Leederville Activity Centre Structure Plan
Part 1: Background Population, demographics and economic profile

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MacroPlanDimasi

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Executive summary

MacroPlan was engaged in association with GHD by the City of Vincent to prepare an Activity Centre Plan for the Leederville Town Centre. This planning framework will respond to the current and future needs of the area and provide guidance on decision making for the planning and development of the town centre.

This report represents part one of the project which aims to identify the current context of Leederville and how the centre is currently performing in the following key focus areas.

Demographics and population

The Leederville Town Centre population is expected to see limited growth to 2041, at an average annual 3.7 per cent, from 1,317 in 2017 to 3,175 in 2041. This reflects the strong potential for high density residential development in the town centre.

The socio-demographics of the centre reflect working professionals with high incomes, largely couples with no children or lone person households. Residents are largely renters, living in separate or semi-detached houses, predominantly Australian born, largely have no need for assistance in day to day activities.

Residential density and diversity

The residential dwelling market within the suburb of Leederville has been relatively stable in terms of volume with an average of 83 properties sold over the last 10 years, while dwelling prices have seen an average annual growth of 0.8 per cent over the period.

The Leederville Town Centre study area is performing well against the State Planning Policy 4.2 dwelling density target, with 34 dwellings per hectare of residential land in 2016, up from 22 in 2011, while the minimum target is 25 dwellings.

Table 1. Leederville Town Centre study area dwelling density performance

	2011	2016
Dwellings	428	655
Residential area (sq.km)	0.192	0.192
Residential area (ha)	19.2	19.2
Leederville study area dwelling density	22	34
SPP 4.2 Secondary Centres density target	**Min 25, Desirable 35 dwellings per hectare**	

Source: Department of Planning, Lands and Heritage – SPP 4.2, Australian Bureau of Statistics, MacroPlan Dimasi

Residential dwelling diversity within the study area has improved over the last 15 years, with unit/apartments increasing from 7.7 per cent in 2001 to 42.3 per cent in 2016, while separate houses decreased from 53.4 to 27.7 per cent and semi-detached dwelling from 38.1 to 28.4 per cent.

The study area has an above average level of housing suitability as measured by the Census of Population and Housing in 2016, which suggests 29.3 per cent of all dwellings were suitable for the number of occupants compared with just 13.7 per cent in the Perth Metro area.

Non-residential land use

The land use mix within the Leederville Town Centre has become more diverse, initially the area was dominated by office/business uses but has since increased health/welfare/community services and utilities/communications uses. Residential land has also increased substantially from none in 1990 to 9.2 per cent of the Town Centre in 2015.

The performance of the Leederville TC study area for mix of land uses is measured against the SPP 4.2 target for Secondary Centres, which is 30.0 per cent non-retail land uses for centres with between 20,000m^2 and 49,999m^2 of shop/retail floorspace. Shop/retail floorspace at 19,250m^2 in 2015, represented just 9.3 per cent of total floorspace within the study area, indicating the centre is performing well against the policy target with 90.7 per cent of floorspace for non-shop/retail land uses.

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Introduction

MacroPlan was engaged in association with GHD by the City of Vincent to prepare an Activity Centre Plan for the Leederville Town Centre. This planning framework will respond to the current and future needs of the area and provide guidance on decision making for the planning and development of the town centre.

Scope

This report represents part one of the project which aims to identify the current context of Leederville and how the centre is currently performing in the following key focus areas.

1. Demographics and population
    - Analysis of the Leederville Town Centre and its catchment area, population growth and demographic trends.

2. Residential density and diversity
    - Analysis of the residential property market including dwelling structure, historical sales volumes and prices, market depth by price point and density and rental market indicators.

3. Non-residential land use
    - Analysis of land use mix within the Town Centre, historical sales volumes and prices, rental listings, visitor statistics and activity.
    - Assessment of activity in the Leederville Town Centre by the type of attractor.

Study Area

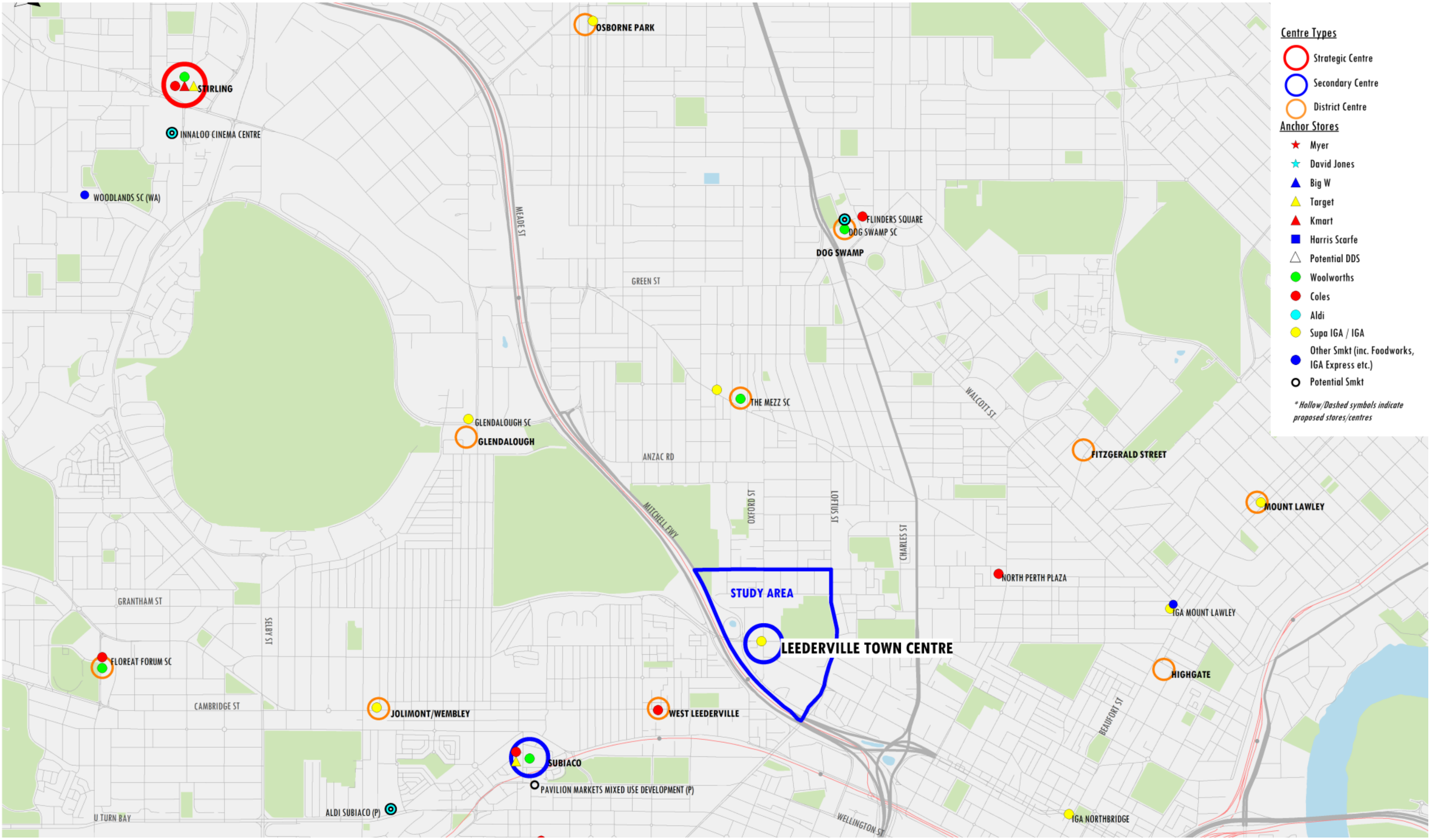
The analysis covers two geographical areas, the Leederville Town Centre study area and the Leederville Town Centre catchment area.

The Leederville Town Centre study area is bounded by the Mitchell Freeway to the west, Loftus Street to the south and east and the northern side of Richmond Street in the north.

The catchment area is delineated based on a combination of specialised expertise in defining catchment areas for a range of different land uses and hierarchies and Geographical Information Systems (GIS) software to undertake catchment area and spatial data analysis.

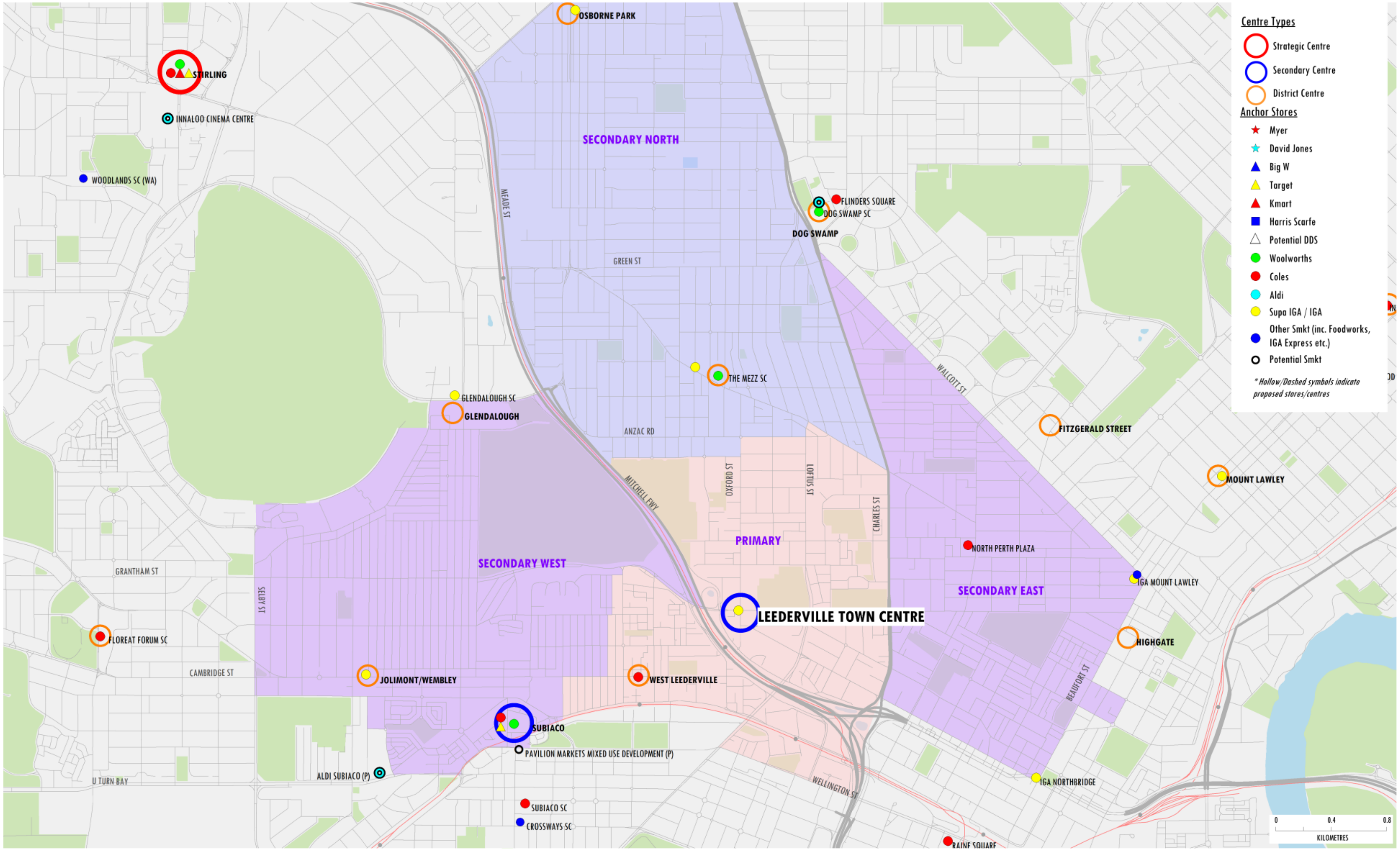
The study area and catchment area are illustrated in the following figures.

