket	1	0.3%
	Bulky Goods	1	0.3%
	Wholesale/Homemaker	1	0.3%
Commercial	Commercial - General	60	20.0%
	Commercial - Finance	25	8.3%
	Commercial - Medical	22	7.3%
	Commercial - Legal	11	3.7%
	Commercial - Real Estate	9	3.0%
	Commercial - Government	2	0.7%
	Commercial - Travel	2	0.7%
Miscellaneous	Hotel	9	3.0%
	Other Type	8	2.7%
	Community	5	1.7%
	Entertainment	2	0.7%
	Automotive	2	0.7%
	Medical - in house	2	0.7%
	Recreation/Fitness	2	0.7%
Vacant	Vacant	39	13.0%
TOTAL		**300**	**100.0%**

Source: Hill PDA business and floorspace survey

Floorspace Type and Distribution

The survey found that as of 2012 the Town Centre provided approximately 72,362sqm of floorspace comprising 15,998sqm of commercial floorspace, 25,511sqm retail, 14,703sqm miscellaneous, 5,491sqm vacant[4] and 10,659sqm mixed use / shop top housing (Table 4).

Offices account for the majority of commercial floorspace followed by financial institutions/banks and medical services. In the retail category, the Superbarn supermarket, personal services and speciality foods occupy the majority of floorspace. Hotels, clubs and community uses occupy the majority of floorspace in the miscellaneous category.

Table 4 - Floorspace by industry in Five Dock Study Area

Category	Land Use	Floorspace (sqm)	Proportion of Total
Retail	Supermarket	3,079	4.3%
	Personal Services	2,845	3.9%
	Specialty Food	2,077	2.9%
	Specialty Non Food	1,848	2.6%
	Cafes & Restaurants	1,792	2.5%
	Domestic Appliance	1,752	2.4%
	Service Station Convenience	876	1.2%
	Take Away Food	809	1.1%
	Clothing	620	0.9%
	Bulky Goods	200	0.3%
	Wholesale/Homemaker	100	0.1%
	Sub-total	**15,998**	**22.1%**
Commercial	Commercial - General	12,909	17.8%
	Commercial - Finance	4,679	6.5%
	Commercial - Medical	3,923	5.4%
	Commercial - Real Estate	1,527	2.1%
	Commercial - Legal	1,411	1.9%
	Commercial - Government	842	1.2%
	Commercial - Travel	220	0.3%
	Sub-total	**25,511**	**35.3%**
Miscellaneous	Hotel	6,132	8.5%
	Community	4,363	6.0%
	Other	2,349	3.2%
	Entertainment	834	1.2%
	Automotive	414	0.6%
	Medical - in house	337	0.5%
	Recreation/Fitness	274	0.4%
	Sub-total	**14,703**	**20.3%**
Vacant	**Sub-total**	**5,491**	**7.6%**
Non-residential Floorspace		**61,703**	**85.3%**
Residential Floorspace		**10,659**	**14.7%**
Total Floorspace in Study Area		**72,362**	**100.0%**

Source: Hill PDA business and floorspace survey

[4] Note – when residential floorspace is removed from calculation vacancy rate increases to 9%

Cluster Analysis

A cluster brings together businesses and supporting organisations to work collaboratively in order to benefit from reduced costs and greater access to labour, capital, ideas, consumers and/or suppliers. A cluster can include businesses with similar capabilities or who are working within the same supply/value chain, from the same local area or a broader market. Economists explain clustering as a means for businesses to enjoy some of the economies of scale usually reserved for large firms. Clustering is particularly evident in certain industries like health, education, banking and manufacturing. A cluster can also include organisations that support these businesses such as accounting, legal, business planning or marketing.

The benefits of clustering are widely acknowledged in both theory and practice with NSW Trade and Investment providing support to the establishment of clusters. Businesses can benefit by potentially establishing a competitive advantage enabling them to perform better than would otherwise be the case. Consumers can also benefit from the economic effect of clustering through better access to choice and lower prices as a result of price competition.

With 20 financial service firms, 11 legal firms, 11 real estate agents, 5 banks and more than 30 other office based businesses, Five Dock could be considered the 'commerce capital' of the local area. The centre also provides a large number of "my-services" (e.g. my doctor, my dentist, my hairdresser etc.) with 17 hair/barber salons, 10 medical centres and surgeries, 4 dentists and a range of other services including chiropractors, optometrists, physiotherapists and podiatrists. In the retail sector the Town Centre contains a cluster of 20 specialty food stores including numerous butchers, bakeries and delicatessens. There are also 24 cafés, restaurants and take away food shops in the Centre.

In summary the Town Centre's business clusters provide it with competitive advantages in financial, legal, medical and personal services and speciality foods. By attracting customers to the Town Centre these clusters also benefit other businesses.

Vacancy Analysis

The floorspace survey found that the Centre had an overall vacancy rate of 9% for commercial and retail units. On a floorspace basis, the vacancy rate increased to 10% indicating that one or a number of larger units were vacant thereby slightly increasing the rate on a floorspace basis.

When discussing the vacancy rates of any given town centre, it is important to note that they are dynamic and change with varying market conditions. They can also vary with respect to the type of unit, what level of a building the unit is located, the quality of the building, its location and the nature of the broader economy.

Existing Vacancy in Five Dock Town Centre

As of April 2012, it was found that:

- There were 36 vacant retail and commercial units in the Centre comprising approximately 4,000sqm;
- 25 of the vacant units (69%) were retail units totaling 2,900sqm or 72% of overall vacant floorspace. Of these units, one 160sqm unit was located on the first floor of a building (5% of vacant retail floorspace);
- 11 of the vacant units were commercial (1,100sqm) or 27% of overall floorspace. Of these:
    - 1 unit was located at ground level (450sqm);

- 5 units were commercial shop top i.e. above a retail unit (465sqm);
- 4 units were commercial level 1 i.e. above a commercial unit (634sqm); and
- 1 unit was commercial level 2 (450sqm).

The results of the more detailed floorspace survey are mapped in Figure 5 below.

Figure 5 - Map of Vacant Retail and Commercial Floorspace

Retail Unit Vacancies

It was found that the majority of vacant units were ground floor retail shops, with an average floorspace size of 114sqm. Whilst this is in keeping with the average scale of a shop for a high street (i.e. around 100sqm), it was found that the general shop size of occupied retail units in Five Dock Town Centre was greater than 100sqm indicating that Five Dock's tenants had a preference for larger shop units.

The survey also found that the majority of vacant retail units were located in older buildings, with a number located at the northern and southern extremities of the Centre – away from the main shopping hub and parking areas. Over the course of the Study, one retail unit (63 Ramsey Road) had been refurbished and tenanted by a vitamin / supplement store.

Another cluster of vacant retail / commercial units were located in new developments at 134 Great North Road and 68 – 80 Ramsey Road (the latter had five ground floor vacant units totalling around 750sqm of vacant floorspace at the time of survey). The vacancies of these newer speculative units skewed the vacancy rate upwards.

The reasons for the ongoing vacancies of all of the units in these new developments (as opposed to the more established surrounding units) is unclear and may relate to the scale of the units or other design features not meeting the needs of prospective tenants. Alternatively the reason may relate to the details of the asking rent. Both of these new developments are mixed use with residential on the upper floors and slightly removed from the main retail focal point of the centre. Accordingly another reason for their vacancy may relate to their higher rental expectations as a new unit, yet slightly removed location from the main shopping focal point and thereby lower level of desirability for businesses.

A cluster of vacant retail / commercial units were also identified at 34 East Street. As may be expected, this implies that units that do not front the main thoroughfare (i.e. Great North Road) are less favourable to businesses that rely on passing trade than units that are more visible and have a high street presence.

Commercial Unit Vacancies

The Centre survey found that the majority of vacant commercial units were located on the first floors of buildings (i.e. 81 - 85 Great North Road). This implies that commercial shopfront space (i.e. real estate agents, banks and accountants) is in good demand and in turn reflects Five Dock Town Centres important 'service' role.

The vacancies on the upper floors indicate however that the Centre is less attractive, or presently oversupplied with commercial office space for professional services and commercial tenants that do not require shopfront space. This was particularly the case for older buildings above retail units and less so for purpose built commercial floorspace that had been designed and built for a specific tenant looking to locate in the Centre.

Only one unit was vacant on the second floor of a building (227 Great North Road) which is likely to be more indicative of the limited number of two storey buildings with second floor commercial floorspace in the Centre than the demand for this type of unit.

In essence the results above indicate that with the exception of purpose built commercial floorspace for a specific tenant, there is presently less demand for commercial floorspace on the first floor of older and lower grade buildings than ground floor or newer purpose built buildings. In turn, first floor commercial units are more attractive than second floor units. This result reflects the Centre's high street service focus as opposed to a commercial centre and the importance of targeting commercial business tenants for the Centre as opposed to the development of speculative commercial office space.

Implications of Vacancies for future development

A healthy and thriving centre requires a reasonable level of vacant retail and commercial floorspace at any point in time. This is because healthy centres need to provide opportunities for new businesses to move to a centre and to keep the centre in question fresh and interesting for visitors. Furthermore a reasonable level of vacancy is required as a price moderator for a centre and to provide choice to new businesses. In general a 3 - 8% vacancy rate of shop front retail is considered desirable.

Vacant sites within a centre can also be positive as they present opportunities for redevelopment. Market research undertaken to inform this Study found that the financial feasibility of redeveloping sites in Five Dock Town Centre are far improved for sites which were vacant or had nominal improvements. This was particularly the case for vacant sites located at the Northern end of the Town Centre. These sites presented the most immediate opportunities for redevelopment under the existing planning controls.

The key issue however relates to the appropriate level of vacancy. Whilst a reasonable level can be a positive, too great a level can conversely have a negative impact. This is in part because centres with higher rates of vacancy can make a centre look dead or run down, dissuading prospective tenants from locating their businesses there. This can have a downhill spiral effect for centres as less business investment results in a higher level of vacancy and so on.

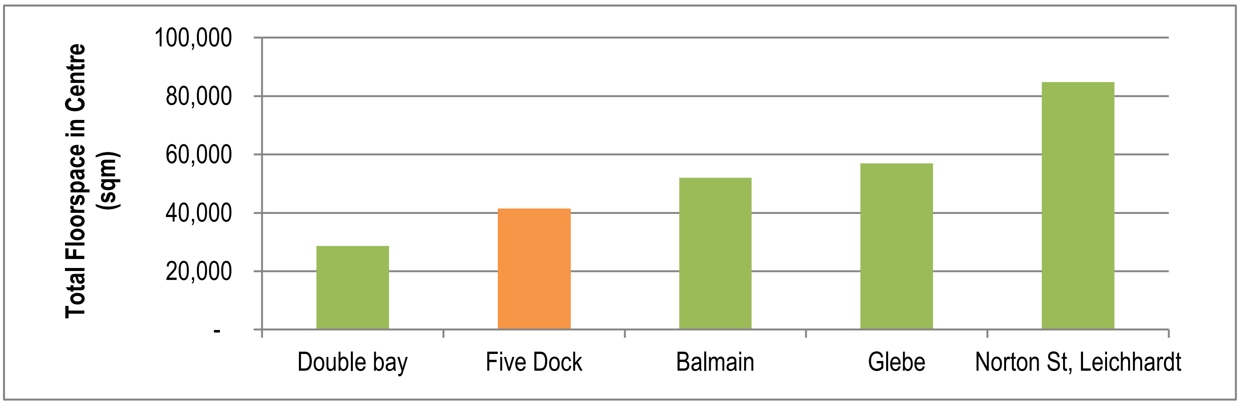
During the consultation stage of this Study, Stakeholders identified that the vacancy of units within Five Dock Town Centre was a key challenge. As noted above, the vacancy rates for the Centre (9 - 10%) were marginally higher at the time of survey than the upper end of the (3 - 8%) range given above. It is important to note however that this is a challenge that is not unique to Five Dock – rather many high street centres across Sydney (and more broadly Australia) are currently experiencing higher than usual rates of retail and commercial unit vacancy. This trend is largely a result of the current economy and in turn more conservative business and consumer sentiment.

Notwithstanding the above, the Study recognises that proactive action now can help to address the higher than desirable vacancy rate in Five Dock Town Centre. Proactive action now can help to put Five Dock in a sound position, to both minimise any further increases in vacancy rates and to prepare the Centre for prospective growth as the economy and consumer sentiment once again improves.

2.5 How Does Five Dock Compare to other Centres?

A comparison with other high street centres is a useful way to illustrate Five Dock's relative floorspace mix and its potential competitive advantage. Figure 6 compares the total commercial and retail floorspace of Five Dock Town Centre with other well know high streets: Balmain, Double Bay, Glebe and Norton Street (Leichhardt).

Figure 6 - Total Floorspace in Selected Centres

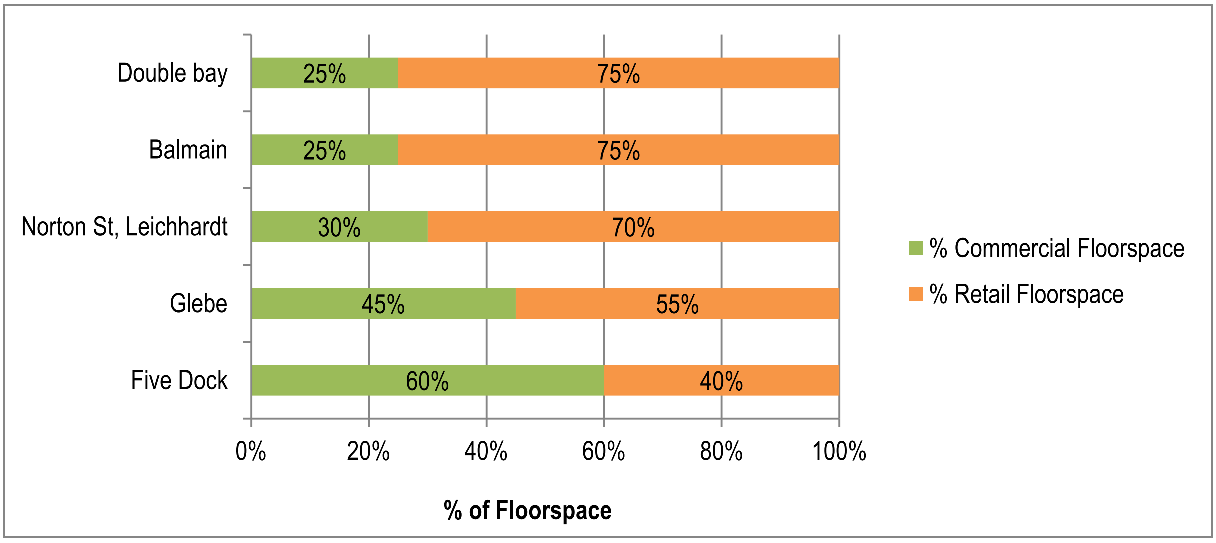


Source: Hill PDA floorspace data and Leichhardt Council Employment Lands Study

The Figure shows that Five Dock Town Centre is larger than Double Bay but significantly smaller than Balmain, Glebe and Norton Street.

Figure 7 compares the commercial and retail mix in each of the selected centres. At 60% Five Dock has the highest proportion of commercial floorspace followed by Glebe and Norton Street which also benefit from the presence of the major banks and other commercial services. Compared to Five Dock however, Glebe and Norton Street have a higher proportion of restaurants, cafes, clothing shops and other non-food speciality shops. Double Bay and Balmain have a far higher proportion of retail floorspace which reflects their reputation as fashion centres.

Figure 7 - Commercial and Retail Floorspace Mix in Selected Centres



Source: Hill PDA floorspace data and Leichhardt Council Employment Lands Study

In summary, Five Dock's strengths are its finance, legal, medical and personal services and speciality foods. These business sectors attract a large number of consumers and workers to the Centre. This is a substantial competitive advantage for Five Dock that provides opportunities for other business types and should be built upon.

While many high-streets seek to revitalise themselves by becoming the new 'eat street' or 'fashion strip', the Town Centre's future prosperity may lay in building on its strength as a personable 'one stop shop' location for the day to day needs of locals – a place where people choose do most of their daily shopping not just for its convenience but also because the experience is so enjoyable and personal in the true village tradition. This type of product is something large centres and malls find it difficult to / can neither offer nor compete with.

3. Planning and Managing Five Dock Centre Today

The following Chapter provides a brief summary of the existing planning and legislative context that governs the development of Five Dock Town Centre. A more detailed analysis of these policies is provided in Appendix 2. The Chapter also profiles existing and prior initiatives designed, funded and implemented by Council and other stakeholders in recent years to enhance the vitality and viability of the Town Centre.

3.1 State Policy Context

There are two main State Policies that set the strategic direction for the Town Centre, these include: the Metropolitan Plan for Sydney 2036 (2010) and the Draft Inner West Subregional Strategy (2008).

The Metropolitan Plan for Sydney sets the strategic direction for Sydney towards 2036. The overarching vision is that by 2036, Sydney will be a *"more compact, networked city with improved accessibility, capable of supporting more jobs, homes and lifestyle opportunities within the existing urban footprint"*. The Plan sets out the challenges which are facing Sydney including Sydney's growing population, the changing population and more jobs closer to home. The Plan outlines nine strategic directions to address these and other challenges.

Of relevance to this Strategy is the strategic direction *Growing and Renewing Centres.* This stipulates that concentrating a wider range of activities near one another in centres that are well served by public transport, makes it easier for people to go about their daily activities. Further, it helps to create lively and functional places in which to live, work, socialise and invest. Consequently, improving the Five Dock Town Centre so that it provides a range of different facilities and services is in line with this strategic direction. This strategic direction includes a series of objectives and actions as follows:

- *Objective B1 To Focus Activity in Accessible Centres* - this objective supports commercial development in existing centres, housing within walking catchments of existing centres and social infrastructure within centres.
- *Action B1.1 Plan for Centres to Grow and Change over Time* - this action recognises that councils should identify centres that will grow and change over time to provide additional housing, employment and services. The Five Dock Town Centre Strategy will assist in detailing the future direction of the Centre and provide recommendations as to how it could be improved.

The *Inner West Subregional Strategy* focuses on the five local government areas that comprise the Subregion, one of these is Canada Bay Council. The Five Dock Town Centre is defined as a village within the Inner West Subregional Strategy. This is defined as *"a strip of shops and surrounding residential area within a 5 to 10 minute walk and contains between 2,100 and 5,500 dwellings"*[5].

[5] NSW Department of Planning, 2008, Inner West Subregional Strategy

The Strategy sets out key directions and actions. Of relevance to this Strategy is the key direction to *Support and Differentiate the Role of Strategic Centres.* Action *B1.1 Establish Typology of Centres* indicates that Councils should incorporate the established centres typology in to their land use and infrastructure planning. Consequently, this Strategy uses the village classification as a basis for improving the Town Centre. In addition to this, Action *B3.1 Establish a Stronger Centres* states that successful centres should:

- Be accessible and pedestrian friendly;
- Provide good public transport options;
- Contain high- level jobs, learning opportunities and cultural activities; and
- Have attractive and safe public domain spaces.

3.2 Local Policy Context

Four key documents set the objectives for the City of Canada Bay and more specifically Five Dock Town Centre as follows:

- The Canada Bay Futures Plan20;
- The Canada Bay Local Planning Strategy;
- The Canada Bay Local Environmental Plans (LEP 2008 and LEP 2011); and
- The Canada Bay Development Control Plans.

The *Canada Bay Futures Plan20* sets a twenty year vision for the LGA by adopting seven key themes. The Plan seeks to further the vision for an *"Engaged, Healthy, Green, Liveable, Moving, Prosperous and Vibrant"* City. The key theme of a *Prosperous City* aims to promote local business of a high quality and global standard (Outcome 6.4). In addition to this, the Canada Bay Local Planning Strategy provides a long term direction (2010 – 2030) for the planning of the LGA to assist decision making in response to population growth and change. The Strategy identifies that there is a healthy demand for retail floor space within local centres.

The Canada Bay Local Planning Strategy outlines a series of objectives and actions for the LGA which are relevant to this Strategy. Of particular note are:

- Objective E1- Continue to strengthen employment with business and retail development in local centres; and
- Objective E7- Protect existing employment generating capacity and provide diverse opportunities for future employment *in the LGA.*

The Canada Bay Local Environmental Plan (LEP 2008) provides zoning provisions that determine land use and building controls within the LGA. The Five Dock Town Centre is zoned B4 Mixed Use in accordance with the Canada Bay LEP (2008). The overarching objective of the zone is *"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"*[6].

[6] Canada Bay Local Environmental Plan (2008)

The Five Dock Town Centre maintains its zoning of B4 Mixed Use in accordance with the Canada Bay draft Local Environmental Plan (LEP 2011). This Plan sets the following objectives: *To provide a mixture of compatible land uses* and *To integrate suitable businesses, office, residential, retail and other development in accessible locations so as to maximise public transport patronage and encourage walking and cycling.*[7]

The Canada Bay Development Control Plan (DCP) applies to the whole LGA and provides planning controls to ensure a high standard of design. Of relevance to this Strategy is *C7 - Infill development in the Five Dock Shopping Centre should reinforce the low scale character of the streetscape* and C8 - For new developments within the Five Dock Commercial Centre, car parking should be provided on-site.

3.3 Prior Studies Initiatives and Studies Undertaken for the Centre

The City of Canada Bay has funded and implemented a number of studies and initiatives aimed at improving the vitality and viability of Five Dock Town Centre. Investment in Five Dock has since the late nineties been guided and led by a partnership of Council, business and property owners. The studies and initiatives undertaken are outlined below (there is more detail in Appendix 3).

Main Street Program 1996-2006

In 1996 an Economic Base study developed an action plan to ensure Five Dock remained the dominant town centre in the southern part of the LGA. The recommendations were implemented and ranged from increasing floor space in the centre through the LEP to the development of a main street program funded by Council and a business rate levy. *Over* $5m was spent by Council in 2003 / 2004 to improve the Centre through footpath widening, new street furniture, landscaping and the undergrounding of overhead cables. These works were enhanced by a business development program with training, newsletters, promotions and a marketing program for the centre. A parking study was also undertaken and developed a range of actions to maximise parking availability in the centre and all recommendations have been implemented except for the development of a multilevel car park at Waterview Street. However, Council purchased land at 9 Waterview Street for the expansion of the car park to provide an additional 19 spaces. By 2006 the main street program had succeeded in meeting its objective and had a leadership role in the *revitalisation of the business precinct of the Great North Road by improving Streetscape and physical design, strengthening business and promoting the centre as a vibrant local centre and focus for new residents".*[8]

Sustainable City Program 2006-12

In 2006 the Sustainable City program was initiated. This drove the development of economic, cultural, social and environmental sustainability across the City. A Great North Road Committee evolved from the Main street program to target activities along this key shopping strip. Achievements within Five Dock include a range of physical improvements, marketing programs, and business development activities.

[7] Canada Bay Draft Local Environmental Plan (2011)

[8] Five Dock Main Street Matters Newsletter December 2003

Improvements included the banner program to beautify the strip, installation of business fences, signage and an illuminations program to support night time vibrancy, Christmas decorations program and the development of public art installations (La Familia, Five Dock Library Gallery, Fred Kelly Place mural, Signal Box Art and Etetching art work in Library windows). Over 20 shopping promotions and 10 events have been hosted by Council including the major annual event Ferragosto which attracts fifty-thousand people from across the metropolitan area. Business Development projects included provision of regular business newsletters, over 60 training events and industry support and cluster promotions which have all involved Five Dock businesses. Council has also invested in research to help and support business including the Five Dock Centre Study, On Street Shopper Survey, Shopping basket analysis, Five Dock Precinct Survey, FuturesPlan20 and the GHD parking study.

Council's annual expenditure in the Five Dock Centre is significant and provides for a dedicated cleansing team, parking patrol, library and event program.

Five Dock Chamber of Commerce

The Five Dock Chamber of Commerce is an incorporated association of business and property owners from the Five Dock Town Centre. The Five Dock Chamber of Commerce seeks to connect businesses to Council. The Chamber has had an active role in preparing the brief for this Strategy and has participated in the consultation exercise to inform it.

4. TRENDS INFLUENCING THE CENTRE

The following Chapter outlines some of the key retail and commercial trends that have the potential to influence the performance of the Five Dock Town Centre both today and in the future. A review of these trends and their potential impacts will assist in ensuring the strategic advice provided in this Strategy is robust and capable of implementation.

4.1 Retail Trends

Over the past three decades significant changes have occurred in the retail industry such as the introduction of new technologies (i.e. self-service check outs, the internet), the ageing of the population, increased female participation in the workplace and changing consumer preferences. These changes have placed increased pressure on many existing centres to either adapt or lose market share.

In response the retail industry has evolved so that it has:

- Allowed residents to purchase goods in smaller quantities than usually provided by manufacturers or wholesalers, from stores located closer to the homes of its consumers and by operating at extended / more convenient times;
- Identified and supplied new products / models of existing products;
- Facilitated price comparison;
- Provided consumer information prior to purchase and after sales service; and
- Provided or arranged financial services for the purchase of goods.

In the 1980s Australian retail floor space totalled approximately 1.8 square metres per person (excluding commercial space and automotive retailing), which was roughly divided into equal components of regional, district and neighbourhood/local centres. Today we have around 2.1 sqm to 2.3 sqm per capita due to increasing affluence and consumerism.

Retail is an important sector of the economy. In 2009-10 retail contributed 4.3% to the GDP and in February 2010, 11% of Australian employees worked in retail[9]. Recent trends suggest that retail sales are increasing after a decline during the recent economic downturn. Retail sales recorded growth of 1.0% in the 6 months to February 2012 and 2.1% growth between February 2011 and February 2012[10]. However, the rate of growth is not even across retail sectors.

Since February 2008 spending has risen on cafes, restaurants and takeaway food services (26.1%) and retail food/groceries (20.4%). Spending on 'other retailing' – which defined by the ABS as newspapers, books, stationary, flowers, recreational goods, pharmaceutical, cosmetic and toiletry goods – also recorded strong growth (18.9%). In contrast spending was much weaker in department stores (-1.6%), household goods (2.1%) and clothing, footwear and personal accessory retailing (2.7%) over the same period (Figure 8).

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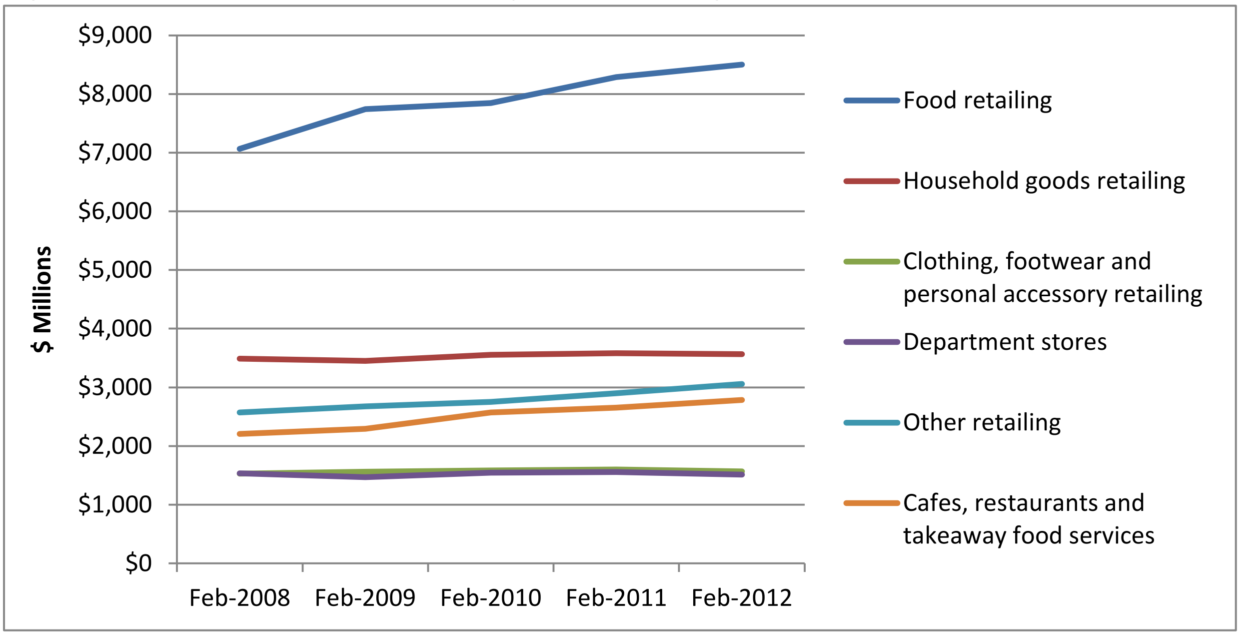
[9] Source: ABS

[10] Source: 8501.0 - Retail Trade, Australia, Sep 2011

Retailers in these latter non-food discretionary categories are therefore experiencing challenging times, as consumers have become cautious and their savings behaviour has changed. The Reserve Bank of Australia recorded the savings rate at 10% of disposable income at the start of 2011 which was the highest level in 20 years.

Figure 8 - Retail Trade in Australia February 2008 to February 2012



Source: Source: 8501.0 - Retail Trade, Australia, Feb 2012 – seasonally adjusted

The retail sector has evolved over the past few decades in a response to some key trends. These trends are discussed further below.

High Street Retailing

Since the 1950s-60s (in parallel with increasing car ownership) there was a move from high street retailing to suburban malls that provide convenient shopping and car parking. A major change in the suburban mall has been the change in ownership. Ownership of suburban shopping centres is largely with the retail property groups (Westfield, GPT and the like) enabling retailers to focus on their core business without having large investments in the property itself. The development of such shopping centres can make it difficult for existing high street retailers to continue to compete for trade.

Big Box Retailing

The Big Box retail format has been growing in Australia since the 1980s with stores occupying large floor space requiring high turnover on low price/cost products. Typically the Big Box retailers have focussed on hardware, whitegoods, home wares, electrical goods and liquor. The recent arrival of Costco and Woolworth's expansion into hardware via the Masters concept suggests that this trend will continue.

Internet Shopping

Internet shopping (also called e-tailing and electronic retailing) is a retail format in which the retailer and customer communicate with each other through an interactive electronic network. A growing proportion of Australians have access to the internet at home. In fact the rate of access has reportedly quadrupled in recent years, from 16% of households in 1998 to 72% in 2008-09[11].

In 2010 some $9.5bn of retail sales in Australia were made online which equates to 3.9% of total ABS retail sales[12]. The main reasons for shopping online were due to price, convenience and range of goods available. The most commonly purchased items were computer and software (20%), books (12%), apparel (11%), food and grocery (10%) and music and videos (7%)[13].

Internet retailing in Australia was seen to account for a smaller proportion of total household expenditure than in most other western countries, with places like the UK and the US recording higher online retail (7.6% and 5% in 2010 respectively).

According to one industry consultant[14], online sales in Australia are forecast to increase to 7.2% of household retail sales by 2015 and to 11.8% by 2020. This would equate to a 16% growth over the next decade.

