



# Canning Bridge Structure Plan Economic Development Study

March 2014

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# 1. Executive Summary

## 1.1 Introduction

The Canning Bridge Economic Development Study, has been prepared to support the Canning Bridge Structure Plan. The structure plan has been prepared by the Western Australian Planning Commission, Department of Planning, City of Melville, City of South Perth, Department of Transport, Public Transport Authority and Main Roads WA as a joint initiative to progress long term planning for the Canning Bridge activity centre.

Canning Bridge has been identified in the State Planning Policy 4.2 as a district centre (activity centre) where community services, higher density housing, employment and a range of mixed use activities are encouraged to accommodate some of Perth's expected growth in the years to 2031 and beyond. This study includes an assessment of current and future aspects of the centre including land use activity, employment and residential populations based on land uses set out in the Canning Bridge structure plan.

## 1.2 Land Use Activity

### 1.2.1 Existing

Canning Bridge activity centre is a diverse location with a mix of primarily residential, commercial office space and supporting retail and entertainment amenities. Currently, the activity centre includes approximately 1,900 dwellings, with approximately 37,417 square metres of non-residential floor space in 2008. The activity centre is office driven with 67% of the non-residential floorspace supporting office business uses as shown in Table 1 below.

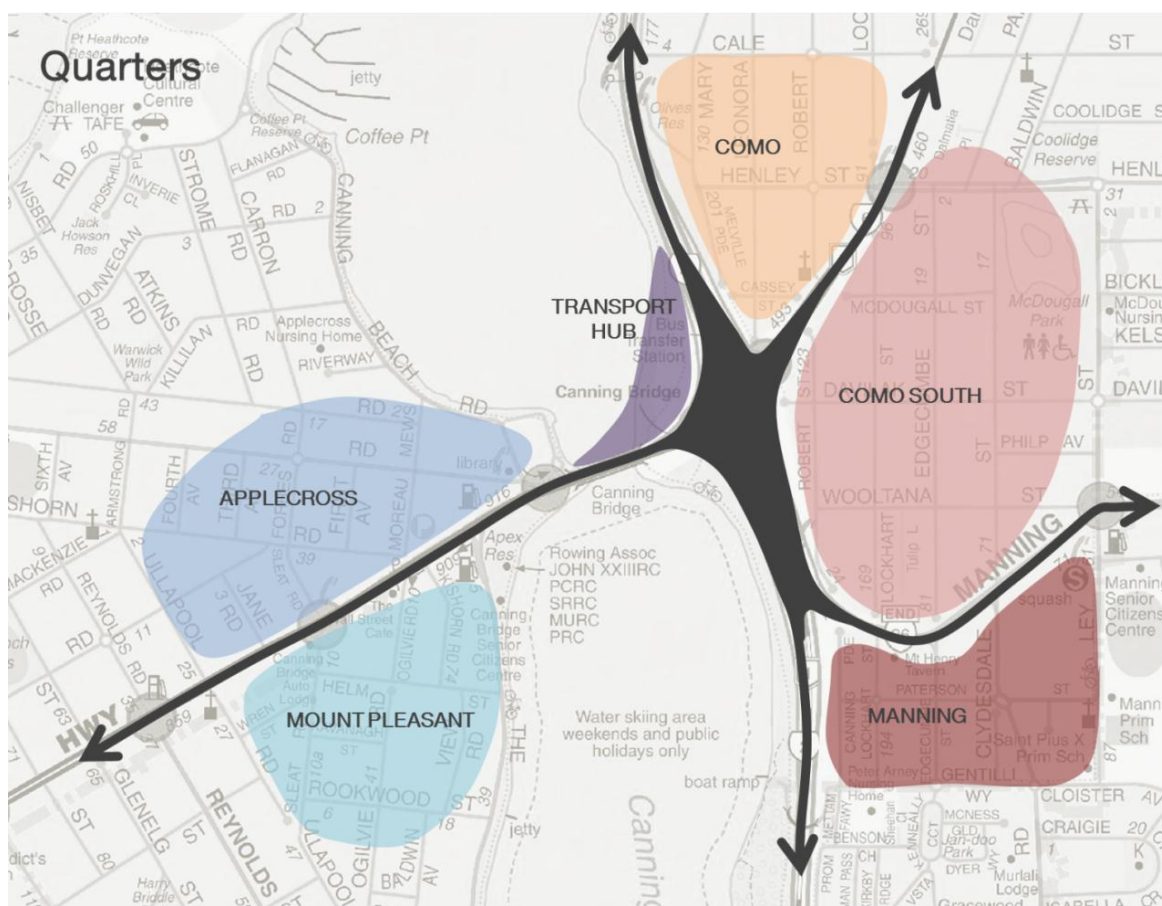
**Table 1: Non-residential Land Use Activities - Existing**

Land Use Activity	Square Metres	% of Centre's Floor Space
Manufacturing/Processing/Fabrication	231	0.62%
Storage / Distribution	200	0.53%
Service Industry	584	1.56%
Shop / Retail	4,714	12.60%
Other Retail	710	1.90%
Office / Business	25,232	67.43%
Health / Welfare / Community Services	662	1.77%
Entertainment / Recreation / Culture	5,041	13.47%
Utilities and Communications	43	0.11%
<b>Total</b>	<b>37,417</b>	

There are no specific gaps in the current overall land use mix, due to maturity of the centre there is a good mix of uses between commercial, retail residential and community.

The Canning Bridge Structure Plan is based on five quarters that are separated by major roads in the activity centre. These quarters are Applecross, Mount Pleasant, Como, Como South and Manning and are shown in Figure 1 below.





**Figure 1 | Canning Bridge Quarters**

The current activity characteristics of the quarters vary, each with a different character and mix of land uses. The existing land uses and primary functions within the quarters are shown in Table 2 below.

**Table 2: Land Use Activities by Quarter - Existing**

Quarter	Primary functions
Applecross	Residential, office and retail
Mount Pleasant	Residential, office and retail
Como	Residential
Como South	Residential and retail
Manning	Residential and retail

### 1.2.2 Future (Vision)

The development of the Canning Bridge activity centre is expected to achieve considerable levels of growth in the following decades and will result in changes to distribution and diversity of land uses, as shown in Table 3.

**Table 3: Non-residential Land Use Activities – Future (2051)**

Land Use Activity	Square Metres	% of Centre's Floor Space
Storage / Distribution	5,154	3%
Service Industry	8,590	5%
Shop / Retail	25,771	15%
Other Retail	3,436	2%
Office / Business	94,494	55%
Health / Welfare / Community Services	17,181	10%
Entertainment / Recreation / Culture	8,590	5%
Utilities and Communications	8,590	5%
Total	171,808	

There are a number of changes for the quarters within the activity centre. The function of Applecross, Mount Pleasant and Manning will retain their current functions but will have much higher intensity of uses. Como and South Como will retain their residential focus but will include additional levels of commercial (office) and retail activities. The anticipated distribution within the quarters of the residential and non-residential floorspace is shown below in Table 4.

**Table 4: Land Use Activities by Quarter – Future (2051)**

Quarter	Residential (sqm)	Non-residential (sqm)	% of Centre's Floor Space	Primary functions
Applecross	527,140	72,423	28%	Residential, commercial and retail
Mount Pleasant	264,637	54,878	15%	Commercial, retail
Como	311,679	15,458	15%	Residential
South Como	654,886	22,131	31%	Residential, retail
Manning	221,508	6,918	11%	Residential, retail
Total	1,979,850	171,808		

### 1.3 Employment

There are approximately 1,700 jobs located within the Canning Bridge activity centre working in a range of areas with the primary areas being office / business and retail. It is expected that with changes to the precinct over time there will be an increase in service, community and entertainment jobs thus providing a better diversity of employment opportunities. Table 5 below illustrates the changes in employment numbers over time.

**Table 5: Employment**

Timeframe	Employment	Estimated Floor Space
2014 - Current	1,700	37,417
2031 - Directions 2031 (Central Sub Regional Strategy)	2,000	45,000
2031 - Canning Bridge Structure Plan	2,400	55,000
2051	7,881	140,000
Ultimate Employment	9,272	171,808

Employment distribution for the precinct zone is estimated in Table 6 below for the sub-regional areas.

**Table 6: Employment by Quarter (2051)**

Quarter	Future Employment	Non-residential (sqm)
Applecross	4,022	72,423
Mount Pleasant	2,925	54,878
Como	863	15,458
Manning	1,118	22,131
South Manning	344	6,918
Total	9,272	171,808

## 1.4 Retail Sustainability

There are a number of centres in close proximity to the Canning Bridge activity centre that meet a large proportion of the areas retail needs, especially for larger retailers. The Booragoon regional centre (including Garden City shopping centre) is 96,000 square metres and consists of nearly 50% of all space within the 3km radius and meets a large proportion of the non-daily retail needs of the community.

The current retail offering meets the needs of the local residents, commercial and office operations, and passing trade requirements. Growth in the retail offerings of the activity centre are expected to grow proportionately to the current retail offering. There is little need for intervention with regards to diversifying activity in the Canning Bridge activity centre due to the good distribution of activity in the precinct at present.

Presently the activity centre exceeds the non-retail performance targets set out in State Planning Policy 4.2 for a District Centre. The Canning Bridge activity centre has evolved as a sustainable commercial and residential based centre that has a level of retail that supports the needs of these people. The catchment area for the Canning Bridge activity centre includes the study area as well as a number of surrounding suburbs and is within the policy's target of between 20,000 and 50,000 persons; it is also expected that the study area will accommodate more than 20,000 persons in its ultimate development.

# Table of contents

1.	Executive Summary .....	i
1.1	Introduction .....	i
1.2	Land Use Activity .....	i
1.3	Employment .....	iii
1.4	Retail Sustainability.....	iv
2.	Introduction.....	1
2.1	Purpose of this Report .....	1
2.2	Background .....	2
2.3	Canning Bridge Activity Centre Objectives .....	2
3.	Existing Situation.....	4
3.1	Land Use Activities .....	4
3.2	Employment .....	7
3.3	Market and Economic Profile .....	7
3.4	Infrastructure .....	8
4.	Planning & Policy Context.....	10
4.1	Directions 2031 and Beyond.....	10
4.2	Central Metropolitan Perth Sub-regional Strategy .....	10
4.3	State Planning Policy 4.2 (Activity Centres in Perth and Peel).....	11
5.	Activity Centre Framework .....	12
5.1	Activity Centres Descriptions .....	12
5.2	Role of the Centre .....	12
5.3	Relationship to Other Centres .....	13
6.	Future Activity .....	14
6.1	Residential Land Use.....	15
6.2	Activity, Non-residential Land-use and Employment .....	15
7.	Retail Sustainability Assessment .....	19
7.1	Retail Sustainability.....	19
7.2	Retail Market Demand and Activity.....	19
8.	Demographic Analysis .....	21
8.1	Applecross Quarter .....	21
8.2	Mt Pleasant .....	25
8.3	Como, South Como and Manning .....	30
9.	Conclusion.....	36

## Table index

Table 1: Non-residential Land Use Activities - Existing .....	i
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Table 2: Land Use Activities by Quarter - Existing.....	ii
Table 3: Non-residential Land Use Activities – Future (2051) .....	iii
Table 4: Land Use Activities by Quarter – Future (2051).....	iii
Table 5: Employment .....	iii
Table 6: Employment by Quarter (2051) .....	iv
Table 7: Non-residential Land Use Activities - Existing .....	4
Table 8: Land Use Activities by Quarter - Existing.....	4
Table 9 Activity Centre Hierarchy.....	12
Table 10: Land Use Activities by Quarter - Future .....	15
Table 11: Estimated Dwellings and Residential Population .....	15
Table 12: Estimated Dwellings and Residential Population – by Quarter.....	15
Table 13: Employment .....	16
Table 14: Non-residential Land Use Activities (2051) .....	16
Table 15: Non-residential Land Use Activities – Applecross (2051) .....	16
Table 16: Non-residential Land Use Activities - Mount Pleasant .....	17
Table 17: Non-residential Land Use Activities – Como (2051) .....	17
Table 18: Non-residential Land Use Activities – South Como (2051).....	18
Table 19: Non-residential Land Use Activities – Manning (2051).....	18
Table 20: Current Retail Market Demand .....	20
Table 21: Potential Retail Spending (2014 terms) .....	20

## Figure index

Figure 1   Canning Bridge Quarters .....	ii
Figure 2   Canning Bridge Activity Centre Broad Study Area .....	1
Figure 3 - 2013 activity functions within Canning Bridge quarters .....	5
Figure 4 - Applecross .....	5
Figure 5 Mount Pleasant .....	6
Figure 6 Como.....	6
Figure 7 Como South .....	7
Figure 8 Manning .....	7
Figure 9 Centres within close proximity to Canning Bridge.....	8
Figure 10 Policy Framework Directions 2031.....	10
Figure 11 Smaller retail based centres in proximity to Canning Bridge .....	13
Figure 12 Bulk and scale of urban development at vision (circa 2050) .....	14
Figure 13 Age Structure - Applecross .....	21



Figure 14 Home Tenure - Applecross .....	21
Figure 15 Current Education - Applecross .....	22
Figure 16 Weekly - Applecross .....	22
Figure 17 Country of Birth - Applecross .....	23
Figure 18 Languages Spoken - Applecross .....	23
Figure 19 Household Composition - Applecross.....	24
Figure 20 Family Composition - Applecross .....	24
Figure 21 Dwelling Types - Applecross.....	24
Figure 22 Vehicles per Dwelling - Applecross.....	25
Figure 23 Age Structure – Mt Pleasant .....	26
Figure 24 Weekly Income – Mt Pleasant .....	26
Figure 25 Current Education – Mt Pleasant .....	26
Figure 26 Home Tenure – Mt Pleasant .....	27
Figure 27 Country of Birth – Mt Pleasant .....	27
Figure 28 Languages Spoken – Mt Pleasant .....	28
Figure 29 Family Composition – Mt Pleasant .....	28
Figure 30 Household Composition – Mt Pleasant .....	29
Figure 31 Dwelling Types – Mt Pleasant.....	29
Figure 32 Vehicles per Dwelling – Mt Pleasant.....	30
Figure 33 Age Structure - Como .....	31
Figure 34 Home Tenure - Como .....	31
Figure 35 Current Education - Como .....	32
Figure 36 Weekly Income - Como.....	32
Figure 37 Country of Birth - Como .....	33
Figure 38 Languages Spoken - Como .....	33
Figure 39 Family Composition - Como.....	34
Figure 40 Household Composition - Como .....	34
Figure 41 Dwelling Types - Como.....	35
Figure 42 Vehicles per Dwelling - Como.....	35



## 2. Introduction

### 2.1 Purpose of this Report

This report (Canning Bridge Economic Development Study) is an accompanying document to the Canning Bridge Structure Plan. This report will discuss what employment opportunities may be reflected in the area as a result of the implementation of the structure plan (growth plan for the Canning Bridge activity centre). The study area is broadly defined as a walkable distance from the Canning Bridge rail station (Figure 2).