Figure 1. Leederville Town Centre study area



Source: MacroPlan Dimasi

Figure 2. Leederville Town Centre catchment area



Source: MacroPlan Dimasi

Section 1: Demographics and population

1.1 Population and dwellings

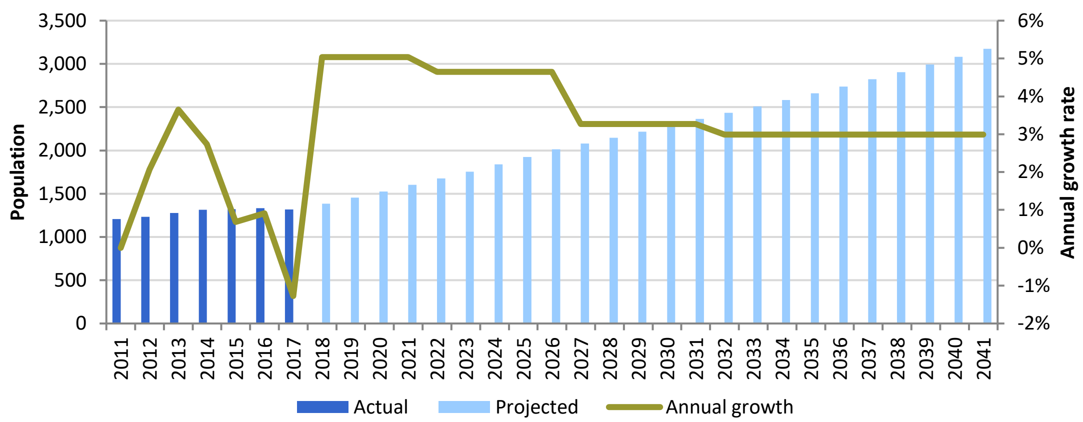
Population projections

The following figure illustrates the projected population growth to 2041 for the Leederville TC study area.

These projections are based on the estimated resident population for the Leederville TC study area and the forecast.id projected growth rates for the suburb of Leederville to 2036, adjusted to reflect the stronger growth potential in the town centre study area compared with the rest of the suburb of Leederville. This is driven by the higher density development potential and with the assumption that the growth rate between 2031 and 2036 remains the same to 2041, this represents the base case projection.

The study area population in 2017 was 1,317 residents, this is forecast to grow to 3,175 to 2041, an average annual 3.7 per cent to 2041.

Figure 3. Leederville TC study area historical and forecast population, 2011 – 2041



Source: Australian Bureau of Statistics – Estimated Resident Population, Forecast.id, MacroPlan Dimasi

This is significantly higher than the Western Australian Planning Commission forecast growth rate for the Mt Hawthorn – Leederville SA2 area of 0.7 per cent to 2031, which again reflects the potential for higher density development within the town centre compared to the rest of the Leederville and Mt. Hawthorn area.

The table below outlines the forecasts by forecast.id for the suburbs of Leederville and Mt. Hawthorn (which together make up the Mt. Hawthorn – Leederville Statistical Area 2) and the Western Australian Planning Commission forecast for the Mt. Hawthorn – Leederville Statistical Area 2 forecast. The forecast.id growth rate projections are moderately higher than the Western Australian Planning Commission projections.

Table 2. Mt. Hawthorn – Leederville SA2 population forecast to 2036

	2016 - 2021	2021 - 2026	2026 - 2031	2031 - 2036
Forecast.id				
Mt Hawthorn	0.8%	0.8%	0.8%	0.9%
Leederville	3.0%	3.1%	2.3%	2.2%
Mt Hawthorn - Leederville SA2	1.5%	1.6%	1.3%	1.4%
Western Australian Planning Commission				
Mt Hawthorn - Leederville SA2	0.4%	0.9%	0.8%	NA

Source: Forecast.id, Western Australian Planning Commission – WA Tomorrow 2018

Dwelling forecast

Based on the population forecast, estimated future household size and dwelling occupancy, the number of dwellings to 2041 has been estimated at 1,528 dwellings, up from 655 in 2016. This equates to an additional 35 (approximately) dwellings per year over the period.

Table 3. Leederville TC study area dwelling forecast, 2016 - 2041

	2016(a)	2021	2031	2041
Population	1,334	1,604	2,364	3,175
Average household size	2.1	2.13	2.14	2.14
Occupancy	97.0%	97.0%	97.0%	97.0%
Dwellings	655	775	1,138	1,528

Source: Australian Bureau of Statistics – Census of Population and Housing 2016, Forecast.id, MacroPlan Dimasi

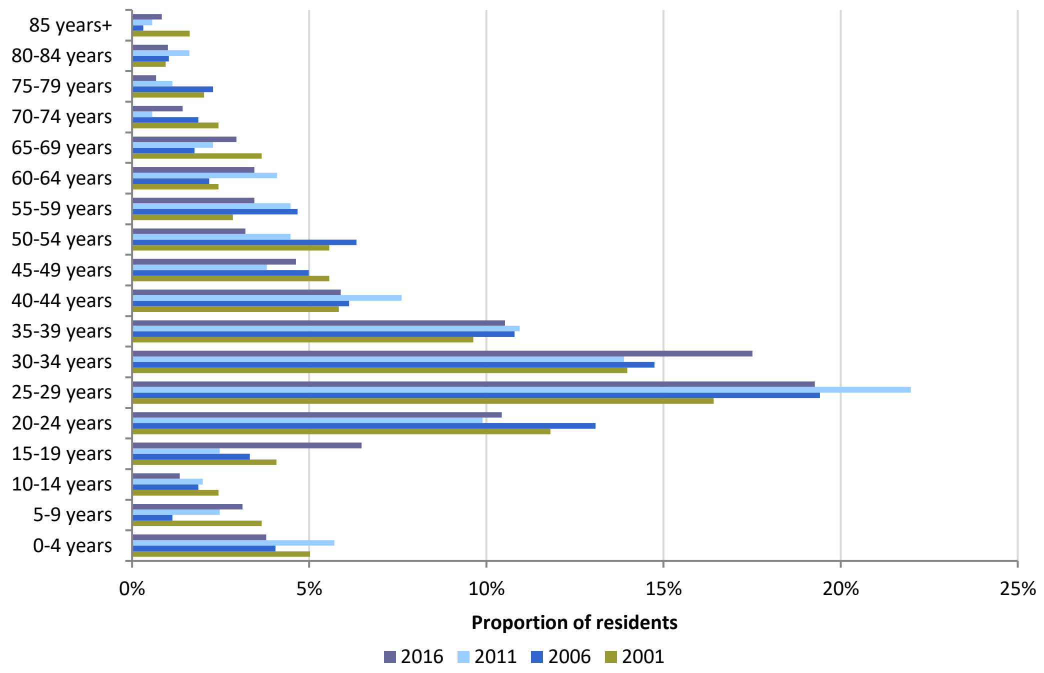
1.2 Demographic trends

Age profile

The following figure illustrates the change in the age profile of the study area every five years from 2001 to 2016.

Between 2001 and 2016 the study area has seen a 2.9 per cent fall in the number of children under the age of 15. On the contrary, the proportion of the population aged between 20 and 40 has increased by 5.9 per cent. This increase in the young working population and decrease in the number of children would suggest the study area is predominately made up of working professionals. Further supported by the fact that those in the retirement aged cohort (65 and above) constituted just 6.9 per cent of the population in 2016, compared to 10.7 per cent in 2001.

Figure 4. Age profile in the Leederville TC study area, 2001 - 2016



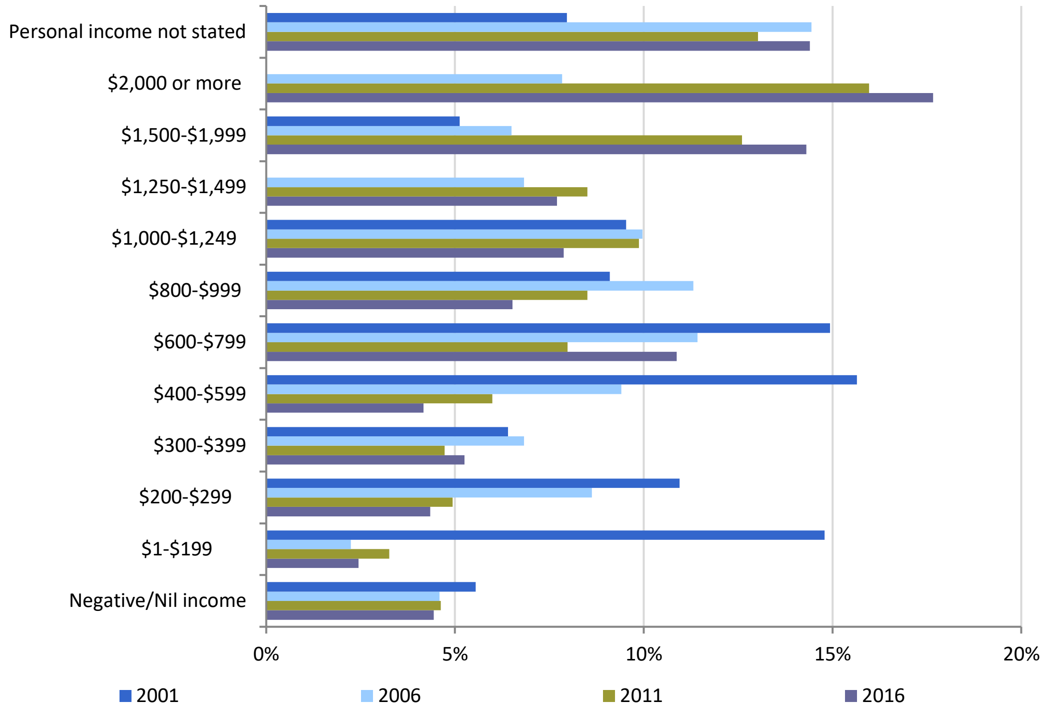
Source: Australian Bureau of Statistics – Census of Population and Housing 2016

Incomes (personal, household) and government support payments

The figure below displays the weekly personal income of residents in the study area.

There has been a significant increase in the number of residents earning more than $2,000 weekly, from 0.0 per cent in 2001, to 16.0 per cent in 2011, and 17.7 per cent in 2016. The portion of those earning between $1 and $599 per week has decreased by 31.6 per cent, moving from 47.8 per cent of the population in 2001, to just 16.2 per cent in 2016.