Despite the growth, online retailing may not necessarily have an adverse impact upon "bricks and mortar" retailers in the high street. Some retailers, such as Myer, Coles and Woolworths, are increasingly seeking to offer online retailing services with goods dispatched from the closest store to customers. As such, although the goods are purchased online they are sourced from local stores and therefore have no net impact upon high street sales. It is therefore estimated that around 40% of all online sales have no adverse impacts upon high street retailers for this reason[15].

Lifestyle and Experience Retailing

More recently, gentrification and large scale infill developments have triggered a recovery in high street retailing. Retail outlets such as cafes, restaurants, niche bookshops and household goods suppliers are now part of the attraction of urban living.

As identified by the Urban Land Institute, today *"shopping is as much about want as it is about need".* What is more, a growing number of consumers are seeking a shopping experience that is not within enclosed malls or online. This desire was commonly voiced by respondents to the Shopper / Visitor survey whereby the outdoor nature of Five Dock and its village charm were significant attractions. Accordingly traditional retail strip centres such as Five Dock are gaining an edge back on shopping malls and internet retailing through their offer of experience.

The growing trend is for a positive experience in a centre as much as a destination for shopping. This trend has given birth to a new type of retail centre referred to by a multiple of names, depending on the location, including 'active edge centres' (as opposed to having blank walls like traditional shopping malls) or 'lifestyle centres'. The growth in the number of lifestyle centres in the USA is outnumbering the growth of indoor shopping centres as a result of *"changing demographics, urban revitalization, a lack of traditional mall development, heightened*

[11] Source: 8146.0 - Household Use of Information Technology, Australia
[12] Source: Retail in the Spotlight Forum, Property Council of Australia 17/11/2011
[13] Source: Retail in the Spotlight Forum, Property Council of Australia 17/11/2011
[14] Urbis – Retail Perspective August 2011
[15] Urbis – Retail Perspective August 2011

competition and bored consumers". It seems that increasingly consumers are becoming less interested in traditional malls and are searching for new shopping experiences and environments with character and ambience.

Lifestyle centres may be defined as open air centres that combine a mix of retail, commercial and community floorspace. They are pedestrian friendly environments with higher quality architecture and have large public spaces where people can gather and be part of the community. They are not as reliant as shopping malls on large anchor tenants (such as supermarkets, department stores or increasingly brand stores such as Zara, H&M or Top Shop) instead they contain a mix of high quality stores such as book and music shops, homewares and furnishings.

Many lifestyle centres in the USA have focused on particular consumer markets or retail niches such as 'outdoor enthusiasts', 'teenagers' and 'home improvements'. Retail Navigator magazine identifies that one of the key factors with lifestyle centres however is that they appeal to more than just shopping. The have a mutli-purpose approach that promotes leisure and entertainment with a range of uses including cafes, restaurants, bars, theatres and libraries. They also include *"a design ambience and amenities such as fountains and street furniture conducive to leisure-time visits and causal browsing."*

As part of this quality and specialised approach, successful lifestyle centres provide a number of 'small indulgence' items that are affordable for people yet provide a 'treat' during the shopping experience. One key example of such an item is coffee. Good quality coffee, mixed with a place to socialise / do business / watch the children while they play creates a positive experience that is both community building and attractive for a range of cultural groups[16]. Coffee is a particularly important attractor for a centre such as Five Dock with its Italian heritage. Other examples of popular small indulgence items that enhance the lifestyle experience in centres include quality chocolate shops (i.e. the Bald Man) or quirky jewellery stores.

4.2 Commercial Trends

The increasing affluence of NSW's population and growth of the New Economy (otherwise referred to as a knowledge and ideas based economy as discussed above) is expected to strengthen demand for commercial floorspace especially in key locations, close to tertiary education and transport links.

> *"Service sector organisations, both public and private sector, are the main users of office space."*
>
> Barkham (2002)

The key long term trend in office development has therefore been the growth in the service and knowledge sectors. These sectors relate to civil service and public sector administration; banking, insurance and finance; private sector administration (corporate headquarters etc.); business services (law, accountancy and consultancy) and consumer services (health, education, media etc.).

In the 1970s there were predictions that with technological advances a much larger proportion of people within the service and knowledge sectors would work from home, reducing employers' overheads and demand for office floorspace. This phenomenon has not been realised, with technology increasing the amount of out of hours work

[16] Retail Trends – What Can You Learn, Yuri Bolotin, Principal, Design Portfolio Pty Ltd

taking place at home or on public transport, but more than 80% of the persons employed across Australia still work in business premises.

Rather than a move away from businesses premises technological advances have contributed towards a greater choice of locations and higher densities of employment within offices, with wireless networks and the like facilitating initiatives such as “hot-desking”.

Sustainable Communities

With rising fuel prices and the introduction of mandatory energy efficiency disclosure for large commercial buildings (>2,000sqm) by the Federal Government in the second half of 2010, sustainability has become an increasingly important driver of price and demand for office floorspace. The growing importance of sustainability was noted in the Jones Lang LaSalle Survey of Investor Sentiment (2009) which found that whilst only 37% of corporate occupiers were willing to pay rental premiums of between 1-10% for sustainable floor space almost 90% considered green building certification when selecting premises.

The Jones Lang LaSalle Survey confirms our own view that energy efficient buildings are becoming the norm and moving forward sustainability will increasingly affect all aspects of construction and services. From a planning perspective a sustainable approach should result in the more efficient use of land in established centres to integrate employment opportunities and minimise the need to travel between home and places of work.

Work Life Balance / Lifestyle Choices

An increase in the number of working hours per household has resulted in time pressures for the workforce. Linked to this is the impact of a greater proportion of dual earning households that means less time for family responsibilities. The employment rate for women in Australia has steadily increased from 29% in 1954 to 47% in 1980 to 61% in 2000 with almost half of these having dependent children. In addition a large number of workers are responsible for caring for an ageing population (population aged 65 years and over projected to rise from 12% in 1999 to 22% in 2030 and 26% in 2050).

As a result work places that enable workers to conveniently combine paid work, leisure and family responsibilities are becoming increasingly attractive. Business parks and large scale CBD / edge of centre developments have generally endeavoured to emulate these features to some degree but often do not provide the diversity and mix of uses to compete with a vibrant CBD / centre location.

It is considered that the need for offices to be conveniently located within a vibrant mix of uses will become increasingly important to office workers and their employers. As such, work places that enable workers to conveniently combine paid work, leisure and family responsibilities are likely to be attractive to employers and workers alike. CBD and centre locations must offer improved access to high quality retail shops and services as an added benefit which is often limited in business park locations. These should include a wide range of health, legal, banking and government related outlets, as well as consumer outlets.

5. ECONOMIC CONSIDERATIONS

The following Chapter focuses on the factors that influence the economics (and thereby the realisation) of development in Five Dock Town Centre. By gaining a better appreciation of these factors, it is possible to design suitable local development controls so as to encourage desirable redevelopment. The Chapter has been informed by market research and the feasibility testing of a nominated development site in the Centre. The Chapter summarises the key findings of the research and modelling whilst a more detailed discussion is provided in Appendix 5.

5.1 Market Research

Hill PDA's market research identified that the performance of properties within the Town Centre has been mixed. Traditional strip retail is concentrated along the Great North Road in the Southern End of the Town Centre (between Kings Road and Second Avenue) while commercial uses are more evident in the Northern End, to the north of Second Avenue.

This development pattern suggests a decline in face rents[17] towards the Northern End of the Town Centre, commensurate with an increasing focus on commercial land uses. Not unexpectedly, given the clustering of land uses along the Great North Road there appears to be an observable difference between the performance of sites in the north of the Town Centre (north of Second Avenue) and that of sites in the south of the Town Centre (between Kings Road and Second Avenue), the latter recording higher rents and better transactional activity.

Sites in the Southern End have in recent times achieved sale rates of between \$5,500/sqm and \$6,500/sqm of site area, with sites in the Northern End achieving between \$3,500/sqm and \$4,500/sqm of site area.

5.2 The Economics of Development

Hill PDA carried out feasibility modelling on a site within the Town Centre based on notional mixed use development schemes (combination of retail / commercial / residential uses). The object of the feasibility modelling was to ascertain if in fact mixed use redevelopment in the Town Centre was viable and if so, the minimum densities required for development to be feasible in today's market.

Mixed Use (Primarily Residential) Development Feasibility

In investigating the required densities for feasibility, Hill PDA formulated high-level mixed use development options based on various densities. Additionally, the impact of reducing car parking requirements of on-site parking was tested. It should be noted that these hypothetical options were not design nor engineering tested.

A summary of the results of the testing are shown in the table below.

[17] 'Face rents' are the rents shown on a lease document which may or may not include incentives or outgoings

Table 5 - Summary of Mixed Use Feasibility Results

Site/Option Specifics	FSR 2.5:1 (4 storeys)		FSR 3.5:1 (6 storeys)	
	Existing parking[1]	Reduced parking[2]	Existing parking[1]	Reduced parking[2]
Site Area	417sqm	417sqm	417sqm	417sqm
Development Yield				
Residential GFA	780sqm	780sqm	1,200sqm	1,200sqm
Non-residential GFA	260sqm	260sqm	250sqm	250sqm
Carparking spaces	24	16	33	18
Performance Indicators:				
Residual Land Value (RLV)	$950,000	$1,300,000	$1,500,000	$2,100,000
RLV ($/sqm of site area)	$2,278	$3,117	$3,597	$5,036
Project IRR	21.46%	21.27%	21.27%	19.82%
Development Margin	19.71%	20.52%	20.52%	23.53%

Notes:

1 - Based on current controls, the following parking ratios apply: Small dwelling (1 space), Medium dwelling (1.5 space), Large dwelling (2 spaces), Visitor spaces (0.5 spaces for each dwelling where the total exceeds 5 dwellings).

2 - Reduced carparking controls have been assumed in the order of: Small dwelling (0.5 space), Medium dwelling (1 space), Large dwelling (1 space), Visitor spaces (0.1 spaces for each dwelling where the total exceeds 5 dwellings). These reduced rates are based on ratios of developments elsewhere in Sydney comparably located along major transport nodes, e.g. as provided under the Marrickville LEP 2011.

Albeit at a high-level, some observations which emerge from the feasibility analysis shown in the table above include:

- Sites with improvements either offering substantial utility or adequate returns are unlikely to be redeveloped in the short to medium term;
- Whilst higher densities are required for *certain* sites located in the Northern End of the Centre, higher densities are applicable to the Southern End as a whole as properties here generally perform better and consequently are more valuable in their current use;
- Where the existing use / building on a site is underperforming (such as 239 Great North Road), an FSR of 2.5:1 may be sufficient to incentivise change on the site;
- Whilst an increase in density to FSR 3.5:1 could improve development feasibility on certain sites, particularly sites in the Northern End of the Town Centre it is unlikely to have any meaningful effect on sites in the Southern End;
- In the case of sites with significant income or improvements with good functional utility (such as 144 Great North Road), higher densities may be required to promote renewal; and
- As reflected in the table above, a reduction in parking requirements[18] translates into significant improvements in development feasibility.

It is important to note that the dimensions of smaller sites can make development even more challenging than larger sites and therefore in most cases warrant higher densities. The cost associated with assembling a site from fragmented sites can in many cases encumber redevelopment. The site tested to inform this Chapter is small in area, i.e. 417sqm and as such would face greater challenges for viable redevelopment than larger sites in the Centre. Accordingly it would require the upper end of the FSR range discussed above, whilst a larger site in the Centre may be viable at a lower density. The development site at 277 Great North Road has a site area of 830m2 and was approved with a FSR of 2.12:1.

[18] Reduced parking requirements could be considered based on comparable areas located along major transport nodes.

The differences in performance between the Northern and Southern Ends of the Town Centre would underpin how viable alternative development scenarios are. Existing property values in the Southern End are generally at higher levels than the Northern End, hence the 'density threshold' for development to occur is higher. Whilst it has been noted that performance in the Town Centre as a whole has declined over the last decade, existing uses in the Southern End have not deteriorated to a degree that would make large scale redevelopment viable as yet.

The feasibility modelling suggests that the existing planning controls are insufficient to incentivise change on most sites. The exception being vacant sites or sites with nominal / underperforming improvements (particularly in the Northern End of the Town Centre) which present the most immediate opportunities for development.

Whilst economic considerations are important and Council should be cognisant of their role in the dynamics of development, it is recommended that an urban design study be commissioned to test the viability and impacts of any increase in density and height controls. This is particularly important when discussing FSRs as great as 3.5:1 as these densities can translate into significant buildings (in terms of height and bulk) that may be considered at odds in terms of design and urban form with the Centre's village character.

Retail / Commercial Development Feasibility

Retail / commercial development is likely to occur in the Southern End when rents and capital values improve to the extent that redevelopment is feasible. This will be achieved when business confidence regarding the levels of patronage and custom brings about an increase in the desirability of Five Dock as a retail strip, translating to higher rents and stronger covenants[19]. Stronger covenants underpin a rise in the performance of a property and thus translate to higher property values. When performance expectations for properties within the Southern End improve sufficiently there will exist a financial imperative to improve and upgrade existing stock.

5.3 Summary

Our findings suggest that Council could adopt a two-pronged approach to stimulate redevelopment in the Town Centre. One measure that would be particularly effective in the Northern End of the Centre would be to vary planning controls (specifically height and density controls). The impact of any variations should however be tested in an urban design study.

A broader approach is considered appropriate to increase the overall performance and desirability of the Town Centre. In the Northern End a mix of residential, commercial and retail uses should continue to be supported but possibly at a higher density, subject to design testing. An intensification of land uses in the Southern End could allow for new public spaces, promote the 'active' interaction of uses and help establish the Town Centre as a destination for visitors. This would not only benefit the existing Town Centre but also act as an impetus for future development in the broader locality. The means by which to achieve these outcomes as part of a comprehensive approach for the Centre are discussed further in the third part of this Strategy.

[19] A covenant refers to a lease agreement; the 'strength' of a covenant is a function of various factors including the reputation and financial standing of the lessee, how favourable the terms of the lease are (e.g. rental levels, rent reviews, etc.) and length of the lease.

6. Five Dock Retail Gaps

In order to better understand the retail experience of the Town Centre, the findings from the floor space survey and shopper and business surveys have been used to identify the potential gaps in the retail offer. With consideration of the existing and emerging retail character of the Town Centre, this process of analysis has revealed some key findings as a way of moving forward and delivering the vision of the Town Centre.

Five Dock is well serviced in…

- Butchers, bakeries and fruit shops – There are a number of speciality food stores, however, they are mainly utilised for convenience purposes;
- Hairdressers and beauty salons;
- Cafes and restaurants – The cafes and restaurants in the Town Centre are mainly family friendly cafes and restaurants; and
- Pharmacies – There are well established pharmacies in the Town Centre that the community visit on a regular basis.

The missing stores…

- A second supermarket;
- Gourmet food stores;
- Restaurants and cafes with extended trading hours;
- Clothing stores (boutique fashion stores which target the medium - high end market; and
- Unique stationary and gift stores.

The opportunities…

- An additional supermarket – The Town Centre is need of another supermarket to provide more variety e.g. Thomas Dux, Aldi, Coles or Woolworths. It is considered that Thomas Dux type would suit the Town Centre in that it is small scale supermarket which provides gourmet options;
- Gourmet Food Stores – The implementation of additional gourmet food stores to strengthen the existing cluster e.g. Pasticceria Tamborrino (Five Dock) and Ranieri Deli (Five Dock). These types of stores would contribute to making Five Dock a shopping destination;
- Restaurants and Bars – Restaurants that attract more night life would be beneficial e.g. The Wine Library (Woollahara) and Pizza e Birra (Surry Hills);
- Boutique Fashion Stores – The implementation of medium-high end boutique clothing stores in Town Centre would diversify the range of clothing stores available e.g. Alfies Store (Balmain);
- Fashion For Kids – Children's clothing stores are in great need within the Town Centre e.g. Seed, Adrienne and Miss Bonneys (Double Bay), Mothercare;
- Gift Stores – Gift stores which provide a unique range of items e.g. Bristol and Brooks; and
- Stationary Stores – Stationary stores which provide an exclusive array of items e.g. Kikki.K and Smiggle.


PART B – STAKEHOLDER CONSULTATION

This part of the Strategy summarises the key findings of the stakeholder consultation programme undertaken to inform the Strategy.

7. Stakeholder Consultation

In order to inform the Strategy, a series of stakeholder consultation exercises were undertaken including:

1. A survey of local businesses;
2. A face to face survey of local shoppers;
3. A survey of local residents;
4. Workshops with the Five Dock Chamber of Commerce and local businesses.

The following section explains the consultation methods, who was consulted and the key issues and comments raised by local stakeholders. A more detailed analysis of the survey responses is provided in Appendix 4 and 5.

7.1 Survey of Local Businesses

A major component of the Strategy's stakeholder consultation process related to the survey of local businesses via a 21 question survey that was developed in consultation with Council. The survey asked a range of questions including the length of operation of the business in question, key issues that affected its success and what improvements could be made to the Town Centre in order to increase trade and turnover.

Surveys were hand delivered to all businesses within the Study Area and additional surveys were emailed. Where it was not possible to hand a survey to a business representative directly (i.e. the business was closed) surveys were left in the businesses mailbox.

Of the 300 businesses located within the Town Centre, 28 provided completed surveys representing a 9% response rate. Whilst this response size cannot be considered statistically representative of all businesses, the returned surveys still contain valuable information for the purposes of this Strategy.

"Improve the entire street scape not just pockets in front of cafes. Provide more parking with fewer parking restrictions near shops. News, promotions, advertising and events available online and via phone Apps. Content provided by local business and council"

Business Owner

The key findings of the business survey include:

- The majority of businesses (58%) lease their premises thus indicating the importance of landowners as another stakeholder in the Centre;
- Local 'stand-alone' enterprises are far more common than franchise and national brand premises;
- More than half of businesses surveyed (57%) had operated in the Town Centre for more than ten years;
- Nearly three quarters of businesses (72%) employed fewer than 5 full time employees while less than half of businesses (46%) surveyed employed part time staff;

- During the weekdays 38% of businesses surveyed remained open after 6pm while on Saturday and Sunday this decreased to 32% and 14% respectively;
- 70% of businesses surveyed opened on a Saturday and 27% on Sunday;
- Restaurants, cafes, food stores and newsagents were busiest on Saturdays whilst financial services, lawyers, fitness centres, dentists and other services were busiest during the weekdays;
- 56% of businesses estimate their average turnover for 2012/13 will be *less* than 2011/12 with most of these respondents being in the café, restaurant, food, specialty, non-food and medical categories. Only 44% of businesses felt their average turnover for 2012/13 will be *greater* than 2011/12 with most of these respondents being in the financial, legal and personal service categories;
- Businesses, particularly those expecting decreased turnover, cited economic conditions and the lack of car parking as the main factors impacting turnover. Other factors that rated highly were competition from other centres, the poor quality and visual appeal of the Town Centre and a lack of passing trade;
- Businesses stated the majority of their customers were residents from the suburb of Five Dock and the surrounding suburbs of Abbotsford, Chiswick, Drummoyne and Haberfield followed by local workers and then visitors from elsewhere in the Inner West Subregion;
- When asked to rate a range of aspects within the Town Centre, on average businesses provide the following responses:
  - *Good* – access to public transport;
  - *Average* – range of shops and services, cleanliness and maintenance of streetscape, sign posting around centre and events and activities; and
  - *Poor* – parking availability, traffic congestion, security and CCTV coverage, marketing and promotion.
- The top four improvements that businesses felt the Town Centre would benefit from were:
  - More public car parking;
  - Increased variety of shops;
  - Better quality streetscape; and
  - Increased marketing and advertising.
- Burwood Westfield was considered Five Dock's biggest competitor due to its greater size, variety of stores, parking and convenience. Haberfield and Leichhardt were also viewed as competing centres which provided greater variety of goods and services;
- The most commonly cited ways in which local businesses and the Chamber of Commerce could improve the Town Centre were as follows:
  - Assist in improving the appearance of the streetscape;
  - Lobby Council to create more parking;
  - Encourage shop owners to take pride in their facades, surroundings and presentation to the public;
  - Encourage a greater diversity of businesses; and

- Undertake more marketing and promotions.

- The most commonly cited ways Council could improve the Town Centre were as follows:
  - Provide more parking;
  - Streetscape improvements; and
  - Promote more development.
- Other ideas provided by respondents included:
  - The introduction of a shuttle bus by Council to transport shoppers and workers around the LGA;
  - Improved street lighting to create a safer more inviting environment of an evening;
  - Encourage more development within the Centre; and
  - Enlarging Fred Kelly Reserve and using it as a hub for the Town Centre.

7.2 Shopper and Visitor Survey

> *"To improve the shopping experience, my visual experience would have to be improved. We also would like a music/arts venue here or just some night life- nice wine bar for example"*
>
> Shopper

As part of the stakeholder consultation process, a shopper / visitor survey with 13 questions were prepared by Hill PDA in consultation with Council. The Hill PDA consultation team then conducted 50 shopper and visitor interviews in the Town Centre along the Great North Road on the 1st and 7th of March 2012. A further 1,050 shopper surveys were mailed to residential properties located within 250 metres of the Centre along with a pre-paid envelope. Council also emailed shopper surveys to 588 local residents.

Approximately 346 surveys were returned from the direct mail and email correspondence representing an excellent response rate of 21%. In total (face to face, mail and email) 396 shopper surveys were completed providing valuable insight into the perceptions and habits of local residents and people visiting the Centre.

The key findings of the shopper / visitor survey include:

- The main reasons people visit and shop in the Town Centre relate to its convenience / proximity to their home (82%), its range and quality of food shops (57%), the provision of medical services (32%) and cafes and restaurants (31%);
- The most common way of getting to and from the Town Centre was walking followed by driving;
- Of those surveyed 43% visited the Town Centre every day while a further 32% of people visited at least once a week;
- Nine out of ten shoppers surveyed lived locally;

- When visiting the Town Centre the most commonly used shops and services were the supermarket (84%), speciality foods, butcher and delicatessen (69%), medical and pharmacy (63%) and banks and post office (61%);
- The typical amount of money spent by shoppers when visiting the Town Centre was less than $100 with 40% spending $51 to $100 and 35% spending between $11 and $50;
- Of those surveyed 44% said they also shopped at Burwood and 32% at Leichhardt. Less than 10% said they shopped at Concord, Sydney CBD, Birkenhead Point, Haberfield and Ashfield;
- The main reasons given for shopping at these alternate locations were:
  - Supermarkets – access to Woolworths, Coles or Aldi;
  - Greater variety and choice – particularly in relation to clothing, department stores or restaurants;
  - Convenience – parking easier to find, on the way to and from work;
  - Better value / cheaper; and
  - Higher quality products and service.
- When asked what is, or could be, unique about the Town Centre the most frequent responses were its character, village atmosphere, sense of community, convenience, family friendly and specialty foods;
- Improvements that shoppers would most like to see in the Town Centre are better range of shops (57%), more car parking (53%), a more attractive streetscape (50%) and more night time activities (31%);
- Most shoppers said they were either satisfied (60%) or very satisfied (20%) with their shopping experience in the Town Centre;
- The Town Centre was considered a family orientated environment by 82% of respondents however improvements frequently suggested included greater access to:
  - Public toilets with baby changing facilities;
  - Family friendly cafes and restaurants;
  - Quality children's play spaces; and
  - Dedicated parent with pram parking.
- When asked for any final comments, the most frequent responses were that the Town Centre should:
  - *Look better* – create an attractive, clean and safe streetscape with more seating and facilities for families and the elderly
  - *Open longer* – more shops, cafes and restaurant open during the evenings and on weekends;
  - *Provide more choice* – a greater variety of shops and services; and
  - *Improve parking* – provide more convenient parking.

7.3 Stakeholder Workshops

Three workshops were held with the Five Dock Chamber of Commerce and local businesses during the course of the Project. The first was held on November 23rd, 2011 and attended by the Chamber of Commerce, local businesses and some Councillors. This workshop helped to inform the shape of the strategy brief.

A second workshop was held on the evening of Wednesday March 14, 2012 which was attended by approximately 20 businesses. The workshop was advertised by Council through the business surveys which were both delivered and emailed to businesses. In addition, written letters were sent to the business owners.

"I would like to see Five Dock's overall appearance improved in line with the feel of the library, Superbarn area. Also, the attractiveness of the streetscape such as Balmain, Leichhardt and Concord would be more interesting while keeping the original Italian Speciality Delis. More interesting shops"

Shopper

Some of the key findings of the workshop include:

- Five Dock's Italian heritage still offers a point of difference and a reputation for specialty foods is an asset that should be built upon;
- Ferragosto, while not seen to benefit all businesses, attracts many visitors and Five Dock needs to find ways to get them coming back;
- A lack of competition is stifling innovation and renewal in the centre and a greater diversity of retail offerings is needed;
- Small sites and fragmented ownership makes attracting a new anchor store (e.g. supermarket) difficult;
- Paving, streetscape and building facades look dirty which, businesses believe, is in part due to insufficient investment on Council's part;
- Businesses are struggling to survive due to depressed trade and high rents;
- The Town Centre's night time economy is hindered by the limited choice of restaurants and cafes that open of an evening. In contrast the RSL club can be very busy on some evenings;
- Permitting new out of centre development will further impact the viability of the centre;
- Parking availability is considered unpredictable and inconvenient which puts people off visiting the Town Centre. While there is a lack of parking along the mainstreet, particularly at the Lyons Road end of the Centre, parking at Supabarn is underutilised;
- Council can help revitalise the Centre by: improving the streetscape and paving; removing graffiti; increasing building height controls to incentivise redevelopment; streamlining development application processes and permitting a greater variety of commercial and light industrial uses at the Lyons Road end of the Centre; and
- New mixed use development that is high quality and reinforces the village character of the Centre should be encouraged.

PART C – THE STRATEGY

This part of the Strategy investigates the strengths, weaknesses, opportunities and risks for the Centre. It also draws together the findings of the Strategy to produce a set of priorities, strategies and actions to revitalise the Town Centre over the next 5 to 10 years.

8. Five Dock SWOR Assessment

The findings from the research and consultation stages suggested three factors are most likely to influence the success of the Town Centre – its people, place and products. This Chapter analyses the Town Centre's strengths, challenges, opportunities and threats within the context of these three interconnected factors and forms the foundation of the Strategy's recommendations.

8.1 Five Dock's Strengths

People

- *Strong sense of community* – Five Dock has a strong sense of community and, given the choice, many residents would prefer to support local businesses than go elsewhere;
- *Large Local Customer Base* – Most of the Town Centre's customers are locals from Five Dock and surrounding suburbs who visit on a regular basis to satisfy their day to day needs;
- *Ethnic mix and diversity* – Five Dock is culturally diverse with a high proportion of its residents from Italian, Mandarin, Cantonese, Greek and Korean backgrounds;
- *Council Commitment* – Council are committed to improving the vitality and viability of the Town Centre; and
- *Active Chamber of Commerce* – Five Dock's Chamber of Commerce aims to be the voice of the local businesses in the Town Centre and plays an important role in connecting businesses to Council.

Place

- *Character* – The Town Centre has a sense of place and a human scale that appeals to the people who shop, work and visit there;
- *Accessibility* and *Proximity* – The Town Centre is highly accessible via public transport and is in close proximity to the CBD;
- *Car Parks* – The Centre is served by four public car parks along with car parking along the retail strip;
- *Streetscape* – Improvements have been made in recent years to the street furniture and footpaths in parts of the centre; and
- *Heritage* – The Centre falls within the Heritage Trail providing some heritage interest and connectivity to other parts of Sydney.

Products

- *Convenience* – The Town Centre meets most of the basic day to day needs of local residents and workers;
- *Established businesses* – The business survey identified that close to 60% of businesses had operated in the Centre over 10 years showing its consistent and established nature for shoppers;
- *A unique mix of local businesses* – The business survey found that local and standalone businesses constituted the majority of businesses in the Centre;

- *Specialty food niche* – The Town Centre is well known for its specialty food stores including butchers, bakeries and delicatessens which act as important attractors for shoppers and create spin off opportunities for other retailers and businesses in the Centre;
- *Concentration of "my-services"* – The large number of medical and personal service enterprises attract a substantial number of people to the Town Centre; and
- *Commercial and Business Hub* – The presence of all major banks, a post office, numerous professional service firms and a large number of other office based businesses make the Town Centre the commercial and business hub of the local area.

8.2 Five Dock's Challenges

People

- *Limited resources* – Council, the Chambers of Commerce and businesses have limited resources to design and implement initiatives to revitalise the Town Centre;
- *Low levels of business confidence* – Many businesses report difficult trading conditions and are pessimistic about the Town Centre's future viability; and
- *Consumer Confidence* – owing to the economic downturn in recent years, consumer confidence and spending has declined in some sectors such as clothing and restaurants whilst other sectors have benefited i.e. groceries and supermarkets.

Place

- *Tired streetscape* – Despite substantial investment by Council the streetscape looks run down and dirty;
- *Poor amenity* – Graffiti, periodic traffic congestion and poor landscaping contribute to the Town Centre having poor amenity;
- *Inadequate street lighting* – There is poor street lighting in the Town Centre which presents an unfriendly, less secure and attractive environment for nightlife;
- *Appearance of shop fronts* – Too many shop fronts have dirty windows and poor displays;
- *Appearance of buildings* – Many buildings are poorly maintained with peeling paint work and unsightly (and potentially unsafe) awnings;
- *Ineffective signage* – Quality of business signage and branding is generally poor and inconsistent across the Town Centre;
- *Parking perceptions* – The overwhelming perception by businesses and shoppers is that there is inadequate levels of parking available in the Town Centre and that existing parking arrangements are inconvenient;
- *Vacant shop fronts* – Vacant shop fronts fuel negative impressions of the Town Centre;
- *Family un-friendly* – There are inadequate baby changing facilities, family friendly cafes, quality children's play spaces and dedicated parking for parents with prams within the Town Centre; and

- *Fragmented land ownership* – Small sites and fragmented land ownership makes redevelopment and attracting larger tenants difficult.

Products

- *Mainstream Supermarket* – Many shoppers indicated they frequently visit competing centres to shop at Coles or Woolworths;
- Internet retailing – Increasingly e-retailing or online retail is reshaping how we shop and growing as a competitor to bricks and mortar shopping centres;
- *Retail variety* – The range of shops and restaurants in Five Dock is more limited than some competing centres (i.e Burwood Westfield and Leichhardt);
- *Quality and value* – Many shoppers believe Five Dock's competitors (i.e Burwood Westfield and Leichhardt) offer better value and higher quality products;
- *Limited opening hours and lack of a night-time economy* – There is little activity in the Town Centre after hours or on weekends (i.e. only 27% of businesses open on Sundays and only 14% after 6pm) which significantly reduces its appeal and the duration of time people visit / shop in the centre; and
- *Marketing and promotion* – In recent years the Town Centre has lacked a coherent, effective and sustained marketing and promotion campaign along with funding that can compete with larger private shopping centres.

