

AUSTRALIAN CAPITAL TERRITORY

Commercial centres and industrial areas floorspace

SUMMARY REPORT



July 2007



ACT Planning &
Land Authority

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Introduction

This is a summary report of the findings of the Commercial Centres and Industrial Inventory for July 2007. The Inventory provides detailed information about the amount and use of floorspace in commercial centres and industrial areas of the ACT. The Inventory has been undertaken biennially since 1993.

The Inventory covers commercial and industrial areas as defined by the Territory Plan.

The Territory Plan currently has a hierarchy of commercial centres. These are:

- 1 Civic
- 2 Town Centres
- 3 Group Centres
- 4 Local Centres

Civic, Town Centres and Group Centres are further broken down into precincts, which include Retail Cores, Business Areas and Mixed Services, and are covered by this inventory.

The survey findings were grouped under three parts:

1. **Canberra** - analysis of total surveyed floorspace being the sum of Commercial Centres and Industrial Areas;
2. **Commercial Centres** - Town, Group, Local Centres and Other Commercial; and
3. **Industrial Areas** - Fyshwick, Hume and Mitchell.

This report uses four floorspace use categories:

1. **Retail** – where the sale of goods is mainly for final consumption;
2. **Services** – restaurants, financial, insurance, health and welfare, clubs;
3. **Vacant** – premises which are not occupied; and
4. **Other** – all others (eg. Community, offices, industrial, petrol stations, etc).

In the Retail Core of Civic and Town Centres, only total shopping mall floorspace and ground level Retail and Services floorspace outside shopping malls have been included. Therefore total floorspace shown in this report is not a measure of total floorspace for Civic and Town Centres. Only ground floor office space is recorded for Civic and Town Centres. Major office space is recorded by the Property Council of Australia in its publication of the *Office Market Report*.

The Banks local centre and small commercial sites in Reid & Phillip and within Residential Policy Areas with overlays allowing mixed uses have been included in the Local Centre Commercial Category. Local centres in Hume and Mitchell industrial districts have been reported in those industrial districts.

From May 1997 the commercial areas of the ANU (a Designated Area in the National Capital Plan), University of Canberra in the Community Facilities Policy Area and Gold Creek in the Entertainment, Accommodation and Leisure Policy Area have been included in this report. In

2005, the Tharwa and Hall local centres and the commercial areas of the Oaks Estate and Yerrabi Waterfront within the Residential Policy Area, and with overlays allowing mixed uses have been included in the report.

Since the publication of the 2005 report, there has been substantial development of commercial space involving a discount factory outlet known as Brand Depot at the Airport. The incorporation of this area has necessitated the introduction of the Majura District.

It is anticipated that a re-drafted Territory Plan will be released in 2008. It is intended to introduce a number of zones, which will replace the current commercial policy areas. Any implications for data collection resulting from these changes will be noted in the 2009 report.

EXECUTIVE SUMMARY

Total Floorspace in Canberra

- In July 2007 there were 7,026 premises with 2,749,897m² in Canberra in the surveyed area of which about 51% was in Industrial Areas and 49% in Commercial Centres.
- Of this total floorspace 32% was used for Retail, 25% for Services, 38% for Other purposes and 5% was Vacant.
- Of the 7,026 premises 36% were in Retail, 35% in Services, 20% in Other and 9% Vacant.
- Fyshwick had the largest proportion of Retail space in Canberra, 28%.
- The average Retail floorspace per premise in Fyshwick (599m²) was over twice the size of an average premise in Commercial Centres (289m²).
- There were 652 premises with 144,658m² of Vacant floorspace of which 34% was in 134 premises in Fyshwick (49,118m²). Central Canberra had the second largest amount of Vacant floorspace (26,892m² in 185 premises).
- There was 2.64m² of Retail and 2.02m² of Services floorspace per person. If 'restaurant/café' floorspace was grouped under the Retail category this would be 3.07m² for Retail and 1.59m² for Services.
- There was a total floorspace growth of 171,175m² between July 2005 and July 2007, 41% of which was in Gungahlin.
- Use of total floorspace changed between July 2005 and July 2007. Retail Floorspace increased by about 78,300m² whereas Vacant floorspace remained constant, although it reduced as a percentage of total floorspace from 5.6% to 5.3%.

Commercial Centres

- Of the 2,749,897m² of total floorspace in Canberra, 1,345,420m² was located in Commercial Centres in 4,941 premises.
- Of the total commercial floorspace 28% was located in Central Canberra district, 25% in Belconnen, 21% in Woden/Weston, 19% in Tuggeranong and 6% in Gungahlin.
- Retail used 42% of this floorspace, Services 35%, Other 18% and 5% was Vacant.
- Town Centres had 64%, Group Centres 23%, Local Centres 8% and Other Centres 4% of Commercial Centres floorspace.
- There was 66,400m² of Vacant floorspace in Commercial Centres which accounted for about 5% of the total Commercial Centres floorspace.
- Of the 66,400m² of Vacant floorspace, almost 38,000m² was in Town Centres, about 16,500m² in Group Centres, over 9,300m² in Local Centres and 2,600m² in Other Centres.
- Tuggeranong Local Centres had the highest vacancy rate (15%), followed by Belconnen Local Centres (10%).
- Woden/Weston Town Centre had the lowest vacancy rate among Town Centres (1.5%).
- Floorspace per person was the highest in Central Canberra district, 2.10m² for Retail and 2.25m² for Services. Woden/Weston had the second highest provision per person with 1.97m² for Retail and 1.60m² for Services.
- Between July 2005 and July 2007, there was a total growth of about 137,200m² of floorspace in Commercial Centres. The largest growth was in Retail floorspace with an increase of about 72,400m².
- The distribution of growth in floorspace by district shows that Gungahlin accounted for over 70% of the total growth, while Woden/Weston accounted for 9%.

Industrial Areas

- Of the 2,749,897m² of total floorspace in Canberra 1,404,477m² was located in Industrial Areas.
- This consisted of 879,103m² of floorspace in Fyshwick, 287,069m² in Mitchell and 238,305m² in Hume.
- Hume accounted for the highest proportion of Vacant floorspace with 5.8%, followed by Fyshwick at 5.6% and Mitchell at 5.3%. Although there were 198 Vacant premises in Industrial Areas, only 14 of these had a floorspace larger than 1,000m², of which 7 were in Fyshwick. Only 2 vacant premises had a floorspace greater than 3,000m².
- Floorspace growth in Industrial Areas between July 2005 and July 2007 was about 34,000m². Over 50% of this growth was in Fyshwick.
- Between July 2005 and July 2007 Services floorspace in Fyshwick increased by about 10,500m² and Other floorspace increased by about 7,200m². Vacant floorspace decreased by 6,400m² and Retail floorspace increased by 6,200m². In Mitchell, Other floorspace increased by 8,500m², Vacant floorspace by 1,800m² and Services floorspace by 1,200m². Retail floorspace decreased by approximately 1,500m². Hume had an increase of 13,000m² in Other floorspace and 1,200m² in Retail floorspace. Vacant floorspace in Hume decreased by about 4,300 m² and Services floorspace by 3,800 m².

DETAILED FINDINGS

CANBERRA

This section analyses the total Canberra floorspace surveyed in July 2007.

Distribution and Use of Floorspace

Table 1 shows the distribution of the total Canberra floorspace in Commercial Centres and Industrial Areas and **Table 2**, the distribution by district. The total floorspace was 2,749,897m².

Table 1: Distribution of Floorspace by Centre Type

	Floorspace (m ²)	%
Town Centre	863,108	31.4
Group Centre	313,303	11.4
Local Centre	111,057	4.0
Industrial	1,404,477	51.1
Other*	57,952	2.1
Total	2,749,897	100.0

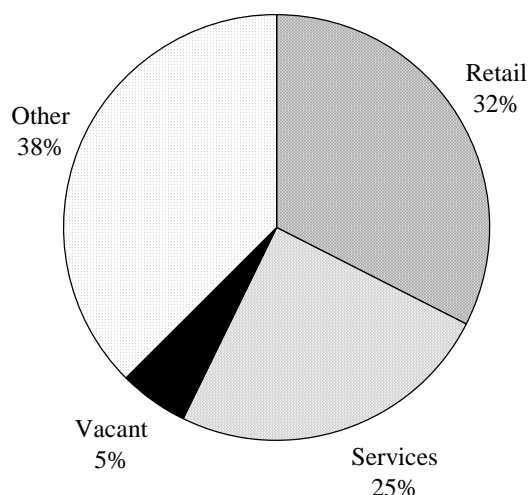
*ANU, University of Canberra, Kambah (Jenke Circt), Gold Creek, Oaks Estate, Yerrabi Waterfront and Airport (Brand Depot) are grouped as 'Other'.

Table 2: Distribution of Total Canberra Floorspace and Premises by District

Location	Floorspace (m ²)	%	No of Premises	%
Central Canberra	376,160	13.7	1,863	26.5
Belconnen	338,174	12.3	991	14.1
Woden/Weston	285,662	10.4	1006	14.3
Tuggeranong	249,587	9.1	680	9.7
Gungahlin	77,832	2.8	312	4.4
Majura	18,005	0.7	89	1.3
Fyshwick	879,103	32.0	1,413	20.1
Mitchell	287,069	10.4	454	6.5
Hume	238,305	8.7	218	3.1
Total	2,749,897	100.0	7,026	100.0

The use of floorspace is summarised under the four main categories of Retail, Services, Vacant and Other (see **Appendix 1** for sub-categories). **Figure 1** shows the distribution of total floorspace between these categories.