**Figure 2 | Canning Bridge Activity Centre Broad Study Area**

#### 2.1.1 Scope

The scope of this project is to:

- Determine the future expected catchment which Canning Bridge serves;
- Correlate the various population and employment projections set by the state government including the *WA Tomorrow*<sup>1</sup> and the *Central Metropolitan Perth Sub-Regional Strategy*<sup>2</sup>;
- Ascertain the demographic profile of current populations in the Canning Bridge activity centre;
- Calculate the aggregate available retail expenditure in the definitive catchment;
- Collate the market demand for non-retail activity with policy directions;

<sup>1</sup> Western Australia Tomorrow, Population Report No. 7, 2006 to 2026, WA Planning Commission

<sup>2</sup> Central Metropolitan Perth Sub-Regional Strategy August 2010, WA Planning Commission

- Investigate the market conditions and subsequent likely development scenarios including key commercial decision drivers likely to influence the amount, nature and timing (and location) of activity in Canning Bridge; and
- Assess the potential economic implications of future Canning Bridge activity on surrounding activity.

## 2.2 Background

This structure plan has been prepared by the Western Australian Planning Commission, Department of Planning, City of Melville, City of South Perth, Department of Transport, Public Transport Authority and Main Roads WA as a joint initiative to progress long term planning for the Canning Bridge activity centre.

The Vision for the activity centre has been formed through ongoing consultation with the community and stakeholders since 2008.

## 2.3 Canning Bridge Activity Centre Objectives

The State Planning Policy 4.2 provides a clear indication of the objectives for activity centres. Those policy objectives have been adapted for the structure plan and are underpinned by specific goals which set the benchmark for the Canning Bridge activity centre.

The Canning Bridge Activity Centre objectives<sup>3</sup> are:

1. Meet district levels of community need and enable employment, goods and services to be accessed efficiently and equitably by the community.
2. Support the activity centre hierarchy as part of a long-term and integrated approach to the development of economic and social infrastructure.
3. Support a wide range of retail and commercial premises and promote a competitive retail and commercial market.
4. Increase the range of employment within Canning Bridge and contribute to the achievement of sub-regional employment self-sufficiency targets
5. Increase the density and diversity of housing in and around Canning Bridge to improve land efficiency, housing variety and support centre facilities.
6. Ensure Canning Bridge provides sufficient development intensity and land use mix to support and increase high frequency public transport.
7. Maximise access to and through Canning Bridge by walking, cycling and public transport while reducing private car trips.
8. Plan development in Canning Bridge around a legible street network and quality public spaces.
9. Concentrate activities, particularly those that generate steady pedestrian activation, within Canning Bridge.

### 2.3.2 Assumptions

The assumptions utilised in the development of this study includes:

- Information provided by stakeholders;
- Existing employment information – Planning Land Use Category;

<sup>3</sup> Canning Bridge Structure Plan (draft), 2014



- The area of the economic development study as shown in Figure 1;
- Built form capacity (yield) prepared as part of the Canning Bridge Structure Plan (draft) 2014; and
- Population and demographic information gathered from the Australian Census (2011), Australian Bureau of Statistics, utilising the whole or relevant part of catchment areas (5117503, 5117811, 5117812, 5114501, 5114528, 5114529, 5114522, 5114521 and 5114513).

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## 3. Existing Situation

### 3.1 Land Use Activities

The Canning Bridge Activity Centre is located 4 kilometres to the south of the Perth City centre. Canning Bridge is an existing metropolitan activity centre with a vibrant residential, commercial and retail community. It is located on the Canning River and near its juncture with the Swan River and enjoys excellent amenity and natural aspects.

The Canning Bridge Activity Centre is diverse with a mix of primarily residential, commercial office space and supporting retail and entertainment amenities. Currently, the activity centre includes approximately 1,900 dwellings, with approximately 37,417 square metres of non-residential floor space in 2008.

There are no specific gaps in the land use mix, due to maturity of the centre there is a good mix of uses between commercial, retail residential and community. There are currently a number of community, civic and cultural facilities within the precinct providing a high level of amenity, especially on the western area of the precinct. The activity centre is office driven with 67% of the non-residential floorspace supporting office business uses as shown in Table 7 below.

**Table 7: Non-residential Land Use Activities - Existing**

Land Use Activity	Square Metres	% of Centre's Floor Space
Manufacturing/Processing/Fabrication	231	0.62%
Storage / Distribution	200	0.53%
Service Industry	584	1.56%
Shop / Retail	4,714	12.60%
Other Retail	710	1.90%
Office / Business	25,232	67.43%
Health / Welfare / Community Services	662	1.77%
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<b>Total</b>	<b>37,417</b>	

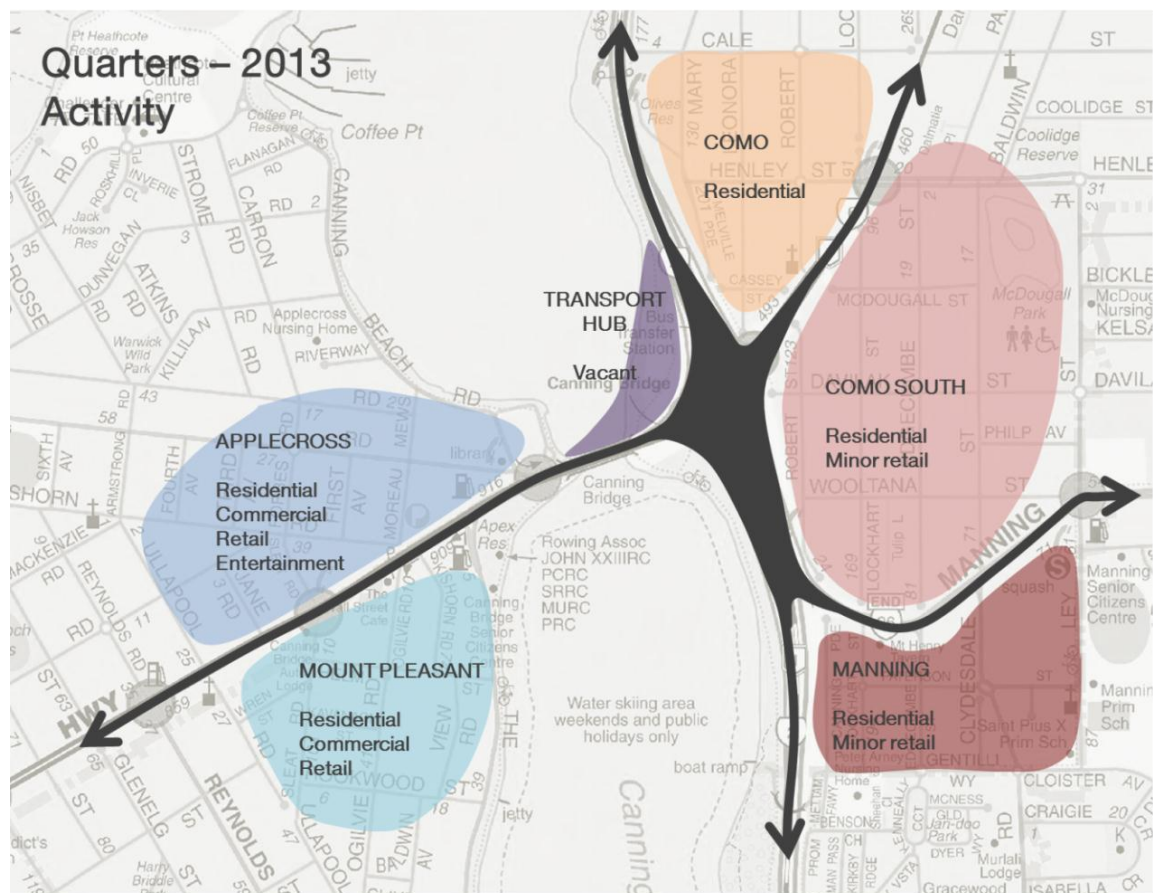
*Source Department of Planning's Commercial Land Use Survey, 2006*

The Canning Bridge Structure Plan is based on five quarters that are separated by major roads in the activity centre. The existing land uses, primary functions and residential typology within the quarters are shown in Table 8.

**Table 8: Land Use Activities by Quarter - Existing**

Quarter	Primary functions	Residential typology (primary)
Applecross	Residential, commercial, entertainment and retail	Flats and single dwelling
Mount Pleasant	Residential, commercial and retail	Flats and single dwelling
Como	Residential	Single dwelling and townhouses
Como South	Residential and retail	Single dwelling and townhouses
Manning	Residential and minor retail	Single dwelling

The primary functions and characteristics of these quarters are shown in Figure 3 below and described in the following sections.



**Figure 3 - 2013 activity functions within Canning Bridge quarters**

### 3.1.1 Applecross

The Applecross quarter's has the highest mix of uses of the quarters, with a well-developed retail and commercial centre which has developed historically along the Canning Highway. The commercial centre has day to day retail facilities such as supermarkets, post office and convenience stores, along with hospitality facilities such as several bars and restaurants. Significant structures of the built form are the heritage listed Raffles Hotel and the Tivoli Theatre, and the only high-rise in the Canning Bridge activity centre with the Raffles apartment development. Residential areas consist of multi-story units or large detached residential homes.



**Figure 4 - Applecross**

### **3.1.2 Mount Pleasant**

Mt. Pleasant quarter has a strip of remnant retail and commercial premises which bound the South side of the Canning Highway, with some well-known local restaurants located at the eastern edge. It is characterised by a number of office developments extending south along Kishorn and Ogilvie Road. There is a mix of low rise residential developments which have been historically developed, gradually being superseded with increased density by newer, multi storey, multi occupancy residential and commercial developments.



**Figure 5 Mount Pleasant**

### **3.1.3 Como**

Como is located on the East of the Canning River and North of Canning Highway. It is directly adjacent to the North South alignment of the Kwinana Freeway and is separated from the Swan River by the Freeway. The quarter is predominantly residential, with small commercial development located at the junction of Henley St and Canning Highway with neighbourhood scale shopping. Generally low rise, housing stock is indicative of grouped housing styles of the 80's and 90's and the area comprises a significantly higher proportion of semi-detached and apartment style housing than the state average.



**Figure 6 Como**

### **3.1.4 Como South**

Como South is located south of Canning Highway and between the Como and Manning quarter's, is a quiet and almost entirely residential area dominated by single and grouped dwelling developments. Commercial activity is notably absent, with a small amount of commercial activity along Canning Highway at Henley Street and a development on Ley Street near Manning Road proposed. None of these activities service the immediate local community's shopping needs.





**Figure 7 Como South**

### **3.1.5 Manning**

Manning represents the smallest and most disconnected part of the Canning Bridge activity centre. Whilst it is separated by major traffic arteries it is largely serviced by the Manning Hub and has a vibrant local community which draws it generally southwards. A standalone tavern development is located at Lockhart St and a small commercial area is located at Ley Street and Manning Road that provides good quality local shopping service for the community. The Manning quarter falls within the neighbourhood catchment of the nearby Manning Hub – a small centre outside the Canning Bridge activity centre structure plan area. Many of the local and regular shopping needs of the Manning quarter community would be filled by the Manning Hub.



**Figure 8 Manning**

## **3.2 Employment**

There are approximately 1,700 jobs located within the Canning Bridge activity centre working in a range of areas with the primary areas being office / business and retail. It is expected that with changes to the precinct over time there will be an increase in service, community and entertainment jobs thus providing a better diversity of employment opportunities. The primary employment in the precinct is office and business with approximately 70% all employment, 15% for retail and the remainder split between other employment categories. Employment is focussed currently within the Applecross and Mt Pleasant quarters.

## **3.3 Market and Economic Profile**

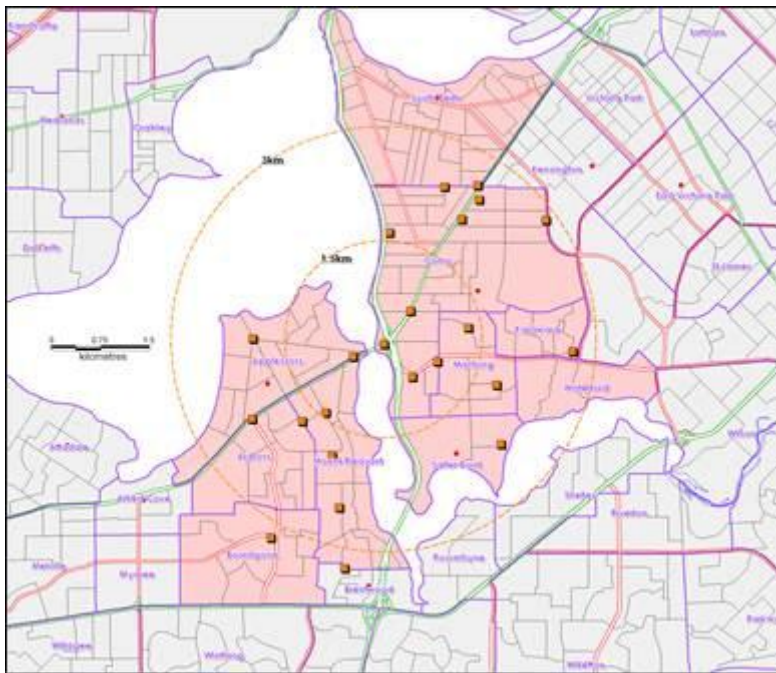
Market and Economic Profile (2009)<sup>4</sup>, prepared for the Canning Bridge activity centre (Appendix A) determined that within 3 km of the Canning Bridge activity centre there is approximately 200,000 sqm of commercial and retail floorspace. Within this same area there are over 30 commercial nodes operating providing services, amenities and employment opportunities for the community. The activity

<sup>4</sup> Canning Bridge Market and Economic Profile (2009), Tactics 4

centre also possesses a high proportion of office space (29%) in comparison to the office floorspace average over the Perth Metropolitan Region (20%) and higher than other activity centres by comparison.

There are a number of centres in close proximity (as shown in Figure 9 below) that provide meet a large proportion of the Canning Bridge activity centre retail needs, particularly in relation to larger and irregular retail needs. The Booragoon regional centre (including Garden City shopping centre) currently has 96,000 square metres, 49% of all commercial and retail space in the 3 km radius. This centre meets the large proportion of the retail needs for the sub-region. There are other local precincts within close proximity to Canning Bridge that provide amenity for their local community including Risely Street (directly north of Booragoon) with 17,000 sqm.

The current retail offering within meets the needs of Canning Bridge activity centre local residents, commercial and office operations, and passing trade requirements. Whilst the Market and Economic Profile (2009)<sup>3</sup> identified a need for additional retail, it was to primarily provide for the growth in local employment and residents and their daily retail needs. Growth in the retail offerings of the precinct are expected to grow proportionately to the current retail offering, and in response to growth in employment and residents. There is little need for intervention with regards to diversifying activity in the precinct due to the good distribution of activity in the precinct at present.