8.3 Five Dock's Opportunities

People

- *Increased networking, cooperation and coordination* – There is opportunity for greater cooperation and coordination between businesses, the Chambers of Commerce and Council;
- *Cultural diversity* – Five Dock's rich Italian heritage and growing ethnic diversity offers a point of difference that can increasingly leveraged off to broaden its cultural offering; and
- *A growing and highly skilled population* – Population growth, gentrification, residential and commercial development in and around Five Dock will increase the number of consumers as well as the spending power of consumers in the Town Centre and create new opportunities for businesses.

Place

- *Return to high street shopping* – The Town Centre can capitalise on consumers growing preference for shopping in locations that have a sense of place and can offer a personal and authentic shopping experiences;
- *Redevelopment of Council assets* – The redevelopment of Council property assets in Five Dock could increase economic activity, stimulate broader renewal and address a number of the Town Centre's current challenges; and
- *Urban design* – Through its planning controls, Council can work with businesses to improve the visual appearance of the streetscape so that is consistent with the desired future character of the Town Centre.

Products

- *Diversify retail offering* – By filling some of the gaps in its current retail offering Five Dock can reduce the number of shoppers being lost to competing centres;
- *Growing consumer consciousness* – The Town Centre can capitalise on consumers growing awareness of the social, economic and environmental impacts of their purchasing decisions and subsequent preference to support local business that are community orientated and environmentally responsible;
- *Growing environmental consciousness* – Increasingly the importance of sustainable travel and living is being recognised by consumers which may encourage an even greater proportion of shoppers to visit the Centre by walking as opposed to driving thereby reducing the strain on car parking provision;
- *Capitalising on the cautious consumer* – The Town Centre's retail offering is well positioned to accommodate the recent shift in consumer behaviour toward greater spending on food, cafes, restaurants, stationary, recreational goods, pharmaceuticals, cosmetics and toiletry goods;
- *New target markets* – The growing affluence of Five Dock and surrounding suburbs provide businesses with opportunities to target those consumers with higher disposable incomes; and
- *Festivals* – Ferragosto is a popular and well know event that attract hundreds of new visitors to the Town Centre.

8.4 Five Dock's Risks

People

- *Consultation fatigue* – Community may grow weary of ongoing discussions and planning for the Town Centre without seeing effective changes occurring;
- *Government Planning delays* – Delays in obtaining planning approvals and amending controls could inhibit growth and investment; and
- *Apathy and a lack of cooperation* – Without coordinated and sustained effort by all interested parties any new initiatives to reinvigorate the Town Centre will fail.

Place

- *Fragmented Land Ownership* – Renewal could be hindered by a lack of cooperation from land owners; and
- *Out of centre development* – Permitting out of centre development in the LGA (or in surrounding IGAs) may detrimentally impact the viability of the Town Centre.

Products

- *Competing centres* – Consumer needs are always changing and many of Five Dock's competitors are constantly adapting to meet those needs.

9. A Vision for Five Dock Town Centre

To encourage debate amongst those that live, work and visit Five Dock this Strategy has proposed a vision for the Town Centre.

> **Proposed Vision for Five Dock Town Centre:**
>
> To be a *convenient* one stop shop for the day to day needs of locals, workers and visitors; an *attractive* destination that offers a personal experience by being authentic, friendly and safe; and a *vibrant* community that works together and celebrates its cultural diversity.

The proposed vision for the Town Centre is based on the key findings from the Strategy. Firstly, the Town Centre should build upon the commercial, specialty retail and convenience niche that differentiates it from other centres rather than trying to reinvent itself as another eat street or fashion strip. Secondly, it is well positioned to capitalise on numerous current and emerging trends including:

- ***A growing and increasingly wealthy population*** – Population growth, gentrification, residential and commercial development in and around Five Dock will increase the number and spending power of consumers in the locality;
- ***A return to high street shopping*** – There is a growing preference amongst consumers for shopping in locations that have a sense of place and that offer a personal and authentic shopping experience;
- ***A growing consumer conscious*** – Consumers have a growing awareness of the social, economic and environmental impacts of their purchasing decisions. This is resulting in greater support for local business that are community orientated and socially responsible;
- ***Growing environmental consciousness*** – Increasingly the importance of sustainable travel and living is being recognised by consumers. This is likely to encourage an even greater proportion of shoppers to visit the Town Centre by sustainable means of travel such as walking, as opposed to driving private vehicles, thereby reducing the strain on car parking provision; and
- ***The cautious consumer*** – There is a shift in consumer behaviour and spending towards food, cafes, restaurants, stationary, recreational goods, pharmaceuticals, cosmetics and toiletry goods.

Thirdly, by approving its appearance and offering a personal experience that is authentic, friendly and safe Five Dock Town Centre can become a destination in its own right. Finally the proposed vision recognises that the Town Centre's future success will require its community to draw on its cultural strengths and its ability to work together.

10. Priorities for Five Dock Town Centre

To achieve the long term vision for the Town Centre, this Strategy calls for the prioritisation and integration of the following five priority areas.

Table 5 - Summary of Priorities for Five Dock Town Centre

1. Look Better	Create an attractive, comfortable and safe environment that encourages shoppers, workers and visitors to enjoy the Town Centre and stay longer. Strategies to be implemented over the next 5 years are: Strategy 1 – Encourage redevelopment and quality urban design Strategy 2 – Improve the appearance and amenity of the public domain Strategy 3 – Improve the appearance of shopfronts
2. Greater Choice	Create a dynamic and exciting range of quality retailers and commercial businesses that will serve the diverse and changing needs of the local community and attract a greater number of visitors from outside the area. Strategies to be implemented over the next 5 years are: Strategy 4 – Provide an additional anchor supermarket Strategy 5 – Provide the right mix of retail and commercial services Strategy 6 – Enhance the night time economy
3. More Convenience	Create a Town Centre that is more convenient for local shoppers to use than competing centres thereby creating reoccurring and regular visits. Strategies to be implemented over the next 5 years are: Strategy 7 – Improve parking provision and accessibility Strategy 8 – Create a family friendly environment
4. Work Together	Create a culture of cooperation and respect between businesses, the Main Street Committee, Council and the Chamber of Commerce where each take responsibility for their own role in implementing the vision for the Town Centre. Strategies to be implemented over the next 5 years are: Strategy 9 – Reduce red tape Strategy 10 – Build business capacity Strategy 11 – Town centre management
5. Attract People	Create greater interest in the Town Centre and attract more shoppers and visitors. The Strategy to be implemented over the next 5 years is: Strategy 12 – Support and promote events

11. Strategies for Five Dock Town Centre

The following Chapter builds on the 5 key priorities identified in Chapter 10. The Chapter explains the research that underpins the priorities in greater detail along with the relevance of the strategies to Five Dock Town Centre.

11.1 Strategies to Look Better

The character of the physical environment plays a critical role in where people choose to shop, relax and entertain themselves. The shopper and business surveys found that shoppers and visitors appreciated the Town Centre's sense of place and human scale but also feel the streetscape was tired, dirty and in need of an upgrade.

Objective

To create an attractive, comfortable and safe environment that encourages shoppers, workers and visitors to enjoy the Town Centre and stay longer.

The following strategies are recommended and outlined in greater detail below:

- Strategy 1 – Encourage redevelopment and quality urban design
- Strategy 2 – Improve the appearance and amenity of the public domain
- Strategy 3 – Improve the appearance of shopfronts

Strategy 1 – Encourage redevelopment and quality urban design

The potential benefits of encouraging redevelopment in the Town Centre are many and include: attracting new residents, replacing deteriorating and underutilised areas, increasing property values, stimulating economic development, attracting and retaining businesses, creating jobs and generating developer contributions.

Feasibility analysis undertaken as part of this Strategy, albeit at a high level[20], identified that development opportunities are more likely to exist in the Northern End of the Town Centre due to the poorer performance (i.e. rents) of sites in this area. Feasibility testing has demonstrated that in most cases a floor space ratio (FSR) of 2.5:1 would be insufficient at this point in time to stimulate re-development. An increase in FSR would however improve development feasibility, particularly in the Northern End of the Town Centre.

It is important to note that an increase in FSR could have many positive impacts in the Centre by stimulating redevelopment on some suitable sites. Such an increase would however have a number of implications to the Centre's design character. By way of example, an FSR increase from 2.5:1 to say 3.5:1 would result in a significantly bulkier and taller (i.e. 6 or 7 storey building) in the Centre. The scale of buildings in Five Dock Town Centre was considered an important factor during community consultation as it was found that the Town Centre – despite its challenges – retains an intimate sense of place and a human scale that appeals to the people who shop, work and visit there. It therefore follows that an increase in permissible building densities could significantly

[20] Please note that this analysis is based on the assessment of one 431sqm site in the centre

change this positive feature of the Centre and that any such change to the local planning controls for one, or a number of sites, must be carefully considered from a design and urban form perspective.

Chapter 5 of this Strategy also found that a relaxation / reduction in parking standards can also be a measure to stimulate development activity in the Centre. As with building densities, it is recognised however that such a change could have repercussions for the rest of the Town Centre. In this regard business consultation found that the availability (or lack of) car parking in the Centre was a key challenge and deterrent for some shoppers and visitors. Accordingly the stimulation of additional development in the Centre through a concession on car parking numbers could on one hand attract more people to live and thereby shop in the Centre. Yet conversely it could exacerbate existing perceived problems, deterring more people to visit and shop from outside the Centre.

With regard to zoning in the Town Centre, our analysis suggests that in its Northern End a mix of residential, commercial and retail uses should continue to be supported via a B4 Mixed Use zoning. However, in a portion of the Town Centre's Southern End Council could consider the application of the B2 Local Centre or B3 Commercial Core Zone to support the intensification of retail, commercial, civic and entertainment uses.

The designation of a commercial core or hub for the Centre would assist in maintaining more viable land values for such development (by restricting residential which represents a financially 'higher and better use'). In this way the creation of an intimate business, entertainment and cultural core in the Town Centre would support its revitalisation. Moreover, the application of a zone that limits new residential development in that defined area would help to reduce future conflicts between commercial operations and local residents. This would be a particularly important consideration for the Town Centre should it seek to encourage night time activity in the centre (including restaurants and wine bars) that have the potential to generate noise and thereby disruptions to surrounding uses.

In addition to design, noise and parking challenges, redevelopment and urban densification in the Centre is also likely to generate additional vehicle traffic and to place increased demands on public infrastructure. A balance must therefore be struck between the potential benefits and costs of redevelopment within the Town Centre and as such investigations should be advanced into the impacts of variations to the planning controls and the identification of various measures to mitigate the same. Based on the outcomes of such analysis, key stakeholders should agree a suitable level of development and location for development to be sort in the Centre that balances the merits of additional local expenditure and activity with the implications to design, parking, traffic and infrastructure.

As an initial step, Hill PDA recommends the preparation of a comprehensive urban design study. Such a study could build on the findings of this Strategy to:

- Analyse the Town Centre in the context of its built form, land use, traffic and movement, character and heritage whilst considering business needs, residential demand and development feasibility findings of this Strategy;
- Identify potential roles for different sections of the Town Centre (i.e. commercial / retail / entertainment hub at the southern end and higher density mixed use hub at the northern end);
- Formulate, evaluate and compare alternate scenarios for the Town Centre in terms of built form, height, building typologies, land uses, subdivision patterns, parking, access, movement and public domain – the scenarios might range from no change though to substantial change;

- Consult extensively with community and establish a preferred planning scenario / masterplan;
- Formulate planning principles to underpin the proposed planning masterplan;
- Identify a desired future design character, preferred land uses and potential site amalgamations;
- Propose development controls (i.e. height, floor space ratio, setbacks, landscape area, private open space, subdivision and car parking);
- Recommend changes to Council's LEP and DCP; and
- Provide an implementation schedule.

Strategy 2 – Improve the appearance and amenity of the public domain

Council has made substantial improvements to the public domain within the Town Centre including widening the footpaths, undergrounding power cables, introducing smart poles and banners, initiating a colour scheme program and upgrading Fred Kelly Reserve. Council has also improved the hard and soft landscaping including the provision of benches, bins and street signage. Despite these efforts one of the main criticisms made during the consultation phase of the Strategy was the poor appearance of the streetscape.

It is likely the poor appearance of some buildings and shop fronts may have contributed to people's attitude toward the public domain and recommendations addressing these elements are included in latter parts of this Strategy. However, there were a number of criticisms specifically related to the public domain, including cracked and dirty paving, graffiti, poor lighting and inadequate landscaping. In summary the feedback from those consulted was that the public domain needs attention.

Council last undertook a major upgrade of the Town Centre's public domain some 8 years ago in 2003 / 2004. Whilst this is relatively recent for a high street retail strip, it should be noted that private shopping centres / mall environments generally upgrade themselves every 4 to 7 years to keep a fresh, contemporary and inviting atmosphere for shoppers. In order to better compete with these shopping destinations, Hill PDA recommends Council initiate planning and budgeting for an upgrade of the Town Centre's public domain with implementation within the next 3 to 5 years. The upgrade could include elements of public art that build on characteristics of the local Italian heritage whilst creating features in the Town Centre that attract visitors and adds colour to the streetscape.

To ensure a co-ordinated and strategic approach to planning occurs, the master plan for the public domain upgrade should be prepared in conjunction with an urban design study for the Town Centre (Strategy 3).

Strategy 3 – Improve the appearance of shopfronts

Buildings and shopfronts make an important contribution to the appearance of a streetscape. During the preparation of the Strategy it was observed that many buildings in the Town Centre have faded and peeling paint work, poorly maintained awnings, redundant signage and ineffective visual merchandising. A number of initiatives to improve the

appearance and impact of business premises are identified below:

Buildings

- Undertake an audit of building exteriors in the Town Centre and identify which buildings are most in need of upgrading;
- Provide advice to building owners on the benefits of upgrading and maintaining their buildings and how it can be done cost effectively; and
- Establish a regular maintenance program for exteriors.

Signage

- Ensure signage is clean, updated frequently, visible and legible;
- Undertake an audit of signage in the Town Centre and identify where signage is cluttered, dirty, redundant, misleading and insufficient and work with businesses to make; and
- Review planning controls for signage to ensure they are appropriate in relation to the size, location and number of signs permitted.

Windows

- Undertake an audit of the quality of shopfront displays in the Town Centre and work with businesses to make improvements; and
- Organise visual merchandising advice / training opportunities for businesses.

Vacant Buildings

A number of mechanisms can be adopted to support a reduction in vacancy levels within a Centre. Central to these mechanisms are two key parties - landlords and tenants. As each of these parties vary with respect to their incentives or prospective input, the following section has discussed mechanisms for each respectively.

Four key ways to work with *landlords and landowners* to reduce vacancy rates as follows:

- A simple yet effective mechanism is to simply contact and engage with landlords regarding the need to reduce the Centre's vacancy rate. Our analysis of similar centres to Five Dock has found that many landlords or landowners do not live in the locality of the centre in question and are thereby unaware of the nature of the challenges it faces. Landlords who live in alternative suburbs, cities and even countries to their properties may not be aware of the mismatch between their asking rents and where the market is / what businesses in the locality can reasonably afford with respect to rent. The cost of rent being a challenge identified by a number of businesses during the consultation stage. Writing to, and otherwise engaging with landlords to explain the current market and issues facing the Centre can lead to a greater sense of ownership and thereby actions such as rent adjustments and incentives to attract prospective tenants.
- Greater engagement with landlords can also lead to investment and thereby improvements in the quality of shopfronts. This may relate to the renovation of shopfronts or internal areas.
- Greater engagement with landlords can also facilitate the use of vacant shopfront space for alternative and temporary uses such as pop up shops; the display of local artists; promotional material for the Town Centre and up and coming community events. By actively using vacant floorspace in this way the Centre

can gain greater visual activity and interest allowing for poor perceptions to be reduced. Such an approach has been successfully applied in centres such as Redfern and Newcastle where high vacancy rates and security shutters have led to poor perceptions and key challenges to success.

- Council's planning and economic development officers can also play a key role in engaging with landowners and providing support for the redevelopment of vacant land or buildings to reinvigorate the Centre. Support from Council can streamline the development process and inform a design / mix of uses that is to the benefit of the Centre as a whole.

In addition to working with landlords and landowners, we recommend actively pursuing and working with *prospective tenants*. To effectively do this, we recommend the preparation of a Target Tenancy Plan by the Main Street Committee and Chamber of Commerce in accordance with Strategy 5 of this Study.

11.2 Strategies to Provide Greater Choice

Evidence suggests that greater choice and diversity can benefit town centre vitality and viability[21]. A diverse centre balances the needs of different consumers and offers a range of retail, leisure, housing, civic and commercial spaces.

Objective

To create a dynamic and exciting range of quality retailers and commercial businesses that will serve the diverse and changing needs of the local community and attract a greater number of visitors from outside the area.

The following strategies are recommended and outlined in greater detail below:

- Strategy 4 – Provide an additional anchor supermarket
- Strategy 5 – Provide the right mix of retail and commercial services
- Strategy 6 – Enhance the night time economy

Strategy 4 – Provide an additional anchor supermarket

The shopper survey conducted as part of the Strategy made a number of findings in relation to supermarkets. Firstly, over 84% of respondents visit the Town Centre to use the Superbarn supermarket. Secondly, many shoppers also indicated they frequently visit competing centres to shop at Coles, Woolworths or Aldi. Finally a key potential improvement for the Centre frequently highlighted by survey responses was the addition of another mainline supermarket in the Town Centre.

The potential benefits of adding a second anchor supermarket in the Town Centre include:

- Increased competition which may improve product pricing, quality and variety;
- Shoppers are less likely to visit competing centres to shop at supermarkets and therefore additional shoppers will be attracted to the Town Centre;

[21] The Retail Planning Briefing Paper 14, The Institute of Retail Studies, University of Sterling – 2010

- The additional shoppers attracted to the supermarket are also likely to visit surrounding retailers; and
- Increased provision of publically available parking.

However there can be significant social and economic impacts associated with the opening new supermarkets in traditional high streets. For example, supermarkets can generate additional vehicle and pedestrian traffic and lead to congestion in surrounding streets. Moreover supermarkets market share can come at the expense of local and independent convenience retailers who are unable to compete with low cost products and free parking. This in turn can reduce the diversity of a town centre's retail offer and undermine its vitality. As such the potential economic and social impacts of a proposed supermarket should be thoroughly assessed.

If an appropriate site was available and the net economic and social impacts are found to be positive an additional supermarket or alternative anchor store could be considered beneficial to Five Dock.

Strategy 5 – Provide the right mix of retail and commercial services

Successful private shopping centres recognise the importance of getting the tenancy mix right. They proactively pursue their markets and adapt to the dynamic nature of retail to stay ahead of the game. More traditional business precincts and centres often fail to take this approach however owing to a range of difficulties. Such challenges relate to the need to coordinate the various property and tenancy interests, the need to raise funding and dedicating resources to research market trends and implement strategies. The Urban Land Institute identifies however that in order to compete successfully with more established retail destinations *"a neighbourhood commercial street must be managed like a shopping centre"*[22].

The ongoing growth in the number and success of private shopping centres and malls and their coordinated campaigns has however begun to highlight the importance of proactively undertaking joint marketing and promotional campaigns for traditional main street business precincts. These Precincts must proactively pursue and offer incentives to businesses that support their vision and the character / niche of t heir precinct.

As discussed above, the results of the consultation process undertaken as part of the Five Dock Town Centre Strategy strongly support the need for more quality businesses that provided a range of services and complement the character of the area. The Strategy also identified a number of gaps in the Town Centre's retail offering (Chapter 6). Appropriate and exciting new businesses in the area would contribute to the vitality of the Town Centre, provide an attraction for new customers and revitalise interest from local residents.

In order to achieve these benefits, a Targeted Tenancy Plan is required for the Town Centre. A suitably qualified business marketing consultant and a proactive leasing and management professional could be engaged to establish a framework that was:

- Tailored to the Town Centre and flexible enough to adapt to changing market trends;
- Based on market research of what consumers in the area need and want;
- Based on market research as to what would attract visitors / tourists from a wider area;

[22] Ten Principles for Rebuilding Neighbourhood Retail, the Urban Land Institute, 2003

- Able to actively pursue desirable businesses that project the right image, aesthetic and lifestyle orientation;
- Able to actively pursue desirable businesses that complement existing businesses, reinforces the agreed vision for the Town Centre, its strengths and the distinct characters / consumer markets; and
- Able to promote incentives and advantages for desirable businesses to locate within the Town Centre over alternative locations.

Once the interests of prospective tenants has been raised, the leasing and management professional would direct interested businesses to appropriate landlords and/or property owners seeking tenants or looking to review leases. In this way the support of local landlords can be established and improved coordination amongst stakeholders. The leasing and management professional may also support existing businesses through advice as to effective tenancy agreements, physical improvements that may be made to the building to attract more suitable tenants and incentives to secure longer term leases.

Alternatively the Council and the Chambers of Commerce can work together to target desirable businesses by:

- Refining the gap analysis undertaken in Chapter 6 and match vacant properties with potential new retail offerings;
- Working with property owners and real estate agents to determine appropriate uses for vacant properties;
- Developing profiles for each vacancy with recommendations for usage; and
- Making the profiles available on appropriate websites and distributed to target franchises.

Strategy 6 – Enhance the night time economy

A common criticism voiced in the shopper surveys was the lack of a vibrant night time economy in the Town Centre. Of the businesses surveyed, 38% remained open after 6pm during weekdays while on Saturday and Sunday this decreased to 32% and 14% respectively. Improving the Town Centre's night time economy therefore represents a substantial opportunity for local businesses.

Evidence suggests successful night time economies should provide a diverse range of public and private attractions that are safe and appeal to all ages[23]. The Town Centre's night time economy could include dining, bars, shopping, street buskers, take away food shops, live music, night markets, public talks, live theatre, gyms, pharmacies, supermarkets, convenience stores and more.

In order to encourage a vibrant night time economy the following initiatives are recommended:

- Facilitate businesses extending their trading hours by permitting amendments to existing development consents;
- Permit extended retail hours (when appropriate) for new businesses;
- Encourage retailers to trade progressively later to test demand and build awareness amongst shoppers;

[23] Open Sydney Discussion Paper – Future Direction for Sydney at night, City of Sydney 2011

- Create spaces for evening buskers and performers that minimise disruptions to residents living in the Town Centre;
- Increasingly utilise Council's library and its central location within the Centre to host cultural events (i.e. plays, art exhibitions and talks) during the evening. Visitors attracted to the events could then patronise local restaurants and bars;
- Investigate opportunities for holding a family orientated market on Friday nights;
- Support the creation of small bars in suitable locations i.e. locations that would not conflict with surrounding residential;
- Review and improve street lighting in the Town Centre's key areas, streets, lane ways and car parks; and
- Work with property owners to install attractive and functional lighting in shopfronts.

11.3 Strategies to Provide More Convenience

How we work and live influences how we shop. Owing to growing labour participation rates, a greater proportion of women in full or part time employment and extended working hours (amongst other matters) we are becoming increasingly 'time poor'. Accordingly we are seeking retail and services with flexible trading hours, that are convenient so that we may quickly pick up the necessary goods on an as needs basis.

In other words, we are steadily replacing the once-a-week shop with a series of small shopping trips as and when we need to buy various goods. We are also seeking retail outside of traditional operating hours, such as on the way home after work or on the weekend.

The importance of convenience as a reason for shopping in an area may be aptly exemplified by the results of the shopper survey whereby 82% of respondents explained their choice for shopping in the Town Centre was its "*convenience to home*".

The Urban Land Institute identified that *"easy accessibility, high visibility, a sense of personal security and adequate convenient car parking are all preconditions for successful retailing and without them retail will likely fail, regardless of the sophistication of the shopping environment or the quality of the tenants"*[24].

Objective

To create a Town Centre that is more convenient for local shoppers to use than competing centres thereby attracting reoccurring and regular visits.

To facilitate this objective, the following strategies are recommended and outlined in greater detail below:

- Strategy 7 – Improve parking provision and accessibility
- Strategy 8 – Create a family friendly environment

[24] Ten Principles for Rebuilding Neighbourhood Retail. the Urban Land Institute, 2003

Strategy 7 – Improve parking provision and accessibility

Car parking in the Town Centre was consistently been raised as a concern by tenants, land owners and shoppers. Many operators felt that the decline in business in the Town Centre was in part owing to a lack of parking and the implementation of car parking restrictions. Accordingly the need to increase car parking spaces and remove time restrictions was consistently cited as a means by which to improve the Town Centre. It should be noted that car parking provision is the single most commonly cited challenge for Town Centres in attracting trade.

Interestingly, whilst parking was identified as a major issue during consultation, it was also found that more people accessed the Town Centre by walking than driving. This is unusual for a Town Centre and indicative not only of the important neighbourhood role played by the Centre but the willingness of residents in the locality to use more sustainable means of transport.

Parking is a notoriously difficult issue to manage in any Town Centre. It is a particular issue in denser inner city environments where opportunities to increase provision are limited and can be prohibitively expensive. The modelling undertaken to inform this Strategy has identified that the provision of car parking is a factor that can hinder development viability and thereby the provision of additional residential, retail and commercial uses in the centre. Conversely however the addition of these uses increases the demand for car parking.

This conundrum must be recognised and understood by local stakeholders so as to strike a balance between the level of redevelopment sought for the Centre and the need to provide convenience for shoppers accessing the centre by private vehicle. In principle, additional development in the Centre should seek to increase opportunities to serve local residents and thereby enable an increased modal split away from the private vehicle.

Based on Hill PDAs research and consistent with GHD's 2004 Transport and Parking Study for the Centre, recommendations that may be adopted to improve accessibility, sustainability and convenience in the Town Centre through parking include:

- Review parking arrangements to ensure that it responds to shoppers needs (i.e. providing sufficient time to shop but also encouraging a turnaround of customers to the benefit of retail trade);
- Encourage improvements to local public transport and enhance the public domain (as part of the broader streetscape improvements) to provide better pedestrian and cycle connectivity (and cycle parking) so as to promote and encourage means of travelling other than private vehicle;
- Negotiate additional public parking (i.e. where viable) in new developments in the Town Centre;
- Identify opportunities through the redevelopment of Council owned sites for additional car parking in the Town Centre;
- Continue to improve provision of parking 'availability' signs (i.e. active signage that informs the driver of the number of spaces available within a car park before a driver enters); and
- Encourage store employees to park away from the store or use alternative modes of transport.

Strategy 8 – Create a family friendly environment

The shopper survey found that the Town Centre is generally considered family friendly but improvements could be made. A lack of family friendly facilities in commercial and public areas can discourage parents with infants and toddlers from shopping in those areas. In contrast businesses that are known to be family friendly can create competitive advantages by attracting family customers who then tend to stay longer, spend more per visit and return more often.

With more than 70% of households in Canada Bay LGA containing families, the Town Centre could benefit significantly from becoming known as the most family friendly shopping experience in the district. Achieving this aim will require a coordinated effort between Council and businesses. To improve the family friendliness of the Town Centre the following initiatives are recommended:

- Make all businesses aware of the needs and benefits of a family friendly environment;
- Review and improve the current provision of public toilets, baby change facilities, parent parking and children's play spaces in both the public and provide domain;
- Provide easy access, baby chairs and flexible arrangements for tables and chairs in restaurants and cafes;
- Organise family days in the Town Centre;
- Improve street lighting and opportunities for passive surveillance in new developments to enhance the Centre's sense of safety and security; and
- Promote the Town Centre as a family friendly environment in marketing and promotional material.

11.4 Strategies to Facilitate Working Together

In order to effectively plan, fund, implement and monitor improvements to the Town Centre a coordinated approach is required. An advantage of competing shopping centres like Westfield is their ability to co-ordinate their tenants and shared domain. These centres can coordinate operating hours, parking offers, physical improvements and marketing. Each tenant is also required to provide an annual levy to contribute to the latter two factors creating a sizeable budget that can have a significant effect on attracting additional customers over other retail areas.

Recognising the advantages of coordinated management in the Town Centre, Council and local businesses have created the Great North Road Committee and implemented a number of joint initiatives aimed at strengthening local businesses (see section 3.3 of this Strategy). Council also established an Economic Development Team to act as a single point of communication and a coordinator between businesses and Council. These initiatives should continue to be supported as they play a valuable role in the coordination of planning, projects and funding.

Objective

To enhance the culture of cooperation and respect between businesses, Council and the Chamber of Commerce where each take responsibility for their own role in implementing the vision for the Town Centre.

The following strategies are recommended and outlined in greater detail below:

- Strategy 9 – Reduce red tape
- Strategy 10 – Build business capacity
- Strategy 11 – Town centre management

Strategy 9 – Reduce Red Tape

The local economy is always changing and so too are successful businesses who realise they must also evolve to meet the needs of their customers. Council can help create an environment in which business can adapt quickly and cost effectively by:

- Continuously streamlining development approval process to minimise the time and cost to businesses and residents. Businesses are more likely to modernise and upgrade their premises if they can receive a fast approval and commence trading sooner. To support the development assessment process Council should encourage pre-development application discussions with businesses. The discussions should be held with the same member(s) of the dedicated team of planners who will be assessing any proposal upon submission. Other council divisions / officers (i.e. traffic and transport, building and economic development) should be included in pre-application discussions to provide a balanced and up front response to any proposal and matters that need to be addressed;
- Preparing a brochure that explains to tenants and landlords what improvements can be made to the physical nature of their building with / without the need for planning consent. This pack would be supplemented with general information about the development control process and who to contact at the Council to discuss proposed alterations/ upgrades further; and
- Ensuring its LEP and DCP planning controls are updated to create an investment ready planning framework. Land owners are more likely to redevelop or upgrade their property when the planning controls make it feasible to do so.

Strategy 10 – Build business capacity

An important way of building a resilient economy and generating business confidence is providing assistance and support for existing businesses. As such many existing initiatives should continue to be implemented including awards programs and networking events. Other initiatives that Council and the Chamber of Commerce can implement to provide businesses with support include:

- Providing up to date information on the local economy and broader retail trends;
- Providing best practice examples of retail offerings from other comparative centres;
- Introducing tailored retail training programs;
- Maintaining an accurate business directory that is readily available online; and
- Creating a business resource centre. The centre – which can be web based and/or in a physical location – would link business and property owners (current and prospective) to events, information, networks and tools to help growing businesses.

Strategy 11 – Town Centre Management

One of the clear advantages key competitors (such as Burwood Westfield) have over the Town Centre at present is their ability to co-ordinate their tenants and shared domain through joint maintenance and cleaning, marketing, advertising and servicing plans and policies. In order to combat the co-ordination advantage malls have over retail strips, a number of initiatives have been implemented in town centres around the world with similar characteristics and issues to Five Dock. The names of these initiatives vary dependant on the country they originate from and include: Town Centre Management (UK), Main Street Programme (Canada) and Business Improvement Districts (US).