Figure 5. Total personal income (weekly) in the Leederville TC study area, 2001 – 2016

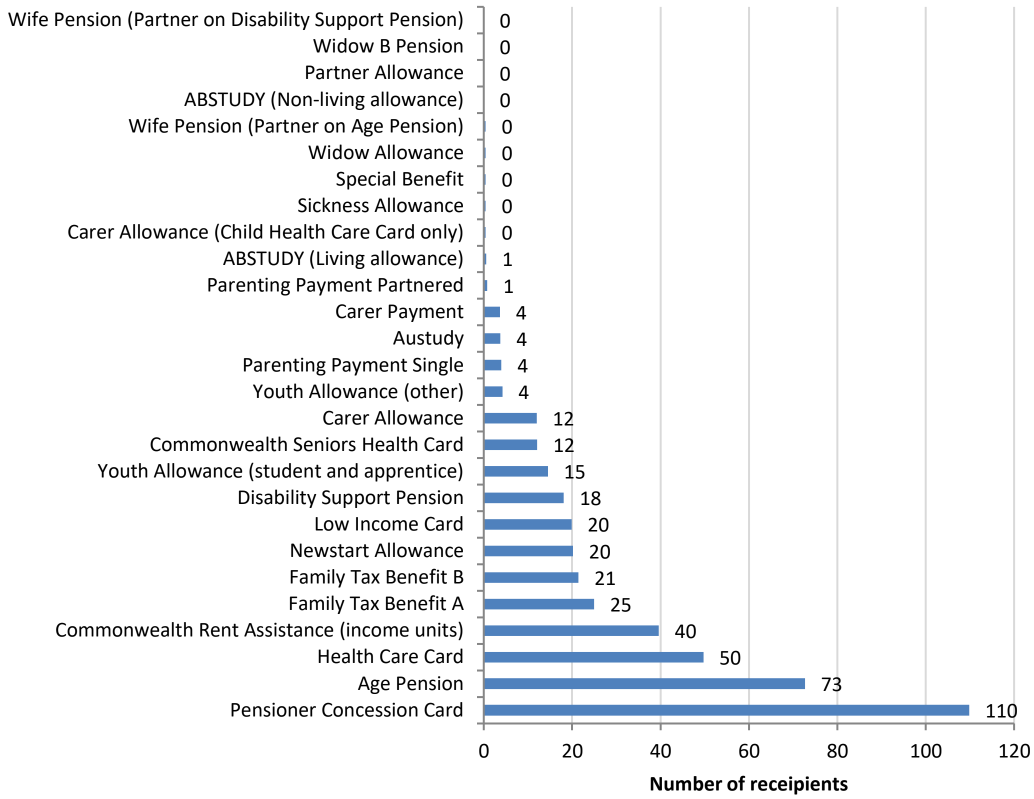


Source: Australian Bureau of Statistics – Census of Population and Housing 2016

The following figure illustrates the number of residents within the suburbs of Mt Hawthorn and Leederville that receive government support payments, as at September 2018.

Within the area there were 110 recipients of the pensioner concession card, 73 residents on the aged pension, 50 recipients of the health care card and 40 recipients of commonwealth rent assistance.

Figure 6. Mt. Hawthorn – Leederville government payment recipients by payment type, September 2018

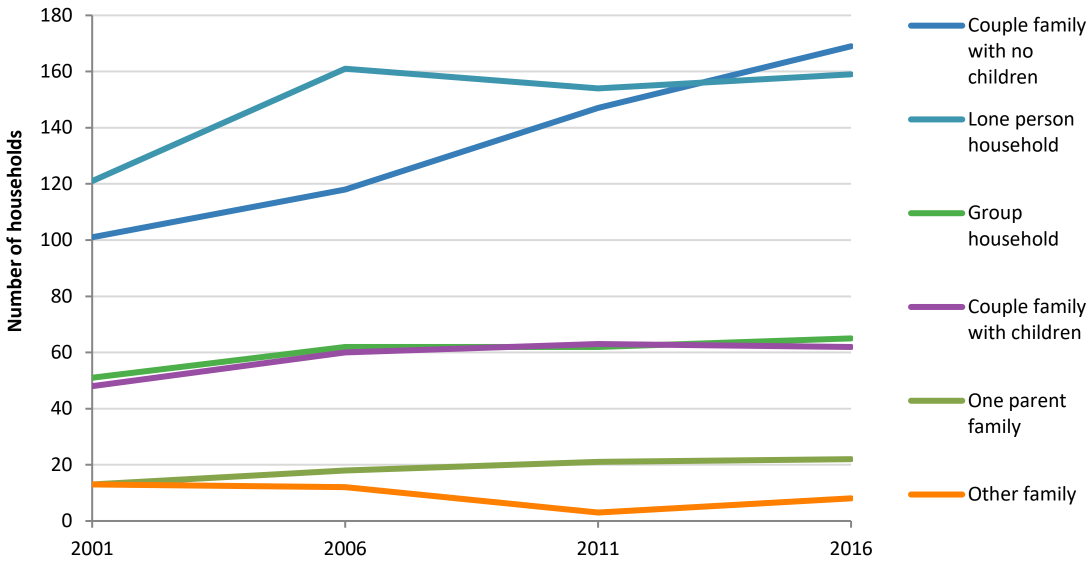


Source: Department of Social Services – Payment Demographic Data

Household composition

Over the period from 2001 to 2016 the number of couple families with no children in the study area increased by 5.7 per cent. As at 2016, the majority of households in the study area were couple families with no children (34.8 per cent). Lone person households make up the second largest category with 159 residents (32.8 per cent). Over the period, the number of couple families with children and the number of group households have remained stable at roughly 12.0 per cent.

Figure 7. Household composition in the Leederville TC study area, 2001 - 2016

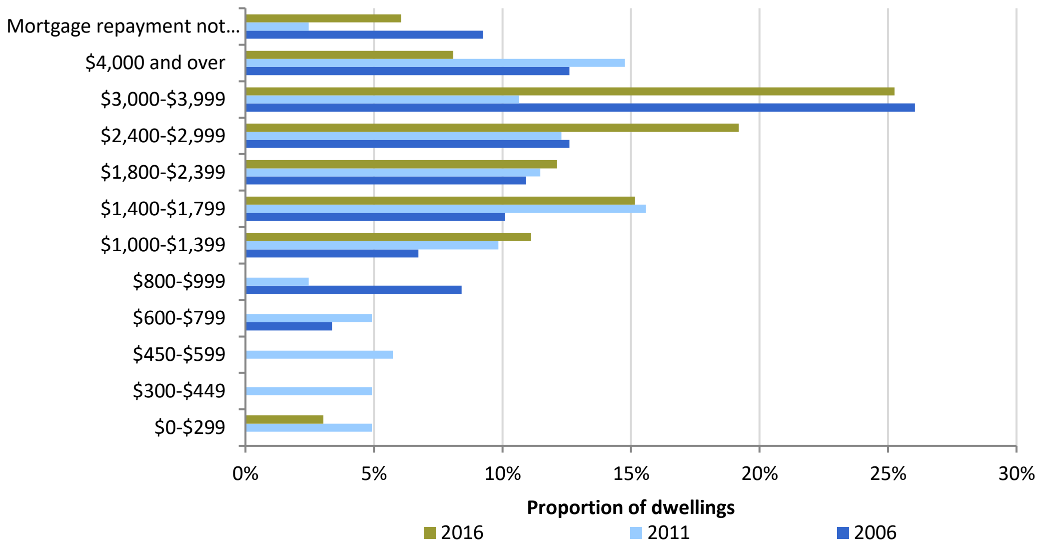


Source: Australian Bureau of Statistics – Census of Population and Housing 2001–2016

Mortgage and rental payments

The following figure shows the monthly mortgage payments paid for dwellings in the study area. Repayments have increased over the period, with the number of people paying between $2,400 and $2,999 increasing by 6.6 per cent.

Figure 8. Mortgage expenditure for dwellings in the Leederville TC study area, 2006 - 2016

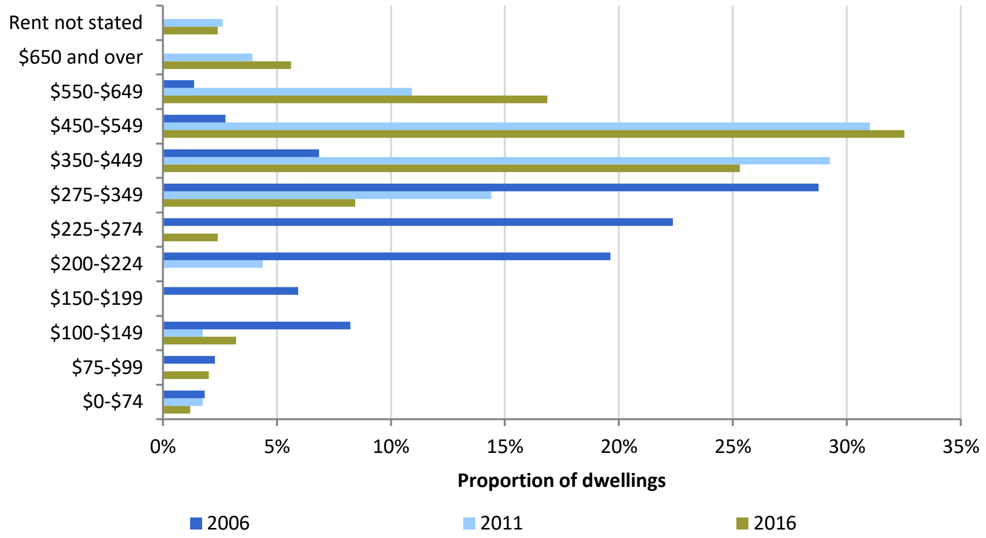


Source: Australian Bureau of Statistics – Census of Population and Housing 2016

MacroPlanDimasi

The figure below depicts the weekly cost of rentals in the area. Over the past 10 years, rental costs have seen significant increases, with 32.5 per cent of tenants now paying between $450 and $549 per week, compared to just 2.7 per cent in 2006. The number of rentals above $650 per week increased dramatically from 0.0 per cent in 2006 to 5.6 per cent in 2016.

Figure 9. Weekly rental cost in the Leederville TC study area, 2006 - 2016

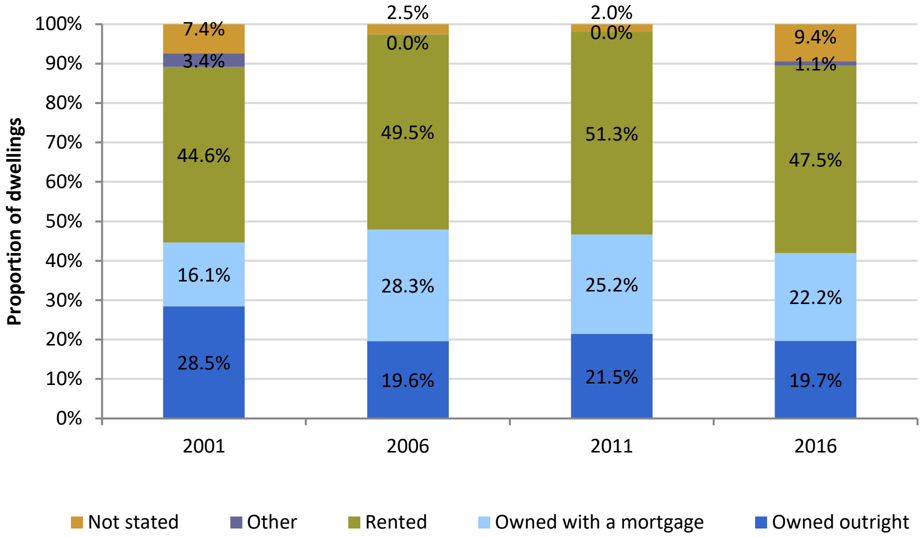


Source: Australian Bureau of Statistics – Census of Population and Housing 2016

Tenure

The following figure displays the tenure type within the study area. A majority of residents rent their homes, averaging approximately 48.2 per cent of the study area population over the period between 2001 and 2016. The proportion of the population that own their homes outright has declined by 1.8 per cent since 2011, and by 8.8 per cent since 2001. On the other hand, those that own their homes with a mortgage have increased by 6.1 per cent since 2001, but levels remain 6.1 per cent lower than their peak in 2006.