**Figure 9 Centres within close proximity to Canning Bridge**

(Source – DPI Commercial Centres Survey 2006)

### 3.4 Infrastructure

The Canning Bridge activity centre is strategically located to benefit from the existing good road and rail connections. Intensification of development in this area will not be without challenges, but there is an opportunity to create an area that takes advantage of the local circumstances to build a local economy with high levels of self-sufficiency.

The Canning Bridge activity centre's location in relation to significant regional transport facilities brings several opportunities and challenges. Transport infrastructure within the study area currently serves two separate functions:

1. Regional road transport: connecting Fremantle and Perth's southern suburbs to the Perth CBD via Canning Highway and the Mitchell Freeway.

2. Strategic public transport interchange: with the Canning Bridge Rail Interchange and nine bus services crossing the river.

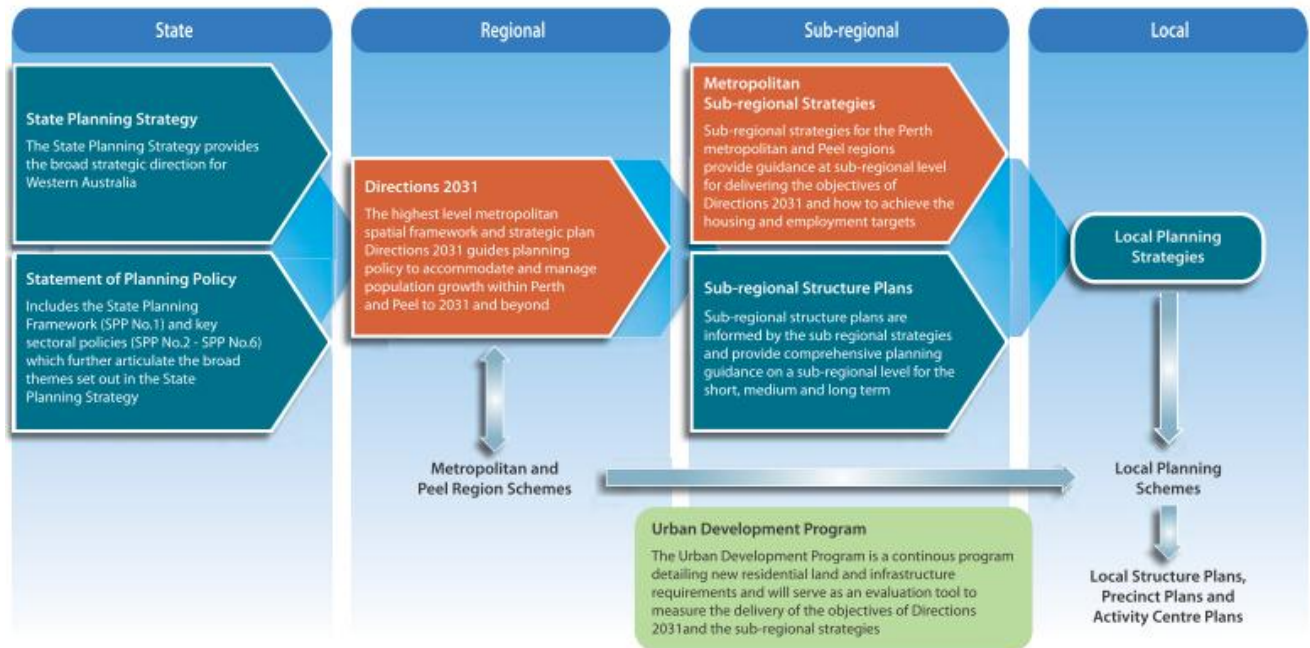
This infrastructure results in large levels of movement within the activity centre and has resulted in the development of some of the retail and commercial activities within the Canning Bridge activity centre.

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## 4. Planning & Policy Context

### 4.1 Directions 2031 and Beyond

*Direction 2031 and Beyond, Metropolitan Planning Beyond the Horizon (Directions 2031)* is a high level spatial framework and strategic plan for the Perth and Peel regions in Western Australia. It provides a framework to guide detailed planning and delivery of housing, infrastructure and services necessary to accommodate a range of growth scenarios..



**Figure 10 Policy Framework Directions 2031**

Directions 2031 defines the Canning Bridge precinct as a District Activity Centre. The policy also includes the following description of the functions of a District Centre:

*'District town centres generally serve the main weekly household shopping, service and community needs of the district. They are predominantly retail focused but many also include a limited mix of other uses such as offices, medical and professional services, hospitality and entertainment and housing. Some also include or are associated with civic, community and recreation facilities.'*

*District centres have a greater focus on servicing the daily and weekly needs of residents. The composition and diversity of activity in a district centre varies throughout Perth and Peel according to the size and maturity of its catchment. However, their relatively smaller scale enables them to have a greater local community focus and provide services, facilities and employment opportunities that reflect the particular needs of their catchments. The continued development of this tier of centres is essential to ensure local communities have good access to a minimum range of services.'*

### 4.2 Central Metropolitan Perth Sub-regional Strategy

The Central Metropolitan Perth Sub Regional Strategy<sup>5</sup> is intended to provide guidance for planning and urban development in the Central Sub-region of Perth and provides greater guidance to deliver Directions 2031. The strategy aims to:

<sup>5</sup> Western Australian Planning Commission: Central Metropolitan Perth Sub-Regional Strategy (2010)



*'plan for a diverse mix of services, facilitates, activities, amenity and housing types in centres to facilitate economic development and employment'.*

The strategy estimates that 3,400 to 4,900 dwellings could be developed by 2031 within the Canning Bridge activity centre.

### **4.3 State Planning Policy 4.2 (Activity Centres in Perth and Peel)**

The State Planning Policy 4.2<sup>6</sup> (SPP 4.2) provides policy guidance on development of activity centres. The policy Supports the objectives and principles of Directions 2031 and provides guidelines for the planning and development of activity centres in Perth and Peel. Policy 4.2 provides specific land use diversity targets for the development of activity centres and what activities are intended to occur in them.

SPP 4.2 encourages diversity in activity centres and includes diversity targets to avoid new centres being retail dominated. The targets therefore do not replace the need to consider or encourage local activity characteristics in existing metropolitan activity centres which are not yet retail driven to the same extent as greenfield centres. According to Policy 4.2,

*'District centres have a greater focus on servicing the daily and weekly needs of residents. Their relatively smaller scale catchment enables them to have a greater local community focus and provide services, facilities and job opportunities that reflect the particular needs of their catchments.'*

The Canning Bridge structure plan has been developed to meet these needs while maintaining the existing community environment. It should be noted that Canning Bridge exceeds the non-retail performance targets of SPP 4.2 and the Structure Plan contains numerous policies and guidelines to ensure these diversity targets continue to be exceeded.

District centres according to SPP 4.2 generally provide the following retail offerings:

- Discount department stores;
- Supermarkets;
- Convenience goods;
- Small scale comparison shopping; and
- Personal services.

Discount department stores and larger supermarket based shopping centres are currently provided by other nearby centres including Garden City in Booragoon. The intention is to promote self-sufficiency for the Canning Bridge activity centre by providing a wide range of employment opportunities and retail to meet the daily and weekly needs of its residents, rather than attempting to compete with larger retail offerings in the sub-region.

The non-retail activities in activity centres and in particular centres similar to Canning Bridge include a range of activities such as:

- Restaurants and cafes;
- Entertainment including movie theatres, concert halls and theatres; and
- Bars, hotels and nightclubs.

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<sup>6</sup> State Planning Policy 4.2 Activity Centres for Perth and Peel (Policy 4.2)

## 5. Activity Centre Framework

### 5.1 Activity Centres Descriptions

State Planning Policy 4.2 defines Canning Bridge as a District Centre in the activity centre framework. Table 9 below provides a summary of the relevant centres in relation to Canning Bridge and their primary functions.

**Table 9 Activity Centre Hierarchy**

Centre Type	Description	Adjacent Activity Centres (distance to Canning Bridge)
Capital City	Large range of high order services and jobs, and the largest commercial component of any activity centre.	Perth – 7 kms
Strategic Metropolitan Centres	These are the main regional activity centres with multipurpose centres that provide a diversity of uses. These centres provide the full range of economic and community services necessary for the communities in their catchments.	Cannington – 8 kms Fremantle – 11 kms
Secondary Centres	Secondary centres share similar characteristics with strategic metropolitan centres but serve smaller catchments and offer a more limited range of services, facilities and employment opportunities. They perform an important role in the city's economy, and provide essential services to their catchments.	Booragoon – 3 kms Victoria Park – 6 kms
District Centres	District centres have a greater focus on servicing the daily and weekly needs of residents. Their relatively smaller scale catchment enables them to have a greater local community focus and provide services, facilities and job opportunities that reflect the particular needs of their catchments.	Bull Creek – 7 kms Bentley – 6 kms Melville – 6 kms South Perth – 5 kms
Neighbourhood Centre	They provide for daily and weekly household shopping needs, community facilities and a small range of other convenience services.  Generally above 1,500 m2 NLA and below 10,000 m2.	Risely Street – 2 kms Applecross Village – 1 km Como Centre – 3 kms
Local Centres	Shop-retail floorspace under 1,500 m2 NLA	Barker Ave – 2 kms Henley Ave – 1 km

### 5.2 Role of the Centre

The role of Canning Bridge as a District Centre is defined by State Planning Policy 4.2 as being:

*“District centres have a greater focus on servicing the daily and weekly needs of residents. Their relatively smaller scale catchment enables them to have a greater local community focus and provide services, facilities and job opportunities that reflect the particular needs of their catchments.”*

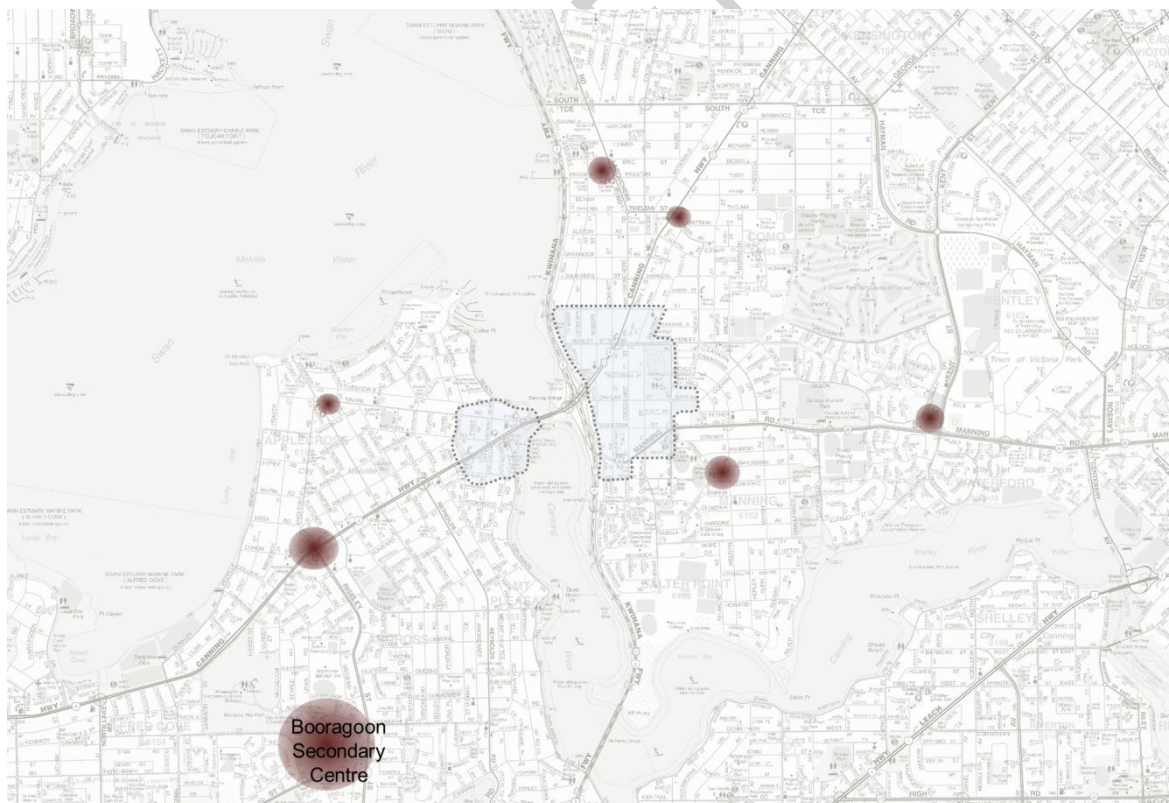
SPP 4.2 denotes that Strategic metropolitan centres, secondary centres and district centres are intended to provide between 10,000 and 100,000 square metres of shop retail floor space.

Canning Bridge is identified as a District Centre. The function to be met by Canning Bridge is to service the daily and weekly needs of its residents, with a local community focus, providing services, facilities and job opportunities that reflect the needs of the Canning Bridge catchment. A district centre would usually support a population (catchment) of 20,000 to 50,000 persons.

### 5.3 Relationship to Other Centres

Located 7 kilometres from the Perth CBD, the Canning Bridge study area is broadly defined by a 1,000 metre radius centred on the Canning Bridge train station. Canning Bridge is located within a wider geographical area including the Booragoon secondary centre, and the Bentley/Curtin specialised centre, which includes Curtin University and Bentley Technology Precinct.

Smaller retail based centres are located in close proximity to the precinct as shown in Figure 11 below. There are larger retail centres within close proximity to Canning Bridge. As a result of this, the need to provide high levels of retail within the Canning Bridge structure plan area are not essential as these land uses can be catered for in near by areas.



**Figure 11 Retail based centres in proximity to Canning Bridge**

## 6. Future Activity

The Canning Bridge structure plan provides the basis for future development of the activity centre with increased levels of residential and working populations. The Structure Plan supports the continued growth of this unique, vibrant and creative community, building on its natural economic and physical competitiveness. The provision of appropriate land uses are required to leverage of the existing attributes of the activity centre including its transport infrastructure. The land use plan proposed by the Canning Bridge structure plan identifies high-density residential and employment generating land uses in close proximity to the Canning Bridge train station, and along Canning Highway.

The Canning Bridge structure plan provides opportunities for people to live and work locally, and providing greater opportunities to live in close proximity to strategic and regular public transport services. The structure plan also provides for greater employment within the structure plan area with a potential to have nearly 10,000 workers in the activity centre. Figure 12 below provides a potential build out in a number of decades to support the projected employment and population levels.



**Figure 9 Bulk and scale of urban development at vision (circa 2050)**

The Canning Bridge activity centre already has a wide variety of land uses with a high level of office accommodation, retail and entertainment. There is not specific intervention required to increase the diversity of the centre's land uses as it grows and all efforts should be made to support the current market driven diversity of the activity centre. The growth of the centre is anticipated to result in a distribution of uses consistent with the current situation. There is likely to be some reductions in land uses such as manufacturing and storage due to the increased density and land values.