Figure 1: Floorspace by Main Category



While the Other category comprises 38% of the total floorspace it accounts for only 20% of total premises in Canberra. This reflects the large floorspace uses, mainly in Industrial Areas, where manufacturing establishments, warehouses and similar businesses exist. The Retail and Services categories have the majority of establishments (premises) with 36% and 35% respectively of the total premises.

Table 3: Breakdown of Floorspace & Premises by Main Category

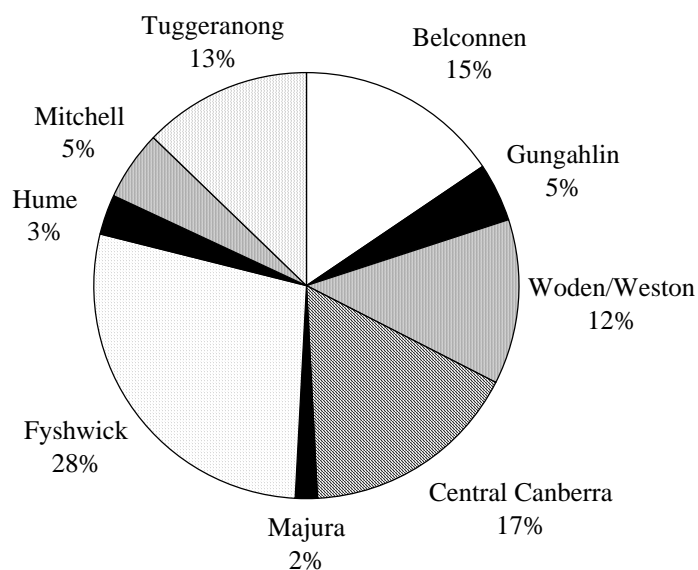
	Floorspace (m ²)	%	No. of Premises	%
Retail	890,985	32.4	2,496	35.5
Services	681,687	24.8	2,460	35.0
Other	1,032,567	37.5	1,418	20.2
Vacant	144,658	5.3	652	9.3
Total	2,749,897	100.0	7,026	100.0

See Appendix 2 for floorspace sub-categories.

Distribution of Retail and Services Floorspace

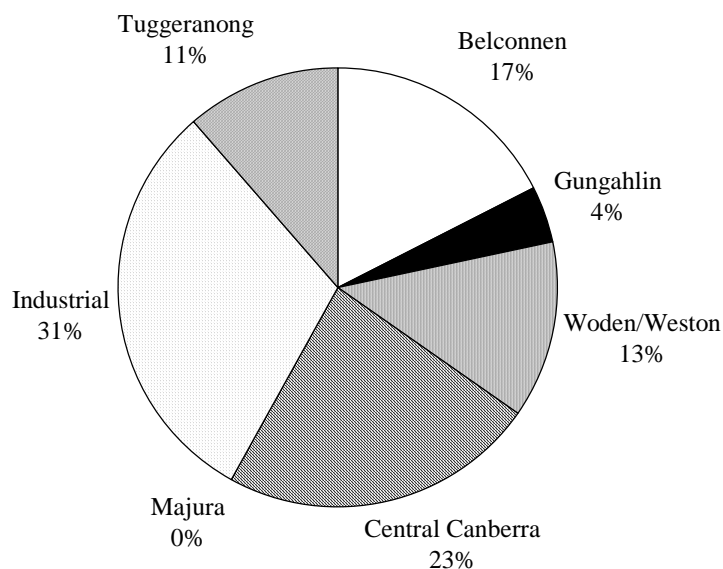
Figures 2 and 3 show the distribution of Retail and Services floorspace by district. Both categories are significant in terms of providing accessible retail goods, business, personal and financial services to the community. See **Appendix 1** for details of Retail and Services categories.

Figure 2: Distribution of Retail Floorspace



Fyshwick had the largest proportion of Retail floorspace in Canberra. This is principally a reflection of its metropolitan bulky goods retailing role (eg furniture, hardware etc. and construction materials). The average Retail floorspace per premise in Fyshwick (599m²) was over twice the size of an average premise in Commercial Centres (289m²).

Figure 3: Distribution of Services Floorspace



Industrial Areas include significant amounts of Services floorspace. Services in these areas often serve the metropolitan level catchment and include computing services, repairing services, etc.

Vacancy Rate

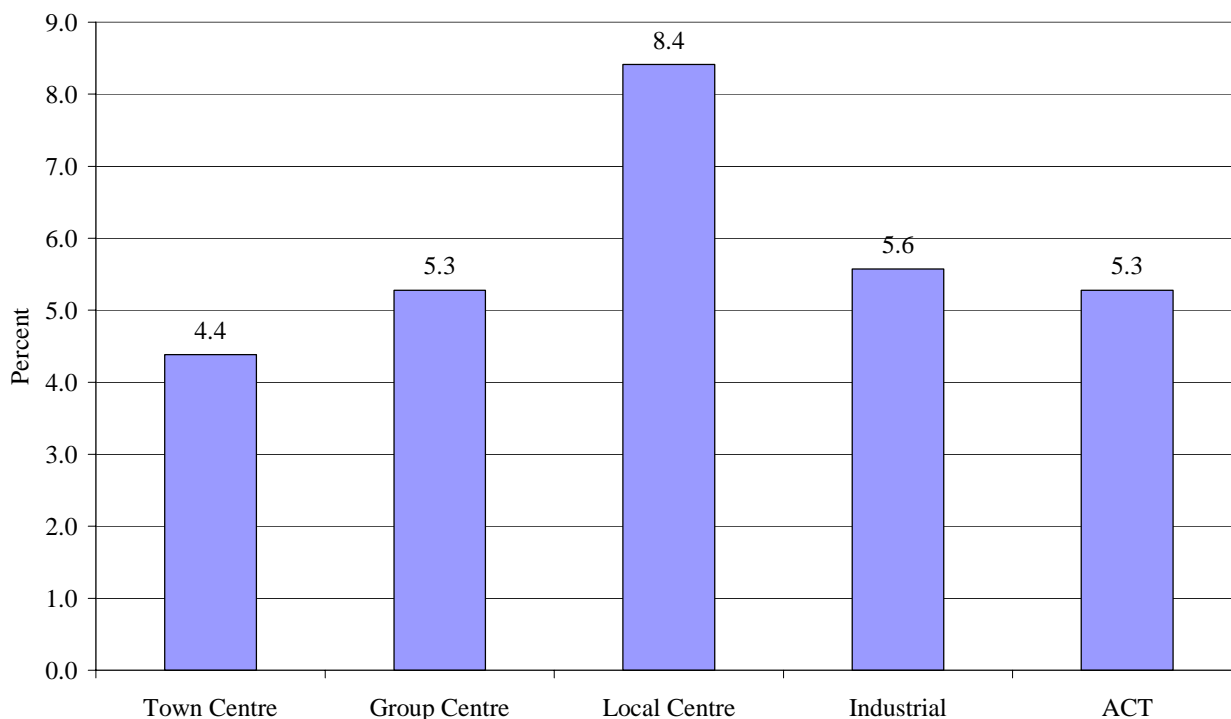
There were 652 premises (144,658m²) with Vacant floorspace in Canberra in July 2007, of which 34% (49,118m²) was in 134 premises in Fyshwick. Central Canberra had the second largest amount of Vacant floorspace (26,892m²) in 185 premises.

Table 4: Vacant Floorspace and Premises by District

	Floorspace	%	No. of Premises	%
Fyshwick	49,118	34.0	134	20.6
Central Canberra	26,892	18.6	185	28.4
Belconnen	15,940	11.0	99	15.2
Mitchell	15,352	10.6	48	7.4
Hume	13,824	9.6	16	2.5
Tuggeranong	10,278	7.1	71	10.9
Woden/Weston	7,866	5.4	54	8.3
Gungahlin	3,315	2.3	33	5.1
Majura	2,073	1.4	12	1.8
Total	144,658	100	652	100

Figure 4 shows the overall Vacancy Rate by centre type.

Figure 4: Vacancy Rate by Floorspace by Centre Type



Floorspace per Person

Total ACT population was estimated at 338,000 in June 2007 by ABS. The latest district distribution has been estimated as follows for the purpose of floorspace per person analysis in this report.

Table 5: Population Distribution by District

District	Population June 2007
Canberra Central	70,400
Belconnen	88,000
Woden/Weston	56,100
Tuggeranong	87,500
Gungahlin	36,000
Total	338,000

There was 2.64m² of Retail and 2.02m² of Services floorspace per person in Canberra in July 2007. This inventory includes ‘restaurant/café’ floorspace under the Services category. However, in some studies ‘restaurant/cafe’ floorspace is considered as part of the Retail category. If the ‘restaurant/café’ floorspace was grouped under Retail the floorspace provision would be 3.07m² for Retail and 1.59m² for Services.