Figure 10. Leederville TC study area dwelling tenure, 2001 - 2016

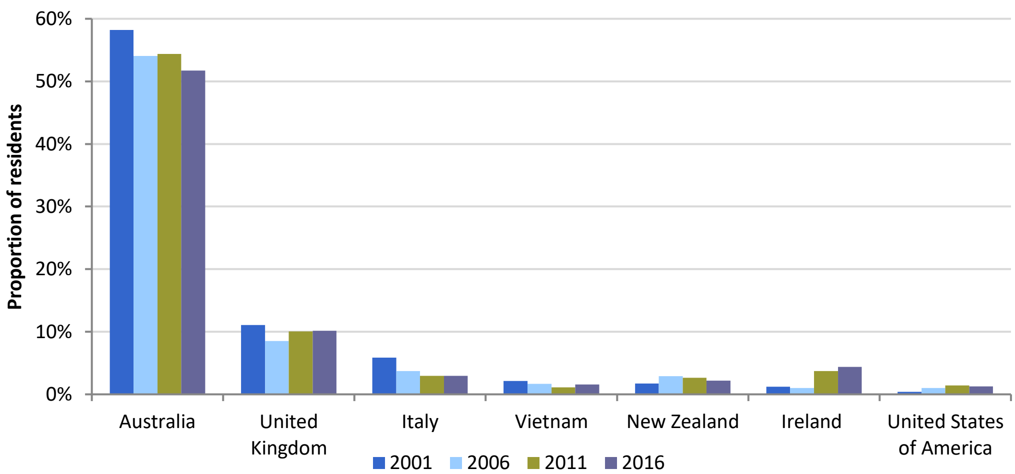


Source: Australian Bureau of Statistics – Census of Population and Housing 2016

Country of birth

The figure below shows the country of birth for residents living in the study area between 2001 and 2016. The population has always been predominately Australian born (beyond 50 per cent), however the proportion of Australians has declined by 6.5 per cent from 2001, with an increase in the number of residents born in Ireland and the United States.

Figure 11. Leederville TC study area country of birth, 2001 – 2016



Source: Australian Bureau of Statistics – Census of Population and Housing 2016

Language spoken at home

More than 70.0 per cent of the population in the study area speak English at home. Over the period there has been a slight increase in the number of residents who speak Chinese, while there has been a rather significant 4.8 per cent decrease in the number of Italian speakers.

Table 4. Language spoken at home in the Leederville TC study area, 2001 – 2016

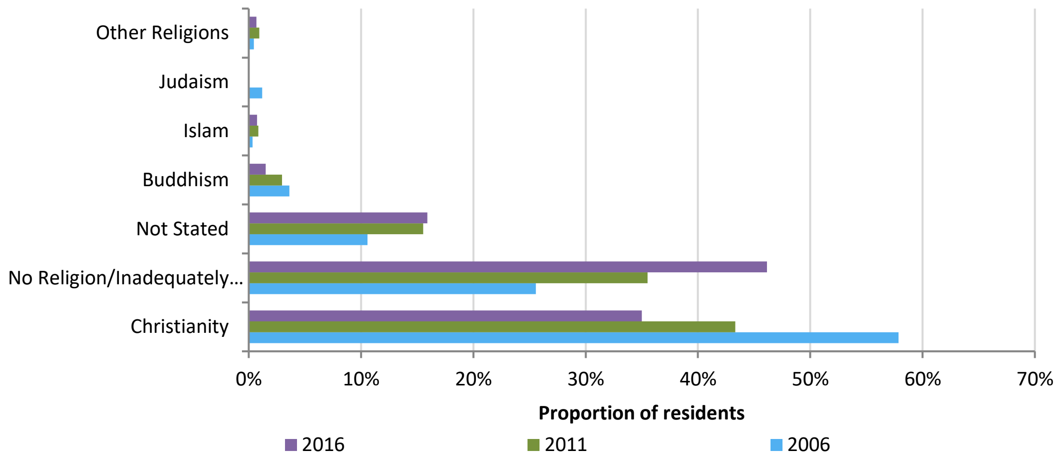
	2001	2006	2011	2016
English	74.6%	70.6%	70.9%	70.9%
Not stated	6.8%	12.3%	15.1%	13.3%
Other	7.3%	7.3%	5.8%	8.6%
Italian	8.8%	5.0%	4.7%	4.0%
Chinese	2.1%	3.2%	2.6%	2.2%
Greek	0.4%	1.6%	0.9%	1.1%
Total	**752**	**966**	**1,054**	**1,191**

Source: Australian Bureau of Statistics – Census of Population and Housing 2016

Religion

The figure below shows the religious affiliation of residents within the study area. The portion of the population who identify as Christian in the study area has fallen from 57.9 per cent in 2006, to 35.0 per cent as at 2016, a 22.9 per cent decline. On the other hand, those with no religion/an inadequate description of their religion increased from 25.6 per cent of the population, to 46.1 per cent.

Figure 12. Religious affiliation in the Leederville TC study area, 2006 - 2016



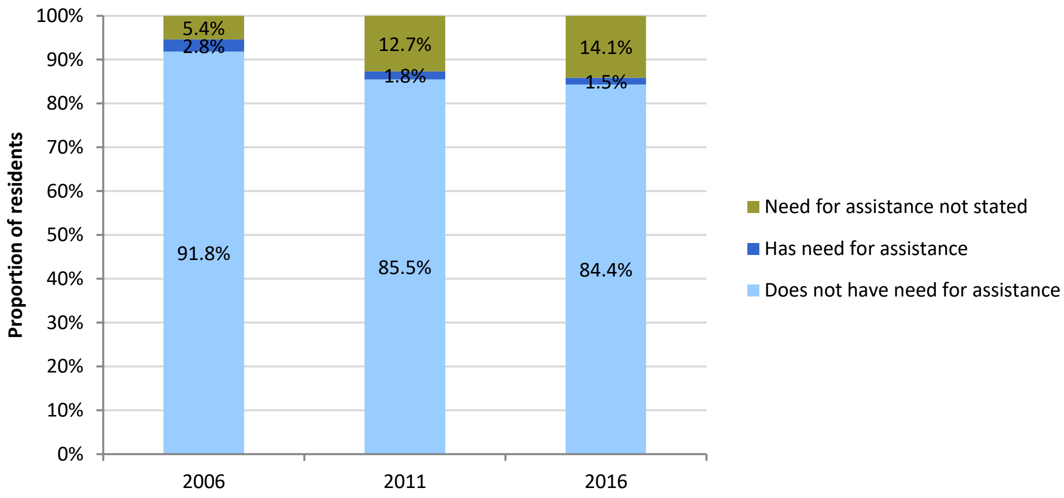
Source: Australian Bureau of Statistics – Census of Population and Housing 2016

Need for assistance

Need for assistance data has been collected by the Australian Bureau of Statistics in the Census since 2006. The population needing assistance is defined by the ABS as *"people who need assistance in their day to day lives with any or all of the following core activities – self-care, mobility or communication because of a disability, long-term health condition (lasting six months or more) or old age."* Over the 10 year period between 2006 and 2016, there has been a 1.3 per cent decrease in the number of residents needing assistance in the study area, as shown in the figure below.

Note that there was a significant increase in the proportion of responses not indicating whether or not there was a need for assistance.

Figure 13. Residents with a need for assistance in the Leederville TC study area 2006 – 2016

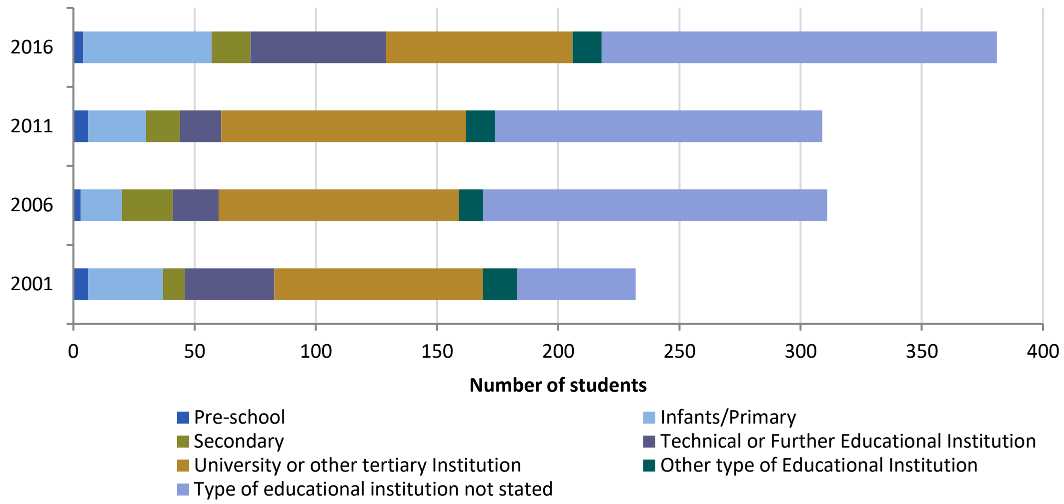


Note: Data not available for 2001
Source: Australian Bureau of Statistics – Census of Population and Housing 2016

Educational institute attending

The following figure shows the educational institute being attended by those who live in the study area. The majority were either studying at a university/tertiary institution or attending a technical/further educational institution. There were a smaller portion attending secondary schools, and a growing number in primary schools.

Figure 14. Leederville TC study area number of students by type of educational institution attending, 2001 - 2016



Source: Australian Bureau of Statistics – Census of Population and Housing 2016

1.3 Catchment area population and demographic profile

Population

The following table outlines the population projections for the Leederville Town Centre catchment area to 2026. These projections are produced by the Western Australian Planning Commission (the official demographer of Western Australia).

The Leederville Town Centre catchment area had a population of 61,350 residents in 2016, this is projected to increase by an average annual 2.0 per cent to 2026, to 74,950 residents. Growth is projected to be largely driven by the primary and secondary east sectors.