Community, civic and cultural facilities within the activity centre will provide a high level of amenity, especially on the western area of the activity centre. These are expected to be supported by facilities established on the eastern areas as development occurs in the future. There are a number of sites that can be redeveloped to accommodate these facilities including the Tivoli Theatre or foreshore or existing sites. Any future facilities will be planned in consultation with the community and provide the relevant function and services required for the local community.

The development of retail offerings are to be design to maximise pedestrian benefit by locating new retail along accessible streets and in areas that can support high footfall. This objective is supported by the design guidelines developed in conjunction with the development of the Structure Plan.



The land use activities shown in Table 10 below are based on the evaluation of the potential yield and built form outcomes for the precinct when it is fully developed.

**Table 10: Land Use Activities by Quarter - Future**

Quarter	Primary functions	Residential typology (primary)
Applecross	Residential, office / commercial and retail	Apartments
Mount Pleasant	Residential, office / commercial and retail	Apartments
Como	Residential	Apartments and townhouses
Como South	Residential, retail	Apartments and townhouses
Manning	Residential, retail and services	Apartments and townhouses

## 6.1 Residential Land Use

The Canning Bridge activity centre is being planned to include a large residential component with a large proportion of this being provided by high and medium density developments. Providing additional levels of residential developments within the Central sub-region will improve employment self-sufficiency and self-containment. The anticipated level of employment that will be created by the need for services in the activity centre and the increase in office accommodation will also support the aim of achieving higher levels of self-sufficiency. Tables 11 and 12 below show the projected increase in dwellings and resultant residential population levels in coming decades.

**Table 11: Estimated Dwellings and Residential Population**

Timeframe	Dwellings	Population
2014 - Current	1,900	3,800
2031 - Canning Bridge Structure Plan (26%)	4,100	8,000
2051 (78%)	12,106	19,000
Ultimate capacity	15,522	24,215

**Table 12: Estimated Dwellings and Residential Population – by Quarter**

Quarter	Dwellings			Population
	1 bed	2 bed	3+ bed	
Applecross	849	1,699	1,699	6,625
Mt Pleasant	455	911	911	3,552
Como	456	912	912	3,557
Manning	965	1,930	1,930	7,527
Manning South	379	757	757	2,953

## 6.2 Activity, Non-residential Land-use and Employment

Activity, land use and employment within the Canning Bridge activity centre are inextricably linked. As the centre develops and in particular increases its office and residential population there will be a response by the market to provide the appropriate level of retail, services and entertainment amenities within the activity centre. In the longer term as the larger developments occur on the eastern side of the precinct these quarters will change considerably in function to include amenities and services for the local catchment. These developments, especially the creation of employment opportunities on the eastern quarters will significantly increase the potential for high levels of self-sufficiency and self-containment.

There are currently approximately 1,700 jobs located within the Canning Bridge activity centre working in a range of areas with the primary areas being office and retail. It is expected that with changes to the activity centre over time there will be a significant increase in the number of workers. The type and

employment numbers in each of the quarter is identified in the tables in section 6.2.1 to 6.2.5. Table 13 below illustrates the anticipated changes in employment numbers over time.

**Table 13: Employment**

Timeframe	Employment	Estimated Floor Space
2014	1,700	37,417
2031	2,400	55,000
2051	7,881	140,000
Ultimate Employment	9,272	171,808

The development of the Canning Bridge activity centre is expected to achieve considerable levels of growth in the following decades and will result in changes to distribution and diversity of land uses. Achieving the vision will result in some changes to the mix of land use activity without fundamentally changing the characteristics of the centre. The anticipated land use activities identified in the Structure Plan to support the Vision are shown in Table 14 below.

**Table 14: Non-residential Land Use Activities (2051)**

Land Use Activity	Square Metres (future)	% of Centre's Floor Space (future)	Employment (Vision)
Storage / Distribution	5,154	3%	52
Service Industry	8,590	5%	344
Shop / Retail	25,771	15%	1,289
Other Retail	3,436	2%	172
Office / Business	94,494	55%	6,300
Health / Welfare / Community Services	17,181	10%	687
Entertainment / Recreation / Culture	8,590	5%	344
Utilities and Communications	8,590	5%	86
Total	171,808		9,272

### 6.2.1 Applecross

The Applecross quarter when fully developed is expected to have more than half a million square metres of residential floorspace that will accommodate approximately 6,625 residents. The quarter will have a diverse level activity with a primary focus on offices with supporting retail and entertainment with more than 4,000 workers. The estimated non-residential land uses for the Applecross quarter are shown in Table 15.

**Table 15: Non-residential Land Use Activities – Applecross (2051)**

Land Use Activity	Square Metres (future)	% of Quarters Floorspace	Estimated Employment
Storage / Distribution	2,577	4%	26
Service Industry	3,007	4%	120
Shop / Retail	9,535	13%	477
Other Retail	1,374	2%	69
Office / Business	44,412	62%	2,961
Health / Welfare / Community Services	5,154	7%	206
Entertainment / Recreation / Culture	3,436	5%	137
Utilities and Communications	2,577	4%	26
	<b>72,073</b>		<b>4,022</b>

### 6.2.2 Mount Pleasant

Mount Pleasant is the smallest quarter and will accommodate about 3,500 residents and nearly 3,000 workers. The residential floorspace will be more than a quarter of a million square metres and accommodate about 15% of the precincts population. The activities in the quarter will be similar to that of Applecross and providing daily services and amenities for the workers and residents of the area. The estimated non-residential land uses for the Mount Pleasant quarter are shown in Table 16.

**Table 16: Non-residential Land Use Activities - Mount Pleasant (2051)**

Land Use Activity	Square Metres (future)	% of Quarters Floorspace	Estimated Employment
Storage / Distribution	0	0%	0
Service Industry	3,007	6%	120
Shop / Retail	7,216	14%	361
Other Retail	687	1%	34
Office / Business	31,183	60%	2,079
Health / Welfare / Community Services	5,154	10%	206
Entertainment / Recreation / Culture	2,577	5%	103
Utilities and Communications	2,148	4%	21
	<b>51,972</b>		<b>2,925</b>

### 6.2.3 Como

The Como quarter is planned to be a predominantly residential area with approximately 5% of the floorspace being used for non-residential land uses. There will be a small area of commercial offices near the train station with additional services and retail offerings to accommodate the residential population of about 3,500 people. Table 17 shows the estimated non-residential land uses.

**Table 17: Non-residential Land Use Activities – Como (2051)**

Land Use Activity	Square Metres (future)	% of Quarters Floorspace	Estimated Employment
Storage / Distribution	0	0%	0
Service Industry	859	5%	34
Shop / Retail	2,577	16%	129
Other Retail	344	2%	17
Office / Business	8,504	53%	567
Health / Welfare / Community Services	1,718	11%	69
Entertainment / Recreation / Culture	859	5%	34
Utilities and Communications	1,289	8%	13
	<b>16,150</b>		<b>863</b>

### 6.2.4 Como South

Como South is the largest quarter and will also have the highest level of population being able to accommodate more than 7,500 residents with more than 650,000 square metres of residential floor space. Office accommodation and other commercial premises will be within the quarter will be supported by services and retail offerings. This quarter will be predominately a residentially focused area with local retail services. The estimated non-residential land uses for the South Como quarter are shown in Table 18.

**Table 18: Non-residential Land Use Activities – South Como (2051)**

Land Use Activity	Square Metres (future)	% of Quarters Floorspace	Estimated Employment
Storage / Distribution	2,577	11%	26
Service Industry	1,289	6%	52
Shop / Retail	3,866	17%	193
Other Retail	687	3%	34
Office / Business	10,394	45%	693
Health / Welfare / Community Services	1,718	7%	69
Entertainment / Recreation / Culture	859	4%	34
Utilities and Communications	1,718	7%	17
	<b>23,108</b>		<b>1,118</b>

### 6.2.5 Manning

The Manning quarter will have the smallest residential population of the activity centre. It will accommodate less than 3,000 residents, being just over 10% of the precincts residents. There will be a small component of retail and community services within the precinct to provide amenity for the local community. The local community will also be serviced by the Manning Hub which is closely located to this quarter. The estimated non-residential land uses for the Manning quarter are shown in Table 19.

**Table 19: Non-residential Land Use Activities – Manning (2051)**

Land Use Activity	Square Metres (future)	% of Quarters Floorspace	Estimated Employment
Storage / Distribution	0%	0%	0
Service Industry	430	5%	17
Shop / Retail	2,577	30%	129
Other Retail	344	4%	17
Office / Business	-	0%	-
Health / Welfare / Community Services	3,436	40%	137
Entertainment / Recreation / Culture	859	10%	34
Utilities and Communications	859	10%	9
	<b>8,504</b>		<b>344</b>

# 7. Retail Sustainability Assessment

## 7.1 Retail Sustainability

A market and economic profile for the Activity Centre undertaken in 2009 determined there are over 30 commercial nodes operating within a 3 km radius of the Canning Bridge activity centre<sup>7</sup> and that this area comprised of nearly 200,000 square metres of commercial floorspace. This 3 km radius area also possesses a high proportion of office space (29%) in comparison to the office floorspace average over the Perth Metropolitan Region (20%).

There are a number of centres in close proximity to the Canning Bridge precinct that meet a large proportion of the areas retail needs, especially for larger retailers. The Booragoon regional centre (including Garden City shopping centre) 96,000 square metres and consists of nearly 50% of all space within the 3 km radius and meets a large proportion of the non-daily retail needs of the community.

The current retail offering meets the needs of the local residents, commercial and office operations, and passing trade requirements. Growth in the retail offerings of the precinct are expected to grow proportionately to the current retail offering primarily as a response to increases in working and residential populations. There is little need for intervention with regards to diversifying activity in the activity centre due to the diversity of the land uses and activity.

Presently the Canning Bridge activity centre exceeds the non-retail performance targets set out in State Planning Policy 4.2 for a District Centre. The Canning Bridge activity centre has evolved as a sustainable commercial and residential based centre that has a level of retail that supports the needs of the local catchment. The catchment area for the precinct includes the study area as well as a number of surrounding suburbs and is within SPP 4.2's target of between 20,000 and 50,000 persons for a District Centre. It is also expected that the study area will accommodate more than 20,000 persons in its ultimate development.

## 7.2 Retail Market Demand and Activity

Canning Bridge is currently a small retail centre with limited retail competition in its surrounds. It should be capable of capturing at least 25% of total food/grocery and convenience based retail spending by its immediate catchment. The proximity to the significant household and fashion retail offer at centres including Booragoon will restrict growth in these particular retail areas.

A small market capture rate is expected to be derived from the broader catchment, as residents in many of these suburbs are catered to by their own local and neighbourhood centres. Further development of the Canning Bridge activity centre is likely to continue its wide range of land uses and have a higher proportion of food/grocery and convenience type retail offer than other district centres. The activity centre is also likely to provide a high level of restaurants, cafes and supporting retail that leverage of the natural attributes of the precinct, including views and proximity to the Canning and Swan rivers.

The emphasis on the primary catchment and food/grocery convenience market will allow Canning Bridge to develop with the likelihood that the majority of its sales will be generated by residents and workers within a 3km proximity to the activity centre. This may change as the precinct matures and if it becomes a major café strip or entertainment area. Table 20 below shows the expected market capture expected by the various retail spending categories and the resulting sales potential for Canning Bridge retailers.

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<sup>7</sup> DPI Commercial Centres Survey 2006



**Table 20: Current Retail Market Demand<sup>8</sup>**

Retail spending category	Primary (3km) \$M p.a.	Secondary (3-5km) \$M p.a.	Total \$M p.a.
Food	\$47.9	\$2.3	\$50.2
Household goods	\$0.9	\$1.0	\$1.9
Clothing, footwear and personal accessory	\$0.3	\$0.4	\$0.7
Department stores	\$0.0	\$0.0	\$0.0
Other retailing	\$14.8	\$0.7	\$15.6
Cafes, restaurants and takeaway food services	\$17.3	\$0.8	\$18.1
Total	\$81.2	\$5.2	\$86.4

The growth and development of the Canning Bridge activity centre will result in increased retail activity. The type of activity and spending ratios may change over coming years if the activity centre is able to develop a diversified and successful entertainment precinct and café strips. Table 21 below provides an estimate of the potential level of retail spending in present day terms.

**Table 21: Potential Retail Spending (2014 terms)**

Timeframe	Dwellings	Population	Total Spending (\$M p.a.)
2014	1,900	3,800	\$86.4
2031	4,100	8,000	\$181.9
2051	12,106	19,000	\$432.1
Ultimate	15,522	24,215	\$550.7

To achieve these potential retail spending levels there would need to be significant increases in the floorspace provided for retail activity. The total retail floorspace required will be dependent on the type of retail offering, intensity of use and duration of trading periods. There are changes in the type of retail offering that occur at activity centres that are located within walking distance of train stations and transport hubs. These changes could include smaller supermarkets with different offerings to those of major shopping centre based supermarkets. These supermarkets due to the intensity of use, turnover and extended opening hours can provide higher levels of sales per sqm than traditional supermarkets.

<sup>8</sup> Canning Bridge Market and Economic Profile (2009), Tactics 4

# 8. Demographic Analysis

The demographic profile information shown within this section have been developed using 2011 census information.

## 8.1 Applecross Quarter

The Applecross quarter community is multi-cultural, educated, affluent, and enjoys housing diversity.

The suburb of Applecross includes areas outside of the Applecross Quarter of Canning Bridge alone; however, it provides a general view of the community of the area. The 2011 Census counted 6,579 people in the Applecross suburb, of these 49 percent were male and 51 percent were female. Aboriginal and Torres Strait Islander people made up 0.1 percent of the suburb's population.

Applecross has fewer young families than the rest of Western Australia. The community here is generally mature, with higher proportions of residents in the 50-64 age range and greater numbers of retirees enjoying the prime of life.