Change in Total Floorspace, July 2005 to July 2007

Table 6 shows a total floorspace growth of 171,175m² between July 2005 and July 2007 in Canberra. There was a total growth in floorspace in Gungahlin of 41%.

Table 6: Change in Total Floorspace by District, July 2005 to July 2007

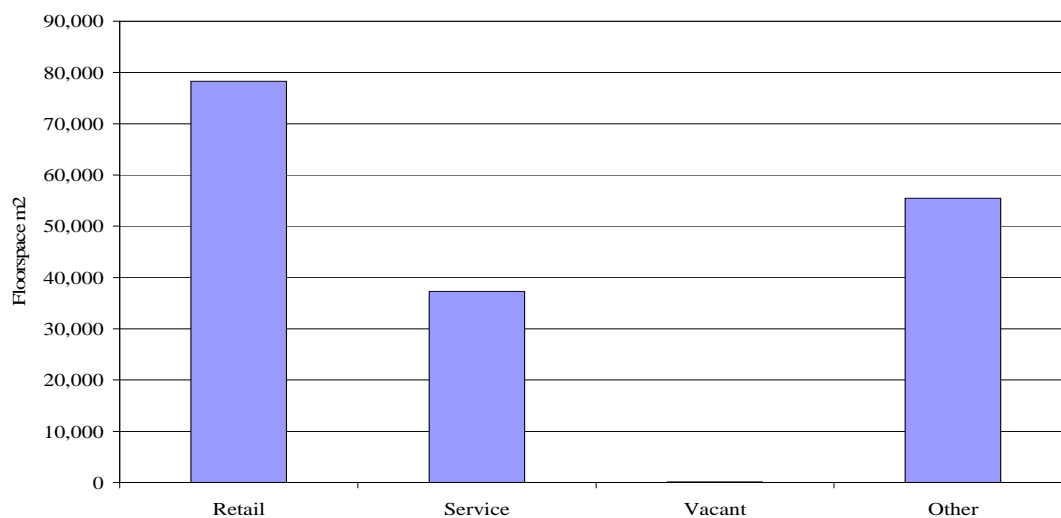
Location	July 2005	%	July 2007	%	Difference	%
	(m²)		(m²)		2005-2007	
Canberra Central	349,019	13.5	376,160	13.7	27,141	7.2
Belconnen	315,249	12.2	338,174	12.3	22,925	6.8
Woden/Weston	261,724	10.1	285,662	10.4	23,938	8.4
Tuggeranong	236,456	9.2	249,587	9.1	13,131	5.3
Gungahlin	45,759	1.8	77,832	2.8	32,073	41.2
Majura	0	0.0	18,005	0.7	18,005	100.0
Industrial	1,370,515	53.1	1,404,477	51.1	33,962	2.4
Total	2,578,722	100	2,749,897	100	171,175	6.2

Table 7 and **Figure 5** record the change in use of floorspace between July 2005 and July 2007 by category. There was a significant increase in Retail and Services floorspace, 78,292m² and 37,281m² respectively, whereas Vacant floorspace remained relatively constant in terms of floorspace but reduced in percentage terms from 5.6% to 5.3% due to increases in floorspace.

Table 7: Change in Total Floorspace by Main Category, July 2005 to July 2007

	July 2005	%	July 2007	%	Difference	%
	(m²)		(m²)		2005-2007	
Retail	812,693	31.5	890,985	32.4	78,292	8.8
Service	644,406	25.0	681,687	24.8	37,281	5.5
Vacant	144,522	5.6	144,658	5.3	136	0.1
Other	977,101	37.9	1,032,567	37.5	55,466	5.4
Total	2,578,722	100	2,749,897	100	171,175	6.2

Figure 5: Change in Total Floorspace by Main Category, July 2005 to July 2007



COMMERCIAL CENTRES

Distribution and Use of Floorspace in Commercial Centres

Tables 8 to 11 and Figure 6 show the distribution and use of total floorspace in Commercial Centres. Of the 2,749,897m² total floorspace in Canberra, 1,345,420m² was located in Commercial Centres in 4,941 premises.

Table 8: Distribution of Floorspace and Premises in Commercial Centres by District

Location	Floorspace (m ²)	%	No. of Premises	%
Central Canberra	376,160	28.0	1,863	37.7
Belconnen	338,174	25.1	991	20.1
Woden/Weston	285,662	21.2	1006	20.4
Tuggeranong	249,587	18.6	680	13.8
Gungahlin	77,832	5.8	312	6.3
Majura	18,005	1.3	89	1.8
Total	1,345,420	100	4,941	100

Table 9: Floorspace and Premises by Main Category in Commercial Centres

	Floorspace (m ²)	%	No. of Premises	%
Retail	567,889	42.2	1,968	39.8
Service	473,909	35.2	2,081	42.1
Other	237,258	17.6	438	8.9
Vacant	66,364	4.9	454	9.2
Total	1,345,420	100	4,941	100

See Appendix 2 for floorspace sub-categories.

Table 10: Floorspace in Commercial Centres by District and Main Category

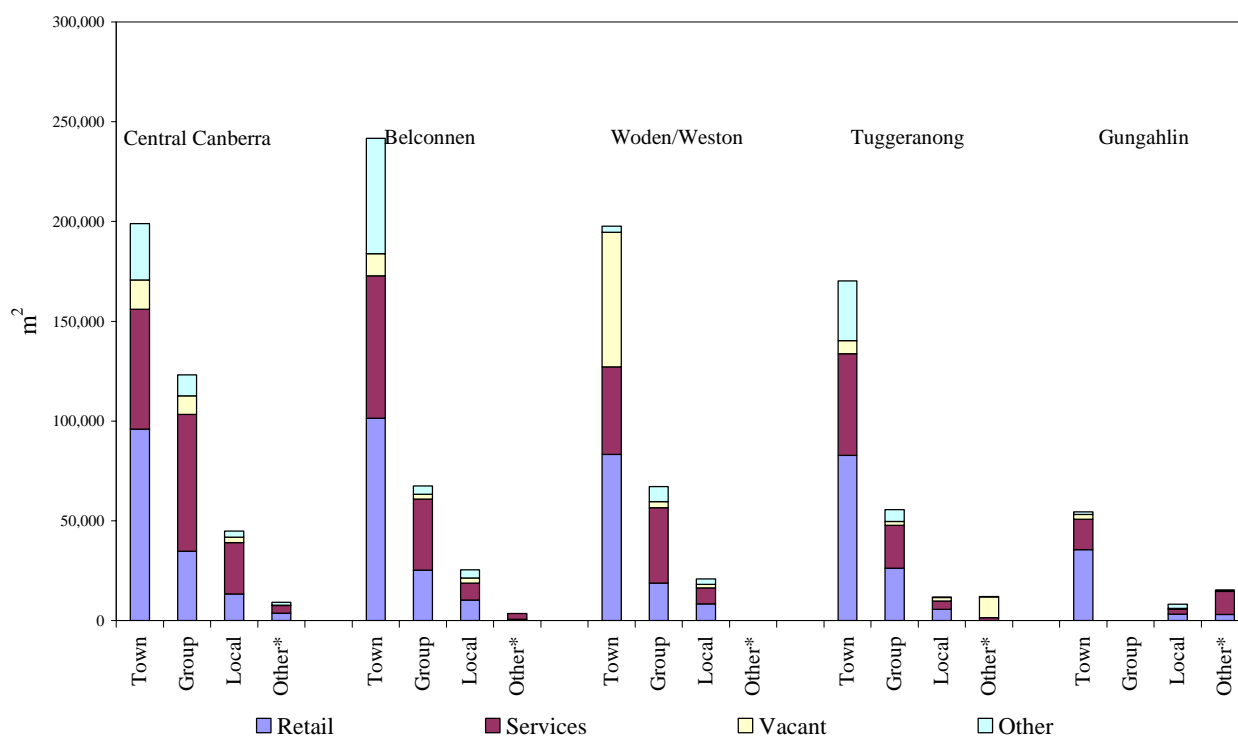
	Retail	%	Services	%	Other	%	Vacant	%	Total
	(m ²)		(m ²)		(m ²)		(m ²)		
Central Canberra	147,639	39	158,372	42	43,257	11	26,892	7	376,160
Belconnen	137,563	41	118,525	35	66,146	20	15,940	5	338,174
Woden/Weston	110,284	39	89,770	31	77,742	27	7,866	3	285,662
Tuggeranong	114,749	46	77,966	31	46,594	19	10,278	4	249,587
Gungahlin	41,807	54	29,191	38	3,519	5	3,315	4	77,832
Majura	15,847	88	85	0	0	0	2,073	12	18,005
Total	567,889	42	473,909	35	237,258	18	66,364	5	1,345,420

Table 11: Floorspace in Commercial Centres by Main Category and Centre Type

	Town	Group	Local	Other*	Total	%
	(m²)	(m²)	(m²)	(m²)		
Retail	399,024	105,114	40,670	23,081	567,889	42.2
Services	241,510	163,440	48,964	19,995	473,909	35.2
Other	184,736	28,214	12,076	12,232	237,258	17.6
Vacant	37,838	16,535	9,347	2,644	66,364	4.9
Total	863,108	313,303	111,057	57,952	1,345,420	100
%	64.2	23.3	8.3	4.3	100	

*ANU, University of Canberra, Kambah (Jenke Circt), Gold Creek, Oaks Estate, Yerrabi Waterfront and Airport (Brand Depot) are grouped as 'Other'.