Table 5. Leederville TC catchment area population projections, 2011 - 2026

	Estimated population			Forecast population	
Trade area sector	2011	2016	2018	2021	2026
Primary	10,170	10,710	11,270	12,110	13,610
Secondary sectors					
• North	20,920	21,340	22,000	22,990	24,990
• East	13,320	13,700	14,640	16,050	18,650
• West	14,230	15,600	16,080	16,800	17,700
Total secondary	48,470	50,640	52,720	55,840	61,340
Main trade area	**58,640**	**61,350**	**63,990**	**67,950**	**74,950**
		Average annual growth (no.)			
Trade area sector		2011-16	2016-18	2018-21	2021-26
• Primary		108	280	280	300
Primary		108	280	280	300
Secondary sectors					
• North		84	330	330	400
• East		76	470	470	520
• West		274	240	240	180
Total secondary		434	1,040	1,040	1,100
Main trade area		**542**	**1,320**	**1,320**	**1,400**
		Average annual growth (%)			
Trade area sector		2011-16	2016-18	2018-21	2021-26
Primary		1.0%	2.6%	2.4%	2.4%
Secondary sectors					
• North		0.4%	1.5%	1.5%	1.7%
• East		0.6%	3.4%	3.1%	3.0%
• West		1.9%	1.5%	1.5%	1.0%
Total secondary		0.9%	2.0%	1.9%	1.9%
Main trade area		**0.9%**	**2.1%**	**2.0%**	**2.0%**

Source: Source: ABS Census 2016; Western Australian Planning Commission, WA Tomorrow 2018; MacroPlan Dimasi

Socio-demographics

The following summarises the key socio-demographic characteristics of the Leederville Town Centre catchment area.

- Personal ($59,007) and household ($130,285) incomes within the catchment area are significantly above the Perth Metro ($44,873 and $115,842) and Australian ($39,800 and $101,610) averages. This is driven by particularly high incomes in the primary and secondary west sectors.
- The average household size within the catchment area at 2.2 is below the Perth Metro average of 2.6, driven by a high proportion of lone person households 17.8 per cent compared with the metro average of 10.2 per cent.
- There is a high proportion of 30-39 and 20-29 year olds (20.9 and 18.8 per cent) compared with the metro average of 15.2 and 14.6 per cent.
- Residents of the catchment area are largely home owners (58.2 per cent), of which most have a mortgage. The catchment has a significant proportion of renters 41.3 per cent compared to the metro average of 27.4 per cent.
- The catchment area is made up of largely Australian born residents (60.9 per cent) which is in-line with the metro average of 61.4 per cent.
- Couples with dependent children are the largest family type within the catchment area at 40.6 per cent followed by couples without children at 27.5 per cent.
- Residents generally have one (43.4 per cent) or two cars (38.0 per cent), in-line with the metro average.

Figure 15. Leederville TC catchment area socio-demographics, 2016

Census item	Primary sector	Secondary sectors North	East	West	Main TA	Perth Metro avg.	Aust. avg.
Per capita income	$64,307	$54,260	$57,718	$62,992	$59,007	$44,873	$39,800
Var. from Perth Metro bmark	*43.3%*	*20.9%*	*28.6%*	*40.4%*	*315%*		
Avg. household income	$132,490	$121,720	$127,017	$143,439	$130,285	$115,842	$101,610
Var. from Perth Metro bmark	*14.4%*	*5.1%*	*9.6%*	*23.8%*	*12.5%*		
Avg. household size	2.1	2.2	2.2	2.3	2.2	2.6	2.6
Age distribution (% of population)							
Aged 0-14	11.1%	17.5%	12.6%	18.1%	15.4%	19.1%	18.7%
Aged 15-19	3.7%	3.6%	2.9%	4.2%	3.6%	6.2%	6.1%
Aged 20-29	23.8%	16.6%	21.6%	15.7%	18.8%	14.6%	13.8%
Aged 30-39	24.1%	20.7%	21.8%	18.2%	20.9%	15.2%	14.0%
Aged 40-49	12.6%	14.9%	13.0%	14.2%	13.9%	13.9%	13.5%
Aged 50-59	9.7%	11.4%	11.6%	10.8%	11.0%	12.2%	12.7%
Aged 60+	15.0%	15.3%	16.6%	18.8%	16.4%	18.8%	21.1%
Average age	37.2	36.9	38.1	37.8	37.4	37.4	38.6
Housing status (% of households)							
Owner (total)	50.5%	61.7%	56.3%	60.7%	58.2%	71.7%	67.4%
• Owner (outright)	21.6%	24.9%	25.7%	28.7%	25.4%	28.8%	31.9%
• Owner (with mortgage)	28.9%	36.8%	30.6%	31.9%	32.8%	42.9%	35.5%
Renter	48.4%	38.1%	43.1%	39.0%	41.3%	27.4%	31.8%
Birthplace (% of population)							
Australian born	58.9%	63.1%	59.3%	60.8%	60.9%	61.4%	71.9%
Overseas born	41.1%	36.9%	40.7%	39.2%	39.1%	38.6%	28.1%
• Asia	10.4%	12.2%	13.5%	15.6%	13.0%	12.5%	11.2%
• Europe	20.1%	15.9%	18.7%	14.6%	16.9%	16.2%	9.6%
• Other	10.5%	8.8%	8.5%	9.1%	9.1%	9.9%	7.4%
Family type (% of population)							
Couple with dep't child.	32.7%	43.2%	36.3%	46.6%	40.6%	47.0%	44.8%
Couple with non-dep't chi	3.3%	4.3%	4.9%	4.5%	4.3%	7.4%	7.7%
Couple without child.	33.6%	24.1%	30.5%	24.8%	27.5%	22.7%	22.8%
One parent with dep't chil	4.9%	6.4%	4.8%	5.1%	5.4%	8.2%	8.8%
One parent w non-dep't c	3.0%	3.0%	3.3%	2.1%	2.9%	3.3%	3.7%
Lone person	20.9%	17.2%	18.4%	15.6%	17.8%	10.2%	11.0%
Car ownership							
% 0 Cars	9.5%	7.4%	10.9%	6.4%	8.3%	4.9%	7.7%
% 1 Car	49.2%	43.7%	44.2%	43.4%	44.8%	33.1%	36.1%
% 2 Cars	31.9%	37.0%	33.5%	38.0%	35.5%	40.5%	37.5%
% 3 Cars	6.9%	8.3%	8.2%	8.6%	8.1%	13.8%	12.2%
% 4 plus Cars	2.5%	3.7%	3.2%	3.6%	3.3%	7.5%	6.5%

Source: Australian Bureau of Statistics - Census of Population & Housing, 2016; MacroPlan Dimasi

Household expenditure

An analysis of the spending profile of households shows the types of businesses that are more likely to be viable in the area if they provide the types of goods and services that the catchment purchases.

The following figure presents a comparison of retail spending behaviour of the Leederville Town Centre catchment area households with metropolitan Perth averages. All retail spending estimates in this report represent annual expenditure per capita and are expressed in constant 2018 dollars (i.e. excluding retail inflation) and including GST.

The expenditure data are provided for households surrounding the Leederville Town Centre for:

- Primary trade area (PTA) – which is the area closest to the Town Centre and consists of the households most likely to spend a greater share of their overall household budget within the Leederville Town Centre.
- Main trade area (MTA) – which covers the broader catchment for Leederville.
- The average expenditure for all households in Perth and Australia.

Retail expenditure is broken into two main categories, food and non-food items and is then broken down further in order to determine the type of expenditure more specifically. The seven sub categories are as follows:

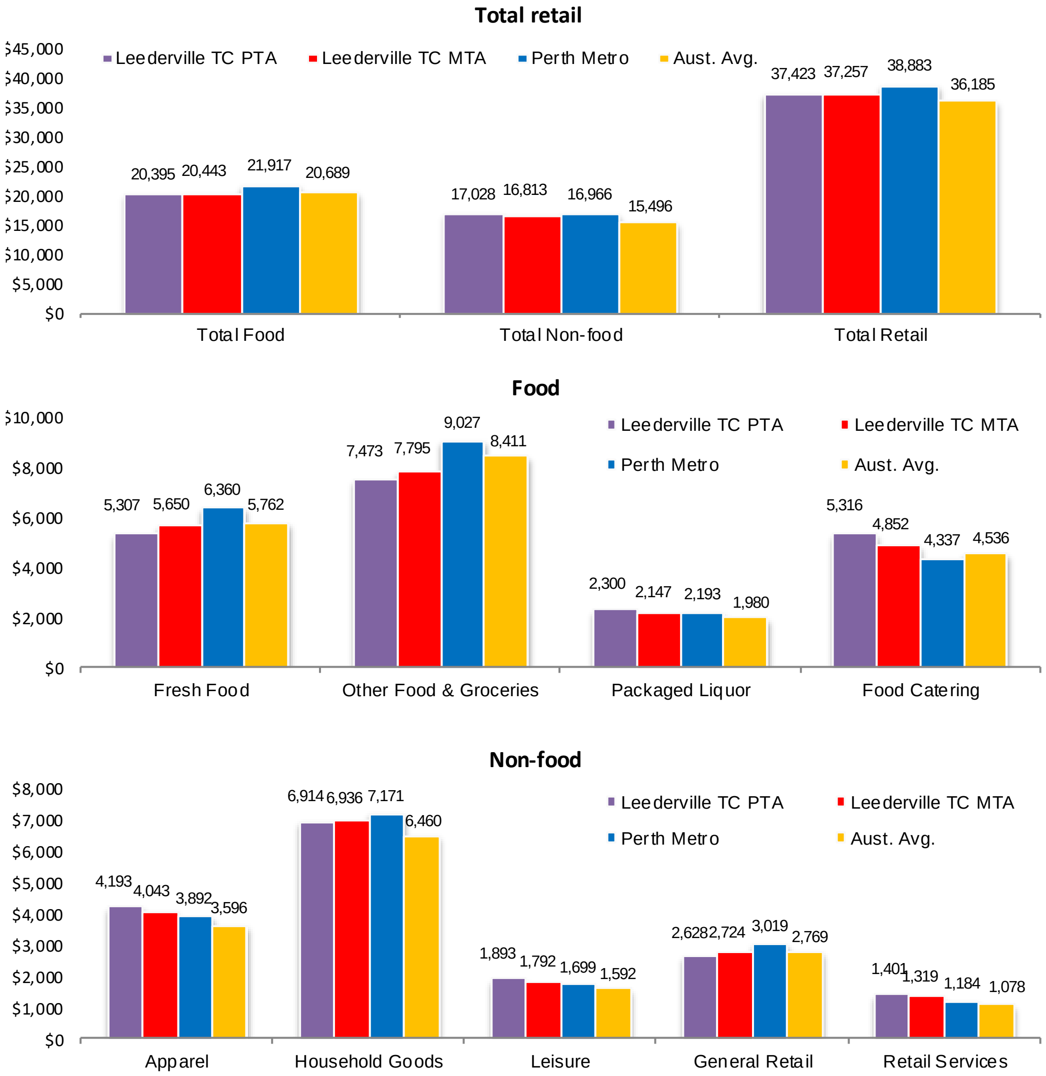
- The food, liquor and groceries (FLG) category incorporates expenditure on food and groceries purchased for consumption at home, including spending on fresh food and other food & groceries, as well as packaged liquor. This category represents the primary market for supermarket business.
- The food catering category includes expenditure on take-away food and cafés and restaurants, as well as liquor consumed on the premises.
- The apparel category incorporates spending on fashion, including women's, children's and men's apparel, footwear, fashion accessories and jewellery.
- The household goods category includes spending on giftware, homewares and other furniture, as well as on electrical products and computers.