Five Dock has a strong foundation of local organisations and a proactive community with best intentions to achieve positive change. The organisations currently responsible for advocating, coordinating and implementing improvements to the Town Centre are the Great North Road Committee, Five Dock Chamber of Commerce and Council. The preparation of this Strategy and the expiry of the Sustainable City Levy in 2012 is an opportune time for Council and businesses to investigate whether the current arrangements are the most effective organisational and funding model to deliver the initiatives required to revitalise the Town Centre.

The main challenge will be the funding mechanism. The majority of town centre renewals are currently being funded through levies on commercial/retail property owners. Hill PDA recommends Council, the Chamber of Commerce and the Great North Road Committee explore alternate town centre management models

Table 6 - Examples of Town Centre Management Models

Example	Overview of Town Centre Management Model
Crows Nest Mainstreet[25]	The aim of the Crows Nest Mainstreet is to work with Council to help local businesses, from public space improvements such as al fresco dining bays and parking upgrades and to assist with proposals for specific developments. The Crows Nest Mainstreet Levy has been in place for 16 years. It is due to expire in June 2013. The Crows Nest Mainstreet program was one of the first of its kind in NSW and has been used as a model for similar mainstreet programs across the State. Over the past 16 years, levy funds have been used to transform the Crows Nest retail centre into a vibrant commercial precinct that attracts visitors both during business and after hours. The Crows Nest Mainstreet Levy applies to 800 commercial properties in the Crows Nest retail area. Decisions about levy projects are made by the Crows Nest Streetscape Committee which includes representatives from Council, the business and resident communities, and Crows Nest Mainstreet. More Information – www.crowsnestnsw.com.au
Double Bay Partnership Inc[26]	The Double Bay Partnership Inc (DBP). was established in 2002 as a public private partnership dedicated to turning Double Bay into a vibrant and attractive centre. The partnership brought together the resources of more than 600 businesses and Woollahra Council. Under the partnership Council match funds raised by Council dollar for dollar up to a maximum contribution of $200,000. To date the DBP has raised around $280,000 from members and received a $280,000 in kind from Council. Council has also invested $5 million on streetscape upgrade in the centre. The DBP is an Incorporated Association with an elected board that has authority over management activities. The key roles of the DBP are to implement Double Bay Partnership Business Plan; create a sustainable, long term funding model; and employ a professional centre manager to oversee the day-to-day implementation of all DBP activities. The DBP was formally registered with the NSW Department of Fair Trading in September 2008. Its operations are governed by a registered Constitution. A management executive, known as the DBP Board, manages the day-to-day running of the organisation. Note: Woollahra Council will review the partnership and its funding model in June 2012. More Information – www.doublebayonline.com

Source: Crows Nest Mainstreet - www.crowsnestnsw.com.au, 2012 and Double Bay Partnership Inc., www.doublebayonline.com, 2012

[25] Crows Nest Mainstreet - www.crowsnestnsw.com.au, 2012

[26] Double Bay Partnership Inc., www.doublebayonline.com, 2012

11.5 Strategies to Attract People

A community's cultural resources can be a major contributor to local economic development. Using public and private funds as well as social media and technology, events can bring together a community's image and culture to create a product that attracts visitors and stimulates the local economy.

Objective

To create greater interest in the Town Centre and attract more shoppers and visitors.

The key strategy to achieve this objective is Strategy 12 – Supporting and promoting events and attractions to the Centre.

Strategy 12 – Support and Promote Events

Ferragosto is an immensely popular festival which attracts over 50,000 people to the Town Centre each year. In addition to being a celebration of the areas proud Italian heritage the festival also provides an influx of economic activity into the local economy and attracts visitors from outside the local area.

The festival is an effective tool to showcase what Five Dock has to offer. For these reasons this Strategy recommends the ongoing support for Ferragosto and investigating other potential events that complement the Town Centre's strengths in fine foods and cultural diversity. Some examples include:

- *Friday night food fair* – A fair comprising international food stalls and family entertainment which is run every Friday night (held weekly during daylight saving);
- *How to Five Dock* – A series of seminars, talks and demonstrations by local businesses that teach visitors new skills such as cooking Italian foods, making homeware or hardware goods for DIY projects;
- *Baby and kids market* – A market providing new and second hand children items including clothing, toys and accessories (held once a month);
- *Growers market* – A market showcasing show casing regional fruit, vegetables, yoghurts and hand-made produce such as chocolates, chutneys and jams (held weekly on a Saturday morning); and
- *Fair trade market* – A market dedicated to fair trade stalls selling food, fashion, art, jewellery and a broad range of creative produce (held four times/year).

An important part of the success of such events is their promotion. Whilst Council and the Great North Road Committee have promoted the Town Centre and its activities through traditional measures such as newsletters, newspaper articles and letter box coupons, new methods such as smart phone applications, Facebook accounts for Friends of Five Dock and marketing SMS messages would prove more effective in attracting a younger, professional and more affluent market. These measures could be investigated further by the Chamber of Commerce and the Great North Road Committee to create effective tools for the Centre that flow on from existing measures (such as Council's website) and complement, rather than draw from measures used by other centres in the LGA.

Another tool that would prove effective for the Centre is a Marketing Prospectus for developers. It is understood that this piece of work has already been initiated by Council to attract additional development to the Centre. This tool could be used in conjunction with other measures to encourage developers to invest in the Centre by showing that is actively promoting and marketing itself so that it attracts good tenants and visitors.

12. SUMMARY OF RECOMMENDATIONS

The following table provides a summary of key priorities, strategies and actions from the Strategy.

Table 7 - Summary of Key Priorities, Strategies and Actions for Five Dock

Strategy		Action		Responsibility	Timescale & Priority
Look Better....					
Strategy 1	Encourage redevelopment and quality urban design	1.	Prepare an Urban Design Study for the Town Centre	Council	
Strategy 2	Improve the appearance and amenity of the public domain	2.	Initiate planning and budgeting for a public domain upgrade, including a concept plan, which should be a component of an Urban Design Study	Council in consultation with local businesses	
Strategy 3	Improve the appearance of shopfronts	3.	Undertake an audit of building exteriors in the Town Centre to identify which buildings are most in need of upgrading	Chamber of Commerce with support from Council	
		4.	Provide advice to building owners on the benefits of upgrading and maintaining their buildings and how it can be done cost effectively	Chamber of Commerce with support from Council	
		5.	Establish a regular maintenance program for exteriors	Building owners	
		6.	Ensure signage is clean, updated frequently, visible and legible	Business tenants and property owners	
		7.	Undertake an audit of signage in Town Centre to identify where signage is cluttered, dirty, redundant, misleading and insufficient and work with businesses to make improvements	Chamber of Commerce and Council	
		8.	Review planning controls for signage to ensure they are appropriate in relation to the size, location and number of signs permitted	Council	
		9.	Undertake an audit into the quality of shopfront displays in Town Centre and work with businesses to make improvements	Chamber of Commerce with support from Council	
		10.	Organise visual merchandising advice / training opportunities for businesses	Chamber of Commerce	
		11.	Work with landlords and landowners to reduce vacancy rates and improve appearance of vacant shopfronts	Chamber of Commerce with support from Council	

Strategy		Action	Responsibility	Timescale & Priority
Greater choice....				
Strategy 4	Provide an additional anchor supermarket	12. Engage with supermarket providers to better understand what opportunities may exist to develop a second supermarket in the Town Centre	Council	
Strategy 5	Provide the right mix of retail and commercial services	13. Prepare and implement a Targeted Tenancy Plan for the Town Centre	Chamber of Commerce with support from Council's Economic Development Team	
Strategy 6	Enhance the night time economy	14. Facilitate businesses extending their trading hours by permitting amendments to existing development consents	Council	
		15. Permit extended retail hours (when appropriate) for new businesses	Council	
		16. Encourage retailers to trade progressively later to test demand and build awareness amongst shoppers	Chamber of Commerce and Council	
		17. Create spaces for evening buskers and performers and utilise Council's library for cultural events that minimise disruptions to residents living in the Town Centre	Council	
		18. Investigate opportunities for holding a family orientated market on Friday nights	Chamber of Commerce with support from other businesses and Council	
		19. Support the creation of small bars in the Town Centre	Council with support from the Chamber of Commerce and other businesses	
		20. Review and improve street lighting in the Town Centre's key areas, streets, lane ways and car parks	Council	
		21. Work with property owners to install attractive and functional lighting in shopfronts	Chamber of Commerce and Council	
More convenience....				
Strategy 7	Improve parking provision and accessibility	22. Review parking arrangements to ensure that it responds to shoppers needs	Council	
		23. Negotiate additional parking in new developments where viable in the Town Centre and provide additional public car parking where possible in Council's own developments	Council	
		24. Continue to improve provision of parking 'availability' signs and enhance the public domain to promote walking / cycling to and from the Centre	Council	
		25. Encourage store employees to park away from the store or use alternative modes of	Chamber of Commerce, Great	

Strategy		Action	Responsibility	Timescale & Priority
		transport	North Road Committee and other businesses	
Strategy 8	Create a family friendly environment	26. Make all businesses aware of the needs and benefits of a family friendly environment	Chamber of Commerce and the Great North Road Committee	
		27. Review and improve the current provision of public toilets, baby change facilities, parent parking and children's play spaces in both the public and provide domain	Council	
		28. Provide easy access, baby chairs and flexible arrangements for tables and chairs in restaurants and cafes	Businesses	
		29. Organise family days in the Town Centre	Council, Chamber of Commerce and Great North Road Committee	
		30. Promote the Town Centre as a family friendly environment.	Council	
Work together....				
Strategy 9	Reduce red tape	31. Streamline development approval process by encouraging pre-development application discussions with businesses	Council	
		32. Prepare a brochure that explains to tenants and landlords what improvements can be made to the physical nature of their building with / without the need for planning consent	Council	
		33. Ensure LEP and DCP planning controls are updated to create an investment ready planning framework.	Council	
Strategy 10	Build business capacity	34. Regularly provide up to date information on the local economy and broader retail trends	Chamber of Commerce	
		35. Regularly provide best practice examples of retail offerings from other comparative centres	Chamber of Commerce	
		36. Introduce tailored retail training programs	Chamber of Commerce with support from Council	
		37. Maintain an accurate business directory that is readily available online	Chamber of Commerce and Council	
		38. Create a business resource centre	Chamber of Commerce and Council	
Strategy 11	Town Centre Management	39. Investigate whether the current arrangements are the most effective organisational and funding model to deliver the initiatives required to revitalise the Town Centre	Chamber of Commerce, Great Northern Road Committee and Council	

Strategy		Action	Responsibility	Timescale & Priority
Attract People....				
Strategy 12	Support and Promote Events	40. Continue to support Ferragosto	Chamber of Commerce, Great Northern Road Committee and Council	
		41. Investigate the benefits of holding complementary events or festivals throughout the year. Market these events through new means of social media that appeal to younger consumers	Chamber of Commerce	

	High priority action requiring implementation in next 12 months
	Lower priority action requiring implementation in next 5 years

DISCLAIMER

This report is for the confidential use only of the party to whom it is addressed (the client) for the specific purposes to which it refers. We disclaim any responsibility to any third party acting upon or using the whole or part of its contents or reference thereto that may be published in any document, statement or circular or in any communication with third parties without prior written approval of the form and content in which it will appear.

This report and its attached appendices are based on estimates, assumptions and information sourced and referenced by Hill PDA and its sub consultants. We present these estimates and assumptions as a basis for the reader's interpretation and analysis. With respect to forecasts we do not present them as results that will actually be achieved. We rely upon the interpretation of the reader to judge for themselves the likelihood of whether these projections can be achieved or not.

As is customary, in a report of this nature, while all possible care has been taken by the authors to prepare the attached financial models from the best information available at the time of writing, no responsibility can be undertaken for errors or inaccuracies that may have occurred both with the programming or the financial projections and their assumptions.

This report does not constitute a valuation of any property or interest in property. In preparing this report we have relied upon information concerning the subject property and/or proposed development provided by the client and we have not independently verified this information excepted where noted in this report.

Appendix 1 - DETAILED DEMOGRAPHIC TABLES

This Chapter examines the demographic characteristics of the resident population within the Canada Bay Local Government Area and the suburb of Five Dock. Comparisons to the state of New South Wales have been made where applicable.

Population Growth

Table 8 shows that the population of Canada Bay LGA is projected to increase by 25,270 persons from the 2006 resident population figure of 68,740 persons to 94,010 persons by 2036. This represents an annual growth rate of 1.09%.

Table 8 - Canada Bay LGA population projections

	2011	2016	2021	2026	2031	2036	Net Growth 2006-36
0-14	13,160	14,560	14,640	14,460	14,490	14,710	**3,630**
15-29	15,940	16,990	17,300	17,530	17,790	18,010	**4,240**
30-44	20,020	21,270	21,150	21,190	21,290	21,600	**3,680**
45-59	15,230	16,940	17,440	17,330	17,310	17,340	**3,990**
60-74	9,800	11,310	12,320	12,660	13,040	13,220	**5,290**
75+	5,280	5,870	6,500	7,490	8,280	9,130	**4,440**
Total	**79,430**	**86,940**	**89,350**	**90,660**	**92,200**	**94,010**	**25,270**
Median Age	37	38	38	39	39	39	

Source: Department of Planning population projections 2010

Each age cohort will experience a positive increase in population by 2036. The age cohorts that will accommodate the majority of this growth are 15-29 years (+4,240 persons), 60-74 years (+5,290 persons) and the 75+ years (+4,440 persons). In 2006 these three age cohorts comprised 38% of the population, this will increase to 43% of the population (+5%) by 2036. The aging population within Canada Bay LGA is reflected in the increase of the median age from 37 years in 2006 to 39 years in 2036.

The population projections for the Five Dock Town Centre are provided in Table 9.

Table 9 - Five Dock Town Centre Population Projections

Area	2006	2011	2016	2021	2026	2031	2036	Net Change 06-36	Annual Growth
Five Dock Town Centre*	10,280	10,499	10,697	10,824	10,927	11,023	11,170	890	0.29%

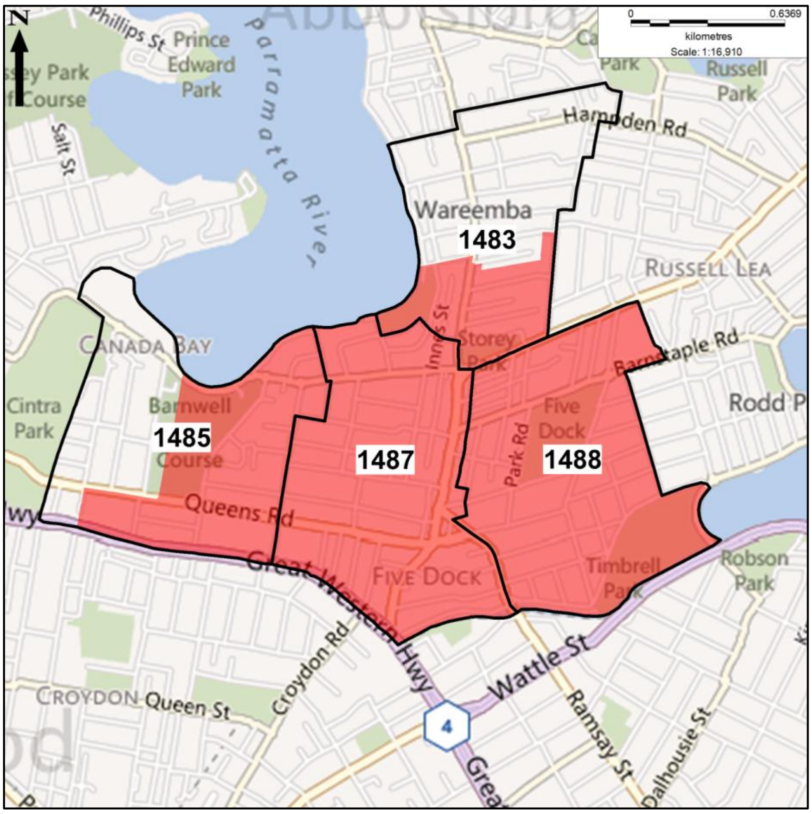
* Travel Zones 1483,1485** 1487 & 1488

* *Travel zones population is one third of BTS figure as Five dock suburb comprises around a third of travel zone

For this analysis the Travel Zone[27] (TZ) data from Bureau of Transport Statistics was used. The selected travel zones are shown on Figure 9.

[27] A travel zone is a small geographic area used for modelling and data analysis. Travel Zones provide a level of analysis between Census Collection District (CD), Mesh Block (MB) and SLA as defined by the Australian Bureau of Statistics.

Figure 9 - The Suburb of Five Dock



Source: Hill PDA, MapInfo 11.0 software and Microsoft Bing © 2011 Microsoft Corporation

The data indicates the population of Five Dock is projected to increase by 890 persons between 2006 and 2036. This represents an annual growth rate of 0.29%.

Please note that the forecasts are based on travel zones which do not align precisely with the ABS suburb boundaries and therefore the population of the Five Dock as of 2006 differs from that recorded in the Census data provided below.

Population and Dwelling Characteristics 2001 – 2006

The following table provides details on the population and dwelling characteristics of Five Dock and Canada Bay LGA as recorded in the 2006 ABS Census.

Table 10 - Population and Dwelling Characteristics 2006 census

Population	Five Dock Suburb	Canada Bay LGA	NSW
Total Population	7,954	65,742	6,549,177
Total Dwellings	3,506	28,268	2,728,719
Occupied Private Dwellings	3,240	26,144	2,470,451
Occupied Private Dwellings (%)	92%	92%	91%
Average Household Size	2.4	2.5	2.6
Age Distribution			
0-14	*16.19%*	*16.47%*	*19.83%*
15-29	*17.45%*	*19.26%*	*19.79%*
30-44	*26.84%*	*25.93%*	*21.75%*
45-59	*18.68%*	*19.60%*	*19.95%*
60-74	*12.17%*	*11.65%*	*11.95%*

75+	*8.66%*	*7.09%*	*6.73%*
Total	***100.00%***	***100.00%***	***100.00%***
Median Age	***38***	**37**	***37***
Place of Birth	**Five Dock Suburb**	**Canada Bay LGA**	**NSW**
Australia & Oceania	*62.66%*	*62.60%*	*84.99%*
Europe	*18.20%*	*12.81%*	*5.94%*
North Africa and Middle East	*1.24%*	*1.46%*	*0.15%*
Asia	*5.71%*	*10.18%*	*1.09%*
Americas	*0.54%*	*0.57%*	*0.33%*
Sub-Saharan Africa	*0.35%*	*0.48%*	*0.18%*
Other / Not stated	*11.29%*	*11.90%*	*7.32%*
	100.00%	***100.00%***	***100.00%***
Language Spoken at Home			
English only	60.64%	*61.73%*	74.00%
Asiatic	6.04%	*10.43%*	7.68%
European	24.33%	*16.92%*	6.55%
Arabic	1.18%	*1.66%*	2.52%
Persian	0.09%	*0.10%*	0.31%
Indigenous Australian	0.06%	*0.03%*	0.03%
Pacific	0.00%	*0.01%*	0.20%
Other	1.33%	*2.15%*	2.78%
Not Stated	6.32%	*6.98%*	5.92%
Total	**100.00%**	**100.00%**	**100.00%**

	Five Dock Suburb	**Canada Bay LGA**	**NSW**
Home Ownership			
Owned or Being Purchased	*61.52%*	*65.42%*	66.70%
Rented	*35.06%*	*31.44%*	29.53%
Other/Not Stated	*3.42%*	*3.14%*	3.78%
Total	**100.00%**	**100.00%**	**100.00%**
Household Structure			
Family Households	*69.38%*	*70.85%*	72.09%
Lone Person Households	*25.85%*	*24.17%*	24.17%
Group Households	*4.78%*	*4.98%*	3.74%
Total	**100.00%**	**100.00%**	**100.00%**
Family Type			
Couple family w. children	*42.99%*	*46.40%*	46.19%
Couple family w/o children	*39.09%*	*39.05%*	36.04%
One parent family	*15.81%*	*12.21%*	16.07%
Other family	*2.11%*	*2.34%*	1.70%
Total	**100.00%**	**100.00%**	**100.00%**
Dwelling Type			
Separate house	*55.50%*	*52.63%*	71.41%
Townhouse	*11.98%*	*10.65%*	9.73%
Flat-Unit-Apartment	*31.77%*	*36.14%*	17.69%
Other dwelling	*0.75%*	*0.54%*	1.10%
Not stated	*0.00%*	*0.04%*	0.07%

Total	100.00%	100.00%	100.00%

Source: ABS 2006 census

From the above table the following observations have been made:

- The suburb of Five Dock contained 7,954 residents which represents 12% of the resident population of Canada Bay LGA (65,742 residents);
- Persons aged 0-29 in the suburb of Five Dock represented 34% of the population which is proportionally lower than the Canada Bay LGA and NSW (36% and 40% respectively);
- The age cohort of 75+ represented 9% of Five Dock's resident population which is proportionally higher than the Canada Bay LGA and NSW (both 7%);
- The suburb of Five Dock had a median age of 38 years which was higher than the median age of both the Canada Bay LGA and NSW (both 37 years);
- A lower proportion of residents in Five Dock and Canada Bay LGA (both 63%) were born in Australia and Oceania than in NSW (85%);
- Five Dock and Canada Bay LGA had a greater proportion of its residents born in Europe and Asia (24% and 23% respectively) when compared with NSW (7%);
- Five Dock and Canada Bay LGA had a lower proportion (61% and 625 respectively) of residents that only spoke English at home when compared to NSW (74%);
- Five Dock and Canada Bay LGA had a higher proportion (24% and 17% respectively) of residents that spoke European language at home when compared to NSW (7%);
- The Canada Bay LGA had a greater proportion (10%) of its residents that spoke an Asian language at home than both Five Dock (6%) and NSW (8%);
- The proportion of dwellings being rented (35%) within Five Dock was significantly higher in 2006 than the NSW (30%) and Canada Bay LGA (31%);
- The proportion of dwellings categorised as owned or being purchased (62%) within Five Dock was lower than that of NSW (67%);
- The proportion of family households within Five Dock was lower (69%) than both Canada Bay LGA and NSW (71% and 72% respectively). In conjunction with this Five Dock had a higher proportion of lone person households (26%) than both Canada Bay LGA and NSW (24% and 24% respectively);
- The proportion couple with children in Five Dock (43%) was lower than both than both Canada Bay LGA (46%) and NSW (46%);
- Five Dock had a higher proportion one parent families (16%) than Canada Bay LGA (12%);
- Dwelling types categorised as separated houses where the predominate type with Five Dock (56%) and Canada Bay LGA (53%) although this was lower than NSW (71%); and
- Five Dock and Canada Bay LGA had a significantly higher proportion of flat-unit-apartments (32% and 36% respectively) than NSW 18%.

In summary Five Dock comprised of a relatively older population than Canada Bay LGA and NSW in 2006 as evidenced by the higher median age (38years) and higher proportion of residents in the 60-74 years and 75+

years. A person within Five Dock was more likely to have been born overseas and speak a second language at home and belong to a family living in a separate house which was owned or being purchased. Five Docks close proximity to Sydney CBD is reflected in the higher proportion of residents living in apartments and renting when compared to NSW.

Five Dock Employment Profile

The following table provides details on the employment and income characteristics of Five Dock, Canada Bay LGA and NSW from the 2006 ABS Census.

Table 11 - 2006 Census Employment and Income Characteristics 2006 census

	Five Dock Suburb	Canada Bay LGA	NSW
Labour Force			
Managers	*16.18%*	17.27%	*12.82%*
Professionals	*25.89%*	29.02%	*19.93%*
Community & Personal Services Workers	*6.78%*	6.48%	*8.07%*
Clerical and Administrative Workers	*18.21%*	16.55%	*14.48%*
Sales Workers	*8.69%*	8.99%	*9.13%*
Technicians & Trade Workers	*11.14%*	9.70%	*12.83%*
Machinery Operators & Drivers	*3.06%*	2.64%	*6.05%*
Labourers & Related Workers	*4.77%*	4.30%	*8.97%*
Inadequately described or N.S.	*1.59%*	1.80%	*1.79%*
Unemployed	*3.70%*	3.26%	*5.92%*
Total	***100.00%***	**100.00%**	***100.00%***
Weekly Household Income			
$0-$349	14.00%	11.33%	14.91%
$400-$799	16.24%	13.45%	21.18%
$800-$1,399	17.51%	17.16%	21.53%
$1,400-$2,499	21.61%	22.96%	19.13%
$2,500+	20.38%	24.81%	12.03%
Partial income stated	7.75%	8.19%	8.30%
All incomes not stated	2.51%	2.10%	2.92%
Total	**100.00%**	**100.00%**	***100.00%***
Median Weekly Household Income	***$1,261***	***$1,510***	***$1,036***

Source: ABS 2006 Census

From the above table the following observations have been made:

- Five Dock and Canada Bay LGA had a greater proportion of its labour force categorised as managers and professionals (42% and 46% respectively) than NSW (33%);
- The proportion of residents unemployed within Five Dock (4%) and Canada Bay LGA (3%) was significantly lower than the unemployment rate in NSW (6%);
- The proportion of persons earning a weekly household income of $2,000+ within Canada Bay (25%) was 13% higher than NSW (12%);
- The proportion of persons earning a weekly household income of $2,000+ within Five Dock (20%) was higher than NSW (12%);

- The proportion of residents earning $1,400+ in weekly household income within Five Dock (42%) and Canada Bay (48%) was significantly higher than within NSW (31%); and
- The median weekly household income for Five Dock was $1,261 compared to $1,036 in NSW and $1,510 in the Canada Bay LGA.

The ABS data shows that in 2006 Five Dock contained a higher proportion of skilled workers (i.e. 'managers' and 'professionals') than NSW, and a consequent lower proportion of non-skilled workers such as 'technicians and trade workers'. As a consequence a higher proportion of Five Dock's residents were earning in higher incomes than in NSW.

Employment Growth

Based on the 2009 BTS employment forecasts the number of jobs in the Canada Bay LGA will grow by 9,670 jobs, from 27,392 jobs in 2006 to 37,062 jobs by 2036. Within Five Dock, which lies within the travel zones of 1485, 1487 and 1488, the number of jobs will increase by 410, from 2,284 jobs in 2006 to 2,694 jobs by 2036.

It must be noted that travel zone 1483 was not included within employment forecasts as no significant areas of retail or commercial floorspace was deemed present.

Table 12 - Employment growth 2006-2036

Locality	2006	2011	2016	2021	2026	2031	2036	Net Increase 06-36
Canada Bay LGA	27,392	30,337	31,670	33,818	34,771	35,767	37,062	9,670
Five Dock Town Centre* (Travel Zones 1485, 1487,1488)	3,538	3,573	3,672	3,883	3,947	4,024	4,150	611

*Travel zone 1483 was not included within employment forecasts as no significant areas of retail or commercial floorspace was deemed present
Source: BTS 2009 Employment Forecast

A detailed look at employment growth within Canada Bay LGA by industry type reveals that the majority of the growth (74% or 7,162 jobs) will come from the industries of Retail Trade (1,375 growth in jobs), Accommodation and Food Services (2,297 growth in jobs), Financial and Insurance Services (1,036 growth in jobs) and Health Care and Social Assistance (2,455 growth in jobs).

Table 13 - Canada Bay Employment growth 2006-2036 by Industry Type

Industry	2006	2011	2016	2021	2026	2031	2036	Net Growth	Proportion of 2036
Agriculture, Forestry and Fishing	19	19	22	25	28	30	33	14	0.1%
Mining	4	5	5	6	6	6	6	2	0.0%
Food Product Manufacturing	1,657	1,565	1,490	1,514	1,495	1,483	1,487	171	4.0%
Beverage and Tobacco Product Manufacturing	11	4	3	1	1	-	-	-11	0.0%
Textile, Leather, Clothing and Footwear Manufacturing	43	34	25	16	9	5	3	-40	0.0%
Wood Product Manufacturing	40	32	25	20	16	13	11	-29	0.0%
Pulp Paper and Converted Paper Product Manufacturing	172	168	120	99	81	67	58	-114	0.2%
Printing, including the Reproduction of Recorded Media	246	240	249	268	279	289	303	57	0.8%
Petroleum and Coal Product									0.0%

Industry	2006	2011	2016	2021	2026	2031	2036	Net Growth	Proportion of 2036
Manufacturing	-	-	-	-	-	-	-	-	
Basic Chemical and Chemical Product Manufacturing	26	28	22	19	16	14	12	-13	0.0%
Polymer Product and Rubber Product Manufacturing	47	35	29	26	22	19	17	-29	0.0%
Non-Metallic Mineral Product Manufacturing	7	7	6	4	3	2	2	-5	0.0%
Primary Metal and Metal Product Manufacturing	18	27	30	34	37	40	43	26	0.1%
Fabricated Metal Product Manufacturing	57	70	58	49	41	33	28	-30	0.1%
Transport Equipment Manufacturing	58	62	54	48	43	37	34	-24	0.1%
Machinery and Equipment Manufacturing	223	327	332	335	328	323	324	102	0.9%
Furniture and Other Manufacturing	231	227	230	238	241	246	256	25	0.7%
Electricity, Gas, Water and Waste Services	112	117	114	118	119	119	121	9	0.3%
Construction	2,059	2,383	2,294	2,360	2,343	2,337	2,360	301	6.4%
Wholesale Trade	1,432	1,485	1,498	1,521	1,470	1,422	1,372	60	3.7%
Retail Trade	3,227	3,720	3,971	4,273	4,367	4,465	4,602	1,375	12.4%
Accommodation and Food Services	1,576	2,718	3,050	3,356	3,516	3,679	3,873	2,297	10.5%
Transport, Postal and Warehousing	538	599	589	611	612	618	640	102	1.7%
Information Media and Telecommunications	553	644	604	570	519	465	416	-137	1.1%
Financial and Insurance Services	2,757	2,657	2,833	3,149	3,353	3,559	3,792	1,036	10.2%
Rental, Hiring and Real Estate Services	603	600	652	717	756	796	843	240	2.3%
Professional, Scientific and Technical Services	2,241	2,830	2,980	3,017	3,086	3,142	3,210	969	8.7%
Administrative and Support Services	539	504	483	457	434	415	408	-131	1.1%
Public Administration and Safety	519	556	547	589	610	638	679	160	1.8%
Education and Training	1,378	1,374	1,454	1,609	1,701	1,801	1,914	536	5.2%
Health Care and Social Assistance	4,516	4,789	5,250	5,868	6,229	6,584	6,971	2,455	18.8%
Arts and Recreation Services	348	333	330	340	332	328	334	-14	0.9%
Other Services	1,413	1,381	1,466	1,611	1,676	1,740	1,810	397	4.9%
Unclassified	725	799	856	952	1,002	1,051	1,100	375	3.0%
Total Employment	**27,392**	**30,337**	**31,670**	**33,818**	**34,771**	**35,767**	**7,062**	**9,670**	**100.0%**

Source: BTS 2009 Employment Forecast

A further look at employment growth within Five Dock Town Centre (Travel Zones 1485, 1487 and 1488) by industry type reveals that most of the 611 additional jobs will come from the industries of Retail Trade (175 additional jobs), Health Care and Social Assistance (127 additional jobs), Other Services (118 additional jobs) and Education and Training (92 additional jobs).