Figure 6: Floorspace by District, Centre Type and Main Category



*ANU, University of Canberra, Kambah (Jenke Circt), Gold Creek, Oaks Estate, Yerrabi Waterfront and Airport (Brand Depot) are grouped as 'Other'.

Table 12: Floorspace by District, Centre Type and Main Category

CENTRAL CANBERRA										
	Town	%	Group	%	Local	%	Other*	%	Total	%
	(m²)		(m²)		(m²)		(m²)			
Retail	95,968	65.0	34,751	23.5	13,230	9.0	3,690	2.5	147,639	39.2
Services	59,993	37.9	68,591	43.3	25,882	16.3	3,906	2.5	158,372	42.1
Other	28,239	65.3	10,687	24.7	2,951	6.8	1,380	3.2	43,257	11.5
Vacant	14,789	55.0	9,200	34.2	2,754	10.2	149	0.6	26,892	7.1
Total	198,989	52.9	123,229	32.8	44,817	11.9	9,125	2.4	376,160	100
BELCONNEN										
Retail	101,407	73.7	25,255	18.4	10,324	7.5	577	0.4	137,563	40.7
Services	71,444	60.3	35,629	30.1	8,490	7.2	2,962	2.5	118,525	35.0
Other	57,831	87.4	4,096	6.2	4,184	6.3	35	0.1	66,146	19.6
Vacant	11,034	69.2	2,408	15.1	2,498	15.7	0	0.0	15,940	4.7
Total	241,716	71.5	67,388	19.9	25,496	7.5	3,574	1.1	338,174	100
WODEN/WESTON										
Retail	83,214	75.5	18,777	17.0	8,293	7.5	0	0.0	110,284	38.6
Services	44,000	49.0	37,787	42.1	7,983	8.9	0	0.0	89,770	31.4
Other	67,417	86.7	7,554	9.7	2,771	3.6	0	0.0	77,742	27.2
Vacant	3,064	39.0	2,977	37.8	1,825	23.2	0	0.0	7,866	2.8
Total	197,695	69.2	67,095	23.5	20,872	7.3	0	0.0	285,662	100
TUGGERANONG										
Retail	82,817	72.2	26,331	22.9	5,601	4.9	0	0.0	114,749	46.0
Services	50,961	65.4	21,433	27.5	4,207	5.4	1,365	1.8	77,966	31.2
Other	30,014	64.4	5,877	12.6	156	0.3	10,547	22.6	46,594	18.7
Vacant	6,503	63.3	1,950	19.0	1,785	17.4	40	0.4	10,278	4.1
Total	170,295	68.2	55,591	22.3	11,749	4.7	11,952	4.8	249,587	100
GUNGAHLIN										
Retail	35,618	85.2	0	0.0	3,222	7.7	2,967	7.1	41,807	53.7
Services	15,112	51.8	0	0.0	2,402	8.2	11,677	40.0	29,191	37.5
Other	1,235	35.1	0	0.0	2,014	57.2	270	7.7	3,519	4.5
Vacant	2,448	73.8	0	0.0	485	14.6	382	11.5	3,315	4.3
Total	54,413	69.9	0	0.0	8,123	10.4	15,296	19.7	77,832	100

*ANU, University of Canberra, Kambah (Jenke Circt), Gold Creek, Oaks Estate, Yerrabi Waterfront and Airport (Brand Depot) are grouped as 'Other'.

Vacancy Rate in Commercial Centres

There was approximately 66,400m² of Vacant floorspace in Commercial Centres which accounted for 4.9% of the total Commercial Centres floorspace in July 2007, of which:

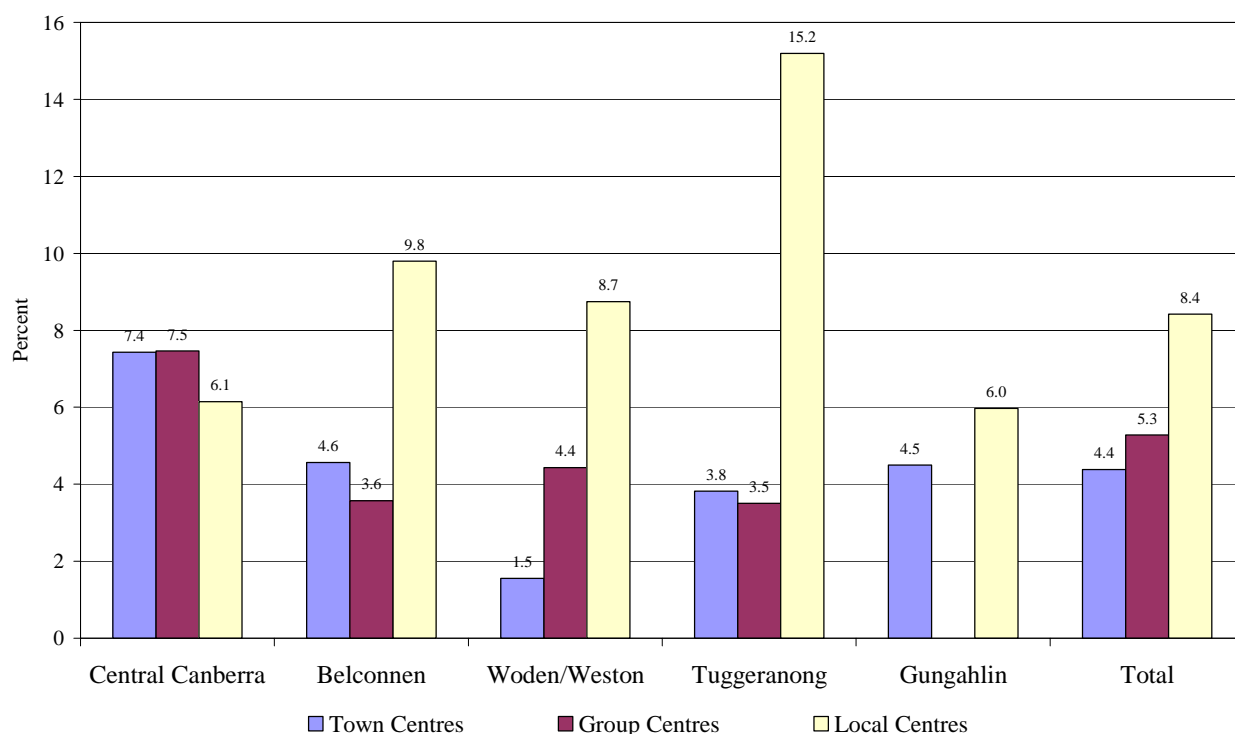
- 37,838m² was in Town Centres;
- 16,535m² was in Group Centres;
- 9,347m² in Local Centres; and
- 2,644m² in Other.

It should be noted that Vacant floorspace does not have a ‘use category’ and therefore it cannot be assumed that the floorspace is for Retail or Services use, etc.

There was 54,729m² of Vacant space on the ground level and 11,635m² on other than the ground level.

Figure 7 summarises vacancy rates for each district by centre type. Vacancy levels in Local Centres were more significant compared with other centres. Tuggeranong Local Centres had the highest vacancy rate, 15%.

Figure 7: Vacancy Rates by Centre Type



* There are no occupied Group Centres in Gungahlin.

Floorspace per Person in Commercial Centres

In Commercial Centres there was 1.68m² of Retail and 1.40m² of Services floorspace per person. If ‘restaurant/café’ floorspace was grouped as Retail, these figures would be 2.10m² and 0.98m² respectively. Floorspace per person was the highest in Central Canberra district. In Tuggeranong, floorspace per person was lower than the other established Town Centres of Belconnen and Woden/Weston. (See **Table 5** for population distribution by district).