- The leisure category includes all spending on sporting goods, music/DVD/games, books, newsagents and stationery, and other film processing and photography products.
- The general retail category includes expenditure on pharmacy and cosmetics, florists, pets, toys, phones, as well as on discount variety products.
- The retail services category incorporates spending on hairdressers and beauticians, optometrists, as well as on clothing alterations, key cutting and shoe/watch repairs.

Household expenditure for the Leederville catchment shows:

- The total level of retail expenditure per household for the catchment population (main trade area) in 2018 was estimated at $37,257, which was marginally below the metropolitan Perth average for $38,883.
- Residents in catchment spend relatively less on fresh food and other food and groceries that the average across Perth. Conversely, they spend relatively more on food catering (restaurants and cafes) and packaged liquor.
- The Leederville catchment also has low levels of expenditure on household goods and general retail.
- People living in the Leederville catchment spend relatively more on apparel, leisure and retail services (travel, fitness, healthcare) than the average Perth resident.

Figure 16. Leederville TC catchment area, retail expenditure per household, 2017-18



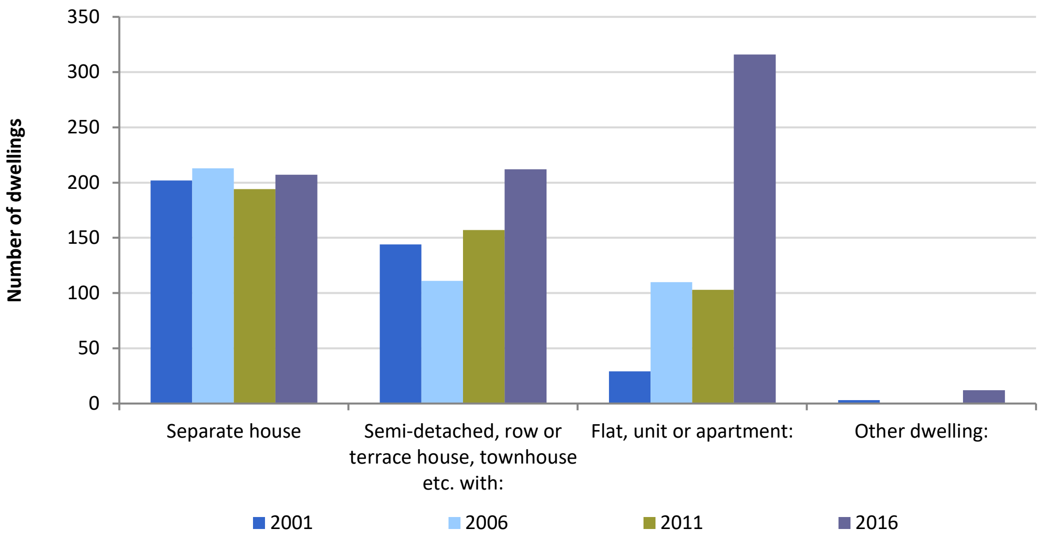
Source: MarketInfo, MacroPlan Dimasi
Notes: PTA = primary trade area; MTA = main trade area.

Section 2: Residential density and diversity

2.1 Dwelling structure

The following figure shows the dwelling structure in the study area from 2001 to 2016. The number of separate houses has seen slight fluctuations over the period, while semi-detached dwellings increased significantly over the last 10 years and flats/units/apartments increasing significantly over the last five years.

Figure 17. Dwelling structure in the Leederville TC study area, 2001 – 2016



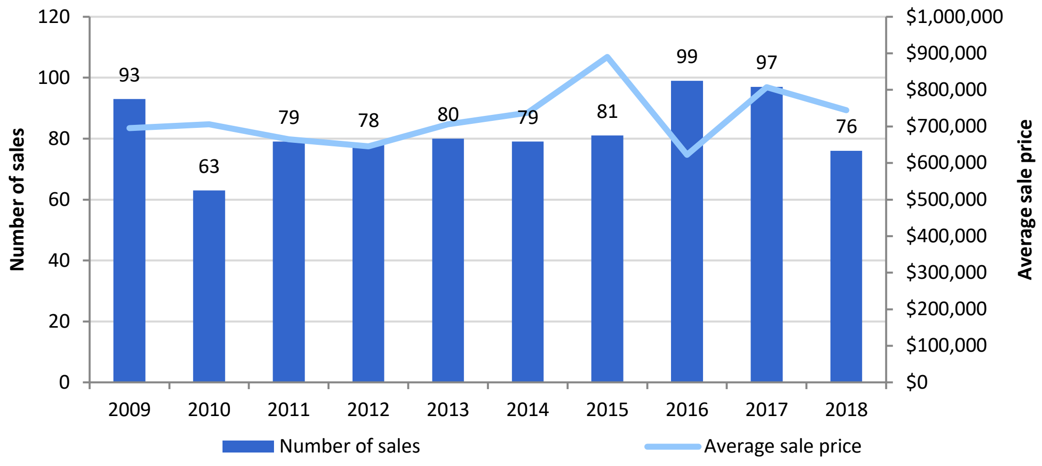
Source: Australian Bureau of Statistics – Census of Population and Housing 2016

2.2 Dwelling sales

The following figure illustrates the number and average sale price of dwellings within the suburb of Leederville over the last decade.

Sales have averaged 83 per year, while prices have grown by an average annual 0.8 per cent over the period from $695,500 in 2009 to $744,800 in 2018.

Figure 18. Leederville residential property sales, 2009 - 2018



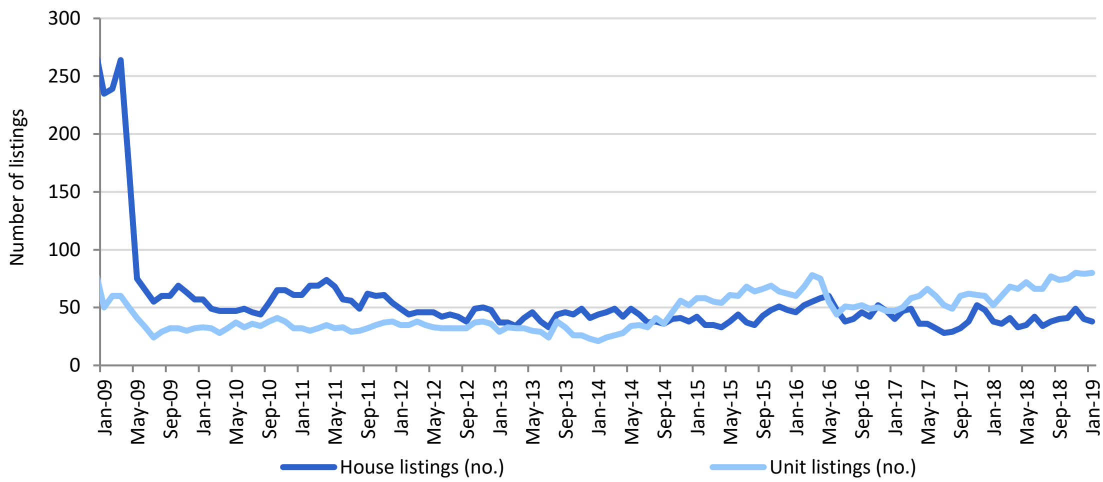
Source: CoreLogic – RP Data, MacroPlan Dimasi

2.3 Residential property listings

The following figure illustrates the residential property (house and units) listings in the suburb of Leederville over the last 10 years.

The average number of houses on the market each month over the last 10 years was 52 and for units 45. Over the last 12 months the average for houses was 40 and units 72 per month. This reflects a trend since mid-2014 when the number of unit listings overtook the number of house listings.

Figure 19. Postcode 6007 residential property listings, 2009 –2019



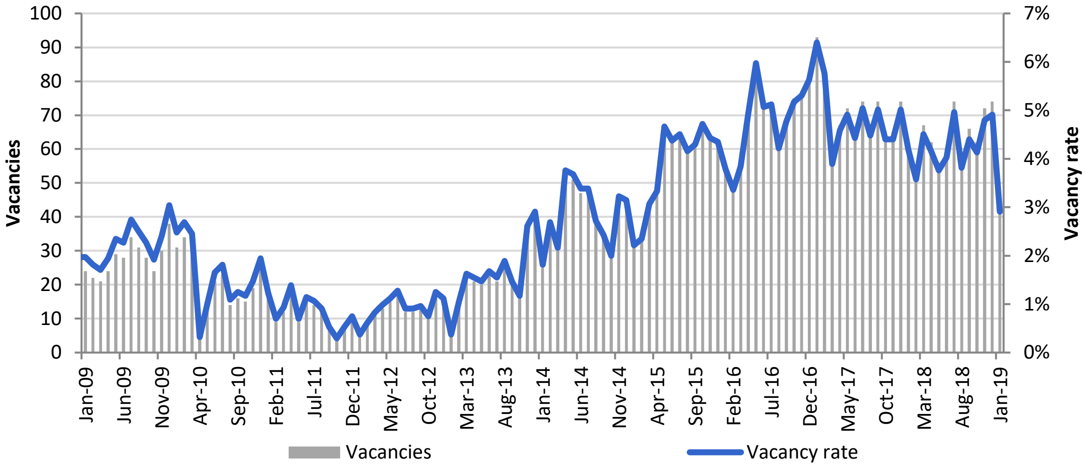
Source: SQM Research

2.4 Vacancy rate

The following figure illustrates the number of vacancies and vacancy rate within the postcode 6007 over the period 2009 to 2019.

Over the five year period to early 2017 vacancy rates have risen from a low of 0.3 per cent in July 2011 to a peak of 6.4 per cent in January 2017, to late 2018 vacancy rates have stabilised and January 2019 saw vacancy rates fall significantly to 2.9 per cent.

Figure 20. Postcode 6007 vacancies and vacancy rate, 2009 - 2019



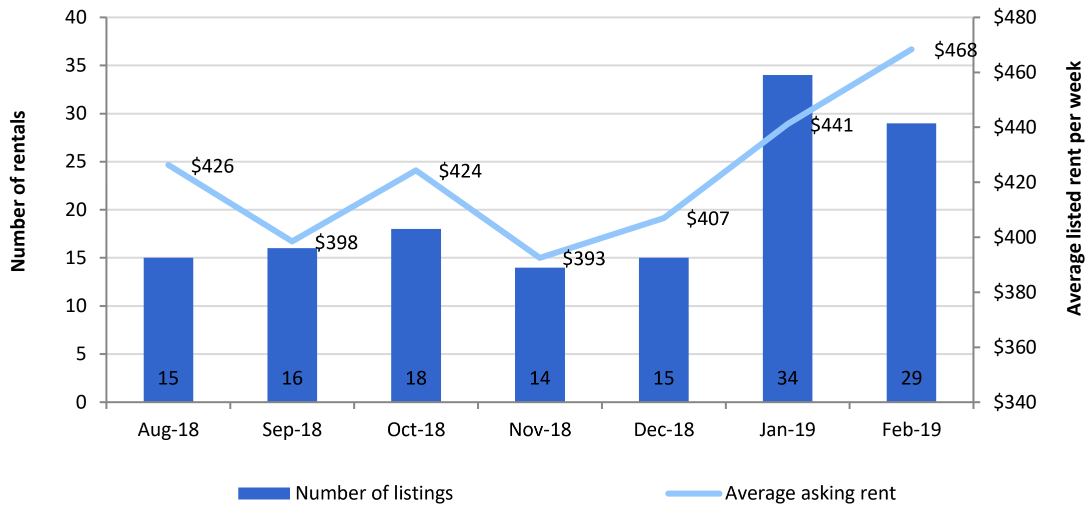
Source: SQM Research, MacroPlan Dimasi

2.5 Rental listings

The following figure illustrates the residential rental listings in the suburb of Leederville over the last seven months.

