



Department of Planning,
Lands and Heritage



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Western Australia.*



Land Use and Employment Survey 2019

Lower Great Southern

January 2020

Table of Contents

Summary	3
1. Introduction	3
1.1 Study Area - The Lower Great Southern Region	4
1.2 Local government profiles	6
City of Albany	6
Shire of Cranbrook	6
Shire of Denmark	6
Shire of Plantagenet	6
2. Summary of Change (City of Albany)	7
3. Lower Great Southern Region Land Use and Employment	8
3.1 Floor Space	8
3.2 Land Uses	9
3.3 Employment	11
Appendices	
Appendix A – Planning Land Use Category (PLUC)	13
List of figures	
Figure 1: Figure 1: Lower Great Southern Region area	6
Figure 2: Occupancy and vacancy rates per local government	8
Figure 3: Occupancy and vacancy rates comparison in Albany	8
Figure 4: Comparison of land use floor space in the City of Albany by category	9
Figure 5: Land use in the City of Albany, Shire of Cranbrook, Denmark and Plantagenet	10
Figure 6: Number of employees in the Lower Great Southern by land use	11
Figure 7: Percentage of employment and land use comparison	12
List of tables	
Table 1: Lower Great Southern Region Local Governments	4

Summary

This report provides a summary of the 2019 Land Use and Employment Survey conducted by the Department of Planning, Lands and Heritage (the department) for the Lower Great Southern region (City of Albany, Shires of Denmark, Cranbrook and Plantagenet).

The Land Use and Employment Survey is a survey of all commercial, industrial, public purpose and recreation zoned land. In regional areas the survey targets townsites, and does not include the surrounding agricultural land. It focuses on the number and type of establishments, the floorspace occupied within a building and the number of employed persons. These three main variables are coded according to the Western Australian Standard Land Use Classification (WASLUC) codes and Planning Land Use Categories (PLUC). Information garnered from this analysis serves to identify significant patterns, themes and emerging trends occurring in the Lower Great Southern region. Comparisons will only be made between the City of Albany 1998 and 2003 surveys. No previous surveys have been conducted in the Shires of Denmark, Cranbrook and Plantagenet.

Key statistics

- 4,312 activities were captured within the Lower Great Southern region. Of these activities, the City of Albany had the majority with 3,255.
- The population within the City of Albany has increased from 29,379 persons in 2001 to 37,826 persons in 2019. This accounts for a total population growth of 29 per cent over the past 18 years. This corresponds with an increase in floor space in the City from 544,210m² to 720,448m² between 1998 and 2003 (32 per cent increase) and a further 50 per cent increase from 720,448m² in 2003 to 1,082,811m² in 2019.
- Storage and Distribution services occupy the largest amount of floorspace (238,227m²), while Office/Business land uses have the highest number of employees with 4,188. (28 per cent)
- 83 per cent of total employment in the region is within the City of Albany.

1 Introduction

This report presents an overview of trends occurring in the study area through consideration of floorspace, employment and land use within the existing townsites. The information underpinning this study is from the 2019 Land use and Employment Survey (LUES).

The LUES collects key information relating to land use and employment, including the type of activities conducted, the floorspace occupied and the number of persons employed by businesses in the study area. The information collected by the survey is critical in employment forecasting and transport modelling. The data is also widely used by internal and external stakeholders such as local governments, state government agencies, academic institutions and property and planning consultants.

The last major analysis of land use in the area was completed in Albany in 1998 and 2003. There is no previous data for the Shires of Denmark, Plantagenet and Cranbrook. Due to this, comparative analysis will only be carried out on the City of Albany data.

1.1 Study area – the Lower Great Southern Region

The study area for this report is the Lower Great Southern region and includes four local government areas. All commercial, industrial, public purpose and recreational zoned land within the major townsites has been surveyed. The data collected has been grouped by the local government areas listed below;

- City of Albany
- Shire of Cranbrook
- Shire of Denmark
- Shire of Plantagenet

The Lower Great Southern region is located on the southern coast of Western Australia and has a diverse economy including tourism, agriculture, construction, health care and education which contributes to the uniqueness of the region. Primary production is a large contributor to the region's economy, this includes broadacre farming through cropping and livestock, as well as viticulture. The Lower Great Southern boasts a range of natural attractions, including its coastline and national parks, which attract both local and international visitors and contribute to its vibrant tourism industry.