Figure 8: Retail and Services Floorspace per Person by District
(restaurant/café floorspace grouped under Services)

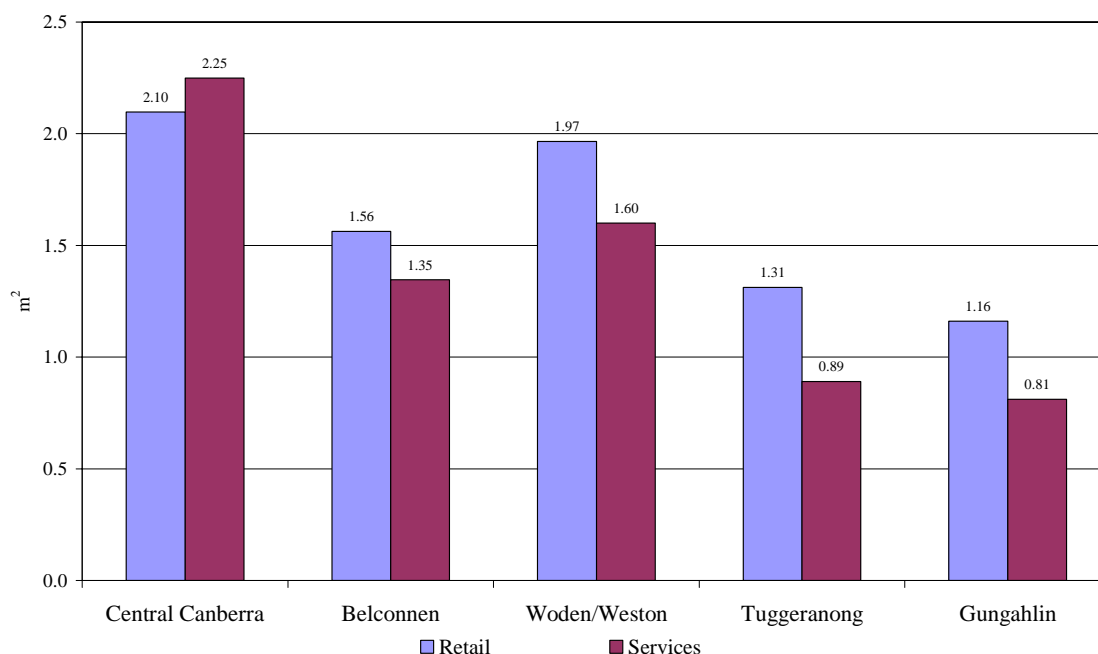


Figure 9: Retail and Services Floorspace per Person by District
(restaurant/café floorspace grouped under Retail)

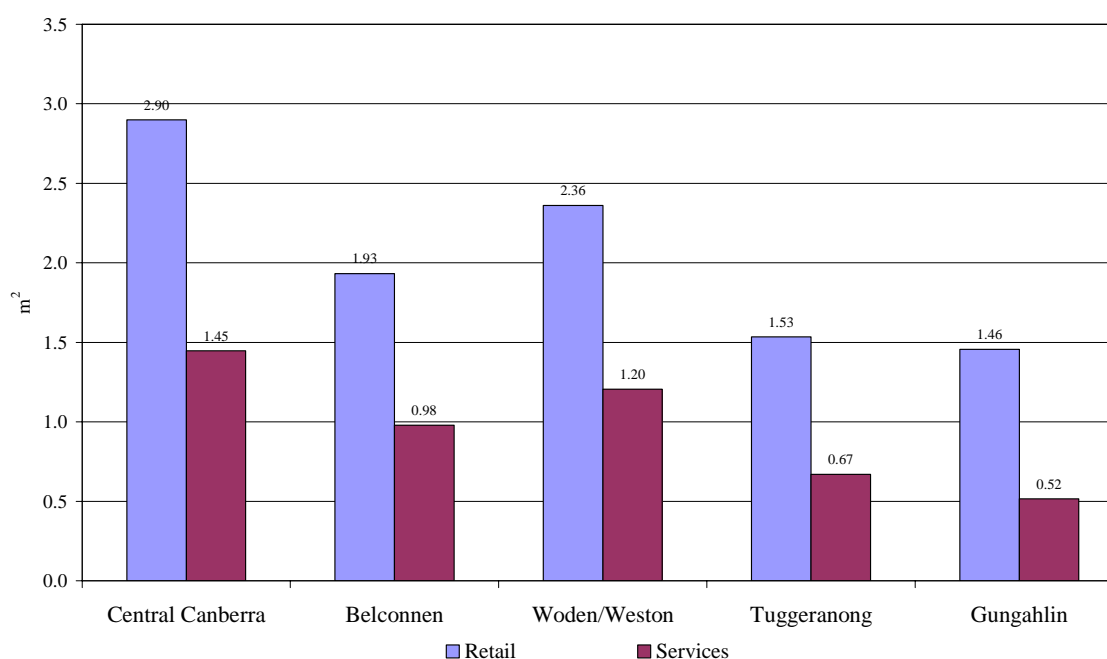


Table 13: Floorspace per Person by District and Centre Type (m²/person)

CENTRAL CANBERRA					
	Town	Group	Local	Other*	Total
Retail	1.36	0.49	0.19	0.05	2.10
Services	0.85	0.97	0.37	0.06	2.25
Other	0.21	0.13	0.04	0.00	0.38
Vacant	0.40	0.15	0.04	0.02	0.61
TOTAL	2.83	1.75	0.64	0.13	5.34
BELCONNEN					
Retail	1.15	0.29	0.12	0.01	1.56
Services	0.81	0.40	0.10	0.03	1.35
Other	0.13	0.03	0.03	0.00	0.18
Vacant	0.66	0.05	0.05	0.00	0.75
TOTAL	2.75	0.77	0.29	0.04	3.84
WODEN/WESTON					
Retail	1.48	0.33	0.15		1.97
Services	0.78	0.67	0.14		1.60
Other	0.05	0.05	0.03		0.14
Vacant	1.20	0.13	0.05		1.39
TOTAL	3.52	1.20	0.37		5.09
TUGGERANONG					
Retail	0.95	0.30	0.06	0.00	1.31
Services	0.58	0.24	0.05	0.02	0.89
Other	0.07	0.02	0.02	0.00	0.12
Vacant	0.34	0.07	0.00	0.12	0.53
TOTAL	1.95	0.64	0.13	0.14	2.85
GUNGAHLIN					
Retail	0.99		0.09	0.08	1.16
Services	0.42		0.07	0.32	0.81
Other	0.07		0.01	0.01	0.09
Vacant	0.03		0.06	0.01	0.10
TOTAL	1.51		0.23	0.42	2.16

*ANU, University of Canberra, Kambah (Jenke Circt), Gold Creek, Oaks Estate, Yerrabi Waterfront and Airport (Brand Depot) are grouped as 'Other'.

Table 13 shows floorspace per person for each main category of floorspace use. Retail and Services floorspace per person is significant in planning terms. Vacant and Other floorspace is also included. It should be noted that not all floorspace in Town Centres is included in this inventory and the Other category includes some community facilities etc. located in the areas surveyed.

Change in Floorspace in Commercial Centres, July 2005 to July 2007

Between July 2005 and July 2007, there was a growth of about 137,200m² of floorspace in Commercial Centres. The largest growth was in Retail floorspace with an increase of about 72,400m². **Figure 10** Shows changes in floorspace by main category.

Figure 10: Changes in Floorspace by Main Category, July 2005 to July 2007

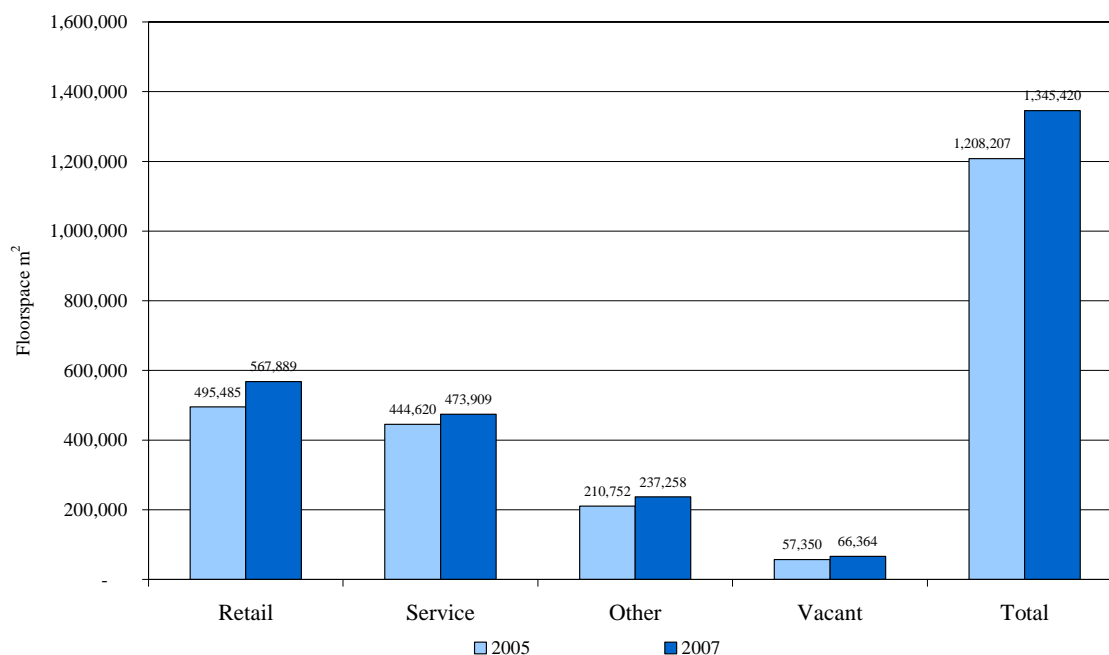
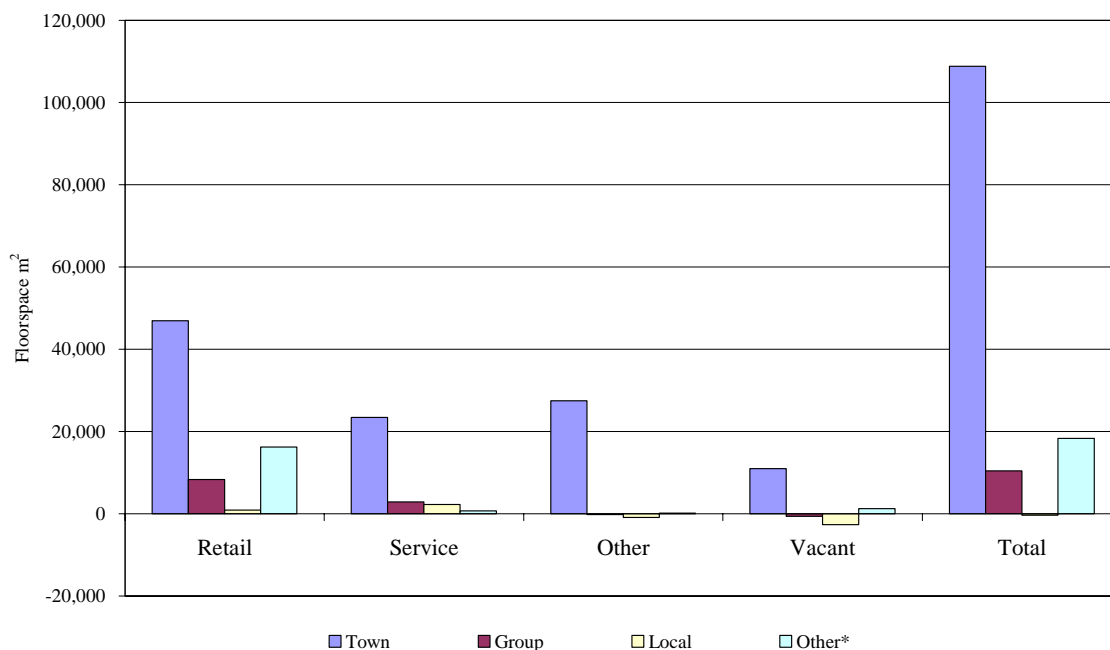