Table 14 - Five Dock Employment growth 2006-2036 by Industry Type

Industry	2006	2011	2016	2021	2026	2031	2036	Net Growth	Proportion of 2036
Agriculture, Forestry and Fishing	5	5	5	6	7	8	8	3	0.2%
Mining	-	-	-	-	-	-	-	-	0.0%
Food Product Manufacturing	10	7	6	6	5	5	5	- 5	0.1%
Beverage and Tobacco Product Manufacturing	9	4	2	1	1	-	-	- 9	0.0%
Textile, Leather, Clothing and Footwear Manufacturing	5	4	2	1	0	-	-	- 5	0.0%
Wood Product Manufacturing	13	10	7	5	4	3	2	- 11	0.1%
Pulp Paper and Converted Paper Product Manufacturing	8	6	4	2	1	0	0	- 8	0.0%
Printing, including the Reproduction of Recorded Media	9	10	10	9	9	9	9	- 1	0.2%
Fabricated Metal Product Manufacturing	39	46	38	32	27	22	18	- 20	0.4%
Transport Equipment Manufacturing	9	10	9	8	7	6	5	- 4	0.1%
Machinery and Equipment Manufacturing	4	3	2	1	0	-	-	- 4	0.0%
Furniture and Other Manufacturing	52	53	53	52	51	49	48	- 4	1.1%
Construction	208	212	204	210	207	205	207	1	5.0%
Wholesale Trade	174	157	159	162	157	152	146	- 27	3.5%
Retail Trade	561	582	625	678	694	712	736	175	17.7%
Accommodation and Food Services	366	306	330	359	372	386	405	40	9.8%
Transport, Postal and Warehousing	205	224	223	233	235	240	249	45	6.0%
Information Media and Telecommunications	19	16	14	13	11	9	7	- 12	0.2%
Financial and Insurance Services	121	95	87	85	81	77	75	- 46	1.8%
Rental, Hiring and Real Estate Services	90	81	88	97	101	107	113	23	2.7%
Professional, Scientific and Technical Services	296	339	349	351	356	361	368	72	8.9%
Administrative and Support Services	88	77	73	69	65	61	60	- 28	1.4%
Public Administration and Safety	176	189	193	211	222	234	250	73	6.0%
Education and Training	269	273	283	310	325	341	361	92	8.7%
Health Care and Social Assistance	335	350	374	410	426	443	462	127	11.1%
Arts and Recreation Services	88	83	83	86	84	84	85	- 3	2.1%
Other Services	**301**	**342**	**356**	**385**	**396**	**407**	**419**	**118**	**10.1%**
Unclassified	80	89	93	101	105	108	111	31	2.7%
Total Employment	**3,538**	**3,573**	**3,672**	**3,883**	**3,947**	**4,024**	**4,150**	**611**	**100.0%**

Source: BTS 2009 Employment Forecast

Where People Originate to Work in Five Dock Town Centre

Using BTS Journey to Work Data it is possible to estimate the proportion of workers in Five Dock Town Centre originate from and their mode of transport. Table 15 shows that of those working within Five Dock Town Centre, 36% reside within the Canada Bay LGA (combination of Canada Bay - Drummoyne SLA and Canada Bay - Concord SLA). The next highest origin SLA was Ashfield with 6% of workers originating from there, 6% originate from Canterbury, 4% originate from Leichhardt, 4% originate from Burwood, and around 3% originate from each from Strathfield, Ryde, Auburn and Marrickville.

Table 15 - Origin of Workers within Five Dock Town Centre 2006

SLA	Percentage
Canada Bay - Drummoyne	30.4%
Ashfield	6.1%
Canada Bay - Concord	5.7%
Canterbury	5.6%
Leichhardt	3.6%
Burwood	3.5%
Strathfield	3.2%
Ryde	3.1%
Auburn	2.9%
Marrickville	2.6%
Other	33%
Total	**100%**

Source: 2006 JTW Data

Table 16 - Mode of Transport

Mode	Percentage
Train	3.8%
Ferry or Tram	0.0%
Bus	4.2%
Car as Driver (incl Truck & Motorbike)	60.6%
Car as Passenger	5.5%
Other Modes	7.0%
Not Stated	1.3%
Worked at Home or Did not go to Work	17.6%
Total	**100%**

Source: 2006 JTW Data

Appendix 2 - POLICY ANALYSIS

Canada Bay Futures Plan20

The Canada Bay Futures Plan20 sets a twenty year vision for the City of Canada Bay and adopts seven key themes in order to further the vision for an "Engaged, Healthy, Green, Liveable, Moving, Prosperous and Vibrant" City.

To create a *Prosperous City* the Plan aims to promote local businesses of a high quality, global standard (Outcome 6.4). This will be achieved by supporting enterprise growth through programs that strengthen business parks, enterprise and industrial corridors (Outcome 6.4.1). It also aims to enable residents to expand their employment skills and strengths while still working close to home (Outcome 6.2). Residents identified that local employment was the best source of future wealth and prosperity for the area.

The Plan notes that the biggest threats to economic growth are transport and logistical challenges and employment related issues such as the ageing population and difficulty attracting staff. An additional challenge identified was the reduction in the proportion of commercially zoned land on account of redevelopment of commercial sites into residential.

Canada Bay Local Planning Strategy (2010)

The Canada Bay Local Planning Strategy provides a long term direction (2010 – 2030) for the planning of Canada Bay to assist decision making in response to population growth and change. The strategy includes an overarching vision of *"working together, we can create a Canada Bay that is engaged, green, healthy, liveable, moving, prosperous and vibrant"*[28] and incorporates seven sub-strategies.

The Strategy identifies that there is a healthy demand for retail floor space within local centres. Further, there is strong demand for office space and retail floor space from local businesses and businesses seeking to relocate from the CBD. The Strategy acknowledges that the concentrations of employment within the LGA are diverse and categorises the Five Dock Town Centre as a traditional 'main street' centre.

The Strategy identifies the following issues and opportunities in relation to Canada Bay:

- Strong employment growth since 2001. There were 22,656 jobs reported in Canada Bay in 2006, which represents an increase of 3,655 (19%). There is a high concentration of employment in the Health and Community Services, Retail Trade, Property Business Services and Finance and Insurance.
- In order to compete with nearby Strategic Centres, Canada Bay will need to differentiate itself.
- There is significant unmet demand for smaller office space (approx. 100sqm) within the LGA.

The Strategy outlines a series of objectives and actions for Canada Bay, of which the follow are relevant to this Study:

- *Objective E1- Continue to strengthen employment with business and retail development in local centres states that:*

[28] Canada Bay City Council, 2010, Canada Bay Local Planning Strategy

- Council should work with local business networks to publicise opportunities and attract the uses to brand the centre.
- Ensure the retention of small frontage shop premises on the ground floor to ensure an active and vibrant public domain.
- Provide for additional small scale office space within local centres.
- Improve the public domain within centres. In particular it is considered that there are opportunities in Five Dock.

- *Objective E7- Protect* existing *employment generating capacity and provide diverse opportunities for future employment in the LGA* states that:
  - State government has given direction to retain employment lands in inner city locations where there is pressure for residential conversion. The Five Dock Town Centre is identified as supporting significant concentrations of employment and employment generating lands.

<u>The Canada Bay Local Environmental Plan 2008</u>

The Canada Bay Local Environmental Plan (LEP 2008) provides zoning provisions that determine land use and building controls within the LGA. The LEP was prepared in accordance with the NSW Government Standard Instrument and consolidates the Concord Planning Scheme Ordinance, 1969 and the Drummoyne Local Environmental Plan.

The Five Dock Town Centre is zoned B4 Mixed Use in accordance with the Canada Bay LEP (2008). The overarching objective of the zone is *"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"*[29].

<u>The Canada Bay Draft Local Environmental Plan 2011</u>

The Canada Bay Draft Local Environmental Plan (LEP 2011) provides draft zoning provisions that may determine land use and building controls within the LGA if the LEP is gazetted. In accordance with LEP 2011 the Five Dock Town Centre is zoned B4 Mixed Use. The objectives of the zone are:

- *To provide a mixture of compatible land uses;*
- *To integrate suitable businesses, office, residential, retail and other development in accessible locations as to maximise public transport patronage and encourage walking and cycling.*[30]

<u>The Canada Bay Development Control Plan 2008</u>

The Canada Bay Development Control Plan (DCP) applies to the whole LGA and provides planning controls to ensure a high standard of design. The DCP includes a chapter that refers to areas zoned for mixed use development. Further, there are specific controls that relate to Five Dock Town Centre, these are:

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[29] Canada Bay Local Environmental Plan (2008)

[30] Canada Bay Draft Local Environmental Plan (2011)

- C1 - Building *heights* should be consistent in form and scale, generally built to the street alignment;
- C2 - Transitional building heights should be provided between the commercial and residential areas to protect the amenity of surrounding neighbours;
- C3 - Floor space ratios should be appropriate to achieve a consistent density of development and streetscape form;
- C4 - Infill development should be well articulated, make a positive contribution to the streetscape and respond to the local urban character;
- C5 - Mixed use development is encouraged in the area. Active street frontages providing both residential and non-residential uses are required to enhance security and surveillance in the area;
- C6 - Parking and servicing arrangements should not alienate the street and the ground level activities, or conflict with the pedestrian space;
- C7 - Infill development in the Five Dock Shopping Centre should reinforce the low scale character of the streetscape;
- C8 - For new developments within the Five Dock Commercial Centre, car parking should be provided on-site. On-site car parking should be located below ground level where possible or located within the building and well-screened;
- C9 - Development should be consistent with the maximum FSR controls in the LEP. The maximum FSR can only be achieved provided the building height and design controls are achieved;
- C10 - For properties with a common rear property boundary, maximum building height is 3 storeys facing Great North Road, stepping down to 2 storeys for the rear 1/3 of the block depth.

Appendix 3 - PRIOR COUNCIL ACTIONS AND INITIATIVES FOR FIVE DOCK TOWN CENTRE

Table 17 - Overview of Council Initiatives and Achievements 2002-2012

Physical Changes		
Element	**Achievement**	**Time**
Street upgrade	• Undergrounded power • Landscaping and plantings • New footpaths • Smart poles • Fred Kelly reserve improvement • All New signage • Lighting poles • Benches and bins replaced • Banner poles • Colour scheme and program	**2004-6**
Banners	• 11 different banner designs • 2 sets designed by the committee • 1 set designed by local young people • 2 by artists	**2006 to present**
On Street Dinning	• Increased number of on street dining 2 licensed in 2005 to 17 licensed currently • 5 Awnings installed	**2006 to present**
Fencing	• 32 safety fences installed along the trip • 19 including business advertising	**2006-7**
Signage	• Visitor information signage including business directory • Visitor parking signs including number of spaces • Varied time parking signs to increase parking turnover • Loading zones	**2007**

Illuminations	• Creating vibrancy and difference in the night time streetscape • Streetscape Christmas trees, illuminations and decorations	**2007**
Public Spaces	• Centre line plantings • Public garden on old library site • Shade cover and giant chess board installed in Fred Kelly Place • Landscaping around public toilets at Ramey Road	**2006** **2007**
Christmas decorations	• Red Bow campaign • Christmas events • 150 businesses supplied with decorations package	**2005-present**
Public Art	• La Familia statue installed • Banner art programs • Gallery facilities introduced into the library with monthly displays • Mural in Fred Kelly Place • Signal and electricity box art Five Dock • Illuminated art Work Library window and Garfield Street	**2008** **2008,9,10,11** **2011** **2011**

Promotions and Events

Element	Achieved	Time
Promotions	• Walk, Shop and Wheel • Ferrafabulous and Ferravibe support shopping at festival time • GoLocal programs including Easter, Mothers Day, Christmas Traditions	**2008**

		Annually **2011**
Food tourism	• Eat Out Week • Flavours of Five Dock – Mothers Day coffee promotion • Mangio Italiano	**Annually** **2011** **2006** **2006**
FerraFabulous Five Dock program	• Branded apparel • Creating a connection with business and stallholders at Ferragosto • Street Decorations	**2008,9,10,11** **Some this year**
Ferragosto	• 50,000 visitors every year • Development of attractions year on year – Ferrakitchen, Ferrapiazza, Homegrown	**Annually**
Fix: A caffeine odyssey	• A focus on coffee with 1000 visitors participating • Entertainers in Fred Kelly Place	**2006**
Cultural Events	• NAIDOC Week Celebrations • Art Exhibitions in Five Dock Library	**Annually**
Consultations in the Square	• Futures Plan 20 • Play space strategy	**2008, 9**

Business Development		
Element	**Achieved**	**Time**
Newsletters,	• Five Dock Vita • e-zines, training and awards • 250 information alerts sent to over 800 businesses across the year	**2012** **Ongoing since 2003**
Business Training	• Developing tools and opportunities for growing the market • 60 training events • 1000 training places provided for local business people	**Since 2003 on going program for next year in production in partnership**
Industry support and Industry cluster promotions	• Conference and events • Health and Wellbeing - 5 Wellness Week promotions • Building and renovation - 4 renovators programs • 2 Sydney Business Events	**Annually**
Research	• Five Dock Centre Study • On Street Survey • Shopping basket analysis • Five Dock Precinct Survey • FuturesPlan20 • GHD parking study	**2012-04-30 2006,8,12** **2010** **2008** **2004**

Improvements to retail	• Accessible business guide • Child friendly business Guide • Green Business Guide	**Ongoing** **Ongoing** **Ongoing**
Green Business program	• Over 420 green business places hosted • 300 changes made by participants to benefit thee environment • 20 Audits and retrofits across the City.	**Annual program**

Table 18 - Initiatives implemented as result of the GHD Parking Study

Parking- GHD Study		
Element	**Task**	**Status**
Parking in residential side streets	Introduce time restrictions into residential side street areas within say, 200 meters of Great North Road, e.g 2 hour restrictions. See figure 9.	Completed 2005
Inconsistent and varied time restrictions throughout area	Establish consistency with on street parking restrictions – maximum 1 hour restrictions along Great North Road and side Streets within say 50 meters of Great North Road and 2 hours elsewhere within say, 200 meters of Great North Road. All off street parking areas to retain to 2 hour restrictions. See figure 9.	Partially completed - more varied parking time implemented throughout the strip in consultation with the Main Street Committee. Whole strip is time limited to maximize benefits to business
High utilization of on street parking on Great North Road	Introduce consistent and low time restrictions for on street parking along Great North Road to improve turnover, e.g 1hour restrictions	Completed

Inadequate directional signage for existing off street car parks	Provide directional and information signage for off street car parks on Great North Road and other approaches to off street car parks.	Additional directional parking signage added. At intersections in 2006. Additional parking signage designed for installation currently.
Potential for improvement of pedestrian links across Great North Road	In addition to the current street improvement works, Council should improve a number of clear and 'strong; pedestrian links across great North Road. This may take the form of improved pedestrian phase times at traffic signals, pedestrian channeling and safety fences, and pedestrian kerb extensions to reduce on street pedestrian exposure. All improvements should be consistent with the Pedestrian Accessibility and Mobility Plan currently being investigated.	Additional pedestrian crossing installed at Fred Kelly place. Traffic Islands at Southern end of street as part of traffic calming.
High utilisation of off street car parks	Provide additional off street car parking spaces by constructing an upper level for the Water view Street car park. Ensure that the new parking facility includes adequate pedestrian links between the car park area and the shopping strip between the car park area and Great North Road. Strict enforcement is also required. It is considered that the re-use of the existing ground level car park would be minimal and two level car park facilities would need to be built from scratch	Additional parking being provided currently at Waterview Street through Council's acquisition of 9 Waterview Street and demolition to add 19 additional car parking spaces.
Illegal (over time) parking in both on street and off street parking areas	Increased policing of restrictions. Enforcement priority should be given to peak parking periods, e.g weekdays and the Saturday morning/midday period.	Increased resources in the parking and enforcement team.
Poor link between off street car parks and shops	Provide clear and lit pedestrian links between off street car parks and Great North Road footpaths. All improvements should be consistent with the Pedestrian Accessibility and Mobility Plan currently being investigated.	PAMP being rolled out with the Access Committee. Prioritised by them. Lane ways project 2010 as part of the Crime Prevention Plan to improve safety in car parks and illuminate links. Completed.
Off street staff and commercial parking in	Improved access options for employees in particular (such as promotion of public	Promotion of public transport on going. Included in

residential areas	transport, car pooling, walking and cycling) so all day parking is minimized. Improve infrastructure for alternatives to car access to the centre e.g. pedestrian and cycle paths, bicycle parking, public transport. Introduce time restrictions into residential side street areas. Ensure improved provision of onsite staff and commercial parking for future developments by enforcing Councils parking code.	all marketing collateral (Five Dock Moment, Explore My Village online collateral.) Also included promotion of public transport in footpath dining agreements and other projects. Cycle racks provided on street to encourage cycling in the area.
High utilization of off street car parks	Subject to the effects that the Supabarn development has on the area, provide additional off street parking spaces by constructing an upper level for the King Street Car Park. Ensure that the new parking facility includes adequate pedestrian links between the ca park area and the shopping strip along Great North Road, It is considered that the re-use of the existing ground level car park areas would be minimal and two level car park facilities would need to be built 'from scratch'.	Additional X parking spaces in Five Dock as a result of the Supabarn development.
Other issues Council never committed to implementing		
Adverse affects of Supabarn development	At this stage the affects of the finalized development should be reassessed at a later date. Existing construction effects are only temporary in nature	Improved access to parking locally. Fees created turn over and additional parking available
Angle parking raised by Five Dock Chamber of commerce as potential alternative on eastern side of commercial centre, particularly Waterview and Barnstaple Road	Streets surrounding the Great North Road strip are generally narrow and unsuitable for angle parking if traffic flows are changed, e.g. one way streets, street closures, etc. however, these may have adverse affects on traffic and should be assessed prior to any implementation. There are significant costs involved in parking spaces gained.	Not practicable
Introduction of resident parking scheme (RPS)	Generally, residents in the area have adequate off street parking. RPS not recommended at this stage	Not practicable
Variable message signs (VMS) for car park	While VMS information is useful it is considered this would not be applicable to the	Not practicable

information	low levels off street parking available in Five Dock. Furthermore, all car parks would need to be monitored to provide information to the VMS

Table 19 - Initiatives Implemented as a result of the Drummoyne Economic Base Study (1996)

Drummoyne Economic Base Study		
Element	**Task**	**Status**
Hierarchy of Business Centres	Five Dock to remain the dominant district level centre in the southern portion of Drummonye and provides retail and commercial services to Five Dock and surrounding suburbs. The centre also contains some district level administrative services but these are of lesser significance than those found in Drummonye.	Five Dock prioritised for investment and location. Reflected in current and proposed LEP.
Hierarchy of Business Centres	It is recommended that Council identify centre as the preferred location for any major additional retail development in Drummoyne in the foreseeable future. While opportunities may exist for the retailing of home-goods and other bulky good products in locations other than these three centres, any new retail proposals for additional supermarkets and specialty shops should be located in one of the three district centres. (Drummoyne, Birkenhead point or Five Dock	Only major retail development in the City is Rhodes and determined by State government not CCBC.
Future demand	Only modest growth in retail floor space demand is anticipated over the next decade; and there is relatively low demand for additional major supermarkets in Drummonye	Only Supermarket developed outside of Rhodes is Supabarn at Five Dock.
Future demand	It is also recommended that Council encourage new retail developments in Drummoyne which provide additional clothing and home goods retail services as such developments could reduce the level of escape expenditure in these product categories flowing from Drummoyne to other areas. In particular, careful consideration should be given to supporting proposals for so called bulky goods retail developments which specifically target the home goods sector.	Renovator's destination in Drummoyne achieved attraction of home wares stores in to local area.

		Clothes retailer attracted to Five Dock post 2006 (Sisa Boutique, La Lupa, (6) etc)
Centre Development	Council encourage any major retail expansion in the centre to take place on the so called police station site in Garfield Street;	Supabarn development completed
Centre Development	Council adopt the recommendation contained in the review of landscaping and urban design options for the Five Dock centre as detailed in the accompanying Knox report (APPENDIX 2) which includes:	Landscape programs undertaken: Lyons Road to Barnstaple Road in 2000 Barnstaple Road to Queens Road 2004 +$5 million
Centre Development	A narrowing in width of the carriageway in Garfield Street at its intersection with Great North Road	Completed in 2004 Street works
Centre Development	Encouraging the development of a public piazza area and limited commercial development to provide a link between the jewel site and Councils existing Library in Five Dock	Completed initially in 2000 and improved in 2004 and further works in 2011 Opportunity cost in excess of 1 million in development opportunity
Centre Development	The definition of various precincts within the centre using landscape elements as recommended in the Knox report; and	Landscape elements extensive: • Traffic calming • widened footpaths' • Distinctive fencing and shelters

		• Plantings • New footpaths • New lighting and illuminations • Plantings • New signage • Public art • Banner flags
Centre Development	Council support the establishment of a Main street committee in Five Dock to facilitate community involvement in the long term improvement of the centre	Committee established and still running
Centre Development	Council prepare a single DCP which would apply to business centres in Drummoyne.	Completed
Centre Development	The plan should contain relevant sections on general building and design principles, car parking, advertising, use of materials and the relationship of proposed development to existing buildings	Included
Centre Development	DCP contain sub-sections relating to both the Five Dock and Drummoyne district centres which clearly articulate Councils long term planning intentions with respect to both centres.	Included
Centre Development	Council abandon its current floor space ration (FSR) control of 1:1 in the major business centre of Drummoyne and Five Dock A 1:1 FSR control should remain in place in other neighbourhood and local shop group centres within Drummoyne, however.	Completed
Centre Development	Council adopt a policy of evaluating development primarily in the context of building and design criteria set out in the proposed DCP with a maximum FSR of 2:5:1 in the Five Dock and Drummoyne district centres being possible where building and design criteria are satisfied	Completed

Centre Development	In preparing a new DCP Council undertake an urban design review in the two major centres (Five Dock and Drummoyne) to establish preferred building heights within various precincts of each centre together with other issues which should be included in the proposed DCP	Completed
Centre Development	Council prepare a single DCP which would apply to business centres in Drummoyne.	Completed
Industrial Lands	The Victoria Road industrial strip currently zoned 4(b)be rezoned to commercial purposes similar to those found in the adjacent 3(c) automotive zone;	Completed and developed
Industrial Lands	Council should support land use with respect to industrial 4(a) land in Abbotsford Bay and seek to encourage both residential and employment generating uses on the site;	Completed and developed
Industrial Lands	Existing land zoned 4(a) in Barnstaple Road be rezoned for residential purposes	Completed and developed
Industrial Lands	Land zoned industrial 4(a) in the Harris Road North Precinct generally be retained in industrial uses;	Retained
Industrial Lands	The Hycraft carpet site which dominates the Harris Road North Precinct be retained for wider industrial purposes or rezoned for residential uses given that traditional retailing is not a preferred use for the site;	Completed and developed. Retains residential and industrial uses
Industrial Lands	Land zoned 4(b) in the Harris Road/Queens Road area remain zoned for industrial purposes into the foreseeable future;	Retained
Industrial Lands	Land zoned 4(a) in the William Street/Queens Road area be retained as a prime industrial zone;	Retained
Industrial Lands	Land zoned 4(a)in the Spencer Street industrial precinct be retained for industrial purposes given its importance to the automotive and related industry in the area; and	Retained
Industrial Lands	Land zoned 4(a)in the Walker Street/Regatta Road area be retained for light industrial or commercial/bulky goods retail uses	Retained
Employment Strategy	Council encourage the development of office-based industries in Drummoyne by adopting the recommendations made elsewhere in this report regarding an increase in FSRs in the major commercial centres (particularly	Completed and developed. Ongoing program of support

	Drummoyne) and promoting Drummoyne (and to a lesser extent Five Dock) as ideal locations for suburban office development in close proximity to the Sydney CBD	
Employment Strategy	Council encourage consideration to be given to the development of private sector health facilities (for instance, private hospitals) given the accessibility of these sites and their proximity to a relatively wealthy residential base.	Canada Bay Private hospital has been redeveloped. A number of health facilities have been developed and supported by Council.
Employment Strategy	Encouragement to the development of home-based businesses within Drummoyne.	Home based business network established and hosted for 18 years. Clear guidelines provide. Now seceded by State regulations.

Appendix 5 - SUMMARY OF BUSINESS SURVEY RESULTS

The City of Canada Bay Council sent 120 business surveys via mail to commercial tenants located within the Five Dock Town Centre (reply paid envelopes were included). In addition, Council emailed 199 business surveys to businesses within the Five Dock Town Centre (39 emails bounced back, 58 emails were opened and 16 businesses completed the survey). Further, Council provided 400 business surveys (hard copies) which the Hill PDA Project Team hand delivered to businesses within the Five Dock Town Centre. The Hill PDA Project Team delivered the business surveys on the 1st and 3rd of March 2012.

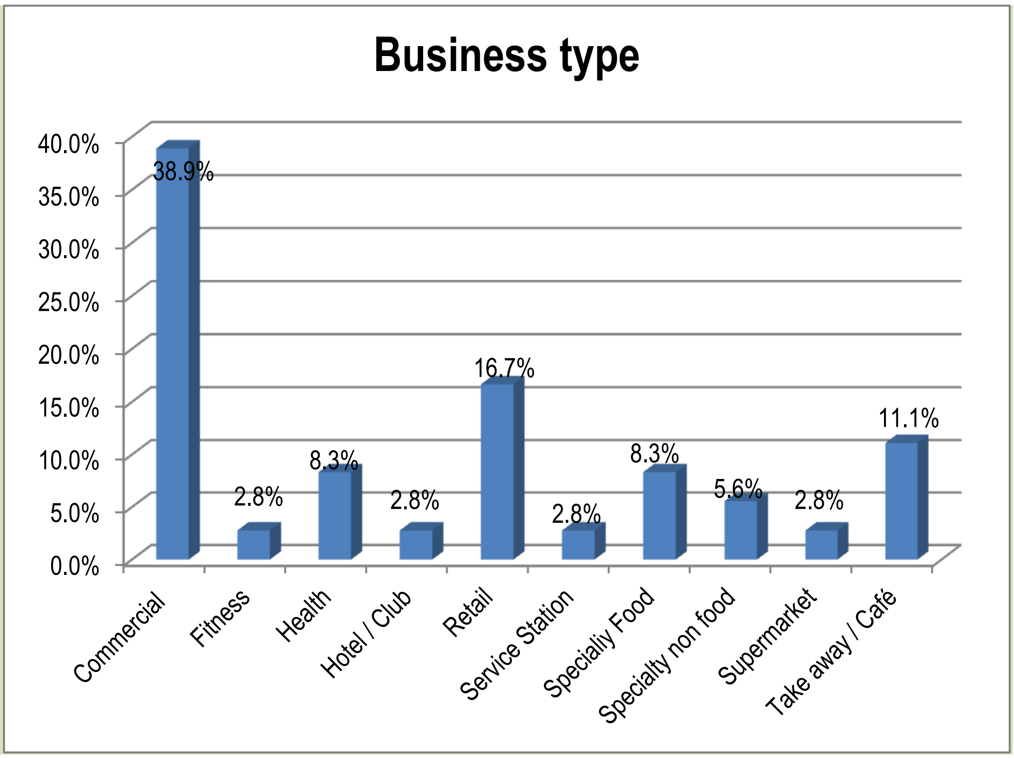
As a result of the business surveys which were distributed, Hill PDA received a total of 37 responses business surveys. This included: 16 which were sent by Council l, 8 received by Hill PDA in the post, 5 which were received by e-mail and a further 8 which were completed online through Survey Monkey.

The survey results have been compiled and analysed. The analysis of survey results is detailed below.

Question 1: Business Types

This question received a 97% response rate from the survey participants. The survey results demonstrate that 39% of those who responded operate the following types of businesses: law firms, accountancy firms, real estate businesses, funeral parlours, travel agencies and educational and financial services. In addition to this, 17% of those who completed the survey run retail related businesses, including: gift shops, video rental stores, computer shops, sports shops and audio visual repair shops. Further to this, 11% of those who responded to this question operate cafes and take away shops. The survey results for question 1 are depicted in Figure 9.

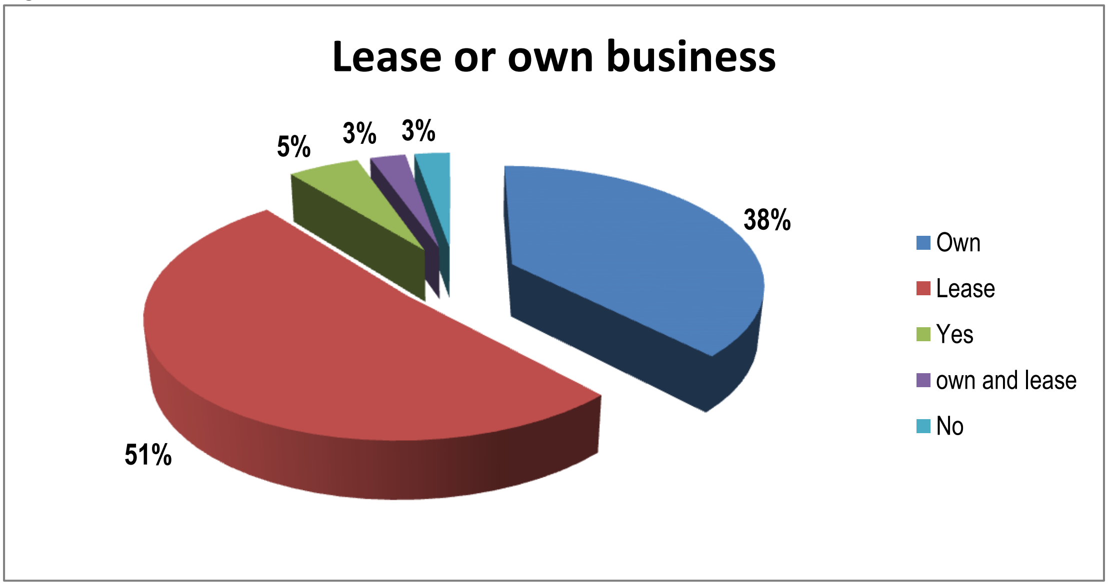
Figure 9 - Total Floor Space in Selected Centres



Question 2: Do you currently own or lease your premises?

The analysis demonstrates that all of those who completed the survey responded to this question. It is apparent that 51% of businesses lease their premises. It is evident that 38% of businesses own the premise from which their business is run. Further to this, 5% responded 'yes' to the question, 3% responded 'own and lease' and 3% stated 'no' for this question. The results relevant to this question are represented in Figure 10 below.

Figure 10 - Lease or Own Business Premises



Question 3: Why did you locate your business in its current location?

The survey results reveal that 100% of survey participants responded to this question. The common themes which emerged from this question are outlined below.