Table 1: Lower Great Southern Region Local Governments

Local government	Land area (km ²)	Estimated Residential Population (2018)
City of Albany	4310.9	37,826
Shire of Cranbrook	3276	1,077
Shire of Denmark	1859.8	6,154
Shire of Plantagenet	4876.7	5,249
Total	14,323.4	50,306

1.2 Local government profiles

City of Albany:

The City of Albany is situated along the southern coast, to the east of the Shire of Denmark, and has the highest population of all the local governments within the region (Table 1). Albany is the regional centre within the Shire, however has smaller satellite towns (villages) such as Wellstead and Manypeaks. Albany is the largest city within the region, providing a range of medical, educational, communication and commercial services. Major industry within the City includes agriculture and tourism, with the port in Albany exporting the majority of grain produced within the Lower Great Southern region.

Shire of Cranbrook:

The Shire of Cranbrook is north of the Shire of Plantagenet and has been described as the "Gateway to the Stirling Ranges", due to its proximity to the mountain range. Broadacre farming characterised by livestock, cropping and viticulture is the primary contributor to the Shire's economy. The town of Cranbrook is home to much of the population and to the largest grain storage facility in the area. The communities of Frankland River and Tenterden are also key towns within the Shire.

Shire of Denmark:

The Shire of Denmark lies to the west of the Shire of Albany and stretches along the southern coast. The town of Denmark is the sub-regional centre, with the smaller coastal villages of Peaceful Bay and Nornalup situated nearby. The Shire of Denmark's primary industry is agriculture characterised by viticulture, livestock and dairy farming. The Shire it is also a popular tourist destination due to its scenic coastline and national parks, which make up 80 per cent of the area of the Shire.

Shire of Plantagenet:

The Shire of Plantagenet is surrounded by all three regions and is the largest Shire within the Lower Great Southern (Figure and Table 1). The Shire consists of the sub-regional centre of Mount Barker, as well as the villages of Kendenup, Narrikup, Rocky Gully and Porongurup. The Shire is primarily agricultural, with both livestock and viticulture being the predominant industries in the area.



Figure 1: Lower Great Southern Region

The previous LUES was conducted 16 years ago (2003) and included only the City of Albany. However, because the City of Albany constitutes the largest proportion of the region's activity, comparisons and changes will likely be similar if previous surveys were conducted in the other local government areas. Since the last survey, Western Australia has undergone many changes regarding the economy. Within the City of Albany, the economy has diversified from a primarily storage/distribution driven economy (storage of grain and export from the port) in 1998 and 2003, to a more widely diversified economy, with a particularly large increase in Health/Welfare/Community Service.

- Vacancy rates have decreased from 11 per cent in 1998 and 2003 to four per cent in 2019.
- The storage and distribution land use category occupied the highest proportion of floor space in 1998 and 2003 (24 per cent and 23 per cent respectively). This has decreased to 17 per cent in 2019, however still occupies the highest proportion of total floor space.
- The Health/welfare and community service land use category currently occupies 16 per cent of floor space within the City of Albany, making it the land use category with the second highest proportion of total floor space
- The amount of floorspace dedicated to the various land use categories has diversified since 1998, when storage and distribution accounted for nearly a quarter of all floorspace in the region. This contrasts with 2019, where the floorspace was more widely distributed with storage/distribution, health/welfare/community service, office/business and residential all recording more than 10 per cent of total floor space.
- The number of employees within the City of Albany increased by 28 per cent from 9,738 in 2003 to 12,487 in 2019.