Figure 11 summarises the changes in floorspace by main category and centre type and shows that between July 2005 and July 2007 Retail floorspace increased mainly in Town Centres.

Figure 11: Changes in Floorspace by Main Category and Centre Type, July 2005 to July 2007



*ANU, University of Canberra, Kambah (Jenke Cirt), Gold Creek, Oaks Estate, Yerrabi Waterfront and Airport (Brand Depot) are grouped as 'Other'.

Table 14: Comparison of Floorspace by District and Main Category between July 2005 and July 2007

District	Retail (m ²)		Services (m ²)		Other (m ²)		Vacant (m ²)	
	July 2005	July 2007	July 2005	July 2007	July 2005	July 2007	July 2005	July 2007
Central Canberra	129,941	147,639	150,904	158,372	45,672	43,257	22,502	26,892
Belconnen	122,184	137,563	113,565	118,525	66,404	66,146	13,096	15,940
Woden/Weston	110,517	110,284	84,083	89,770	55,457	77,742	11,667	7,866
Tuggeranong	113,569	114,749	75,736	77,966	39,282	46,594	7,869	10,278
Gungahlin	19,274	41,807	20,332	29,191	3,937	3,519	2,216	3,315
CANBERRA	495,485	552,042	444,620	473,824	210,752	237,258	57,350	64,291

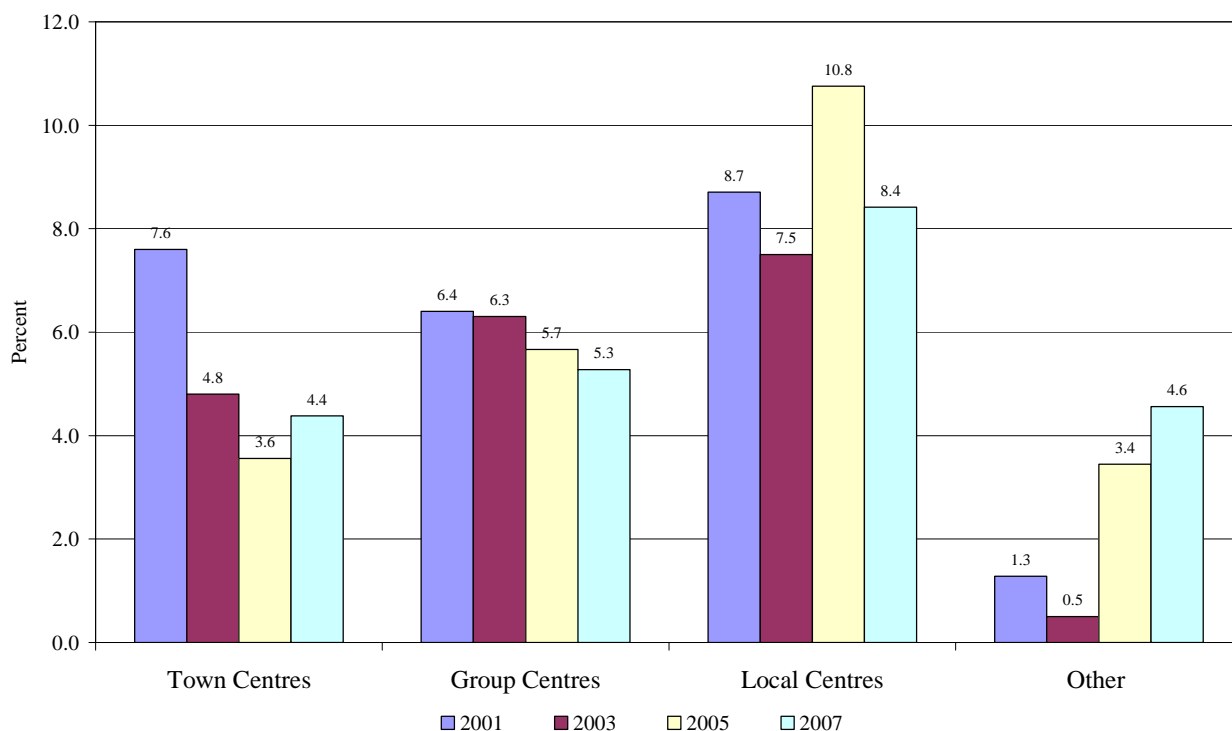
District	Commercial Centres Floorspace (m ²)		Difference 2005-2007	% of Total Growth 2005-2007	% of Change in a District 2005-2007
	July 2005	July 2007			
Central Canberra	349,019	376,160	27,141	22.8	7.8
Belconnen	315,249	338,174	22,925	19.2	7.3
Woden/Weston	261,724	285,662	23,938	20.1	9.1
Tuggeranong	236,456	249,587	13,131	11.0	5.6
Gungahlin	45,759	77,832	32,073	26.9	70.1
CANBERRA	1,208,207	1,327,415	119,208	100.0	9.9

The distribution of growth in floorspace by district shows that Gungahlin accounted for 70% of the total growth, while Woden/Weston accounted for 9%.

Vacancy Rates in Commercial Centres 2001, 2003, 2005 & 2007

Vacant floorspace in Commercial Centres increased by approximately 9,000m² between July 2005 and July 2007. **Figure 12** shows that there was a decrease in the percentage of Vacant floorspace in Group and Local Centres and an increase in Town and ‘Other’ Centres.

Figure 12: Vacancy Rates in Commercial Centres 2001, 2003, 2005 & 2007



INDUSTRIAL AREAS

Distribution and Use of Floorspace in Industrial Areas

Of the 2,749,897m² total floorspace in Canberra 1,404,477m² was located in the Industrial Areas of Fyshwick (879,103m²), Mitchell (287,069m²) and Hume (238,305m²).

Figure 13: Floorspace in Industrial Areas by Main Category

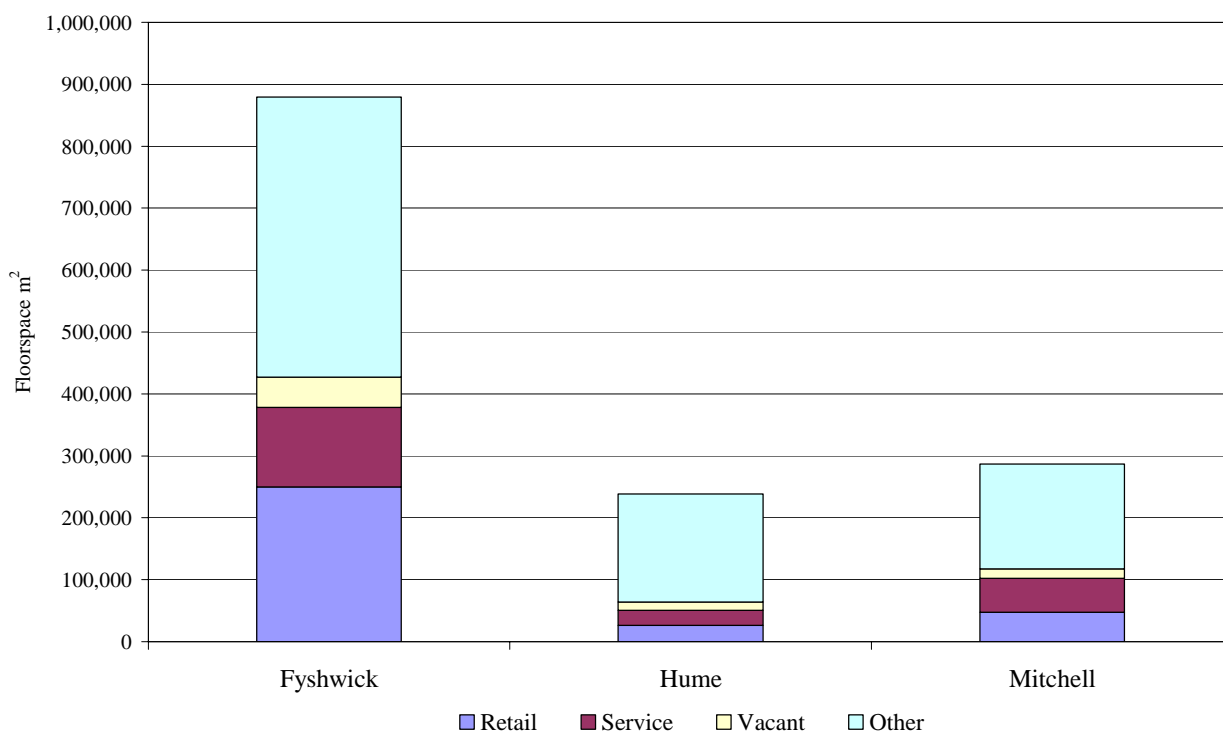


Table 15: Floorspace and Premises by Suburb and Main Category in Industrial Areas