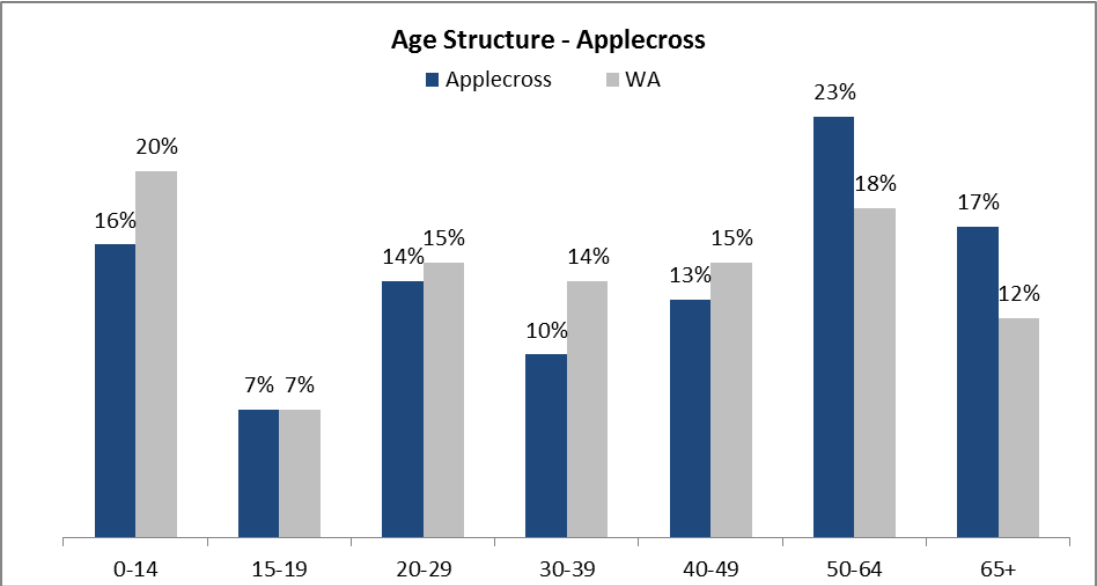


Figure 10 Age Structure - Applecross

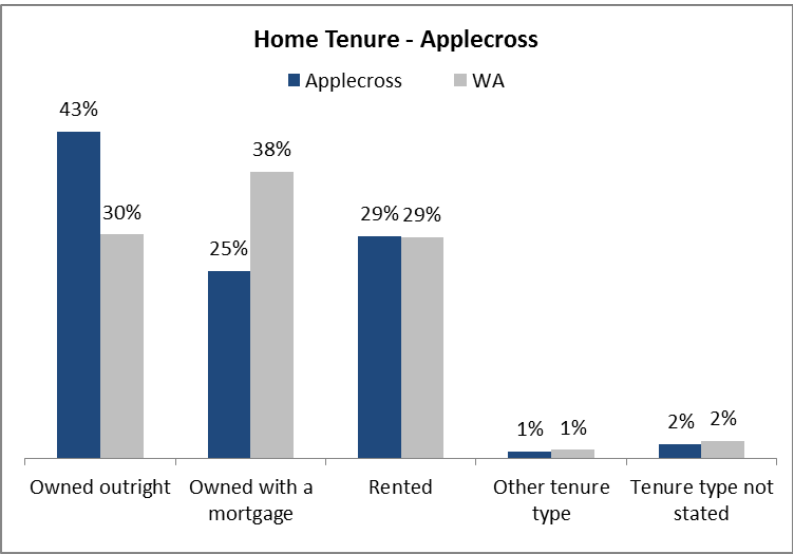
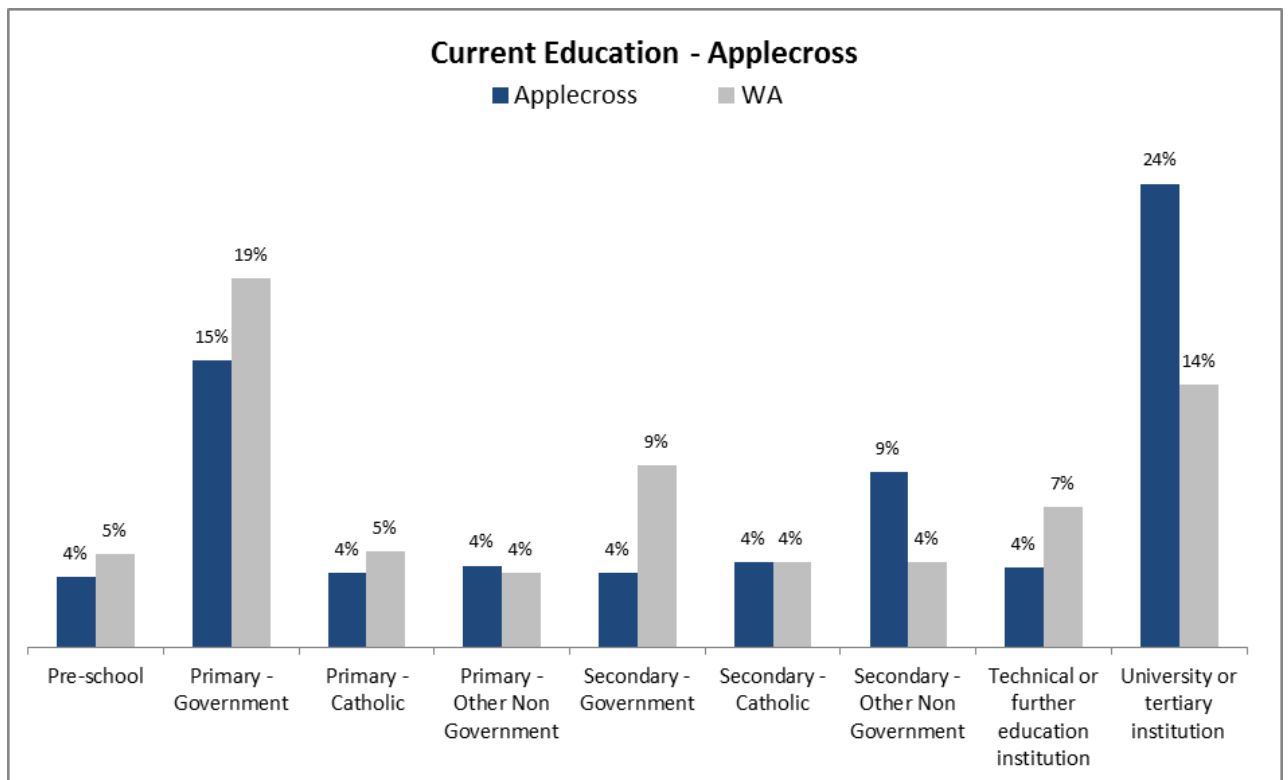
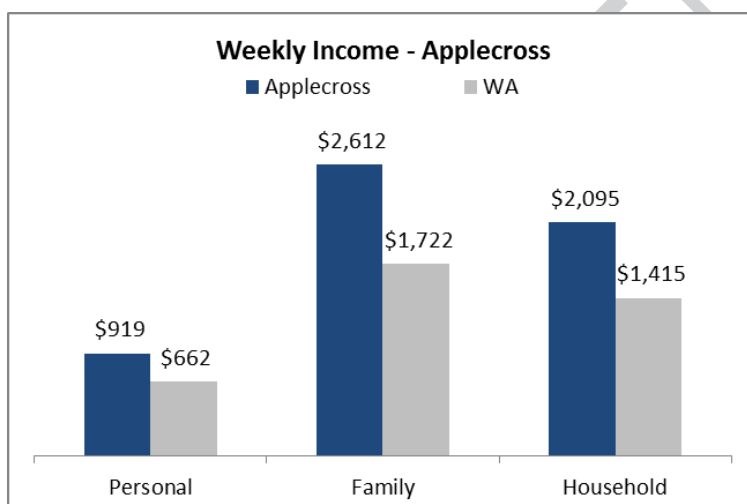


Figure 11 Home Tenure - Applecross



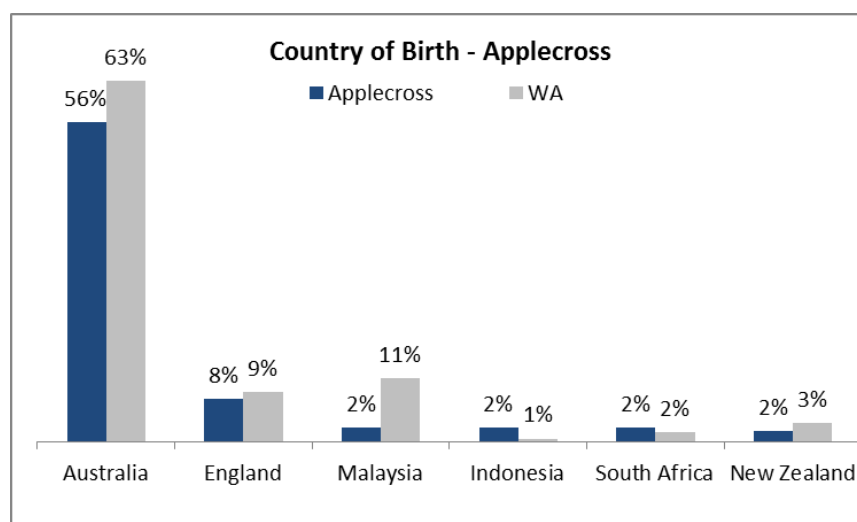
**Figure 12 Current Education - Applecross**



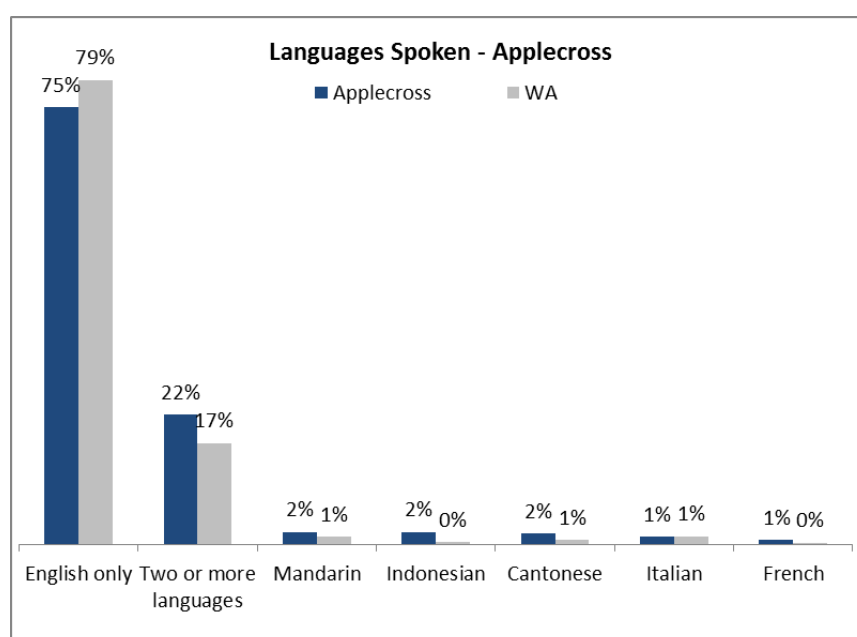
**Figure 13 Weekly - Applecross**

The Applecross community enjoys private schooling, even at the primary level where, whilst there are fewer children to attend primary school, lesser proportions attend government schools compared to the state average. High school students are also more likely to attend a private school. Those residents in tertiary education tend more toward university compared to technical colleges, supporting a well-educated community in Applecross. There are no educational establishments within the quarter.

The Applecross community is also affluent when compared to the Western Australian average, with higher personal, family and household incomes than the rest of the State. Rates of home ownership in Applecross are consistent with the rest of WA; however there is a greater proportion of home owners that own their home outright, therefore enabling greater disposability of income.



**Figure 14 Country of Birth - Applecross**

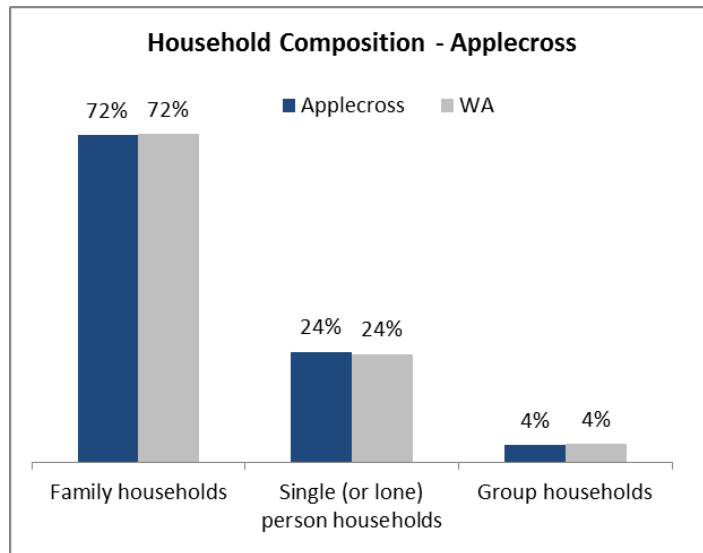


**Figure 15 Languages Spoken - Applecross**

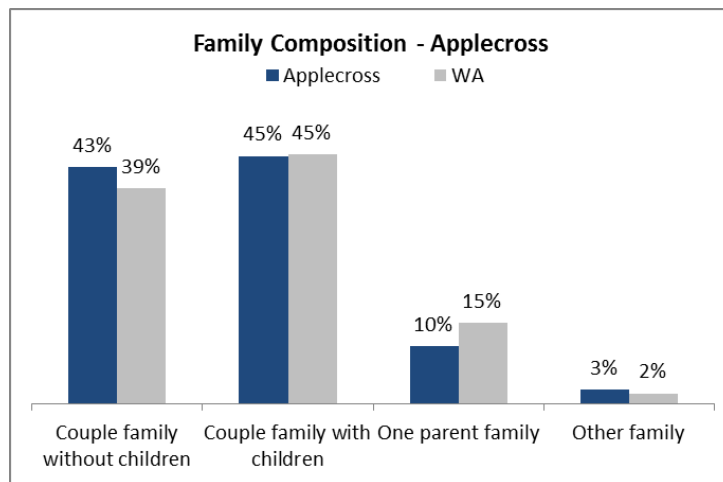
Applecross is comparatively multicultural, with greater proportion of first generation migrants than the state average, and a higher proportion of households speaking two or more languages at home. Migrants in Applecross are from a range of backgrounds, with fewer English and Malaysian migrants than the state average, instead with migrants from a greater diversity of Asian countries.

Similar to the rest of Western Australia, the composition of households in Applecross is dominated by family households, with fewer households comprising groups of unrelated individuals. Applecross supports fewer couples with children than the state average, and fewer one parent families.