- Corporate decision;
- Amenities of premise such as air conditioning and parking on site;
- The need for more space;
- Opportunity / availability;
- Convenience of location;
- Business has been at location for extended period of time (92 years for one respondent);
- Bought business in existing premise, as one respondent said ''purchased an existing jewel business'';
- Family history;
- Exposure to foot / road traffic;
- Public transport access;
- Owning of premise; and
- Live close to premise.

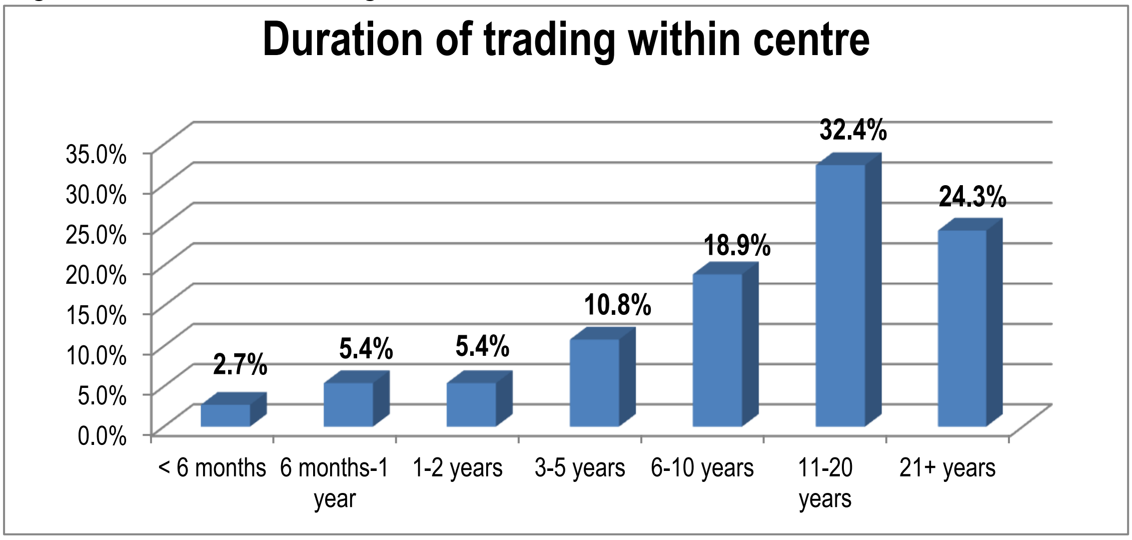
Question 4: How would you best describe your business?

The analysis of survey results show that 30% of the participants are sole traders, 16% operate a local product / service, 16% run a boutique, 11% stated they operate a franchise and 11% stated they manage a national brand and 16% stated other. In the 'other' category, business partnership was nominated as the most common form of business.

Question 5: How long have you been trading in this centre?

There was a range of responses to this question, most significantly the survey results demonstrate that 32% of businesses in the Five Dock Town Centre have been trading for 11-20 years. In addition to this 24% have been trading for over 21 years. Further to this 19% stated that they have been trading for between 6-10 years. This demonstrates that the businesses trading within the centre are stable.

Figure 11 - Duration of Trading within Centre



There was a 92% response rate to this question. Of the respondents a total of 563 employees are employed the respondent businesses.

Question 6: Average number of employees over the year

There was a 92% response rate to this question. Nearly three quarters of businesses (72%) employed fewer than 5 full time employees while less than half of businesses (46%) surveyed employed part time staff.

Question 7: What are your trading hours?

This question received a 97% response rate and the results are outlined below.

During the week

The results show that 69% of businesses open between 8am and 10am, 17% open before 8am and 3% open after 10am. In regard to closing times it is apparent that 5% of businesses close before 5pm, 58% of those who completed the survey close between 5pm and 6:30pm and 25% close after 6.30pm. Consequently, the majority of businesses open between at 8am- 10am and close between 5pm-6.30pm.

Saturday

The survey results demonstrate that on Saturday 57% of businesses open between 8am- 10am, 25% open before 8am and 4% open after 10am. The majority of businesses who completed the survey close before 5pm (43%) on a Saturday. It is apparent that 14% of those who completed the survey close between 5pm-6.30pm and 29% close after 6.30pm. Therefore, the large majority if businesses open between 8am-10am and close before 5pm.

Sunday

It is evident from the survey results that on Sunday the majority of businesses open before 8am (42%). In addition, 25% of businesses open between 8am-10am and 0% of businesses open after 10am. The vast majority of businesses close before 5pm (33%) and after 6.30pm (33%).

Figure 12 - Business Opening Hours

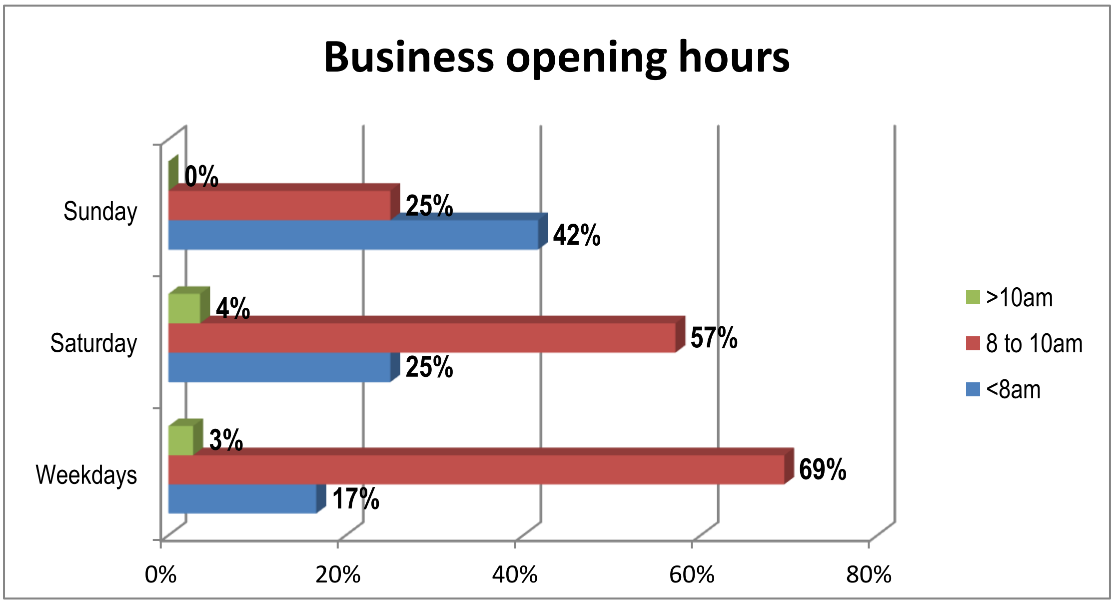
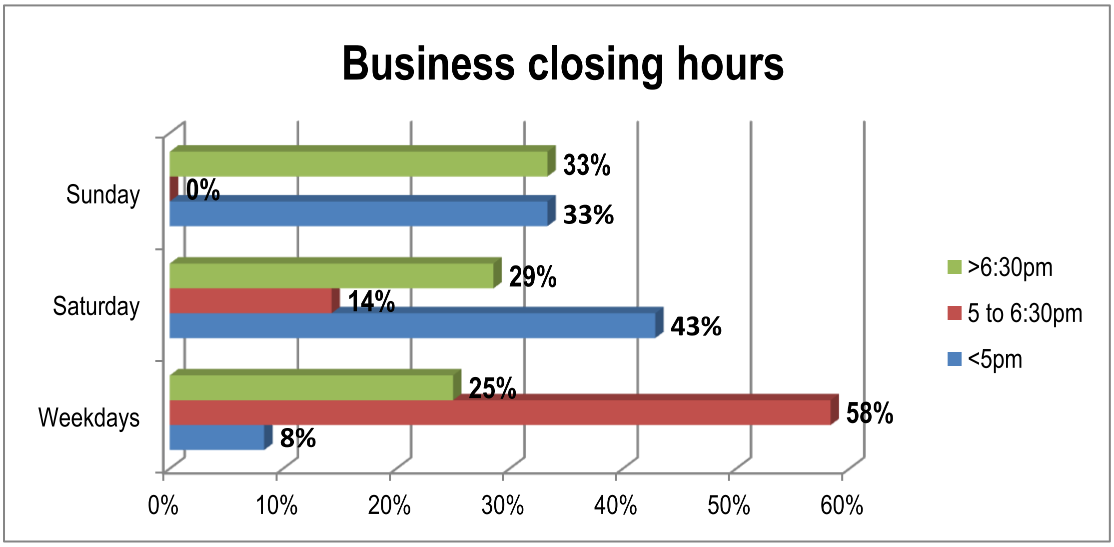


Figure 13 - Business Closing Hours

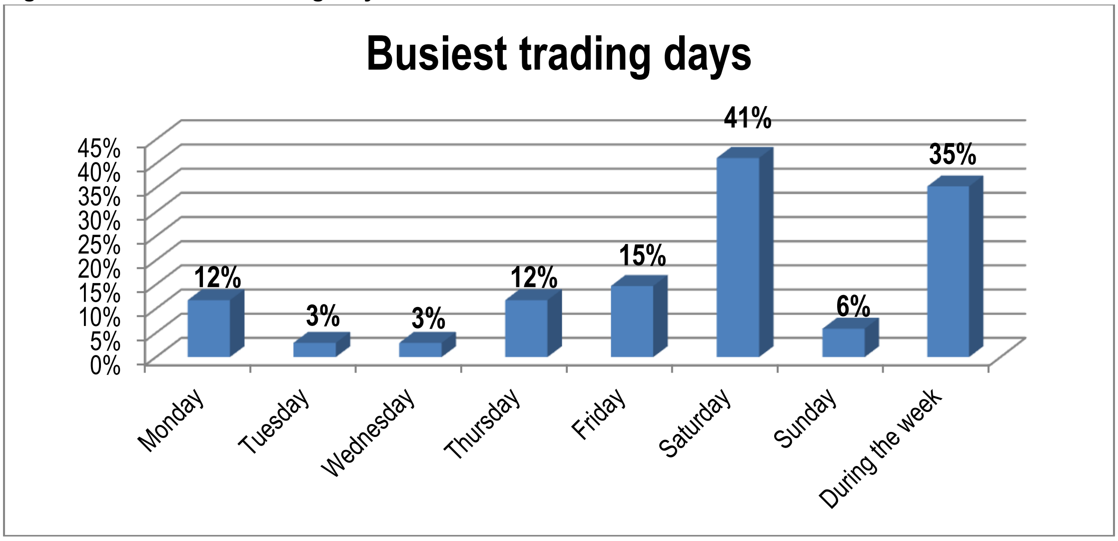


Question 8: What are your busiest trading hours and days?

It is evident from the survey results that 92% of participants answered this question. The majority of survey participants stated that Saturday is their busiest trading day (41%). Further to this, 35% that their busiest trading days occur during the week. More specifically, survey participants nominated the following as their busiest trading days:

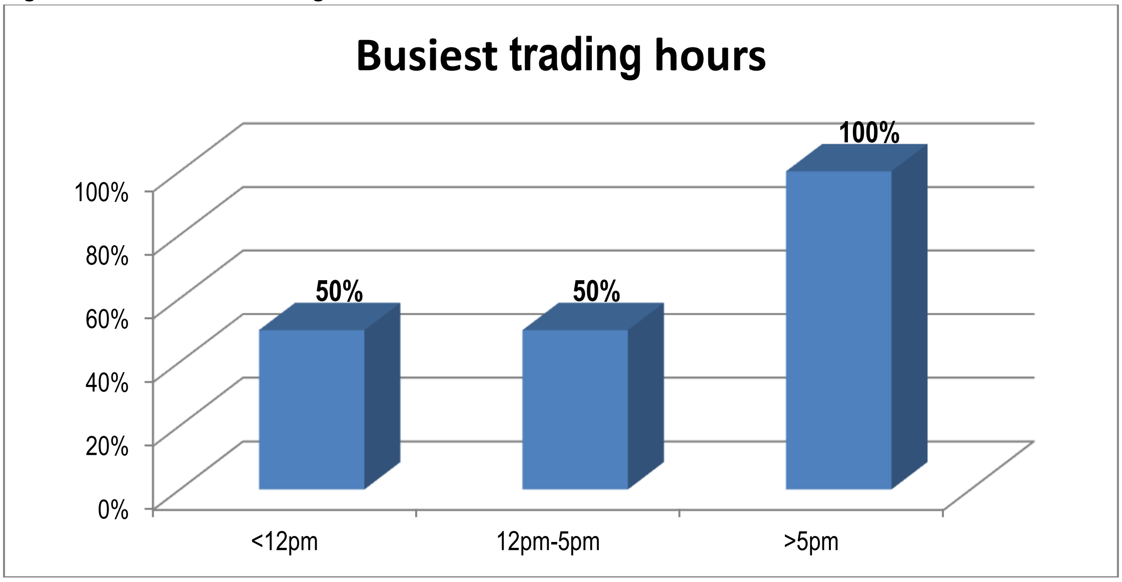
- 15% stated Friday;
- 12% stated Monday;
- 12% stated Friday;
- 6% stated that Sunday;
- 3% stated Tuesday; and
- 3% stated Thursday..

Figure 14 - Busiest Trading Day



The results from this question show that the significant majority of businesses experience their busiest trading hours after 5pm (100% of survey participants). In addition to this, 50% of those who responded to the question also stated they experience frequent trade before 12pm. Further to this, 50% indicated that their busiest trading hours are between 12pm-5pm.

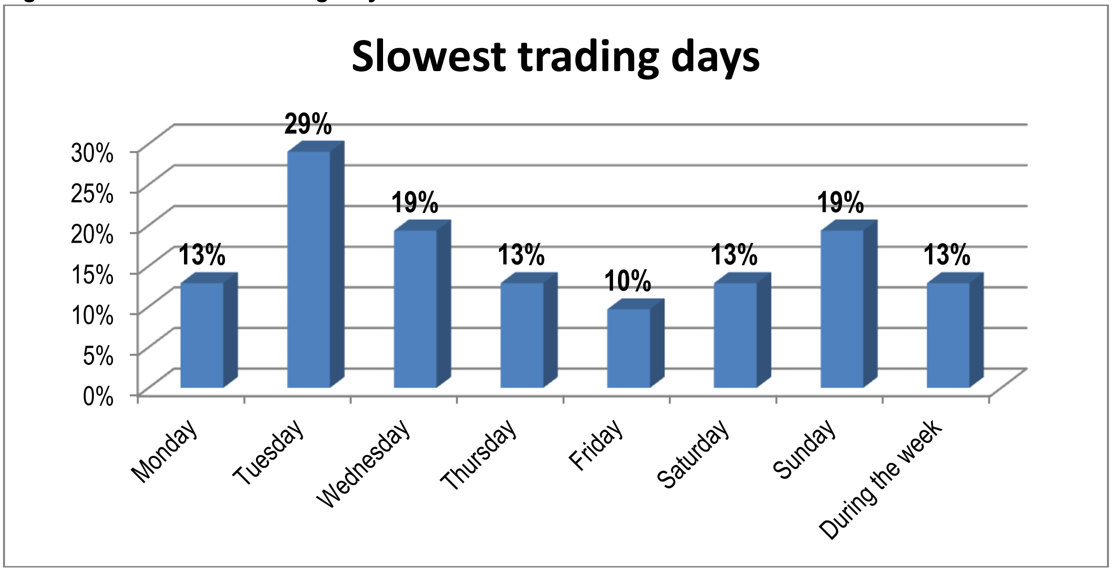
Figure 15 - Busiest Trading Hours



<u>Question 9: What are your slowest trading hours and days?</u>

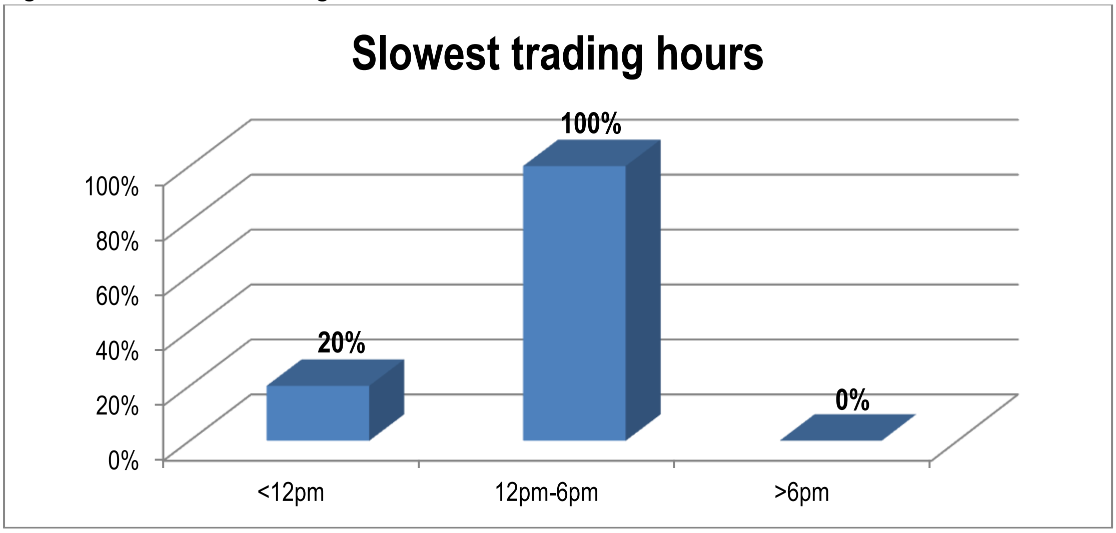
The large majority of survey participants nominated Tuesday as their slowest trading day (29%). Further to this, 19% of survey participants specified Wednesday and 19% stated Sunday. It is clear that Friday was nominated as the least slowest trading day.

Figure 16 - Slowest Trading Days



There were 5 (16%) survey participants who stated their slowest trading hours. All of those who answered this question specified 12pm-6pm as their slowest trading hours. In addition to this, 20% of those who responded to this question also experience slow rates of trade before 12pm.

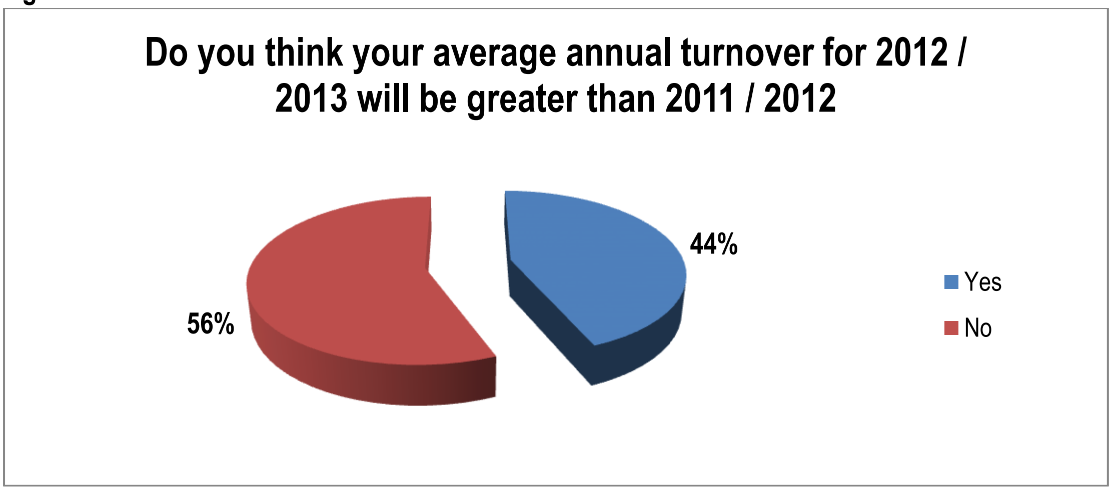
Figure 17 - Slowest Trading Hours



Question 10: Do you think your average annual turnover for 2012 / 2013 will be greater than 2011 / 2012 and by what percentage?

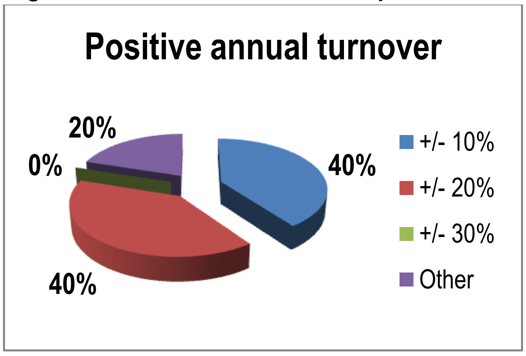
This question received an 86% response rate. The majority of survey participants do not anticipate their turnover during 2012/2013 will be greater 2011/2012 (56% of survey participants). The survey results demonstrate that 44% of participants believe they will experience growth during 2012/2013. Further to this, 31% stated how much annual growth they expect. The response to this question varied, with 40% of those who responded stating they expect 10% annual growth and 40% of participants stating they expect to experience 20% annual growth.

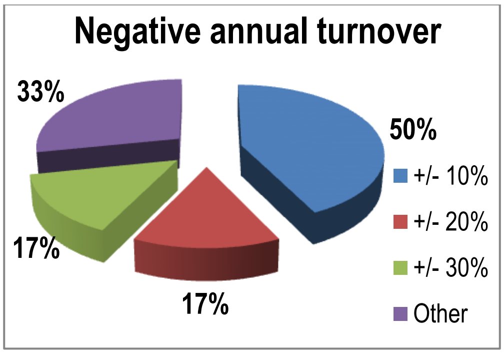
Figure 18 - Annual Turnover



There were 6 (19%) survey participants who commented on the extent by which their annual turnover will decrease. It is apparent that 50% of those who answered this question expect to experience -10% in annual turnover between 2012-2013.

Figure 19 - Annual Turnover Expectations



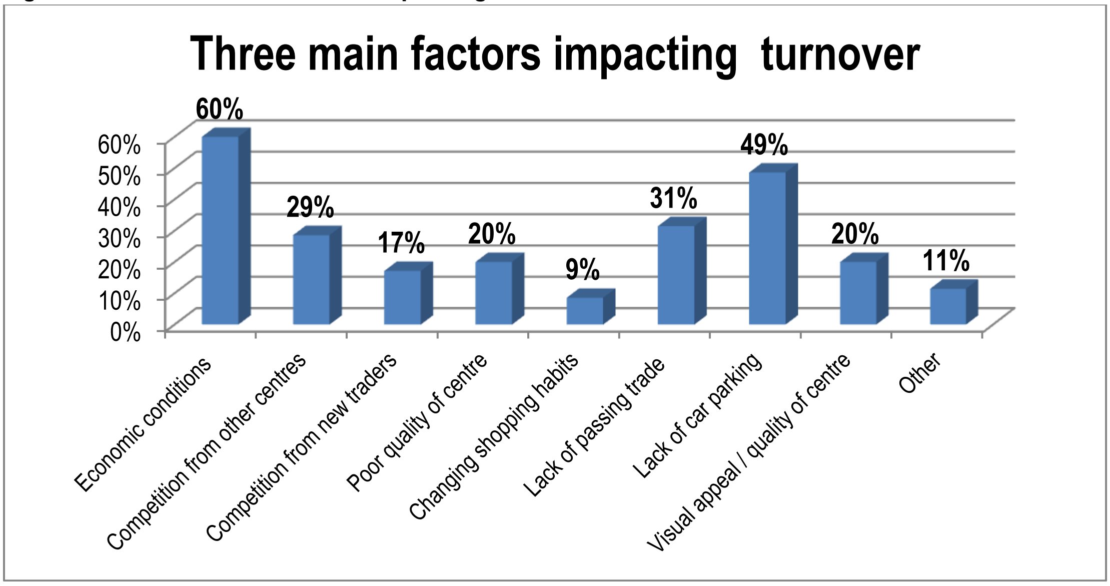


Question 11: What are the 3 main factors impacting your turnover?

This question received a high response rate of 95%. The vast majority of survey participants (60%) stated that economic conditions as the main factor affecting turnover, 49% specified a lack of car parking, 31% nominated a lack of passing trade and 29% indicated competition from other centres as the main reason impacting turnover.

The least nominated factors in response to this question were: changing shopping habits (9%) and 'other' (11%). The other category mainly related to Government legislation / taxation and a lack of business in the area. The survey results from this question are depicted in Figure 20.

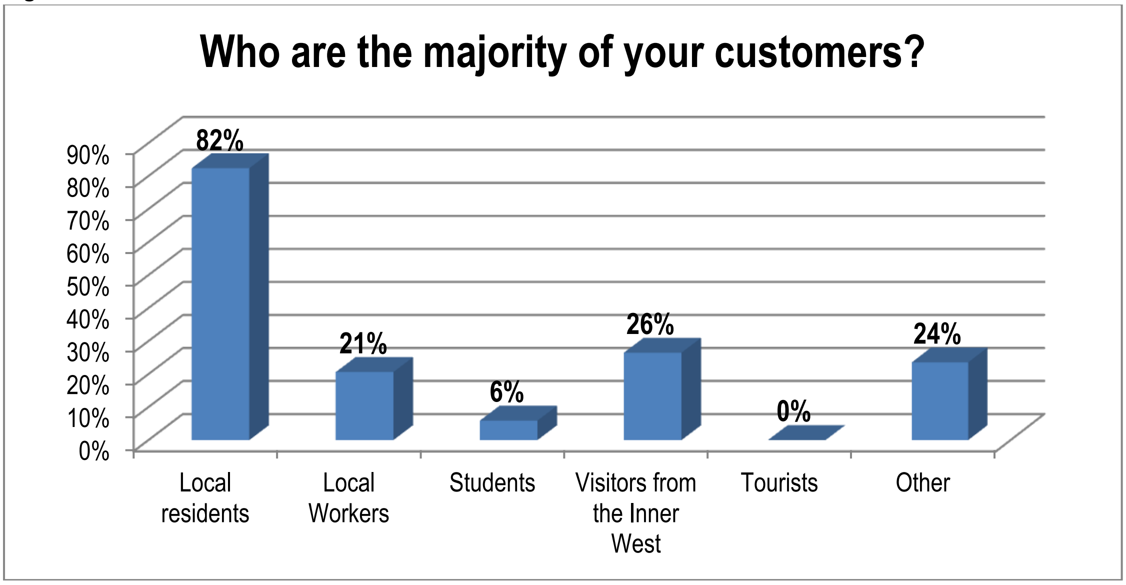
Figure 20 - Three Main Factors Impacting Turnover



Question 12: Who are the majority of your customers?

This question received a high response rate of 92%. The significant majority of survey participants stated that local residents (82%) made up the majority of their customer base. In addition to this, the survey results revealed that 26% of customers are visitors from the inner-west and 21% of customers work in the Five Dock area. This demonstrates a large local customer base in relation to both local residents and those who work in Five Dock.

Figure 21 - Customer Sources



Question 13: From what locations (i.e. suburbs) do the majority of your customers come from?

The most frequently stated response to this question was Five Dock. The most common surrounding suburbs specified were: Abbotsford, Drummoyne, Chiswick, Road Point, Canada Bay, Wareemba, and Haberfield. Survey participants also nominated the suburbs of Balmain, Hunter Hill, Leichhardt, Burwood, Sydney CBD, Corydon Park, Concord and Strathfield. In addition, larger geographical areas were stated such as the Sydney Basin and Inner West.

Question 14: How would you rate the following aspects of the centre your business is based in?

In order to analyse this question each topic has been analysed separately and is outlined below.

Range of shops and services

The majority of survey participants (60%) stated that the shops in the Five Dock Town Centre are average. Further to this, 26% rated the shops as poor and a further 14% specified that the shops and services were good.

Cleanliness / Maintenance of public spaces

In relation to this question, 46% of survey participants stated that they rate the cleanliness and maintenance of public spaces in Five Dock as 'average'. Further to this, 29% of participants specified 'poor' and 26% stated 'good'.

Signposting around the centre

The majority of survey participants consider the signposting in Five Dock to be 'average'. Further, 20% rate it as 'poor' and 20% stated that the signposting in the Five Dock Town Centre is 'good'.

Events / activities in centre

This question received a variety of responses. It is apparent that 42% consider the events and activities in the Five Town Centre to be 'average'. In addition to this, 39% stated that they consider the events / activities in Five Dock Town Centre to be 'poor' and 20% specified that the events/activities as 'good'.

Quantity of parking spaces

The large majority of survey participants consider the quantity of car parking spaces in Five Dock to be 'poor'. Further, 28% stated 'average' and 6% specified 'good' in response to this question.

Access by public transport

The response to this question was varied. It is apparent that 40% of survey participants consider access to public transport within the Five Dock Town Centre to be 'good', 37% stated that it is 'average' and 20% answered 'good'. In addition, 3% of survey participants revealed that they did not know about the accessibility of public transport within the Five Dock Town Centre.

Traffic congestion

The majority of responses to this question stated that traffic congestion in the Five Dock Town Centre is 'poor' and 31% consider it to be 'average'. In addition, 3% of survey participants stated that they did not know about traffic congestion within the Five Dock Town Centre.

Security / CCTV coverage

In relation to this question, 57% of survey participants stated that Security and CCTV coverage was 'poor' and 11% consider it to be 'average'. Further to this, 3% specified that the Security and CCTV coverage within the Five Dock Town Centre is 'good'.

Marketing and promotion

The survey results demonstrate that 46% of survey participants consider the marketing and promotion of the Five Dock Town Centre to be 'poor'. In addition, 31% stated that it was 'average' and 6% stated that it was 'good'. It must be noted that 17% stated that they did not know about the marketing and promotion within the Five Dock Town Centre.

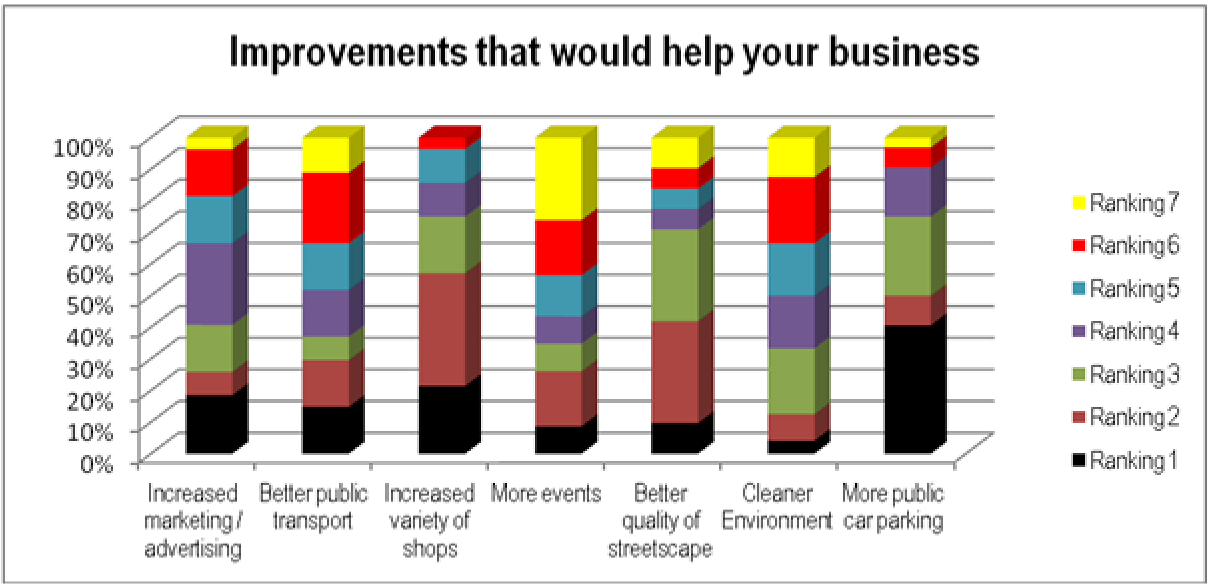
Other

There were four survey participants who nominated the 'other' category. The information provided for this question shows that the some consider new development within Five Dock to be 'poor'. In addition, the provision of car parking spaces and parking time limits was nominated to be 'poor'.