	Fyshwick		Hume		Mitchell		Total	
	(m ²)	No. of Premises	(m ²)	No. of Premises	(m ²)	No. of Premises	(m ²)	No. of Premises
Retail	249,666	417	26,214	23	47,216	88	323,096	528
Service	128,698	257	24,177	27	54,903	95	207,778	379
Other	451,621	605	174,090	152	169,598	223	795,309	980
Vacant	49,118	134	13,824	16	15,352	48	78,294	198
Total	879,103	1,413	238,305	218	287,069	454	1,404,477	2,085

See Appendix 2 for floorspace sub-categories.

Fyshwick had the largest floorspace in all categories with 32% of total Canberra Retail floorspace (28% of Fyshwick's total space). The proportional and absolute amount of Retail and Services floorspace in Mitchell and Hume was relatively low compared with Fyshwick. Almost 68% of total premises in Industrial Areas were located in Fyshwick.

Vacancy Rate in Industrial Areas

Hume had the highest vacancy rate of 5.8%, followed by Fyshwick at 5.6% and Mitchell at 5.3%. Although there was a total of 198 Vacant premises in Industrial Areas, only 14 of these had a floorspace larger than 1,000m², of which 7 were in Fyshwick. Only 2 vacant premises had a floorspace greater than 3,000m².

Change in Floorspace in Industrial Areas, July 2005 to July 2007

Floorspace growth in Industrial Areas between July 2005 to July 2007 was about 34,000m². Over 50% of this growth was in Fyshwick.

Use of floorspace also changed in this period. Services in Fyshwick increased by 10,500m² and Other increased by about 7,200m². Vacant decreased by 6,400m² and Retail increased by 6,200m². In Mitchell, Other increased by 8,500m², Vacant by 1,800m² and Services by 1,200m². Retail decreased by approximately 1,500m². Hume had an increase of 13,000m² in Other and 1,200m² in Retail. Vacant floorspace in Hume decreased by about 4,300 m² and Services by 3,800 m².

Figure 14: Change in Floorspace in Industrial Areas, July 2005 to July 2007

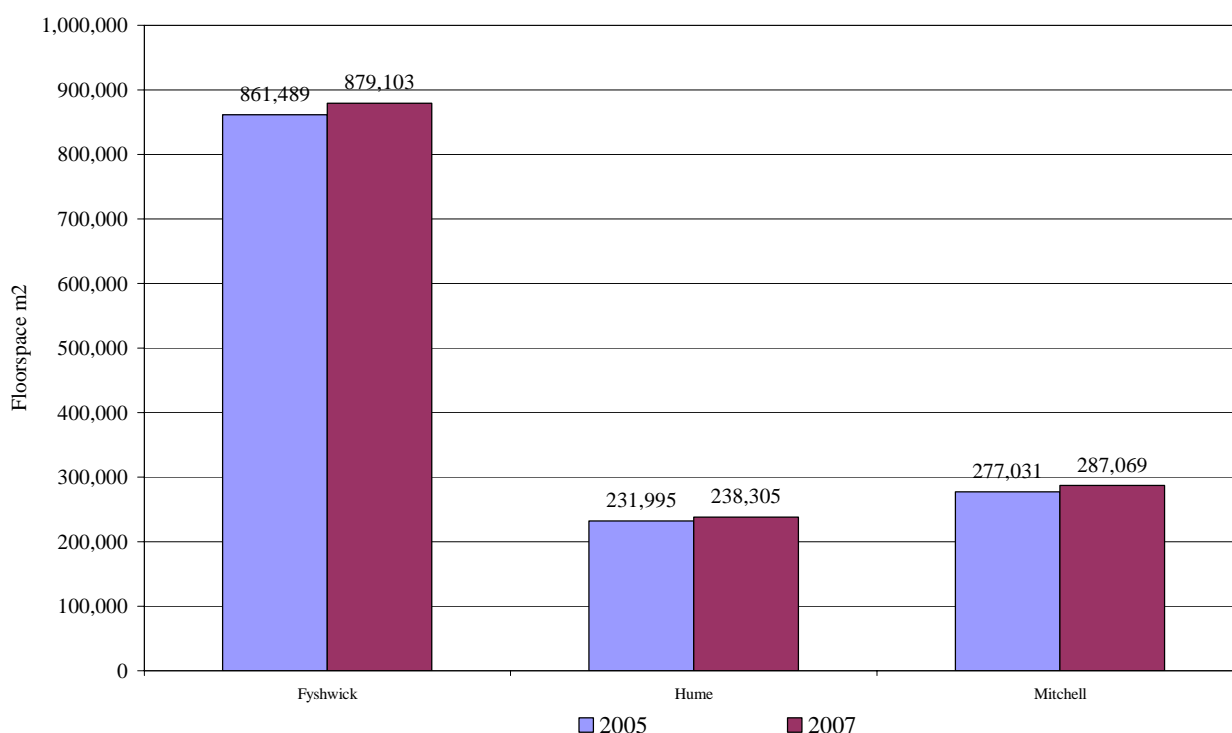


Table 16: Change in Floorspace in Industrial Areas, July 2005 to July 2007

	2005 (m²)	2007 (m²)	Difference (m²)	Difference (%)
Retail Floorspace				
Fyshwick	243,454	249,666	6,212	2.5
Mitchell	48,705	47,216	-1,489	-3.2
Hume	25,049	26,214	1,165	4.4
Total	317,208	323,096	5,888	1.8
Services Floorspace				
Fyshwick	118,133	128,698	10,565	8.2
Mitchell	53,709	54,903	1,194	2.2
Hume	27,944	24,177	-3,767	-15.6
Total	199,786	207,778	7,992	3.8
Vacant Floorspace				
Fyshwick	55,522	49,118	-6,404	-13.0
Mitchell	13,542	15,352	1,810	11.8
Hume	18,108	13,824	-4,284	-31.0
Total	87,172	78,294	-8,878	-11.3
Other Floorspace				
Fyshwick	444,380	451,621	7,241	1.6
Mitchell	161,075	169,598	8,523	5.0
Hume	160,894	174,090	13,196	7.6
Total	766,349	795,309	28,960	3.6
Total all Industrial Areas	1,370,515	1,404,477	33,962	2.4

APPENDIX 1

Methodology

Data for the inventory was collected by field observations. Floorspace data was obtained from field measurement, building plans and advice from shopping centre management. Figures are indicative of functions and floorspace at individual centres, and it is expected that there will be some minor discrepancies. The following sections describe the retail functions used in classifying premises.

Scope of Survey

The floorspace of a business is the gross leasable area (GLA) expressed in square metres and therefore excludes lifts, stairs, walkways etc.

The boundary definitions for the Town, Group and Local Centres and for Fyshwick, Mitchell and Hume comply with the Territory Plan ‘commercial policy’ and ‘industrial policy’ areas.

The survey covered the following:

- All floorspace in shopping malls,
- Ground level Retail and Services floorspace in the core of Town Centres (outside shopping malls),
- All floorspace in Service Trades Areas (Mixed Services Precinct ‘C’) of the Town Centres,
- All floorspace in Group and Local Centres,
- All floorspace in Industrial Areas,
- All floorspace in Gold Creek,
- All floorspace in Kambah, Jenke Circt, and
- Retail and Services floorspace in the Universities have been included since the May 1997 floorspace inventory;
- Retail and Services floorspace in Tharwa, Oaks Estate, Hall and Yerrabi Waterfront have been included since 2005;
- Floorspace at Brand Depot on airport land in Majura has been included this year.

The following were not included in the survey

- Major office buildings in Town Centres,
- Commercial ‘E’ corridors and office sites (eg. Northbourne Ave, Canberra Ave, Fernhill Technology Park),
- Upper floors in the core of Town Centres (excluding shopping malls), and
- Ground floor in the core of Town Centres (excluding shopping malls) if not Retail or Services floorspace (such as cinemas in Civic, bowling facility in Woden, etc.);
- All Mixed Use Areas.