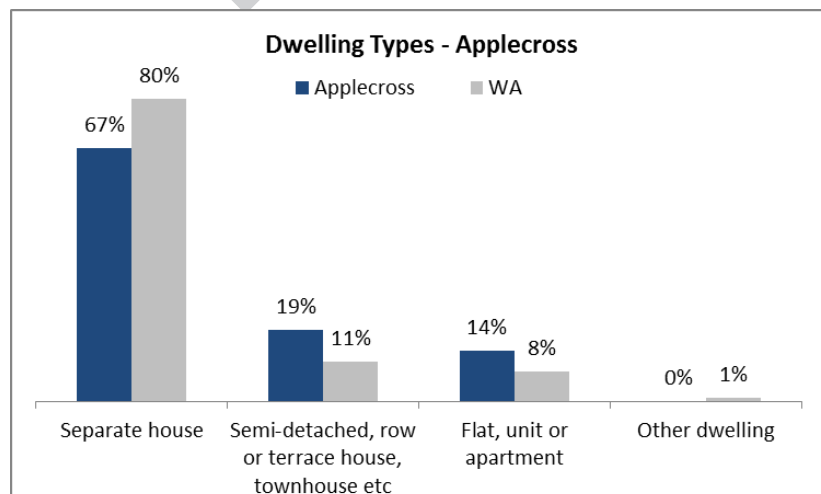




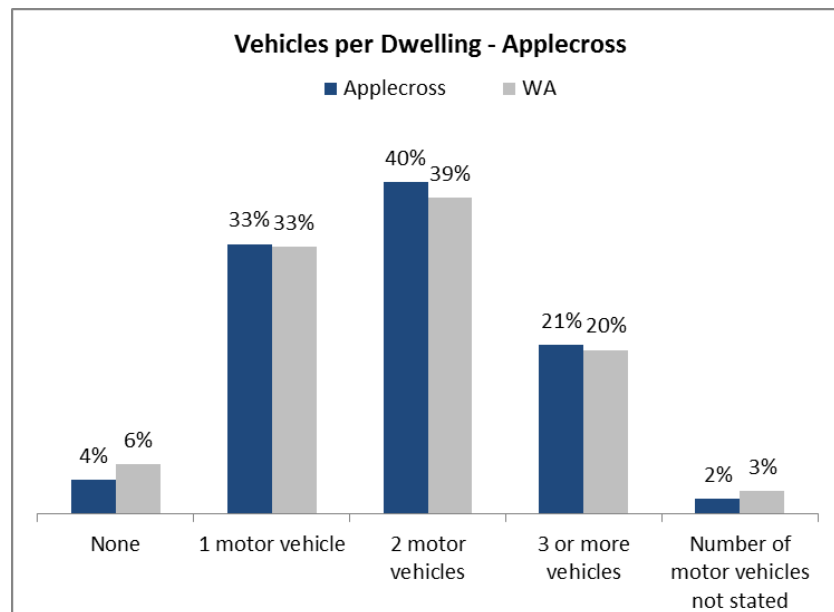
**Figure 16 Household Composition - Applecross**



**Figure 20 Family Composition - Applecross**



**Figure 21 Dwelling Types - Applecross**



**Figure 22 Vehicles per Dwelling - Applecross**

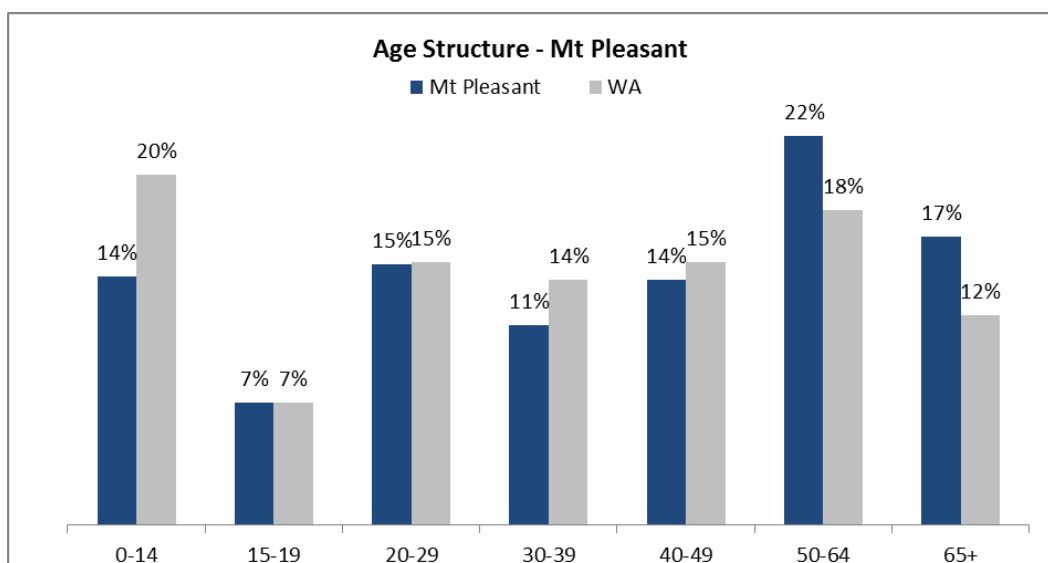
Despite similar household composition to the rest of Western Australia, there is greater housing diversity in Applecross than the state average, with greater proportions of semi-detached housing and apartments. When compared to household composition, the level of housing diversity suggests that Applecross families are willing to live in accommodation other than separate housing, including more dense products such as townhouses.

## 8.2 Mt Pleasant

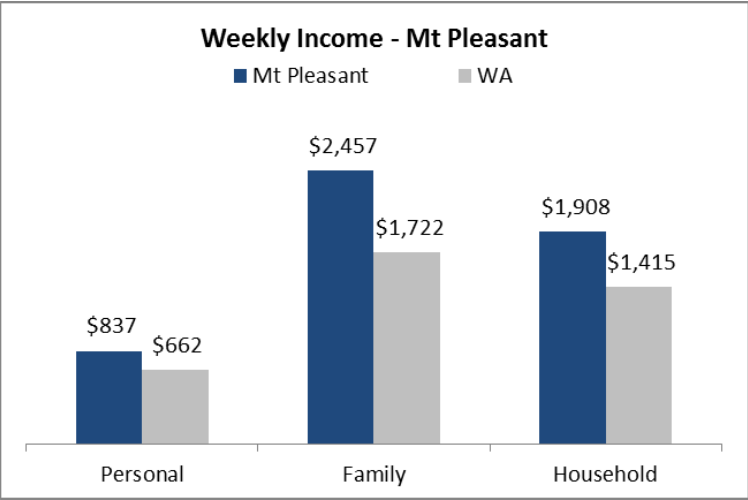
The Mt Pleasant community is multicultural, educated, affluent, and enjoys living in separate houses, with fewer children.

The demographic profile below has been developed using 2011 census information for the Mt Pleasant suburb, and includes areas outside of the Mt Pleasant Quarter of Canning Bridge alone. However, it provides a general view of the community of the area.

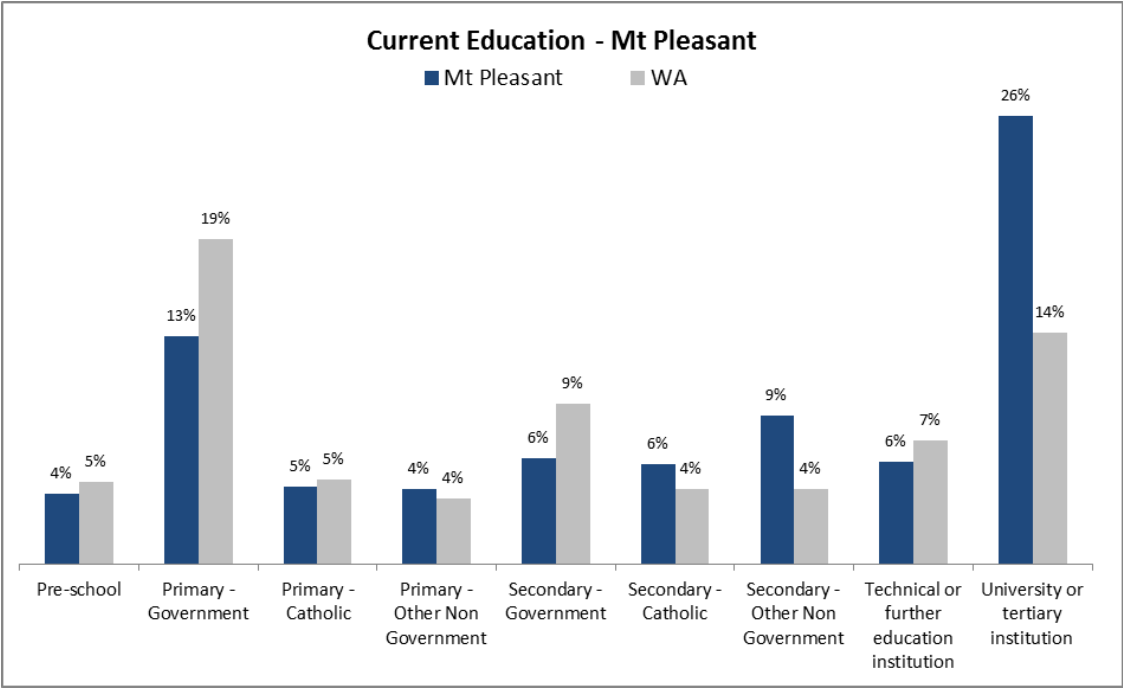
The 2011 Census counted 6,496 people in the Mt Pleasant suburb, of these 48 percent were male and 52 percent were female. Aboriginal and Torres Strait Islander people made up 0.2 percent of the suburb's population.



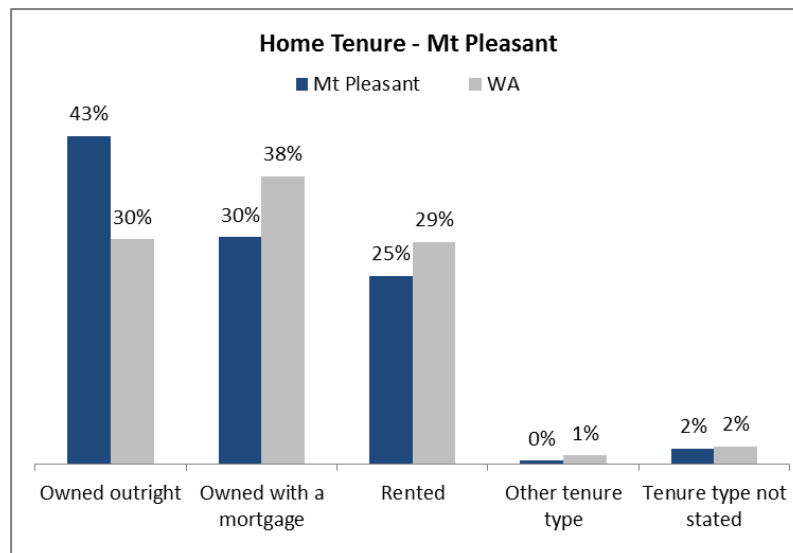
**Figure 17 Age Structure – Mt Pleasant**



**Figure 18 Weekly Income – Mt Pleasant**



**Figure 19 Current Education – Mt Pleasant**



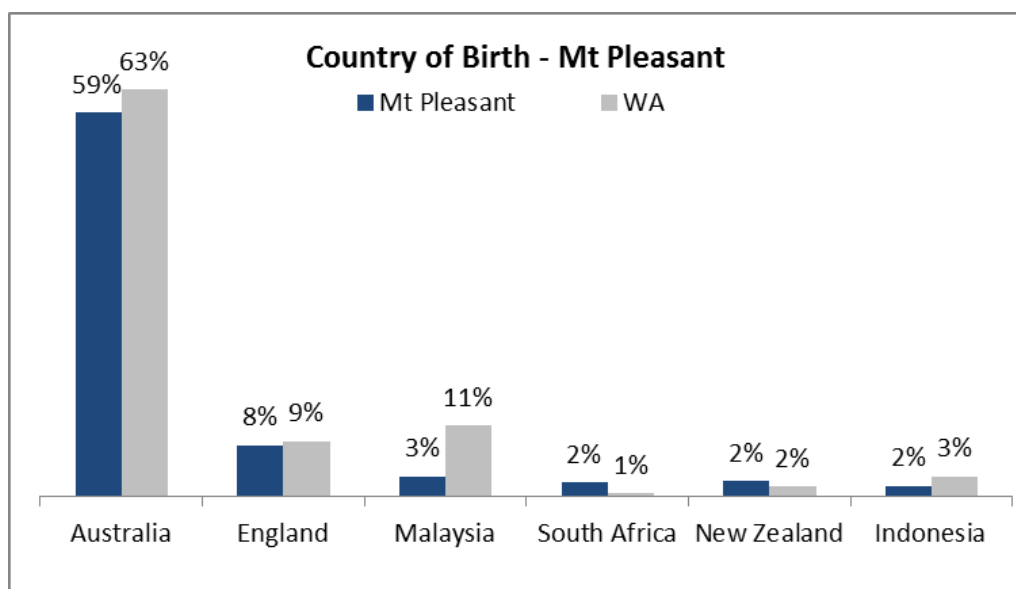
**Figure 20 Home Tenure – Mt Pleasant**

Mt Pleasant has fewer young families than the rest of Western Australia. The community here is generally mature, with higher proportions of residents in the 50-64 age range and greater numbers of retirees enjoying the prime of life.

The Mt Pleasant community enjoys private schooling, even at the primary level where, whilst there are fewer children to attend primary school, lesser proportions attend government schools compared to the state average. High school students are also more likely to attend a private school. There is a high proportion of university students in the suburb, supporting a well-educated community in Applecross. There are no educational establishments within the quarter.

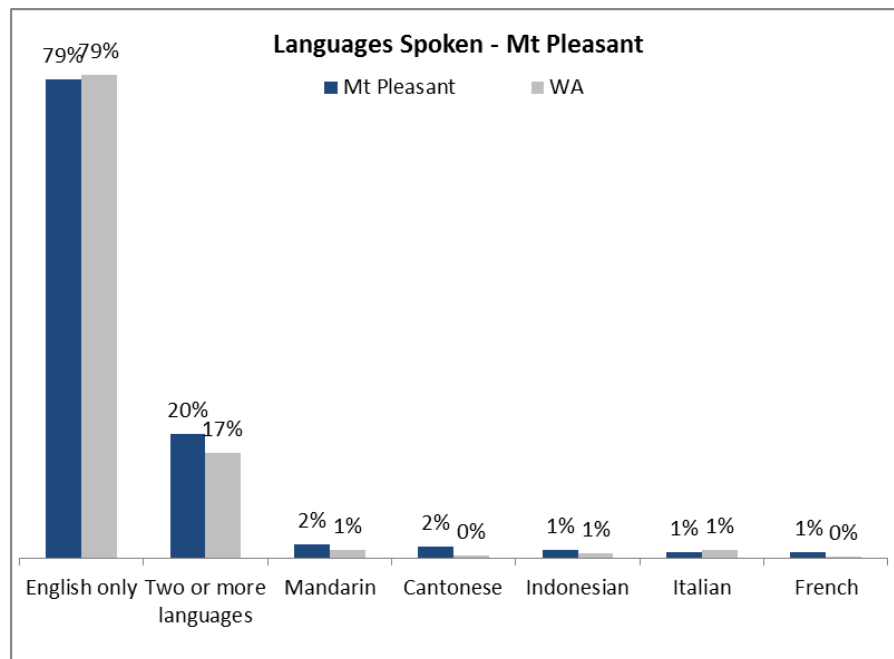
The Mt Pleasant community is affluent when compared to the Western Australian average, with higher personal, family and household incomes than the rest of the State. Rates of home ownership in Mt Pleasant is higher than the rest of WA, with a greater proportion of home owners that own their home outright, enabling greater disposability of income.

Mt Pleasant is comparatively multicultural, with a higher proportion of households speaking two or more languages at home. Migrants in Mt Pleasant are from a range of backgrounds – with English migrants, along with migrants from several Asian countries.