<u>Question 14: What improvements to Five Dock Town Centre would help your business? (Rank in order 1-7)</u>

This question received a 97% response rate. In relation to improvements which could be made to the Five Dock Town Centre the majority of survey participants stated 'more parking' (36%). In addition to this 28% nominated 'increased variety of shops' and 28% stated 'better quality of streetscape'. It must be noted that the 'more events' was the least nominated improvement (17%). Further to this, 'better public transport' was also one of categories which least nominated (17%). The responses to this question are depicted in the Figure 22 below.

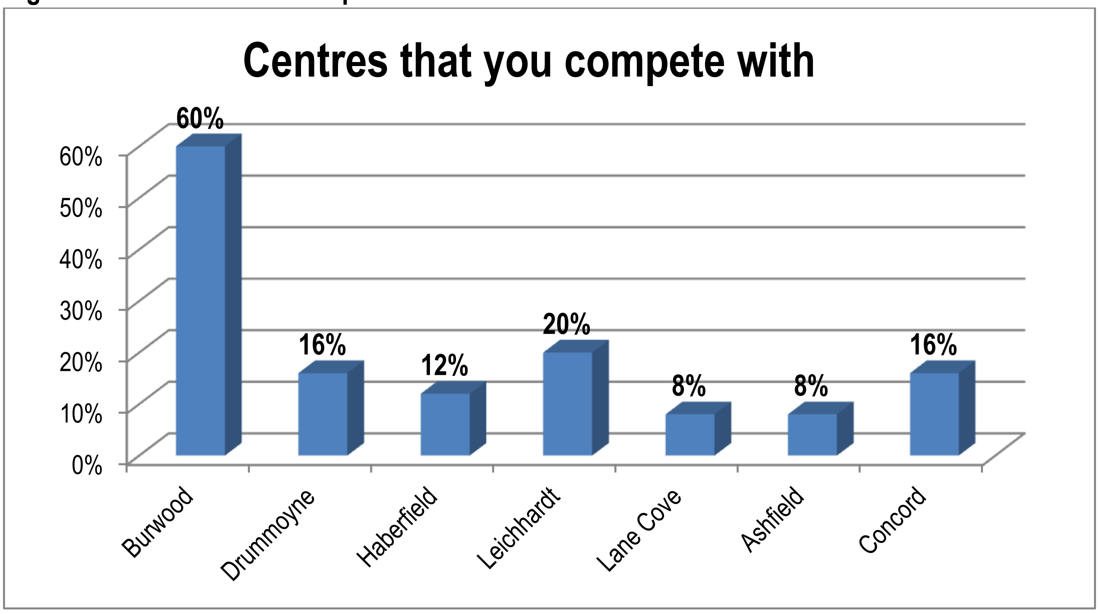
Figure 22 - Improvements that would help Businesses



Question 14: Which centre(s) does Five Dock and your business competes with the most and why?

This question received a response rate of 68%. The majority of survey participants (56%) nominated Burwood as the centre which directly competes with their business in Five Dock. In addition to this, the following centres were specified as competing with businesses in Five Dock: Leichhardt (20%), Drummoyne (16%), Concord (16%), Haberfield (12%), Land Cove (8%) and Ashfield (8%).

Figure 23 - Five Dock's Competitors



The survey participants nominated the following reasons as to why the aforementioned centres compete with Five Dock:

- Higher pedestrian rates;
- Better parking options;
- Close proximity of centre to both Five Dock Town Centre and residents;
- Better promotion of shopping centres;
- Greater variety in shops;
- Larger size of centres;
- Burwood RSL Club;
- Better landscaping;
- More Restaurants; and
- The presents of major supermarket tenants such as Woolworths and Coles.

Question 15: What do you think local businesses and the Chamber of Commerce could do to improve Five Dock Town Centre for your business?

This question received an 81% response rate. The survey participants nominated the following ways in which local businesses and the Chamber of Commerce could improve the Five Dock Town Centre:

- Encourage a greater range of businesses not just 'hairdressers and estate agents';
- Encourage the development of a night time economy such as restaurants and cafes;
- Redevelop the look of Great North Road;
- Encourage development and renovation within the town centre;
- The chamber of commerce should focus on business networks and development rather than re-zoning land, height restrictions and stopping other development;
- Improve traffic condition there are 'more than 3 traffic lights within 100 metres of one another';
- Provide more parking – this will provide for spaces for customers and provide an impetus for a greater variety of shops to open;
- Encourage local businesses to improve their facades;
- Provide more marketing and advertisement to give more exposure for local businesses;
- Increase planting of trees around the centre;
- Clean up the streetscape by fixing the footpaths, planter boxes and fixed umbrellas on the sidewalk;
- Increase the village feel of the centre much like Wareemba, Concord and George Street at North Strathfield; and
- The provision of loading zones along the main strip for courier company deliveries.

Question 16: What do you think Council could do to improve Five Dock Town Centre for your business?

This question received an 81% response rate. The survey participants stated that Council could improve the Five Dock Town Centre in the following ways:

- Provide more parking;
- Encourage the renovation and further development within the town centre;
- Provide better public transport such as a train line;
- Clean and upgrade the street scape by adding some colour, artwork, signs, planter boxes and seats;
- Hold more events which will encourage people into the area;
- Reduce the cost of outdoor dining;
- Improve traffic flow down the main strip;
- Provide better security;
- Develop beautification programs so owners reinvest in the area;
- Creating certainty that Five Dock will remain the retail shopping centre for the area by limiting retail in the B6 corridor;
- Shorten the Development Approval process for any new businesses;
- Remove the half an hour parking limit and replace with an hour limit; and
- The southern end of the centre from the port office down is older and poorly maintained. The parking seems to be in the top end attracting the majority of the potential customers away from the bottom end. Perhaps the redevelopment of the old bowling club to address this issue.

Question 17: Do you have any other comments or ideas regarding Five Dock Town Centre?

This question received a 51% response rate. The survey participants nominated the following ideas which could assist in improving the Five Dock Town Centre:

- The provision of a shuttle service sponsored by council and local businesses to provide transport for local workers allowing them to park further away while providing a shuttle service for people from the main locations of Abbotsford, Concord, Drummoyne, Haberfield to Five Dock;
- The area needs a greater variety of shops and cafes, the areas of outdoor eating within five dock need updating;
- There needs to be more parking provided for customers and residents of Five Dock. Ten years ago there was more parking and business was better;
- Five Dock needs to have a greater range of opening hours after 8pm the area is 'dead suburb';
- Fred Kelly Reserve is a little hub and should be increased. Council should purchase adjacent vacant lots to Fred Kelly Reserve and thus provide a proper town centre;
- Better night time lighting will provide better security and encourage businesses to stay open latter;
- Biggest complaint from customers is 'lack of parking';
- Encouragement should be given towards high rise mixed use developments and better security for the area; and
- The old port office needs to be developed.

Appendix 5 - SUMMARY OF SHOPPER SURVEY RESULTS

The Hill PDA Project Team conducted face to face interviews with the general public on 1st and 7th of March. Over this period, the Hill PDA Project Team conducted 50 face to face interviews within the Five Dock Town Centre. In addition to this, Canada Bay Council sent 1049 shopper surveys via mail to residents within 250 meters of Five Dock B4 Mixed Use zoning (reply paid envelopes were included). Canada Bay Council also emailed shopper surveys to 588 local residents.

In response to the surveys sent out, Hill PDA received 40 completed surveys via post and 3 surveys through email. Further to this, Canada Bay Council received 235 completed surveys (via post). The results from the emails sent are as follows: 82 bounced back, 176 emails were opened and 51 people resent the completed survey back to Council. Further to this, 68 shopper surveys were completed online via Survey Monkey.

As a result of the shopper surveys which were conducted and sent to residents, a total of 369 shopper surveys were completed. The results from the shopper surveys give insight into the perceptions and habits of local residents and people who visit the Five Dock Town Centre. The following investigation provides an analysis of each survey question.

Sex of respondents

This question had a response rate of 76%. The results from the survey analysis reveal that (excluding online surveys) 68% of participants were female and 32% were male. It is apparent that (excluding the online surveys) the most common age bracket for survey participants was 45-54 years (24% of participants). Further to this, those in the >65 years age bracket accounted for 20% of survey participants. Those in the 35-44 age bracket accounted for 19% of survey participants and those aged between 55-64 years equated to 15% of those who responded.

Figure 24 - Sex of respondents

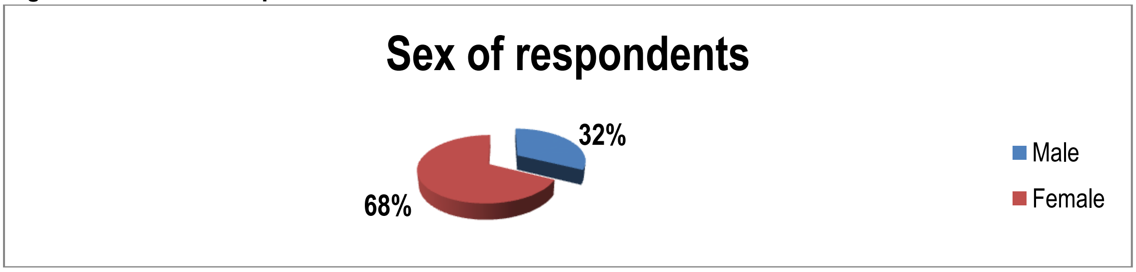
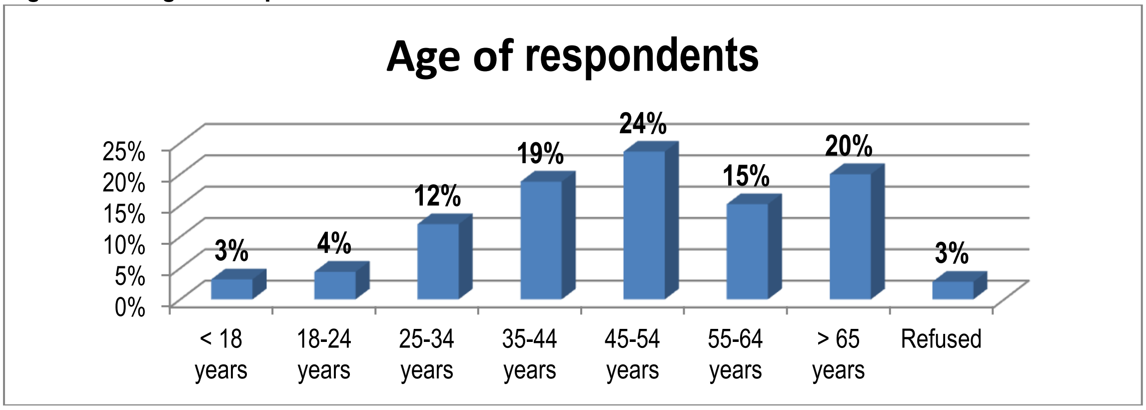


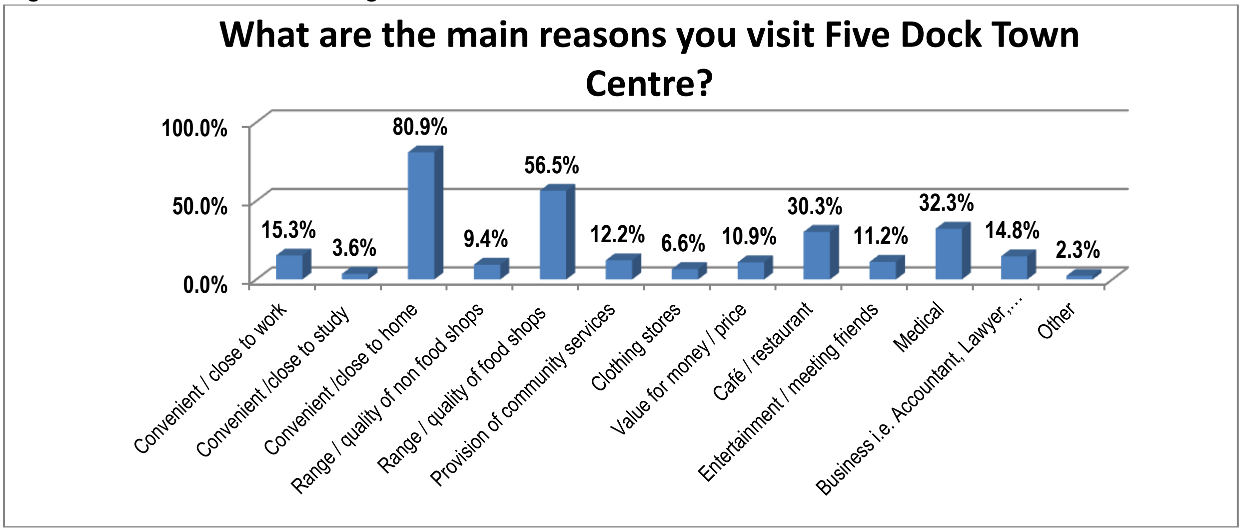
Figure 25 - Age of respondents



Question 1. What are the main reasons you visit Five Dock Town Centre?

This question had a 99% response rate. It must be noted that some survey participants nominated multiple reasons for visiting Five Dock Town Centre. The majority of survey participants (81%) nominated the 'convenience and close proximity to their residence' as the main reason for visiting the Five Dock Town Centre. Following on from this 56% of those who responded specified that they are attracted to the Five Dock Town Centre because of the 'range/quality of shops' and 30% stated that the cafes/restaurants attract them to the Centre. It must be noted that the least nominated reason for visiting the Centre was 'convenient/ close to study' (3.6%). There were a number of participants who nominated the 'other' category and stated the following reasons for visiting the Centre: the playground, just passing through, visiting for the first time and accessibility to public transport. Figure 26 below depicts the survey results for this question.

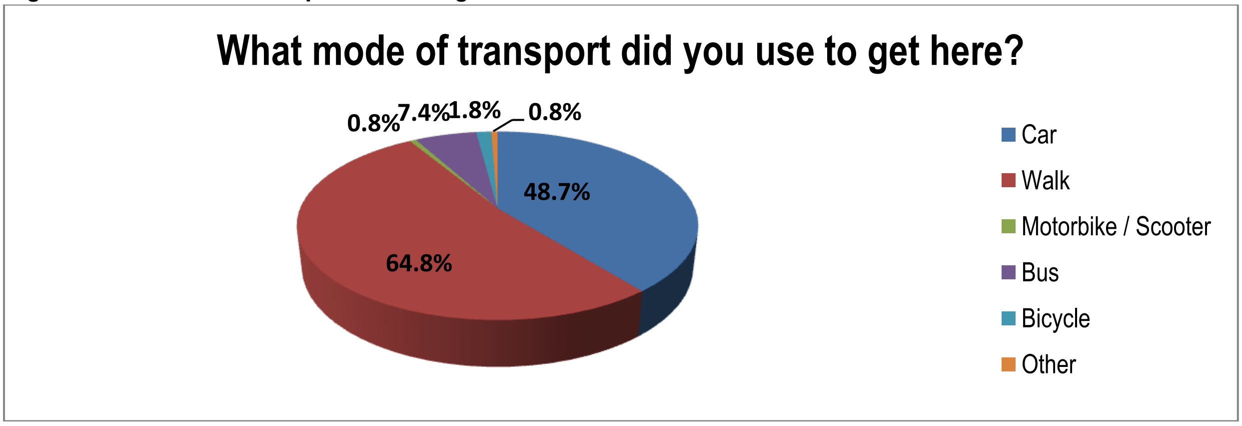
Figure 26 - Reasons for visiting Five Dock Town Centre



Question 2. What mode of transport did you use to get here?

The survey results reveal that 99% of participants responded to this question. It is apparent from the analysis that the most common form of transport to the Centre is 'walking' (65%). In addition, the following forms of transport area also utilised to travel to the Centre: Car (49%), Bus (7.5%), Bicycle (2%) and motorbike/ scooter (2%). It is evident from the analysis that 75 participants nominated multiple modes of transport. The most frequent combination of transport to the Centre included both travelling by car and walking (76%).

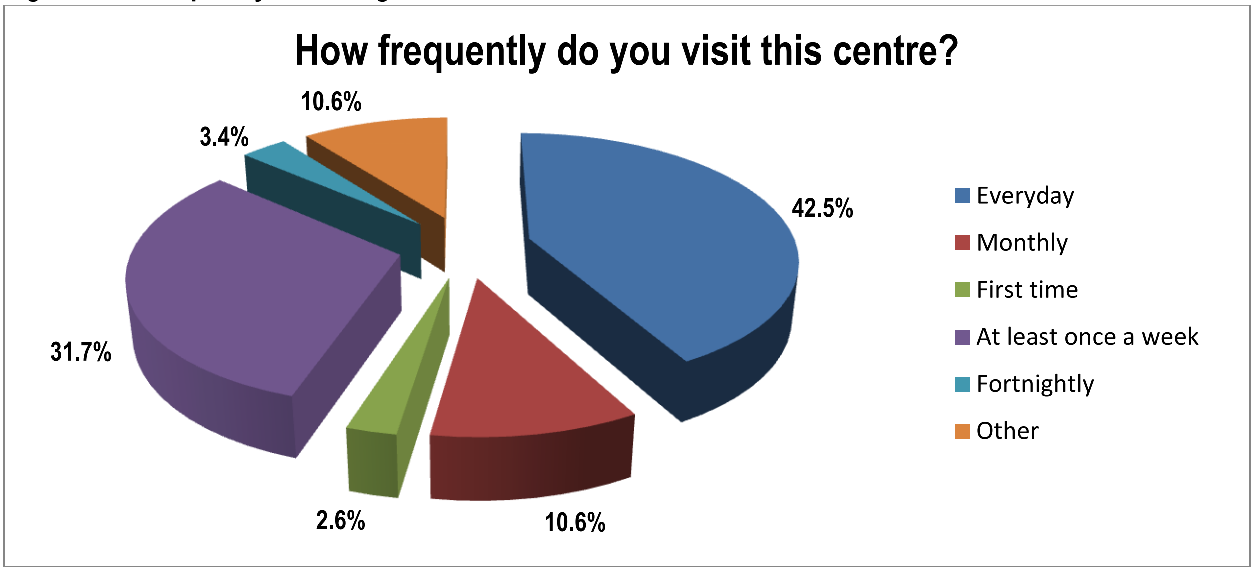
Figure 27 - Mode of transport used to get to Five Dock Town Centre



Question 3. How frequently do you visit this centre?

This question had a high response rate of 98%. The most common response for the frequency of visits to the Five Dock Town Centre was ‘everyday’ (43%). This was followed by at least once a week (32%), monthly (11%), fortnightly (3%) and first time vising the centre (3%). It must be noted that 11% of survey participants nominated ‘other’, of those who responded ‘other’ the most frequent response was ‘three times per week’ (11 participants) and ‘every second day’ (6 participants). The survey results for this question are depicted in Figure 28 below.

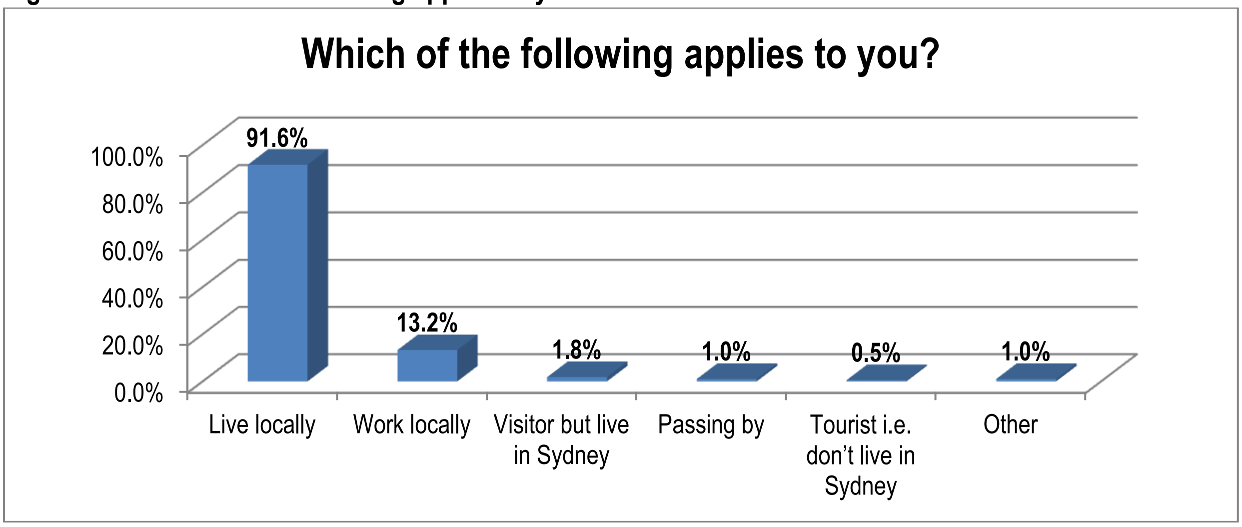
Figure 28 - Frequency in visiting Five Dock Town Centre



Question 4. Which of the following applies to you?

It is apparent that this question had a high response rate of 99.5%. Most significantly, 92% of survey participants responded that they ‘live locally’. In addition to this, 13% stated that they ‘work locally’ and 2% revealed that they were visiting from another area of Sydney. It must be noted that 25 survey participants nominated that they both live locally and work locally in response this question. The results from this question are shown in Figure 29 below.

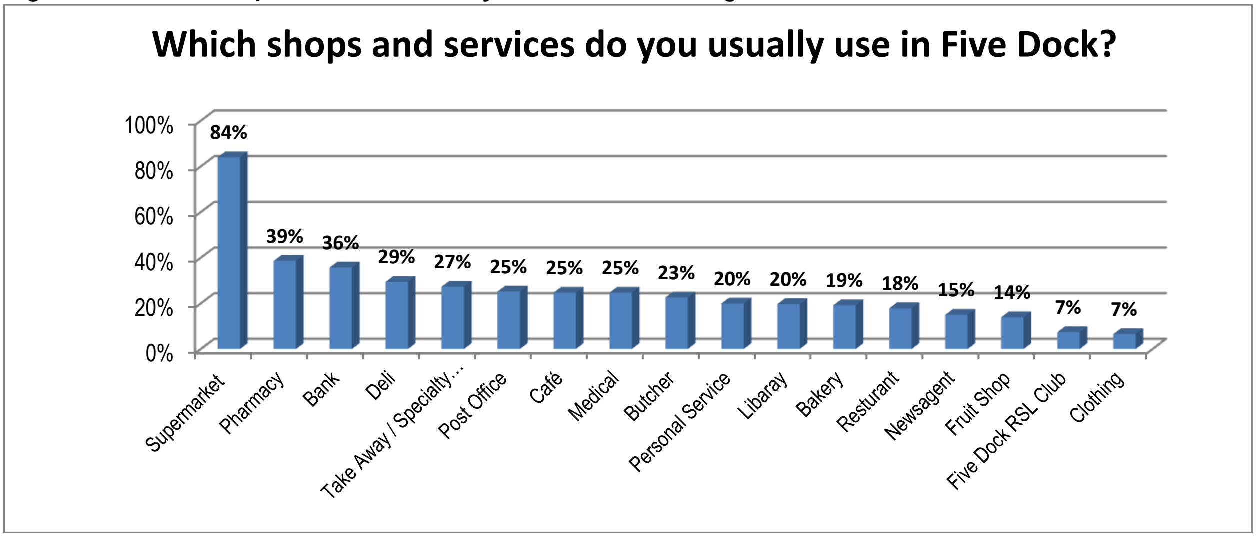
Figure 29 - Which of the following applies to you



Question 5. Which shops and services do you usually use in Five Dock?

The survey results revealed that 84% of participants nominated the supermarket as the main shop they visit in the Five Dock Town Centre. In addition to this, survey participants nominated the Pharmacy (39%) and Banking (36%) as shops and services they usually visit. It must be noted that the least common reasons nominated were the Five Dock RSL (7%) and clothing / gift shopping (7%). The detailed analysis of survey responses to this question is illustrated in Figure 30.

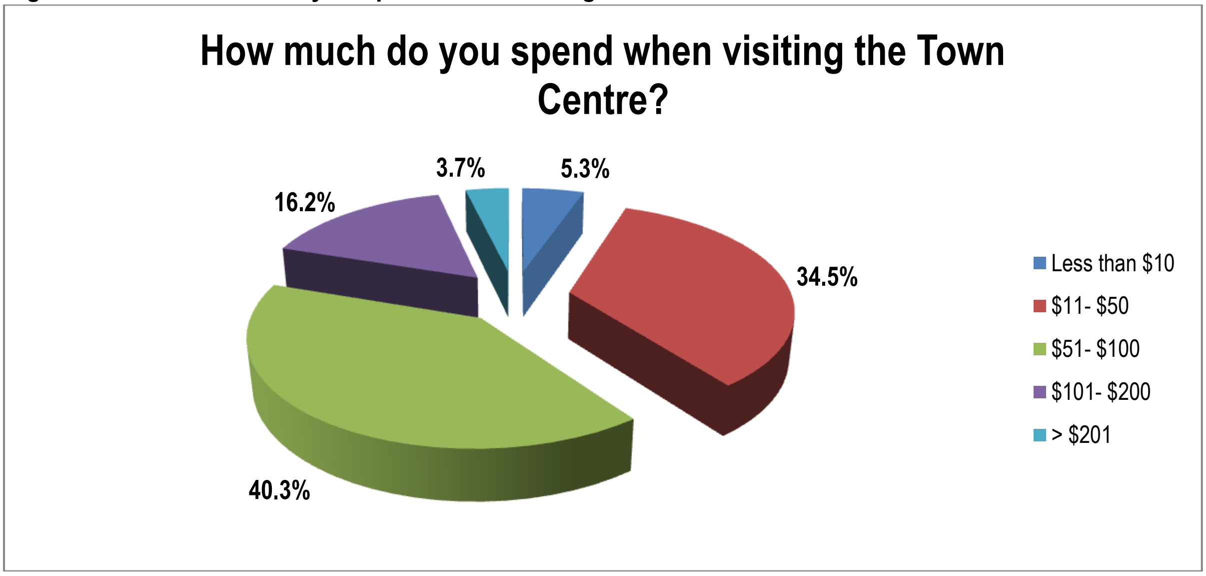
Figure 30 - What shops and services do you use when visiting Five Dock Town Centre



Question 6. On average how much do you spend on a visit to Five Dock Town Centre?

The majority of survey participants responded to this question (95%). The most frequent response regarding the amount spent on a visit to the Five Dock Town Centre was $51-$100 (40%). The survey results reveal that 35% of participants spend $11-$51 on average when visiting the Centre. In addition, it is apparent that 16% spend $101-$200 and 5% spend less than $10. It must be noted that the least frequent response to this question was $201 (4%).

Figure 31 - How much do you spend when visiting Five Dock Town Centre

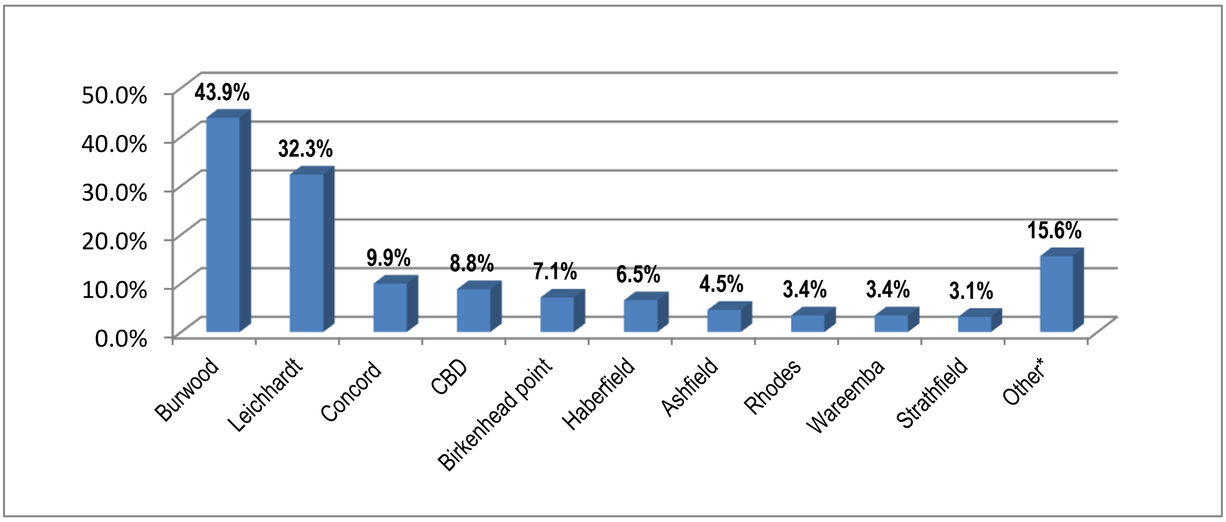


Question 7. Where else do you shop and why?

This question had a response rate of 89%. It is apparent that the large majority of those who completed the survey shop at Burwood (44%). The next most frequent responses were Leichhardt (32%), Concord (10%) and Sydney CBD (9%).

The survey results reveal that 16% of participants nominated the category 'other'. The shopping destinations nominated include the following: Chatswood, Five Dock, Balmain, Top Ryde, Drummoyne, Lane Cove, Rozelle, Homebush, Parramatta, Newtown, Edgecliff, Hurstville, Lilyfield, Mosman, Macquarie, Abbotsford, Marrickville ,Randwick ,Westmead ,Campsie ,Glebe, Castle Towers, Castle Hill ,Doonside, Bankstown and Blacktown. The responses to this question are depicted in Figure 32 below.

Figure 32 - Where else do you shop?



The survey participants nominated the following reasons for shopping elsewhere:

- Major supermarkets such as Coles and Woolworths;
- On way to or from work;
- For alternative foods;
- For clothing - no men's clothing in Five Dock;
- There is a greater range;
- More parking opportunities and convenience of parking;
- looking for a particular product/service;
- Closer to home / work;
- Price competitive / greater value;
- Greater range of restaurants and cafes;
- Clothing in Five Dock is terrible.
- Greater range of specialty shops;

- More enjoyable cafes and restaurants;
- The presence of department stores such as David Jones, Target, K-Mart, Medicare, Millers Fashion Store, Pumpkin Patch;
- More of a village atmosphere;
- Like the grocery stores better;
- Bigger shopping complexes and quality of shops;
- Passing by;
- More pleasant environment; and
- The change of area.