3 Lower Great Southern Region Land Use and Employment

3.1 Floor Space

There is a total floorspace (net lettable area) of 1,383,788m² in the Lower Great Southern region, of which 96 per cent is occupied. The City of Albany accounts for 78 per cent of total floor space within the region. The Shires of Denmark, Plantagenet and Cranbrook account for 12, seven and four per cent of total floor space, respectively. The high level of floorspace in Albany compared to other local governments is primarily due to the City having a population approximately three times greater than the other local governments combined, resulting in higher economic activity (Table 1). The City of Albany’s floorspace has increased from 544,210m² to 720,448m² between 1998 and 2003 (32 per cent increase). Floor space then increased by 50 per cent from 720,448m² in 2003 to 1,082,811m² in 2019.

The City of Albany and Shire of Plantagenet have the highest floor space vacancy rates of four per cent, in comparison to Cranbrook and Denmark, which have vacancy rates of three and one per cent, respectively. As stated above, the larger population of Albany results in a naturally higher chance of vacancy. The higher vacancy rates in Plantagenet could be linked to a decrease in labour force by 1.2 per cent between 2011 and 2016 (ABS 2018). In 2003 Albany had a vacancy rate of 11 per cent, decreasing to four per cent in 2019 (Figure 3).

With this region being a large grain producer, 33 per cent of land use within the Shire of Cranbrook is used for storage/distribution, accounting for 16,350m². The majority of this can be attributed to one large facility owned by CBH situated in Cranbrook. Within the Shire of Plantagenet, 23 per cent of land use is comprised of health/welfare/community services, making it the third highest industry of employment in the Shire.

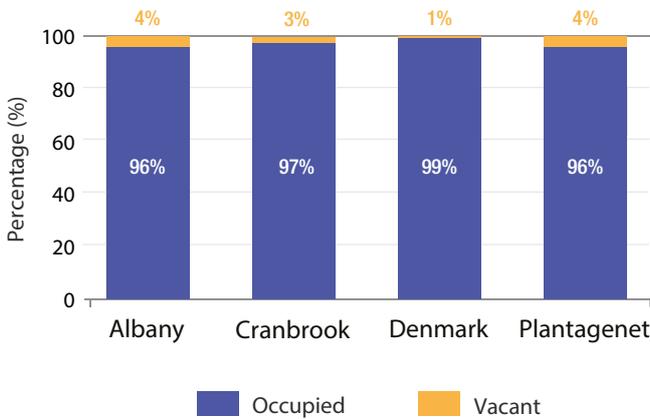


Figure 2: Occupancy and vacancy rates per local government

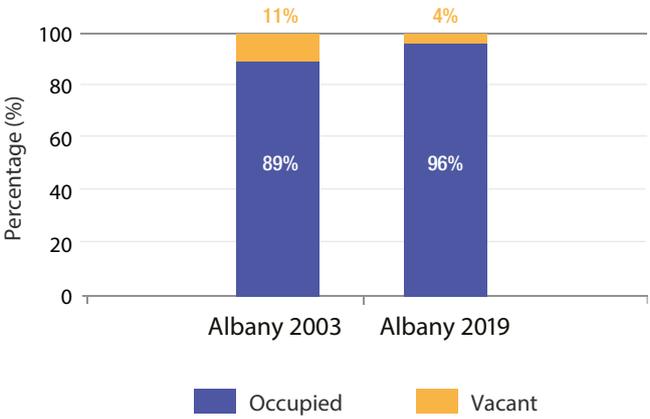


Figure 3: Occupancy and vacancy rates comparison in Albany

3.2 Land Uses

The predominant land uses in the Lower Great Southern are storage and distribution (238,227m²) and health/welfare/community services (227,767m²), or 17 per cent and 16 per cent of total land use. The proportion of storage and distribution land uses is high due to the nature of this land use being characterised by large operating facilities. Approximately 33 per cent of land use in Cranbrook (16,350m²) falls within storage/distribution category, mainly due to the CBH grain storage facility. Similarly, storage/distribution contribute to nearly 25 per cent of all floor space within Albany (206,791m²), owing to the airport and the large port facility, which mainly exports grain and woodchips. Other large storage and distribution industries within the area include wineries and general industrial companies such as grocery and hardware stores.

