5. LAND USE SURVEYS AND ANALYSIS

A land use survey was undertaken of ground floor uses in the five activity centres as a basis for analysing the composition of centres in terms of:

- Tenants and type of activity;
- Shop frontage by activity type;
- Identifiable precincts (retail, entertainment, etc.); and
- Vacancy levels.

5.1 Methodology

The methodology adopted for undertaking the land use survey reflected the need for a process that may be easily replicated in the future based upon a standard land use classification and easily measurable indicators for land use. Accordingly, activities were classified according to the Australian and New Zealand Standard Industry Classification (ANZSIC) being the classification system used by the Australian Government and industry generally. While land use surveys traditionally use gross lettable floor area as a measure of land use, a decision was made to use shop frontage as an alternative measure for a number of reasons, including:

- Shop frontages are easily measured using a Geographic Information System (GIS) and commercially available digital maps of property boundaries; and
- Frontage measurements provide a more accurate indication of the function of a centre.

- Premises were classified as vacant if there was no apparent commercial activity being undertaken. Properties, that were being renovated, were classified as vacant for the purpose of this survey regardless of whether there was a lease in place.

5.2 Total Shop Frontage

The total shop frontage of all five activity centres is 10,700 linear metres, with the amount attributable to each strip, and their share of total frontage, is as follows:

- Bridge Road (3,230 metres / 30%);
- Smith Street (2,920 metres / 27%);
- Brunswick Street (2,040 metres / 19%);
- Swan Street (1,280 metres / 12%); and
- Victoria Street (1,260 metres / 12%).

In terms of total shop frontage, Bridge Road and Swan Street are the dominant activity centres within the City of Yarra. This is supported by the catchment analysis undertaken in Section 6.

Table 5: Street Frontage by Activity Centre and Retail Sector (metres)

Sector	Bridge Rd.	Brunswick St.	Smith St.	Swan St.	Victoria St.	All Centres
Business Services	372	135	306	60	149	1,022
Cafes, Restaurants & Bars	443	566	454	238	266	1,967
Clothing & Footwear	824	391	508	216	46	1,985
Food Retailing	151	157	238	112	169	827
General Retail	848	349	615	253	248	2,313
Other	309	196	407	171	186	1,268
Personal Services	133	94	253	79	87	646
Vacant	149	151	135	150	108	692
Total	3,228	2,039	2,916	1,279	1,258	10,720

Table 6: Distribution of Street Frontage by Activity Centre

Sector	Bridge Rd.	Brunswick St.	Smith St.	Swan St.	Victoria St.	All Centres
Business Services	36%	13%	30%	6%	15%	100%
Cafes, Restaurants & Bars	23%	29%	23%	12%	14%	100%
Clothing & Footwear	41%	20%	26%	11%	2%	100%
Food Retailing	18%	19%	29%	14%	20%	100%
General Retail	37%	15%	27%	11%	11%	100%
Other	24%	15%	32%	13%	15%	100%
Personal Services	21%	15%	39%	12%	13%	100%
Vacant	22%	22%	19%	22%	16%	100%
Total	30%	19%	27%	12%	12%	100%

Table 7: Distribution of Street Frontage by Retail Sector

Sector	Bridge Rd.	Brunswick St.	Smith St.	Swan St.	Victoria St.	All Centres
Business Services	12%	7%	10%	5%	12%	10%
Cafes, Restaurants & Bars	14%	28%	16%	19%	21%	18%
Clothing & Footwear	26%	19%	17%	17%	4%	19%
Food Retailing	5%	8%	8%	9%	13%	8%
General Retail	26%	17%	21%	20%	20%	22%
Other	10%	10%	14%	13%	15%	12%
Personal Services	4%	5%	9%	6%	7%	6%
Vacant	5%	7%	5%	12%	9%	6%
Total	100%	100%	100%	100%	100%	100%

5.3 Tenancy Mix and Precincts

The tenancy mix of a centre, together with its overall size, is a major determinant of its role in the retail hierarchy and opportunities for the promotion of niche retail precincts, which increase its attraction to visitors particularly from outside the local area. Each of the activity centres has been reviewed in terms of their tenancy mix and level of precinct development.