Question 8. What do you think is, or could be, unique about Five Dock Town Centre i.e. its Character, Sense of community, its convenience, the type of shops?

This question received a high response rate of 83%. The analysis of the question has been divided into two categories, these are: factors that make Five Dock Town Centre unique and areas that Five Dock could improve and / or negative aspects. The survey results relevant to each category are outlined below.

Factors that make Five Dock Town Centre unique

- Good service, good quality and cheaper;
- Types / variety of shops;
- Community feeling, locals are friendly;
- Smaller shopfront;
- Proximity to Sydney CBD;
- Small village atmosphere;
- The area is close to playgroups / childcare and a school;
- Nice people / nice little village;
- Local businesses, not too many chains;
- The main street character and diversity of independent business;
- Cultural mix, sense of community;
- The history of the area;
- Streets wide, pedestrian paths wider, good for pedestrians;
- Italian cafe feel;
- The wide footpaths;
- The heritage builds such as the old post office;
- It's an Italian food destination (e.g. butchers, Italian delis & patisseries, cafes, restaurants);

- The presence of small businesses rather than supermarkets & malls;
- Convenience of not having to travel to other locations;
- Neighbourhood character;
- Convenience of Town Centre;
- 'Like the fact there are no Woolworths or Coles';
- It's not over commercialised, it has specialty shops and cafes, safe and community driven environment; and
- Food produce is the best I have found.

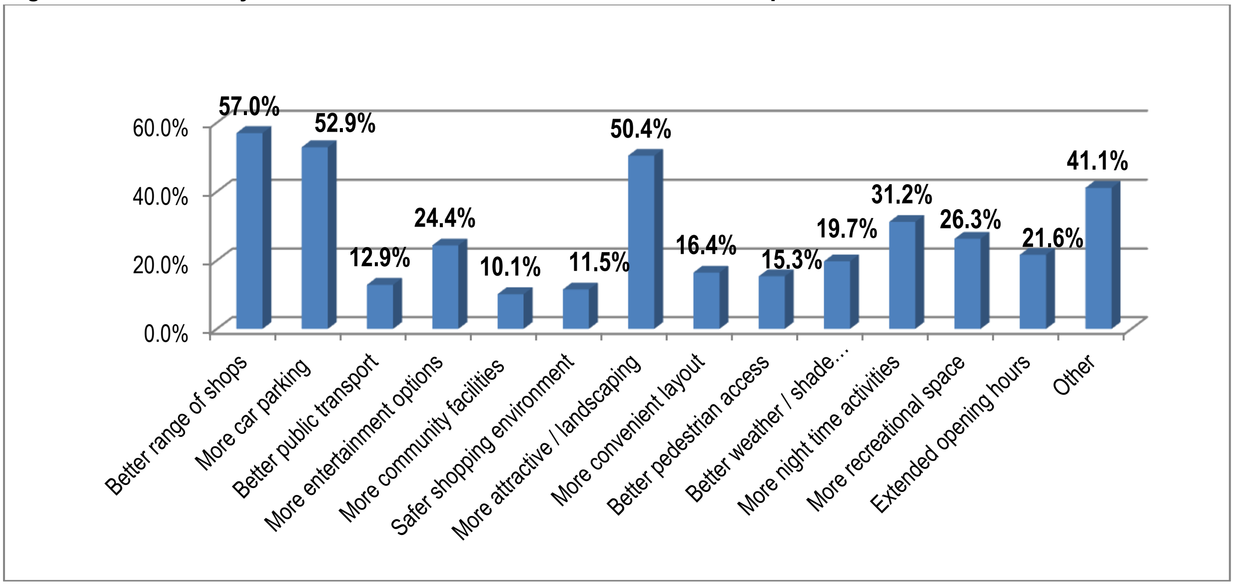
Areas that Five Dock could improve and / or negative aspects

- Convenience/ pretty daggy needs an upgrade;
- Its character - more cafes will provide more character;
- ''Only if an atomic bomb is dropped'';
- Should get rid of all the traffic on Great North Road;
- Italian character and heritage should be utilised;
- ''Too many empty shops'';
- 'Great North Road is a letdown';
- '' Pretty it up, renovate shops'';
- 'It is truly uniquely ugly - King Street Newtown's poorer and uglier sister. The so-called beautification projects of the '90s and early '00s(?) were expensive failures'; and
- Needs a face lift and close off Garfield Street from the police station down to Great North Road it's a nightmare the centre needs 'to be spruced up'.

<u>Question 9. How do you think the centre could be improved? What changes could be made to make you want to shop here more frequently?</u>

This question had a response rate of 92%. The main reason nominated for improving the Town Centre was 'increasing the range of shops' (57%). In addition to this 53% stated that an increase in the 'availability of parking spaces' would improve the centre, 50% specified 'improvements in landscaping', and 31% stated that 'more night time activities' could improve Five Dock Town Centre. The survey results for this question are depicted in Figure 33 below.

Figure 33 - How do you think Five Dock Town Centre could be improved?



It is apparent that 41% of survey participants nominated 'other' in response to this question. The reasons specified are detailed below.

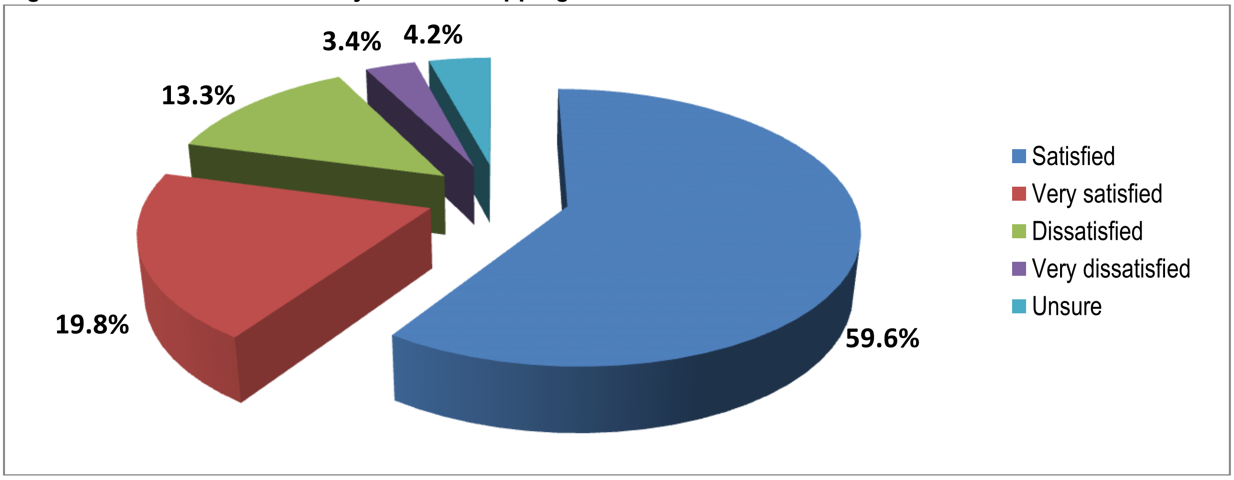
- The introduction of a Woolworths or Coles;
- The development of a night time economy for example bars and clubs;
- Proper notification of cultural festivals beforehand;
- Upgrading of the street scape and better lighting;
- Encouraging the shops to remain open on Sunday;
- Better dining / cafes particularly with outdoor / greenery / village;
- The introduction of community gardens;
- More restaurants;
- ''Can be hard to park at times and also when you do park can be hard to turn around and head to new destination once parked due to traffic/turning restrictions'';
- The introduction of a light rail system; and
- ''Get rid of the birds in Five Dock square, they poo all over the square and play equipment making it unhygienic".

Question 10. Overall how satisfied are you with shopping in Five Dock Town Centre?

This question had a high response rate of 97%. In relation to how satisfied participants are with shopping the Five Dock Town Centre a significant majority (80%) stated that they had a positive experience shopping in the Centre. The results revealed that a small portion of participants had a negative experience shopping the Centre (16%).

Further analysis revealed that 60% of respondents stated they were satisfied with shopping in the Centre and 20% specified they were very satisfied. It is apparent that 13% of participants were dissatisfied, 4% stated they were unsure and 3% were very dissatisfied with shopping in Five Dock Town Centre. The analysis of survey results for this question is shown in Figure 34.

Figure 34 - How satisfied are you with shopping in Five Dock Town Centre?



The reasons for shopping satisfaction / dissatisfaction provided by the survey participants is outlined below.

Positive responses:

- Most of the things I need to pick up on a daily basis are here;
- The centre meets all of my needs;
- On the whole it is convenient;
- There is a good range of amenities;
- The convenience of the centre;
- People overall are friendly;
- Five Dock has a community feel;
- The friendly staff and range of options;
- I like Five Dock a lot especially shops and library; and
- ''It's great''.

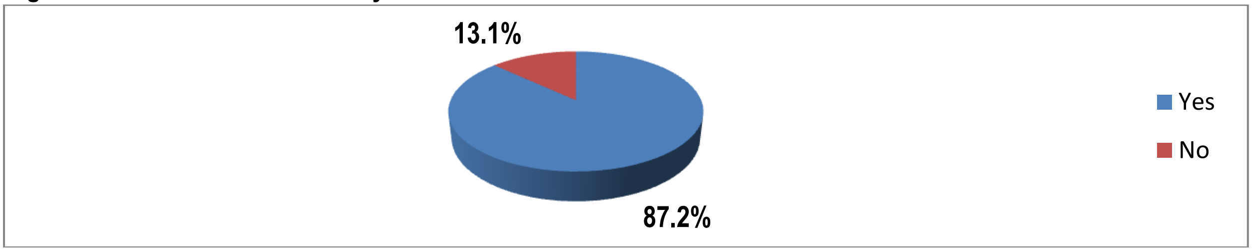
Negative responses:

- No florist on the main street, no bookshop;
- No outdoor eating spaces;
- No major supermarket anchor like Woolworths or Coles;
- It has what I need for living here. It's not amazing for night time activity so I tend to get take away and go home;
- A hardware store, and more clothing stores are needed;
- The area is expensive;

- The street scape is dirty (pigeon and bird excrement);
- There is better shopping value elsewhere;
- Finding a parking spot is a problem, particularly for visiting RSL Club – ''you have to leave the club to move your car if you want to have a long lunch/chat with friends'';
- Landscaping needs improvement;
- More variety & upgraded amenities needed to support business owners;
- Landlords should improve their premises;
- ''Parking is terrible'';
- It doesn't have everything I need so I need to go elsewhere which is inconvenient;
- Five Dock desperately needs a normal supermarket charging normal prices;
- Very inconvenient parking, stressful not good for the elderly;
- Has potential but it's boring and rundown;
- Five Dock has lost its village atmosphere it once had because it has become too busy with cars, buses and trucks passing thru causing dirt & noise pollution;
- Variety of shops at Five Dock is limited;
- Five Dock is a ghost town Sunday'; and
- "It still looks like an industrial area / precinct"

The significant majority of survey participants (87%) stated that Five Dock is a family orientated Centre There was a small portion of participants (13%) who stated that it was not a family orientated environment. The survey results are depicted in Figure 35 below.

Figure 35 - Is Five Dock a family oriented environment?



<u>Question 12. What child friendly improvements would you make to Five Dock?</u>

This question received an 80% response rate. It must be noted that this question was to be answered through a ranking system of Low, Medium and High. However, some survey participants ticked the categories instead of using the ranking system. Those who ticked the options have been given the designation of ''allocated''.

Improve access and mobility for parents with prams and toddlers - The survey results showed that 13% of respondents allocated the category, 10% designated it as a medium priority, 9% as a high priority and 6% designated the category as how.

Provide quality children's play space – The survey analysis demonstrated that 19% of respondents allocated the category, 12% designated it as a high priority, 11% as a medium priority and 6% designated the category as low.

Accessible public toilets with nappy change facilities - This category revealed that 30% of survey participants allocated the category, 18% designated it as a high priority, 6% as a medium priority and 5% designated the category as low.

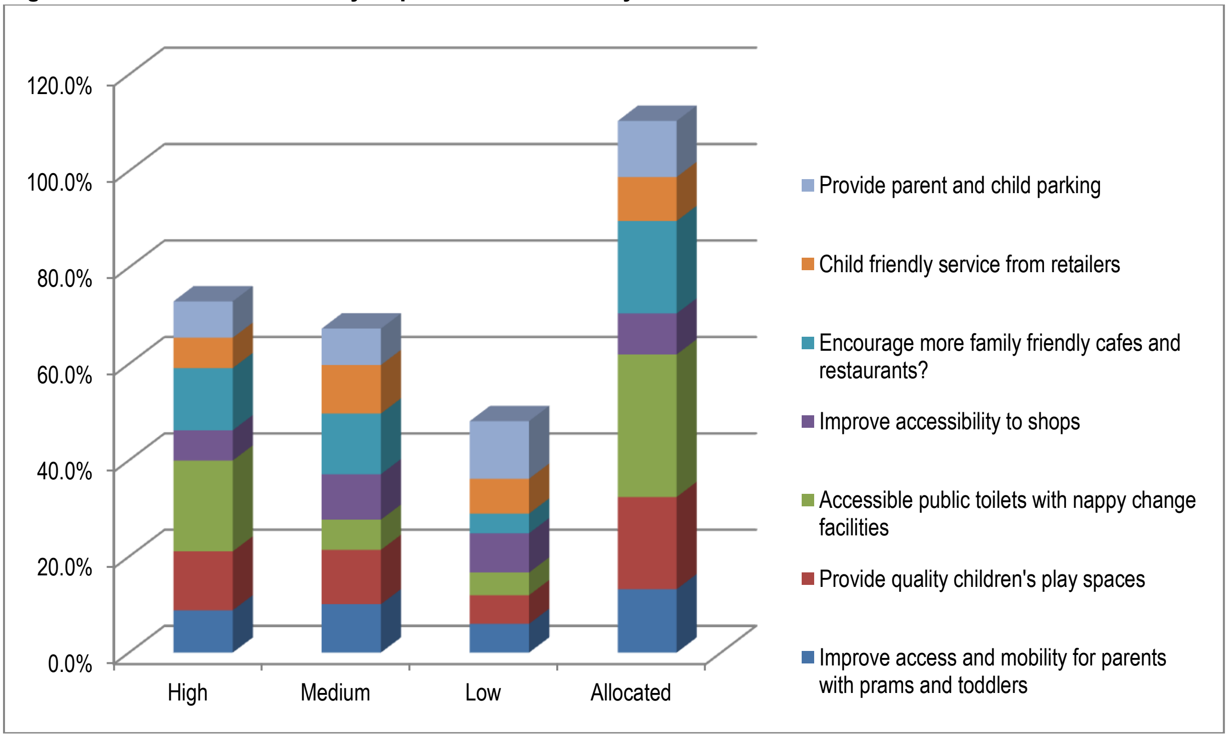
Improve accessibility to shops – The survey results demonstrate that 9% of respondents allocated the category, 9% designated it as a medium priority, 8% stated that it is a low priority and 6% said that it was a high priority.

Encourage more family friendly cafes and restaurants – This category reveal that 19% of respondents allocated the category, 13% stated that it is a high priority, 13% specified that it is a medium priority and 4% stated that it is a low priority.

Child friendly services from retailers – The survey results revealed that 10% of respondents stated that this is a medium priority, 7% nominated it as a low priority and 6% designated the category as high. It must be noted that 9% allocated this category.

Parent and child parking – 12% of those who completed the survey stated that this is a low priority, 8% specified that it is a high priority and 8% designated the category as medium. It must be noted that 12% allocated the category.

Figure 36 - What child friendly improvements would you make to Five Dock?



The survey respondents who nominated the category of 'other' stated the following:

- Remove the industrial zoning and uses within Five Dock;
- Upgrade and cleaning of public spaces within Five Dock such as the park opposite Superbarn;
- Lower traffic spends and give priority to pedestrians;
- Provision of public toilets;
- More parking;
- Provide more entertainment to attract families;
- Planting of more trees / improvements in landscaping;
- Cleaning the street scape;
- Provide childcare;
- The area needs to be improved for adults and elderly too;
- There are no baby / toy shops;
- The repairing of the rubber flooring in the playground;
- Maintain the village atmosphere in Five Dock Town Centre;
- Removing of graffiti; and
- Upgrading shop frontages to make them more attractable.

Question 13. Are there any other comments you would like to make about improving your shopping experience in Five Dock Town Centre?

This question received a response rate of 53%. The most common responses provided for this question are summarised below.

- Allocation of funds to create a high quality shopping experience;
- Improve the footpath along the town centre;
- Remove the industrial uses along the Great North Road;
- The development of a supermarket such as Woolworths, Coles or Aldi in Five Dock;
- The planting of more trees / hedges in Five Dock;
- Cleaning / improving of the street scape and shop frontages;
- Reward systems implemented by retailers for loyal customers, such as Superbarns point system for shopping;
- Provision of more seating / widening of footpath;
- Provision of leash areas for dogs;
- Increase variety of stores provided in Five Dock;
- 'A family pub would do very well' in Five Dock, there is to many 'butchers and hairdressers';

- The development of more cafes and places with outdoor eating;
- The provision of more parking, Water View Street car park / King Street car park could be converted into multi story car parks;
- The provision of more public toilets;
- The development of an enclosed mall where you can eat, drink coffee and shop;
- Improve the traffic flow / reduce speed limit / resurface the road;
- The development of a night time economy;
- The development of a local market so local artists and food producers can sell their products;
- Increase competitiveness between shops so prices decrease;
- Lowering of shop rents as to lower vacancies;
- Increase retail shops in the area as there are too many commercial uses (banks, solicitors, real estat.);
- Improve safety at Five Ways intersection. This intersection is dangerous as cars seem to ignore of don't recognise the signals;
- Reduce traffic congestion / rethink bus stop positions to keep traffic flowing;
- The provision of more public transport;
- The provision of better lighting within Five Dock;
- The development of underdeveloped sites in Five Dock such as the site opposite Superbarn;
- Five Dock should emulate Concord;
- Better removal of rubbish on the street;
- Make the area more safe;
- The town centre needs a 'face lift';
- Do not increase building heights as this will affect the village feel of Five Dock; and
- Extend trading hours and promote trading on Sundays within the town centre.

Appendix 6 - ECONOMIC ANALYSIS

Definition of Terms and Concepts

The development equation is set out in simple terms as follows:

GDV = L + B + F + P

where GDV = Gross Development Value, L = Land, B = Building, F = Finance, P = Profit

GDV 'Gross Development Value' is based on the capitalisation of net income, or the sales of completed built space.

Land Land costs are comprised of the cost of the land itself together with its acquisition costs such as stamp duty and conveyancing fees. Landholding costs constitute the statutory charges of land ownership which are payable during the development period. These include council rates, water and sewerage rates and land tax.

Building Building costs can be predicted by measurement of gross building areas and the application of unit rates for similar buildings completed. Rise and fall in labour and material costs should be allowed for. Building expenses constitute all construction costs and professional fees for consultants engaged including architects, planners, cost consultants and project managers.

Finance Capital investment generally takes two forms: debt and equity. Debt capital is usually employed during the construction phase following the same 'S' curve along which building costs accrue. On construction completion, construction funding is usually converted to term debt. Equity capital accrues interest on an opportunity cost basis for funds employed, i.e. the investment potential foregone in the 'next best' alternative investment opportunity. Equity capital is usually expended before debt capital is advanced. Arrangement, commitment, establishment, usage and facility fees apply to debt while arrangement fees apply to equity.

Profit Project is the developer's required margin to compensate for risk and enterprise.

The development equation can be rearranged to calculate land value as a form of residual value:

L = GDV – (B + F + P)

where the Residual Land Value is the remainder after deducting all costs from revenue.

Hurdle Rates

Target hurdle rates are dependent on the perceived risk associated with a project (planning, market, financial and construction risk). The more risk associated with a project, the higher the hurdle rate.

A site that is covered by clear and unambiguous planning controls is less risky; clear planning direction will contribute to mitigating planning risk and thereby reducing the lead-in time to development commencement.

The absence of clear planning and development controls would conceivably result in developer resistance and corresponding increases in required hurdle rates to compensate for increased risk and longer holding periods. This is expected to result in an increased project IRR to between 25% and 30%.

Economic Viability / Financial Feasibility

The development supply pipeline remains constrained by credit pricing and availability, this coupled with prevailing low rents and soft yields making the feasibility of large scale commercial development delicate. It is widely acknowledged that rents and capital values are generally below that of replacement cost. Not unexpectedly as a result of poor development viability, there have been limited transactions of *commercial* development sites particularly in fringe/marginal town centres.

The performance of properties within the Town Centre is mixed. Traditional strip retail is concentrated along the Great North Road in the Southern End of the Precinct (between Kings Road and Second Avenue) while commercial uses are more evident in the Northern End, to the north of Second Avenue. This suggests a decline in face rents towards the Northern End of the Precinct, commensurate with an increasing focus on commercial land uses.

There appears to be an observable difference between the performance of sites in the north of the Town Centre (north of Second Avenue) and that of sites in the south of the Town Centre (between Kings Road and Second Avenue), the latter recording higher rents and better transactional activity. Sites in the Southern End have in recent times achieved sale rates of between $5,500/sqm and $6,500/sqm of site area, with sites in the Northern End achieving between $3,500/sqm and $4,500/sqm of site area.

The economic viability of various land use options can be assessed by comparing the resultant Residual Land Values with the ‘as is’ *land value* of sites. Land use options that return higher Residual Land Values than the $3,500/sqm to $6,500/sqm bandwidth (depending on which section of the Centre they are located in) are considered economically viable or financially feasible as it implies that they are a ‘higher and better’ use than current use, facilitating incentives for their development and renewal.

Mixed Use Development Feasibility

Hill PDA carried out feasibility modelling based on notional mixed use development schemes (combination of retail/commercial/residential uses). The object of the feasibility modelling was to ascertain if in fact a mixed use was viable and if so, the minimum densities required for development to be feasible in today’s market.

The provisions of the draft Canada Bay LEP 2011 seeks to impose development controls to properties within the Town Centre. The economic impact of various controls including those related to land use, density and carparking has been tested on selected key sites within the Town Centre.

This section provides an overview of our financial assessment of notional development schemes premised on:

- A mix of uses (retail, commercial, residential) as permitted in the B4 Mixed Use Zone; and
- Densities from FSRs of 2.5:1 to 3.5:1.

The feasibility of each of the mixed use development option has been measured by the project’s Internal Rate of Returns (IRRs) and Residual Land Values (RLVs). The ranges of acceptability are indicated below:

Table 20 - Performance Criteria for Development Options

Performance	Residual Land Value[1]		Project IRR[2]
	Southern End	Northern End	
Feasible	>$5,500/sqm	>$3,500/sqm	>18%-20%
Marginally feasible	$4,500/sqm-$5,500/sqm	$3,000/sqm-$3,500/sqm	16%-18%
Not feasible	<$4,500/sqm	<$3,000/sqm	<16%

Notes:
'As is' values of $5,500/sqm in the Southern End and $3,500/sqm in the Northern End assumed
1 - Residual Land Value (RLV): the purchase price for the land to achieve a zero Net Present Value (NPV)
2 - Project Internal Rate of Return (IRR): the discount rate where the Net Present Value (NPV) equals zero

Whilst Hill PDA has adopted the project IRR as the primary indicator of performance (feasibility), regard has also been given to the following performance criteria:

- **Residual Land Value**: this represents the purchase price of the land whilst achieving a zero Net Present Value (NPV). An analysis of transactional activity of sites within the Town Centre indicates that under current planning controls 'as is' values are in the region of $5,500/sqm to $6,500/sqm of site area in the Southern End and between $3,500/sqm and $4,500/sqm of site area in the Northern End. For a use to be considered feasible, the corresponding Residual Land Value needs to be greater than the 'as is' value so as to make it (the proposed use) a 'higher and better use'. There is little economic impetus for effecting land uses that return lower Residual Land Values than their current values.
- **Development Profit**: Total revenue less total cost including interest paid and received.
- **Development Margin**: Profit divided by total development costs (including selling costs).

In order to understand the economic factors influencing development within the Town Centre, several notional schemes were tested for feasibility however it should be noted that these hypothetical options have not been design or engineering tested.

<u>144 Great North Road</u>

This site measures 417sqm and is currently improved with a two storey building with the benefit of multiple leases in place. This site was sold in November 2010 for $2.7m, analysing to $6,500/sqm of site area. Located on Great North Road (on the corner of Rodd Road), this site has the benefit of on-site basement carparking with rear lane access. Hill PDA tested the feasibility of two density scenarios, i.e. development to FSRs of 2.5:1 and 3.5:1. The following table provides the results of high-level feasibility testing of the site under various density controls.

Table 21 - Site 1 (144 Great North Road) Mixed Use Development Options

Site/Option Specifics	FSR 2.5:1 (4 storeys)	FSR 3.5:1 (6 storeys)
Site Area	417sqm	417sqm
Development Yield		
Residential Gross Floor Area (GFA)	780sqm	1,200sqm
Non-residential Gross Floor Area (GFA)	260sqm	250sqm
Performance Indicators:		
Residual Land Value (RLV)	$950,000	$1,500,000
RLV ($/sqm of site area)	$2,278	$3,597
Project IRR	21.46%	21.27%
Development Margin	19.71%	20.52%
Feasibility[1]	No	No

Notes:
1 - This is based on comparison of the recent sale price of $2,700,000 (November 2010) and the Residual Land Values of the respective density scenarios.

Figure 37 - Site at 144 Great North Road

Source: Red Square

The utility offered by and the condition of the existing improvements underpin the 'as is' value of this property. As indicated by its sale price of $2.7m in November 2010, the 'as is' value of $6,500/sqm of site area far exceeds the RLVs of $2,300/sqm and $3,600/sqm of site area. Accordingly, there is no economic impetus/incentive for sites such as this one, i.e. with significant improvements that underpin a good rental return to be redeveloped in the short to medium term.

Whilst development to the above densities is not presently feasible on 144 Great North Road, it does not suggest that development on *all* sites within the Town Centre is not feasible. Sites that are improved with less substantial buildings generating less rental returns, development to FSRs of between 2.5:1 and 3.5:1 could still be feasible as indicated by the following sites.

Analysis of Development Sites within the Town Centre

There are a handful of sites within the Town Centre that have been granted with development consent. An analysis of these sites including their sale prices, development yields and existing uses is carried out to understand the conditions under which redevelopment in the Town Centre is occurring.

Table 22 - Analysis of Development Sites

Site/ Description	Status/ Transactional Activity	Comments
239 Great North Road Site Area: 841sqm Location: Northern End of Town Centre close to Lyons Road	Under construction, apartments for sale off-the-plan. Site sold in October 2008 for $2.2m ($2,600/sqm of site area). Sale analyses to $1,300/sqm/FSR based on approved FSR 2:1.	Subsequent to site acquisition, a DA for 16 residential units, 3 commercial units lodged; this was refused in November 2009. A second application was lodged in May 2010 and approval obtained for 14 residential units, 5 commercial units (FSR 2:1).
227 Great North Road Site Area: 436sqm Location: Northern End of Town Centre just south of Lyons Road	Approved for mixed use development. Site sold in November 2010 for $2,587,750 ($5,900/sqm of site area). Sale analysis to $1,700/sqm/FSR based on approved FSR 3.44:1.	This site has been the subject of several development applications refused including fit out as sex services premises and alterations to use as a carpark. A mixed use development application was approved in November 2011 for 17 residential units and 2 commercial units (FSR 3.44:1).

Source: RP Data, Reed Construction Data, Hill PDA research 2012

From the above it can be observed that development is more likely to occur in the Northern End of the Town Centre where existing land values are lower compared to the Southern End. In trying to understand the minimum densities required for development we can analyse these development sites on per sqm and per FSR bases. The above development sites were sold at prices equating to $1,300/sqm/FSR and $1,700/sqm/FSR.

This implies that at a density of FSR 2:1, the existing site value must not exceed $2,600/sqm of site area for development to be viable. In the same vein, at a density of FSR 3.44:1, existing site value must not exceed $5,900/sqm of site area for development to be viable.

It should also be noted that at higher densities, minimum lot sizes in the order of 400sqm are required for development not only from an economic perspective but also from an urban design position.

Issues for Economic Viability

There has been a lack of development activity in the Town Centre in recent times, indicative of a lack of developer confidence and delicate development feasibility. Development activity is more prevalent elsewhere in Five Dock where existing uses (residential) are of a 'lower order' and intensification of residential uses represents a higher and better use of a site.

The challenges for development have been compounded in recent times by the difficulty in obtaining credit. This problem is not unique to the Inner West but is a significant impediment to development throughout the Sydney metropolitan area and indeed elsewhere in the state.

There has been a dearth of development site transactions in the Town Centre; most sites transacting on the basis of continued use. In most cases site values in continued use far exceed site values assuming demolition and redevelopment.

The following issues continue to challenge development, with feasibility in many instances delicate:

- **Site assembly** - acquisition of land is a high risk and high resource activity for developers particularly where numerous parcels of land have to be amalgamated prior to development. The Town Centre is characterised with numerous small allotments hence making site assembly a challenge. The cost of acquiring multiple sites for a development significantly adds time and cost to the development. It is therefore unrealistic to expect redevelopment of small allotments within the Town Centre to occur in the short to medium term.

- **Site constraints -** physical shape and environmental constraints and the need for infrastructure provision (particularly applicable in release areas) affect the developable area of the site. As intimated in the earlier section, development to higher densities will be more effectively achieved on larger sites, i.e. on sites exceeding 400sqm.
- **Intensity of build -** there is often a misconception that 'more is better': as floorspace increases so does the number of storeys and basement levels to accommodation car parking requirements and hence construction cost. In deciding the amount of capital to apply to a site, i.e. how intensely the site should be developed, developer capital will be applied to the extent where incremental revenue is equal to incremental cost.
- **Product type** - residential markets are acknowledged to be diverse, e.g. market acceptance for higher density product is good within most inner suburbs of Sydney, hence end sale prices of the completed product justify higher cost of construction. However in the case of the Town Centre it has yet to establish itself as a residential locale within the suburb of Five Dock. Until the Town Centre gains market acceptance for residential product, end sale prices achievable will be modest.
- **Cost of development -** recent difficulties in securing credit and relatively high statutory cost obligations have exacerbated the overall cost of development. Lead-in time to development can significantly contribute to development holding costs, including the time needed to procure development consent.

The biggest challenge for development in the Town Centre is the existing levels of property prices and owner expectations. In some cases this may be remedied by the variation of planning controls, i.e. increase in density and height. In cases where redevelopment is unlikely to occur in the short to medium term, attention and initiatives should be on other measures to improve the vibrancy of the town centre.