Between August 2018 and December 2018 the number of properties on the market for rent remained relatively stable at an average 16. Listed rents have increased over the last four months from an average $393 per week in November 2018 to $468 in February 2019.

Figure 21. Leederville suburb, residential rentals, Aug 2018 – Feb 2019



Source: CoreLogic – RP Data, MacroPlan Dimasi

2.6 Market depth by price point and density

Analysis of residential property sales within the suburb of Leederville over the last three years provides an indication of the market depth by price point and dwelling density.

Table 6. Suburb of Leederville sales history by dwelling size, 2016 - 2018

Number of bedrooms	Sales	Lower quartile	Median price	Upper quartile
1 bedroom	32	$345,000	$425,000	$467,000
2 bedroom	91	$445,000	$530,000	$727,500
3 bedroom	93	$617,500	$780,000	$890,000
4 bedroom	23	$1,040,000	$1,145,000	$1,303,875
5 bedroom	2	$1,241,500	$1,261,000	$1,280,500

Source: CoreLogic – RP Data, MacroPlan Dimasi

2.7 Dwelling density and diversity performance target

Density

To assess the Leederville centre's performance in dwelling density the Department of Planning, Lands and Heritage SPP 4.2 Activity Centre performance benchmark for dwelling density in Secondary Centres is used.

The following table outlines the density performance target identified in SPP 4.2 and how the Leederville Town Centre study area compares based on the number of dwellings as measured by the Census of Population and Housing and residential land area as indicated by the ABS Mesh Block Statistical areas within the study area.

Table 7. Leederville TC study area dwelling density performance

	2011	2016
Dwellings	428	655
Residential area (sq.km)	0.192	0.192
Residential area (ha)	19.2	19.2
Leederville study area dwelling density	22	34
SPP 4.2 Secondary Centres density target	**Min 25, Desirable 35 dwellings per hectare**	

Source: Department of Planning, Lands and Heritage – SPP 4.2, Australian Bureau of Statistics, MacroPlan Dimasi

The Leederville Town Centre study area is performing well against the SPP 4.2 dwelling density target, with 34 dwellings per hectare of residential land in 2016, up from 22 in 2011.

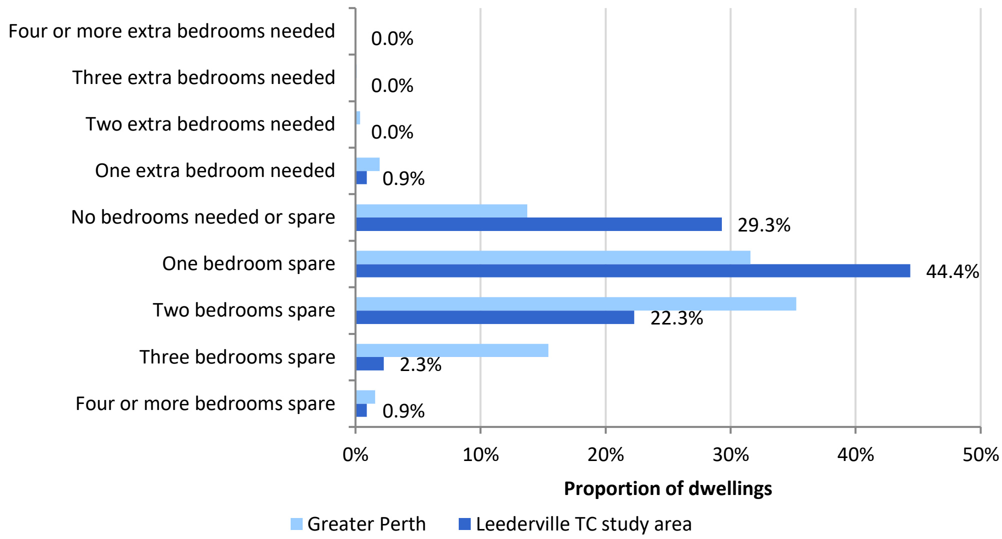
Diversity

Dwelling diversity has increased over the last 15 years as indicated previously in Section 3.1 Dwelling structure, which illustrated the increase in the proportion of semi-detached and apartment dwellings in the study area.

A further measure of the performance in the diversity of dwellings within the study area is the suitability of dwellings to their occupants. The following figure outlines the suitability of dwellings to their occupants as measured by the Census of Population and Housing in 2016. This measures the suitability of a dwelling by the number of bedrooms compared to the number of occupants.

Almost of a third of all dwellings in the study area did not require extra bedrooms or had any spare bedrooms (29.3 per cent) while 44.4 per cent had one extra bedroom and 22.3 per cent had two extra bedrooms. This suggests better diversity than the Perth Metro area where only 13.7 per cent of dwellings were did not require extra bedrooms or had any spare bedrooms and 31.6 per cent had one-bedroom spare, 35.3 per cent had two bedrooms spare and 15.4 per cent had three bedrooms spare.

Figure 22. Leederville TC study area housing suitability, 2016

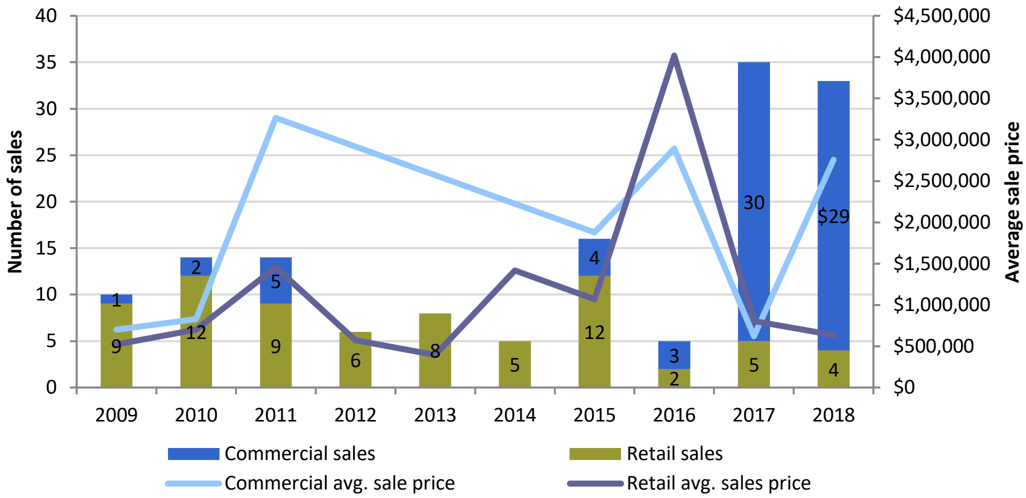


Source: Australian Bureau of Statistics – Census of Population and Housing 2016

3.1 Historical property sales by land use

The following figure illustrates the historical sales of retail and commercial properties within Leederville over the last 10 years. Retail properties have made up the majority of sales over the period with the exception of 2017 and 2018 when commercial sales exceeded retail sales. Over the period the average number retail properties sold was 72 compared with seven commercial properties.

Figure 23. Leederville suburb, historical retail and commercial property sales, 2009 - 2018



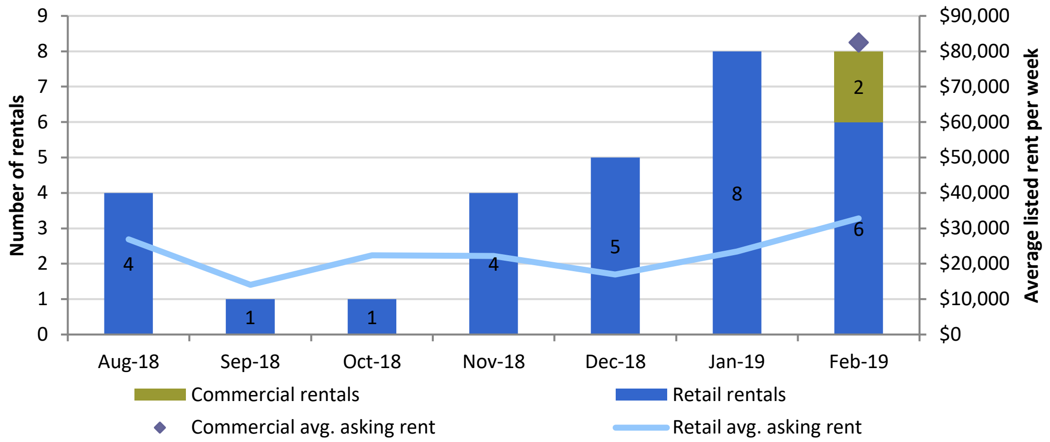
Source: CoreLogic – RP Data, MacroPlan Dimasi

3.2 Rental listings

The following figure illustrates the commercial and retail rental listings in the suburb of Leederville over the last seven months.

There were only two commercial properties listed over the period, both in February 2019, these properties were listed at an average $82,500 per annum. In contrast there have been a number of retail properties listed for rent over the period, an average four per month, the average listed rent in February 2019 was $32,800 per annum.

Figure 24. Leederville suburb, historical commercial and retail rentals, Aug 2018 – Feb 2019

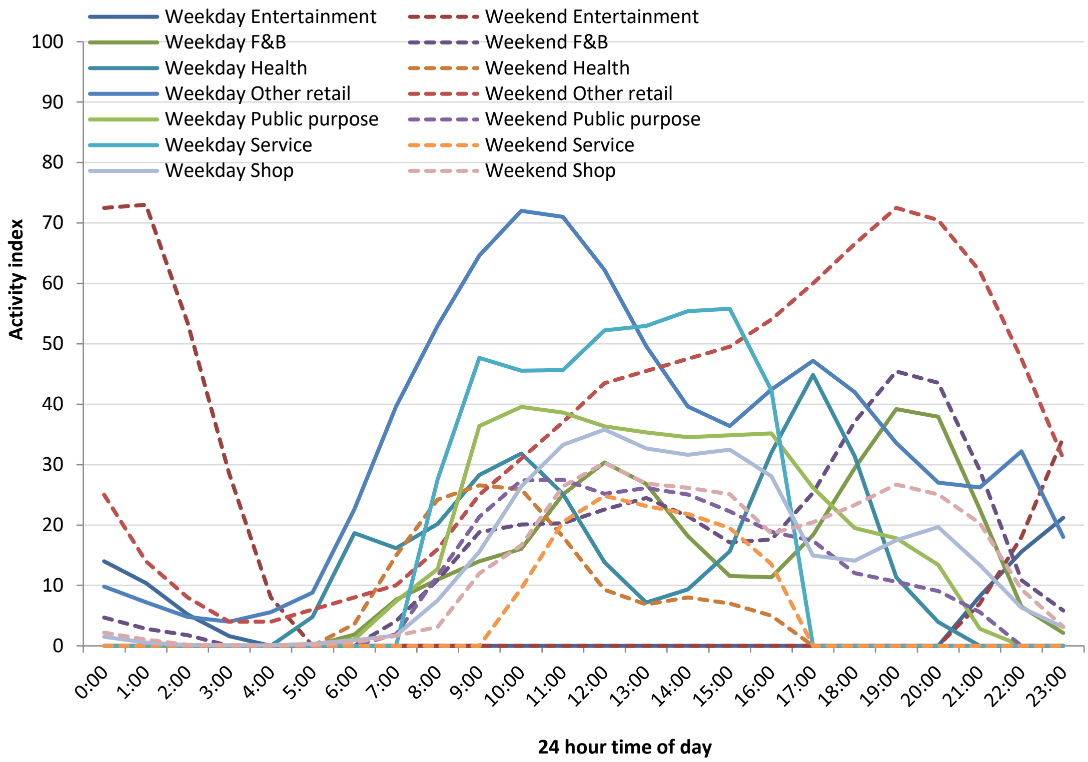


Source: CoreLogic – RP Data, MacroPlan Dimasi

3.3 Activity

The following figure illustrates when different types of businesses in the Leederville Town Centre are most active. Note that the data illustrates an index and therefore business types cannot be compared against each other.