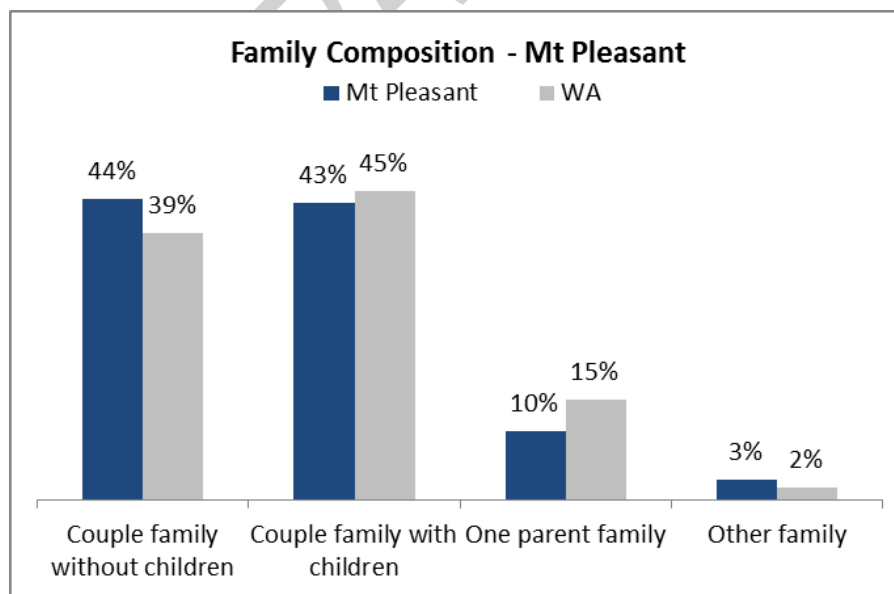
**Figure 27 Country of Birth – Mt Pleasant**



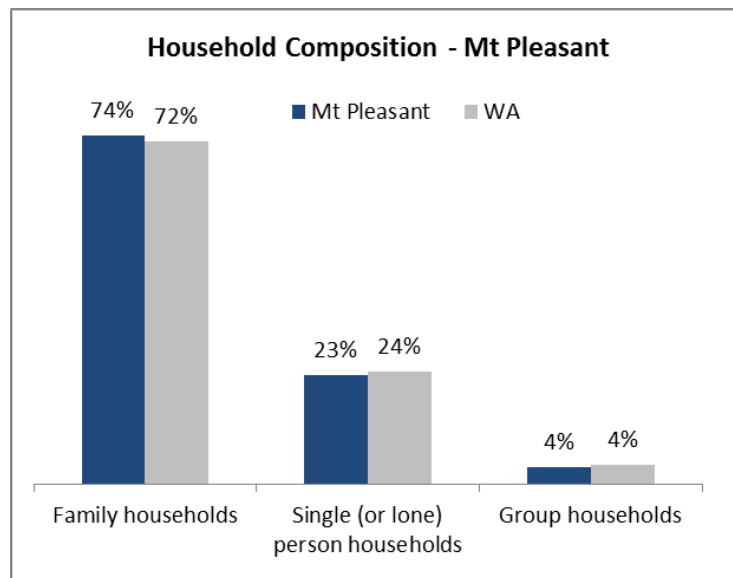


**Figure 218 Languages Spoken – Mt Pleasant**

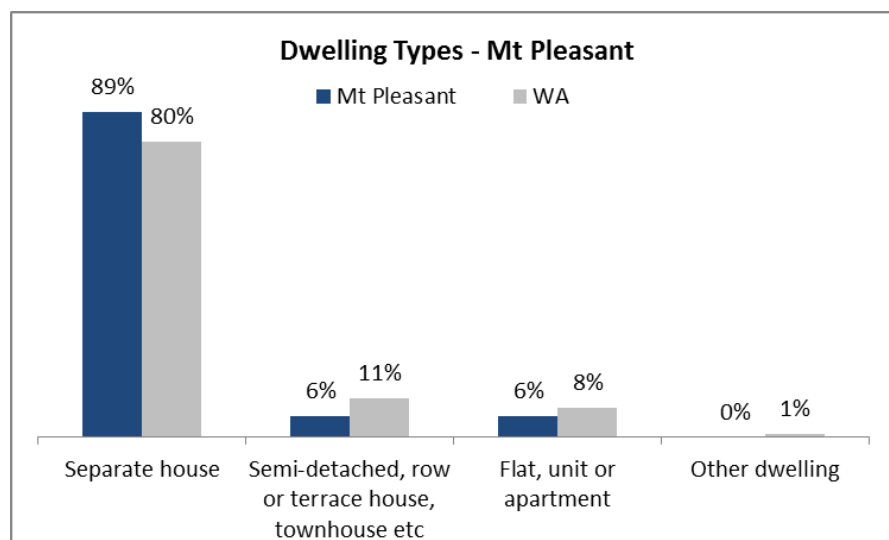
Similar to the rest of Western Australia, the composition of households in Mt Pleasant is dominated by family households, with fewer households comprising groups of unrelated individuals. Mt Pleasant supports a higher proportion of couples without children than the state average, and fewer one parent families.



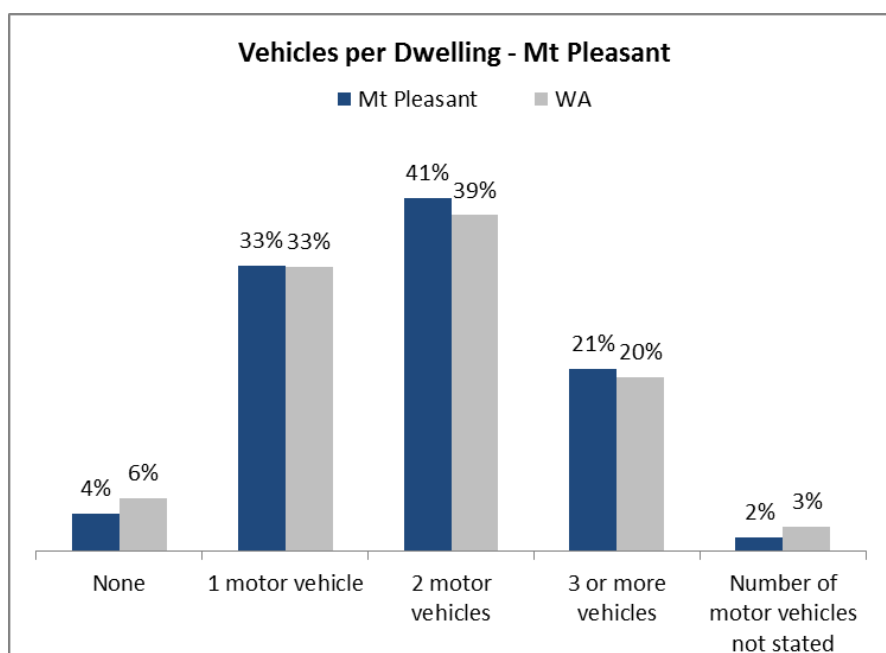
**Figure 22 Family Composition – Mt Pleasant**



**Figure 30 Household Composition – Mt Pleasant**



**Figure 31 Dwelling Types – Mt Pleasant**



**Figure 32 Vehicles per Dwelling – Mt Pleasant**

Despite fewer families with children in Mt Pleasant, there is lesser housing diversity in Mt Pleasant than the state average, with greater proportions of separate housing. The availability of housing compared to household composition suggests that greater numbers of single people live in separate housing in Mt Pleasant than seen in the rest of Western Australia.

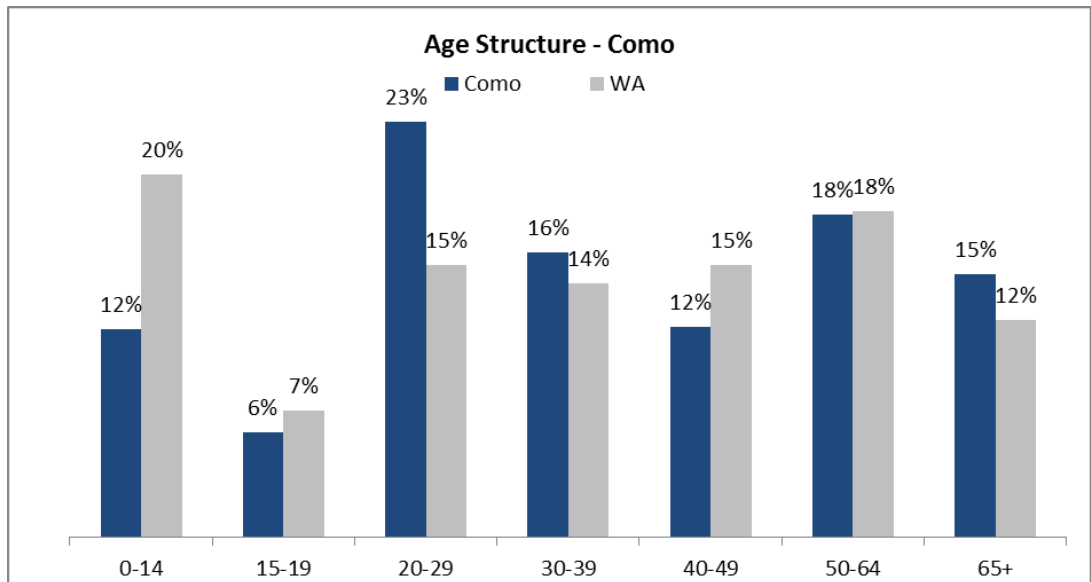
Like the rest of Western Australia, the Mount Pleasant community enjoys owning cars, and have a slightly higher proportion of houses with two cars, and a slightly lower proportion of houses with no cars at all.

### 8.3 Como, South Como and Manning

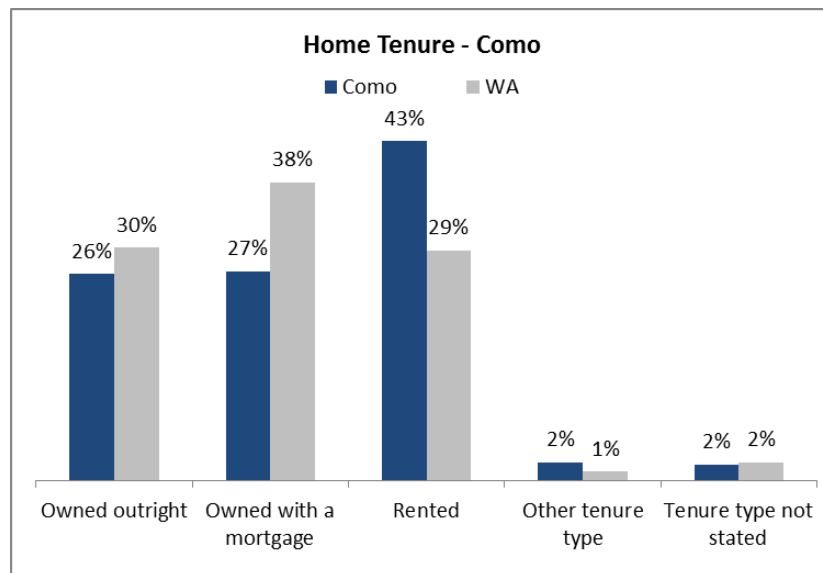
The demographic profile below has been developed using 2011 census information for the Como suburb, which incorporates the Como, Manning and South Manning Quarters, along with additional areas outside of the Canning Bridge study area. However, it provides a general overview of the community of the area. For the purposes of this section, 'Como' refers to the census suburb, incorporating all quarters and additional area to the east of the study area.

The Como demographic profile shows an affluent suburb that is also strongly influenced by Curtin University, with significant student residency.

The 2011 Census counted 13,399 people in the Como suburb, of these 47 percent were male and 53 percent were female. Aboriginal and Torres Strait Islander people made up 0.9 percent of the suburb's population.

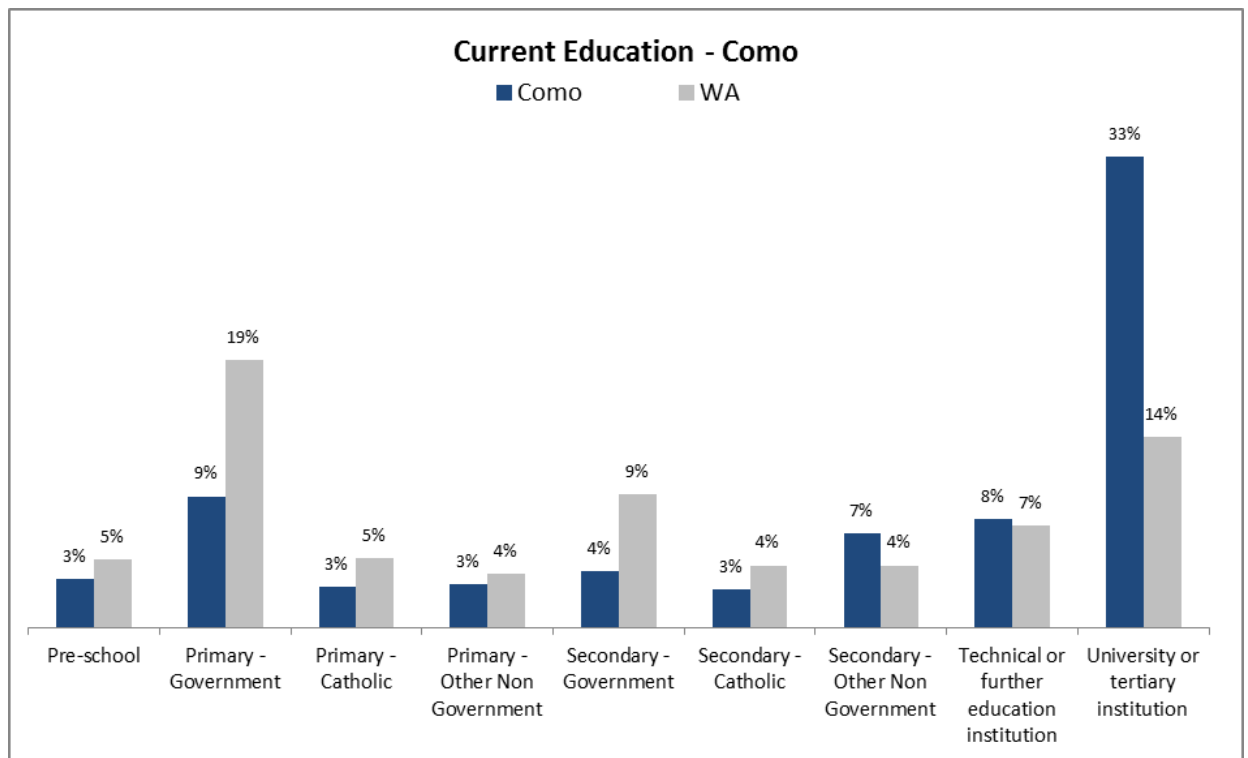


**Figure 33 Age Structure - Como**

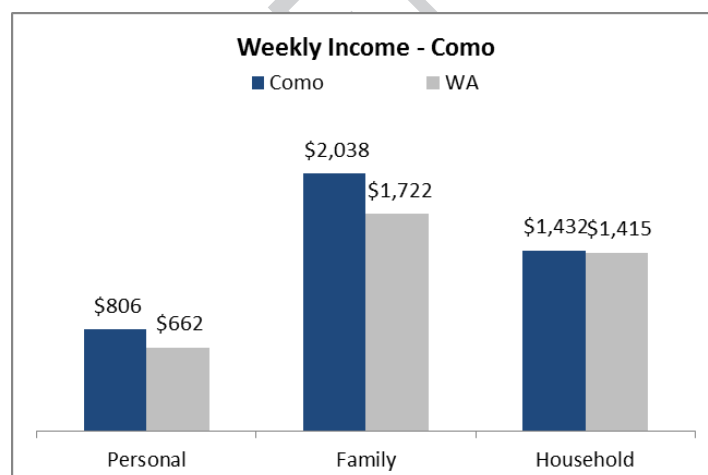


**Figure 234 Home Tenure - Como**





**Figure 245 Current Education - Como**



**Figure 256 Weekly Income - Como**

People living in Como are generally similar in age composition to the rest of Western Australia, except with significantly more people in their twenties (university students), and with far fewer children.