Categories of Use

Categories of use have been derived from the Australian Bureau of Statistics Australian Standard Industry Classifications (ASIC), but have been modified to comply with the broader categories required for this inventory. The floorspace use categories are divided into four main categories:

1. **Retail** - where the sale of goods is mainly for final consumption;
2. **Services** - restaurants, financial, insurance, health and welfare, clubs;
3. **Vacant** - premises which are not occupied; and
4. **Other** - all others (eg. community, offices, industrial, petrol stations, etc).

Details are given in the following table:

Correlation of floorspace classifications and Australian Standard Industry Classifications (ASIC)

CLASSIFICATION	ASIC CLASSIFICATION.
Retail category	
1. Department & Variety	4814. Department & Variety Stores
2. Food: Supermarket	4881. Grocers, Confectioners
3. Food: Other	4882. Butchers 4883. Fruit, Vegetable Stores 4885. Bread Cake Stores 4886. Fish Shop, Take Away Food
4. Clothing & Footwear	4843. Men's Boy's Wear 4844. Women's Girl's Wear 4845. Footwear
5. Fabrics & Furniture	4847. Fabrics, Household textile 4848. Floor Coverings 4849. Furniture Stores
6. Household Appliances & Hardware Stores	4850. Household Appliances & hardware 4853. Domestic Hardware 4854. Jewellers 4855. Music Stores 4856. Household Appliance 4857. Electrical Appliance
7. Other: Retail	3342. Photographic Film Processing 4846. Shoe Repairers 4861. Auto Parts 4881. Tobacconist 4884. Liquor Stores 4891. Pharmacies 4892. Photographic equipment 4893. Sports, Toy Stores 4895. Second Hand Goods Dealers 4894. Newsagents, Stationers, Booksellers 4896. Nurserymen, Florists 4897. Retailing NEC
9. VACANT	

CLASSIFICATION	ASIC CLASSIFICATION.
Services category	
10. Banks Etc. & Insurance	614. Banking 615. Non-Bank Finance 616. Investment 623. Insurance
11. Restaurants & Cafes Clubs & Hotels	920. Cafes, Restaurants 921. Hotels & Accommodation 924. Licensed Clubs
12. Health Welfare & Education	810. Health 8151. Medicine 8152. Dentistry 8154. Optometry 8156. Community Health centres 8160. Veterinary services. 8200. Education 8250. Libraries 8300. Welfare, Religious Institutions. 8400. Other community Services 8470. Business & Labour Associations. 8491. Employment Services. 8492. Police 8494. Fire Brigades 8495. Sanitary Services.
13. Business Property & Travel	510. Travel 630. Property Services 631. Real Estate 6322. Property developers 633. Technical services undefined 637. Accounting Services 638. Data Processing, Advertising & Marketing 639. Plant Hire, Leasing
15. Other Services	4853. Engraving 4844. Tailor 4846. Shoe Repairs 4856. Key Cutting 4857. Electrical Repairs 4890. Other Retailers Undefined 590. Postal & Telecommunications 6384. Typing, copying, Mailing Services 913. Entertainment 914. Sport & Recreation 930. Personal Services 934. Laundry, dry-cleaning 935. Hairdressers 936. Other Personal Services 940. Domestic Help

CLASSIFICATION	ASIC CLASSIFICATION.
OTHER category	
20. Petrol Stations	4864. Service Stations
21. Motor: Other	4861. New Motor Vehicles 4862. Used Motor Vehicles 4865. Smash Repairs 4864. Automotive Repair 4866. Motor Cycle Dealers 4867. Boat & Caravan Dealers 4868. Tyre & Battery Retailers
22. Community Facilities	8306. Religious Institutions 9144. Sport & Recreation NEC
24. Offices: NEC	No ASIC Classification
25. Other	2642. Printing & Publishing 2500. Wood Products - Furniture 2870. Cement, Concrete Products Undefined 2872. Ready-mixed Concrete 3100. Fabricated Metal Products Undefined. 3164. Metal Coating Finishing 3600. Electricity & Gas Undefined 3700. Water, Sewerage Drainage Undefined 4110. Building Construction Undefined 4121. Road, Bridge Construction 4200. Special Trade construction 4242. Plumbing 4243. Electrical Work 4244. Heating Air-conditioning 4248. Earth moving, Dredging. 5000. Transport Storage Undefined 5700. Services to Transport Undefined

APPENDIX 2

Floorspace Use (m²) by Detailed Categories in Canberra, July 2007

Sub categories	COMMERCIAL CENTRES							INDUSTRIAL AREAS		TOTAL
	Canb North	Canb South	Belconnen	Tuggeranong	Woden/Weston	Gungahlin	Majura	Subtotal	Fysh/Hume/ Mitch	
Dept & var	41,042	0	27,284	31,272	27,495	8,905	0	135,998	20,245	156,243
Food -s'market	12,515	9,090	30,571	30,384	19,567	11,903	0	114,030	343	114,373
Food other	11,603	2,788	13,709	9,499	11,243	4,145	1,105	54,092	12,807	66,899
Clothes/shoes	18,320	3,379	7,977	6,715	7,962	2,331	9,791	56,475	6,942	63,417
Textile/furn	1,720	8,438	3,013	2,782	2,442	341	1,004	19,740	94,780	114,520
Appli/hardware	7,397	2,755	25,103	15,521	14,500	8,184	924	74,384	98,941	173,325
Other retail	22,905	5,687	29,906	18,576	27,075	5,998	3,023	113,170	89,038	202,208
Vacant	20,164	6,728	15,940	10,278	7,866	3,315	2,073	66,364	78,294	144,658
Fin/insur	9,415	4,088	5,450	3,189	7,944	1,674	0	31,760	6,386	38,146
Rest/cafes	41,795	14,752	32,371	19,410	22,171	10,610	0	141,109	4,800	145,909
Health/welf	15,282	10,372	35,035	17,477	22,344	7,642	0	108,152	63,781	171,933
Bus/prop/trav	14,099	15,211	13,396	3,782	16,551	1,923	0	64,962	69,707	134,669
Other serv	23,604	9,754	32,273	34,108	20,760	7,342	85	127,926	63,104	191,030
Petrol stations	2,354	1,015	4,855	2,811	2,188	510	0	13,733	2,512	16,245
Motor-other	10,830	210	29,642	13,969	43,376	880	0	98,907	140,761	239,668
Commun fac	1,193	0	3,658	5,484	5,916	720	0	16,971	0	16,971
Offices (nec)	19,883	1,665	2,977	5,045	3,248	0	0	32,818	66,652	99,470
Other	3,683	2,424	25,014	19,285	23,014	1,409	0	74,829	585,384	660,213
Total	277,804	98,356	338,174	249,587	285,662	77,832	18,005	1,345,420	1,404,477	2,749,897

Floorspace Use by Detailed Categories in Industrial Areas, July 2007

Sub categories	COMMERCIAL CENTRES							INDUSTRIAL AREAS		TOTAL
	Canb North	Canb South	Belconnen	Tuggeranong	Woden/Weston	Gungahlin	Majura	Subtotal	Fysh/Hume/ Mitch	
Dept & var	41,042	0	27,284	31,272	27,495	8,905	0	135,998	20,245	156,243
Food -s'market	12,515	9,090	30,571	30,384	19,567	11,903	0	114,030	343	114,373
Food other	11,603	2,788	13,709	9,499	11,243	4,145	1,105	54,092	12,807	66,899
Clothes/shoes	18,320	3,379	7,977	6,715	7,962	2,331	9,791	56,475	6,942	63,417
Textile/furn	1,720	8,438	3,013	2,782	2,442	341	1,004	19,740	94,780	114,520
Appli/hardware	7,397	2,755	25,103	15,521	14,500	8,184	924	74,384	98,941	173,325
Other retail	22,905	5,687	29,906	18,576	27,075	5,998	3,023	113,170	89,038	202,208
Vacant	20,164	6,728	15,940	10,278	7,866	3,315	2,073	66,364	78,294	144,658
Fin/insur	9,415	4,088	5,450	3,189	7,944	1,674	0	31,760	6,386	38,146
Rest/cafes	41,795	14,752	32,371	19,410	22,171	10,610	0	141,109	4,800	145,909
Health/welf	15,282	10,372	35,035	17,477	22,344	7,642	0	108,152	63,781	171,933
Bus/prop/trav	14,099	15,211	13,396	3,782	16,551	1,923	0	64,962	69,707	134,669
Other serv	23,604	9,754	32,273	34,108	20,760	7,342	85	127,926	63,104	191,030
Petrol stations	2,354	1,015	4,855	2,811	2,188	510	0	13,733	2,512	16,245
Motor-other	10,830	210	29,642	13,969	43,376	880	0	98,907	140,761	239,668
Commun fac	1,193	0	3,658	5,484	5,916	720	0	16,971	0	16,971
Offices (nec)	19,883	1,665	2,977	5,045	3,248	0	0	32,818	66,652	99,470
Other	3,683	2,424	25,014	19,285	23,014	1,409	0	74,829	585,384	660,213
Total	277,804	98,356	338,174	249,587	285,662	77,832	18,005	1,345,420	1,404,477	2,749,897