Figure 25. Leederville Town Centre, level of activity by time and type of business, as at Feb 2019



Source: Google Places API, MacroPlan Dimasi

3.4 Diversity and mix of land use performance target

Leederville Town Centre land uses as a proportion of total floorspace within commercial, public purpose and recreational complexes (as defined by the Department of Planning, Lands and Heritage) between 1990 and 2015.

Table 8. Leederville TC study area floorspace proportion by land use, 1990 - 2015

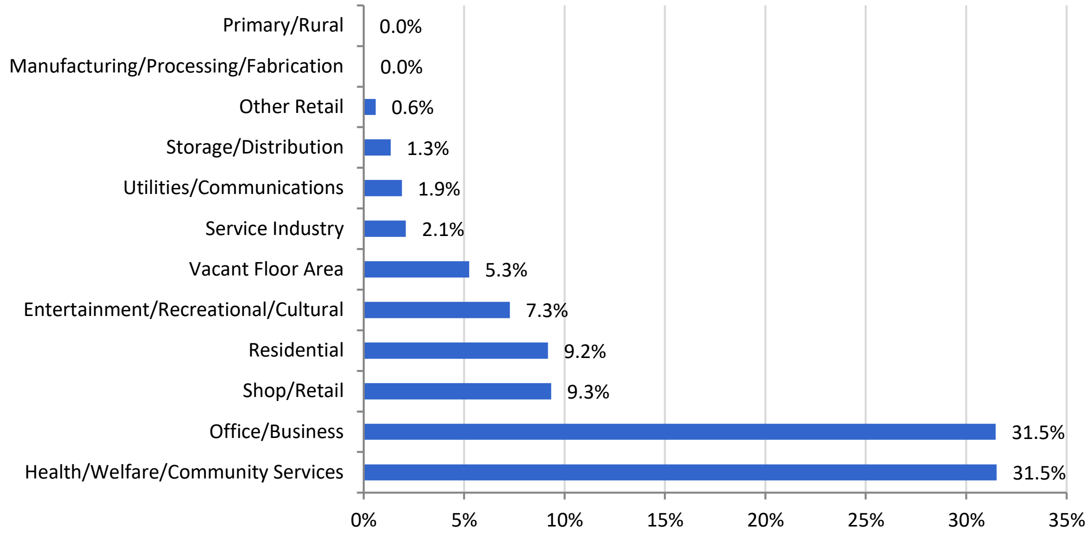
PLUC Category	1990	1993	1997	2002*	2008	2015
Health/Welfare/Community Services*	1.3%	0.6%	1.0%	26.0%	28.9%	31.5%
Office/Business	45.7%	48.6%	46.9%	36.1%	34.8%	31.5%
Shop/Retail	18.9%	17.1%	19.5%	9.7%	11.0%	9.3%
Residential	0.0%	0.0%	0.0%	0.5%	0.6%	9.2%
Entertainment/Recreational/Cultural	10.5%	10.3%	10.8%	11.6%	11.3%	7.3%
Vacant Floor Area	3.7%	2.7%	3.1%	9.1%	7.1%	5.3%
Service Industry	3.0%	4.2%	4.6%	1.4%	1.7%	2.1%
Utilities/Communications	1.0%	2.4%	2.1%	0.7%	0.7%	1.9%
Storage/Distribution	4.5%	4.1%	3.2%	1.9%	1.2%	1.3%
Other Retail	5.1%	7.2%	5.9%	2.3%	1.8%	0.6%
Manufacturing/Processing/Fabrication	6.3%	2.7%	2.9%	0.8%	0.9%	0.0%
Primary/Rural	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Total	**61,364**	**64,591**	**64,738**	**114,728**	**125,135**	**206,192**

*The significant increase in health/welfare/community services floorspace between 1997 and 2002 is due to public purpose and recreational complexes being added to the Survey in 2002.
Source: Department of Planning, Lands and Heritage – Land Use and Employment Survey 1990 – 2015, MacroPlan Dimasi

The land use mix within the Leederville Town Centre has become more diverse, initially the area was dominated by office/businesses uses but has since increased health/welfare/community services and utilities/communications uses. Residential land has also increased substantially from none in 1990 to 9.2 per cent of floorspace in the Town Centre.

The following figure illustrates the various land uses in the study area. Office/business and health/welfare/community services are the two largest uses at 31.5 per cent each, followed by shop/retail (9.3 per cent), residential (9.2 per cent), and entertainment (7.3 per cent).

Figure 26. Leederville TC study area land use mix, 2015



Source: Department of Planning, Lands and Heritage – Land Use and Employment Survey 2015, MacroPlan Dimasi

The performance of the Leederville TC study area for mix of land uses is measured against the SPP 4.2 target for Secondary Centres, which is 30.0 per cent non-retail land uses for centres with between 20,000m^2 and 49,999m^2 of shop/retail floorspace.

The previous indicates that the study area is just 9.3 per cent shop/retail floorspace and 90.7 per cent of other land uses, indicating the centre is performing strongly in terms of land use diversity.

Conclusions

Based on the analysis the following outlines the current context and performance of the Leederville centre against the Key Focus Areas.

Demographics and population

The Leederville Town Centre population is expected to see limited growth to 2041, at an average annual 3.7 per cent, from 1,317 in 2017 to 3,175 in 2041. This reflects the strong potential for high density residential development in the town centre.

The socio-demographics of the centre reflect working professionals with high incomes, largely couples with no children or lone person households. Residents are largely renters, living in separate or semi-detached houses, predominantly Australian born, largely have no need for assistance in day to day activities.

Residential density and diversity

The residential dwelling market within the suburb of Leederville has been relatively stable in terms of volume with an average of 83 properties sold over the last 10 years, while dwelling prices have seen an average annual growth of 0.8 per cent over the period.

The Leederville Town Centre study area is performing well against the SPP 4.2 dwelling density target, with 34 dwellings per hectare of residential land in 2016, up from 22 in 2011, while the minimum target is 25 dwellings.

Table 9. Leederville TC study area dwelling density performance

	2011	2016
Dwellings	428	655
Residential area (sq.km)	0.192	0.192
Residential area (ha)	19.2	19.2
Leederville study area dwelling density	22	34
SPP 4.2 Secondary Centres density target	**Min 25, Desirable 35 dwellings per hectare**	

Source: Department of Planning, Lands and Heritage – SPP 4.2, Australian Bureau of Statistics, MacroPlan Dimasi

Residential dwelling diversity within the study area has improved over the last 15 years, with unit/apartments increasing from 7.7 per cent in 2001 to 42.3 per cent in 2016, while separate houses decreased from 53.4 to 27.7 per cent and semi-detached dwelling from 38.1 to 28.4 per cent.

The study area has an above average level of housing suitability as measured by the Census of Population and Housing in 2016, which suggests 29.3 per cent of all dwellings were suitable for the number of occupants compared with just 13.7 per cent in the Perth Metro area.

Non-residential land use

The land use mix within the Leederville Town Centre has become more diverse, initially the area was dominated by office/businesses uses but has since increased health/welfare/community services and utilities/communications uses. Residential land has also increased substantially from none in 1990 to 9.2 per cent of the Town Centre.

The performance of the Leederville TC study area for mix of land uses is measured against the SPP 4.2 target for Secondary Centres, which is 30.0 per cent non-retail land uses for centres with between 20,000m^2 and 49,999m^2 of shop/retail floorspace. Shop/retail floorspace at 19,250m^2 represents just 9.3 per cent of total floorspace within the study area, indicating the centre is performing well against the policy target with 90.7 per cent of floorspace for non-shop/retail land uses.

Appendix 1: PLUC categories

Table 10. Land Use and Employment Survey PLUC category definitions

PLUCK No.	PLUC code	Description	
1	PRI	Primary/Rural	Land use activities which usually involve the use of large areas of land including mining, agriculture, fishing and nature conservation. The function of many of these activities is to make use of, or extract from, the land in its natural state. Since such activities are the first step in the production process they are quite distinct from the other categories.
2	MAN	Manufacturing/Processing/Fabrication	This category includes land use activities involving the manufacture, processing and fabrication of all general goods. Both the scale and associated environmental impact of these activities separate them from other land use categories.
3	STO	Storage/Distribution	Any land use activity which involves the storage, warehousing or wholesaling of goods usually conducted from large structures, or involving large bulky goods, but does not include activities that attract general retail trade activities
4	SER	Service Industry	This category includes service industries offering a range of services. The scale and environmental impact of such activities require their separation from other land uses. These services include film processing, cleaning, motor vehicle and other repair services, and other servicing activities, including some construction activities
5	SHP	Shop/Retail*	Any activity which involves the sale of goods from a shop located separate to and/or in a shopping centre other than those included in category 6 – Other Retail
6	RET	Other Retail	Many of these activities normally are not accommodated in a shopping centre. By virtue of their scale and special nature, the goods of these activities separate them from the Shop/Retail category (e.g. car sales yard, carpet showroom).
7	OFF	Office/Business	Administrative, clerical, professional and medical offices are activities which do not necessarily require the land area/floorspace or exposure of other land uses. Although offices require building and parking facilities, these needs are quite distinct from those of commercial uses and service industries
8	HEL	Health/Welfare/Community Services	Includes government, government-subsidised and non-government activities which provide the community with a specific service, such as hospitals, schools, personal services and religious activities.
9	ENT	Entertainment/Recreation/Culture	Activities which provide entertainment, recreation and culture for the community and which occur in building and/or on land, such as passive and active sports venues, museums, amusements, gambling services, hotels and the like.
10	RES	Residential	Includes all types of residential land use ranging from single housing to nursing homes for the aged, residential hotels, motels, other holiday housing, institutions and religious housing. Floorspace and employment on private Residential land uses are not included in the output of the Commercial Land Use Survey.
11	UTE	Utilities/Communications	All forms of local, State, national and international communication, transport and other utilities (electricity, gas, water, sewerage, roads, parking and other transport or communication- related activities, etc.) covering the public and private sectors
12	VFA	Vacant Floor Area	This category accounts for vacant floor areas of buildings including non-residential and residential.
13	VLA	Vacant Land Area	Includes land which has not been improved by development and remains unused.

Source: Western Australian Department of Planning, Lands and Heritage – Land Use and Employment Survey 2015-17

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