5.3.1 Brunswick Street

Brunswick Street is dominated by cafes, restaurants and bars which account for 28% of total shop frontage (refer Table 7) followed by clothing and footwear (19%) and general retailing (17%). The centre also dominates in the provision of cafes, restaurants and bars across the municipality, accounting for 29% of total frontage across the five strips. This is well ahead of Smith Street and Bridge Road, each of which account for 23%of total street frontage.

Brunswick Street does not dominate in any other areas, and has a lower than average share of business and personal services, and general retailing. This centre is however well complemented by its proximity to Smith Street with a much higher provision of services and general retailing.

The obvious strength of Brunswick Street is as an entertainment precinct, as evidenced by its tenancy mix, and its strong appeal to non-local visitors (51% of survey respondents) of which over 70% visited either a café, restaurant or entertainment venue.

5.3.2 Smith Street

This centre offers a more diversified mix of tenants compared to Brunswick Street with no dominant activities. The share of total shop frontage held by each form of activity is consistent with that recorded across all five centres. This centre does however hold a dominant role in the provision of:

- Business services (30% of all centres frontage);
- Clothing and footwear (26%);
- General retailing (27%); and
- Personal services (39%).

The dominance of Smith Street in clothing and footwear and general retailing has supported the appeal of this centre to non-local visitors who accounted for 46% of respondents, with 53% of this group visiting the centre to undertake non-food shopping. The development of a strong factory outlet precinct at the northern end of Smith Street reflects the role of this centre.

5.3.3 Victoria Street

Victoria Street is the smallest centre in terms of total shop frontage, but has the second highest incidence of cafes, restaurants and bars after Brunswick Street. Similarly, it has an above average provision of food retailing outlets. The development of this centre as a strong Asian food precinct has been reflected not only in the land use mix, but also shopping patterns of visitors. Over 70% of local residents visiting the centre indicated that they had come to purchase groceries, compared to between 20% and 55% in the remaining four centres. Furthermore, 63% of non-local visitors indicated that they had come to do grocery shopping, which is significantly greater than the next highest centre being Swan Street with only 20% of non-local visitors undertaking grocery shopping.

The positioning of this centre as a food precinct is expected to be further enhanced by the future entry of an Aldi supermarket into the centre. The budget orientation of this new supermarket will complement many of the existing food retailers to extend and strengthen this centre's catchment.

5.3.4 Bridge Road

While Bridge Road accounts for 30% of total frontage across the five centres, it accounts for an even higher proportion of business services (36%), clothing and footwear (41%) and general retail (37%). As indicated in the catchment analysis undertaken in Section 6, the catchment for this centre encroaches upon that of both Swan and Victoria Streets, reflecting the role of this centre in providing higher-order goods and services.

Bridge Road has established itself as a strong clothing precinct between Hoddle Street and Church Street, as a restaurant precinct east of Church Street (on the southern side only), and as a homewares precinct beyond this towards the Yarra River. The further consolidation of similar activities into these precincts will continue to strengthen its appeal to visitors. Survey results indicate that Bridge Road has the greatest exposure to non-local visitors whom accounted for 56% of respondents. Non food retailing was the main activity visited (69% of respondents) followed by cafes (41%).

5.3.5 Swan Street

Swan Street has a relatively balanced mix of activities, which is consistent with that of all five centres together. The centre may be divided into a number of identifiable precincts being:

- Core retail precinct between Richmond railway station and Church Street;
- Former Greek restaurant precinct immediately to the east of Church Street; and
- Homewares / builders supplies precinct east of Coppin Street.

5.4 Vacancy Rates

For the purpose of this Study it has been assumed that a shop is vacant if there is no activity being undertaken on the premises. Based on this definition, any premises that are under refurbishment are classified as vacant regardless of whether there is a lease in place. In addition, vacancy rates have been calculated for all premises surveyed which includes both the core and fringe components of a centre.

The vacancy rates for each of the centres have been calculated as follows:

- Brunswick Street- 7.2%
- Smith Street 4.6%
- Victoria Street 9.0%
- Bridge Road 4.7%, and
- Swan Street 11.2%