Education is dominated by university students and also those attending technical institutions. Lesser proportion of primary and secondary school students. Those students in secondary school are more likely to attend a private school compared to the state average, with primary school attendance focussing on government education similar to the rest of the state. There are no educational establishments within the quarter.

Personal and family incomes are higher in Como than the state average, although household incomes are similar suggesting families living in Como have greater affluence than other households, to be expected where there is a greater percentage of student households.

High student residency in Como results in high rental rates. Those that own their home are more likely to have a mortgage compared to the rest of the state, whilst the high proportion of rentals results in less likelihood of owner occupiers in the quarters.

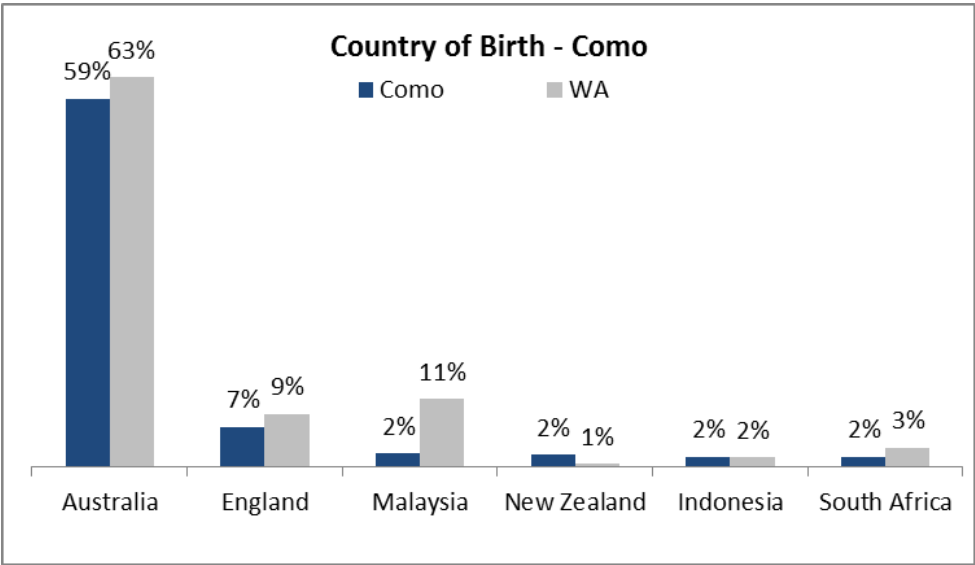


Figure 26 Country of Birth - Como

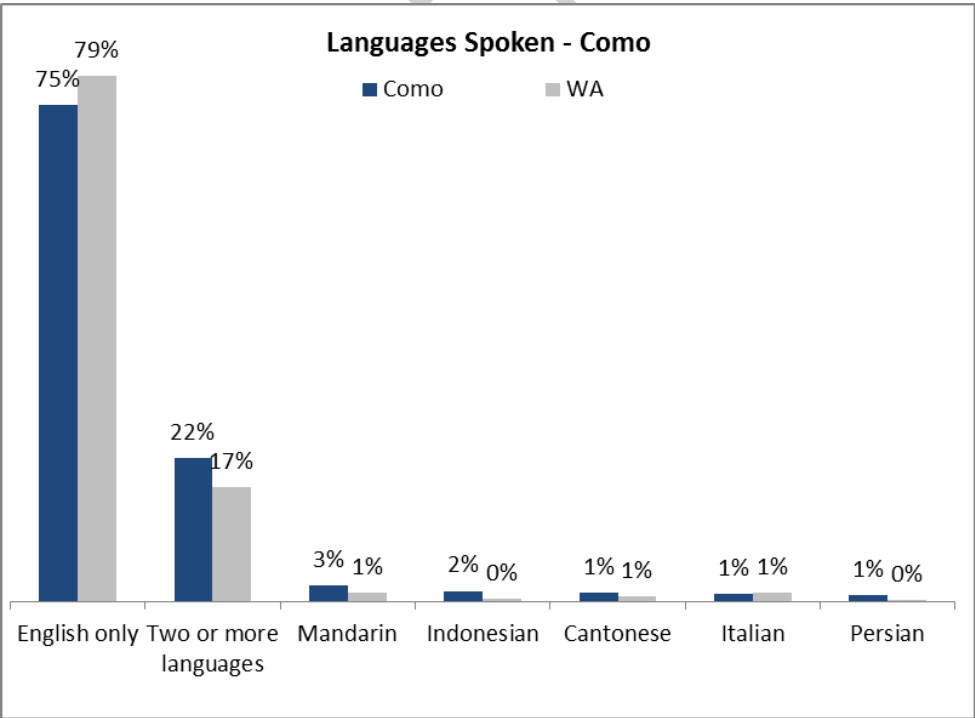
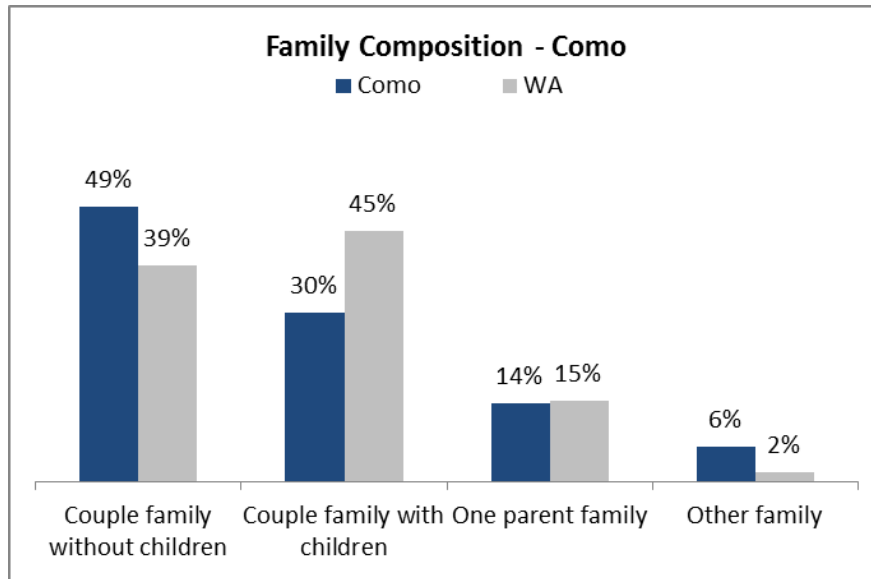
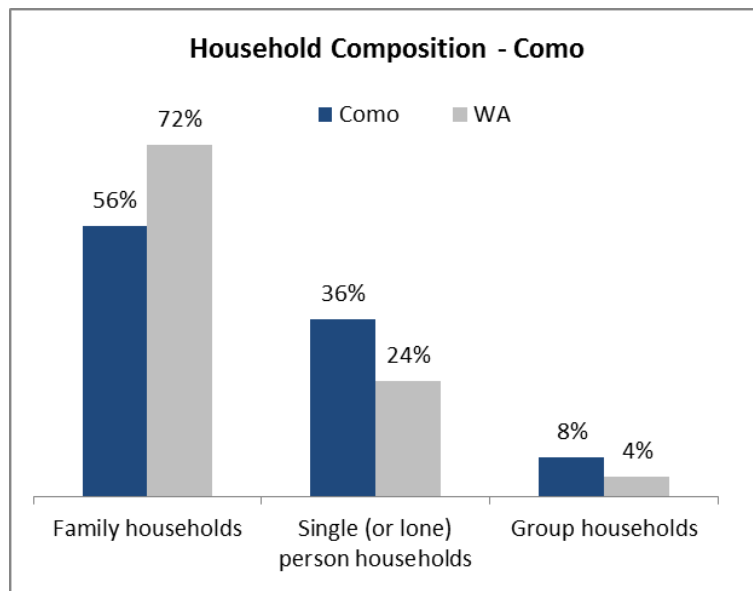


Figure 27 Languages Spoken - Como

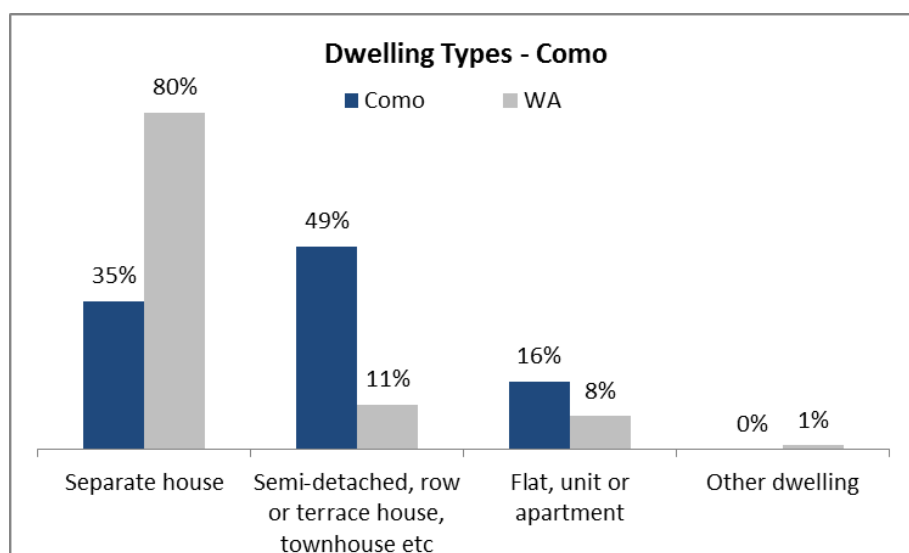
The Como community is comparatively multicultural, with a greater proportion of first generation migrants than the state average, and a higher proportion of households speaking two or more languages at home. Migrants in Como are from a range of backgrounds, with similar English though fewer Malaysian migrants than the state average, instead with migrants from a greater diversity of Asian countries.



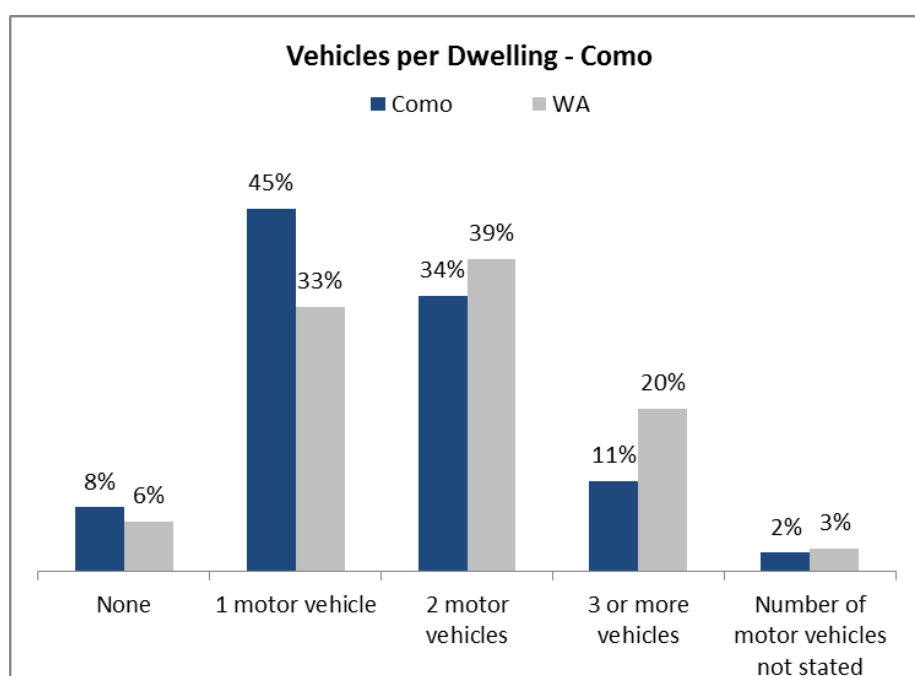
**Figure 28 Family Composition - Como**



**Figure 40 Household Composition - Como**



**Figure 41 Dwelling Types - Como**



**Figure 42 Vehicles per Dwelling - Como**

Fewer families in Como have children, with a higher proportion of 'other' family types in the suburb. Household composition is influenced by high student residency, with fewer family households and higher numbers of single or group households.

Housing in Como is diverse, with much less separate housing than the state average, and greater proportions of semi-detached housing and apartments. The proportion of families compared to the proportion of single housing suggests that families in Como are willing to live in accommodation other than separate housing, and single households and students live in a variety of smaller and denser housing types.

Cars are comparatively less common in Como, with fewer dwellings having 2 or more cars, and a greater proportion of dwellings with no or only 1 car. Whilst higher proportions of group households would be expected to have more cars per dwelling, fewer cars in Como might be related to a greater number of single person houses, fewer families and children, and also student residency with less car ownership.

## 9. Conclusion

Canning Bridge is currently a highly functioning activity centre, providing significant office floorspace, supported by lesser proportions of retail and other commercial land uses.

Canning Bridge will experience significant changes to 2051 with the implementation of the Canning Bridge Activity Centre Structure Plan. Office/business will continue to be the predominant non-residential land use; with the proportion of other land use types, including retail, increasing as the need for local services increases with population.

By 2051 the predominant non-residential land uses within the quarters will be as follows:

- Applecross – Office/Business 62%, Shop/Retail 13%
- Mount Pleasant – Office/Business 60%, Shop/Retail 14%
- Como – Office/Business 53%, Shop/Retail 16%
- South Como – Office/Business 45%, Shop/Retail 17%
- Manning – Health/Welfare/Community Services 40%, Shop/Retail 30%

Whilst it is evident that shop/retail will be a significant land use within the centre, surrounding retail centres such as Booragoon will also service the Canning Bridge activity centre and therefore limit the growth of retail land uses within the centre.

Residential typologies will experience a shift from predominantly single house and semi-detached dwellings to apartments and town houses. This shift in housing typology will assist in accommodating the proposed increase in population which in subsequently improve employment self-sufficiency and self-containment. Overall employment numbers in centre will increase significantly between 2014 and the 2051 planning scenario.



DRAFT

GHD



GHD House, 239 Adelaide Tce. Perth, WA 6004  
P.O. Box 3106, Perth WA 6832  
T: 61 8 6222 8222 F: 61 8 6222 8555 E: permail@ghd.com.au

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