The large amount of floorspace dedicated to the health/welfare/community services land use category is reflected in the number of education and health facilities within the region. The City of Albany encompasses 18 primary and high schools, one University and one TAFE while the Shire of Denmark is also home to the WA College of Agriculture. Furthermore, there are multiple health care services throughout the region, mostly concentrated within the City of Albany.

Health/welfare/community service also recorded the highest proportion of total floor space for the Shire of Plantagenet (24 per cent), with all land uses recorded within the town of Mount Barker. The town is a sub-regional centre providing the basic services for the residents within the area who are unable to travel to larger municipalities, such as Albany. This contributes to most of the land uses within the town being devoted to basic services such as health, education, public safety and community facilities.

Within the region, residential land use constituted second highest proportion of total floorspace at 12 per cent. Denmark recorded 20 per cent of its land use as residential, in a large part due to the high number of camping/holiday parks for the tourism market within the area as well as the residential college boarding accommodation.

An analysis of past LUES data from the City of Albany indicates that storage and distribution has been the dominant land use since 1998, accounting for 24 per cent of all land use (132,905m²). Similarly, in 2003, storage/distribution dominated land uses, accounting for 23 per cent (167,933m²). However, data from 2019 indicates there has been a shift in the dominance of storage and distribution to a more diverse economy (Figure 4). While still dominant in 2019, storage/distribution (STO) has decreased, with entertainment/recreation/culture (ENT), health/welfare/community services (HEL), office/business (OFF), residential (RES) and utilities/communication (UTE) have increased their share of the total floorspace.

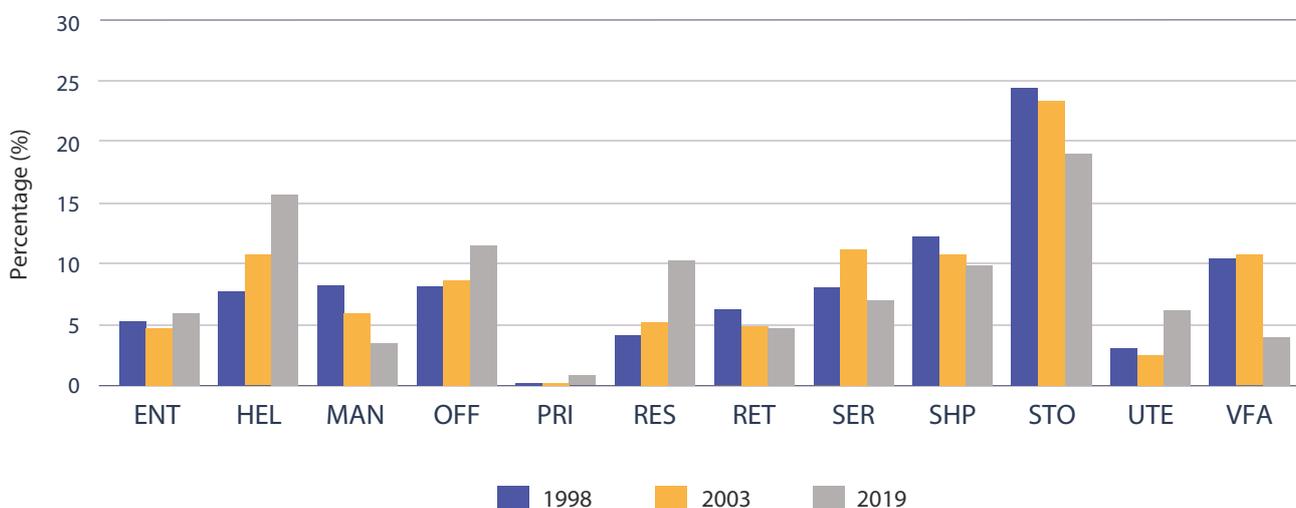


Figure 4: Comparison of land use floor space in the City of Albany by category

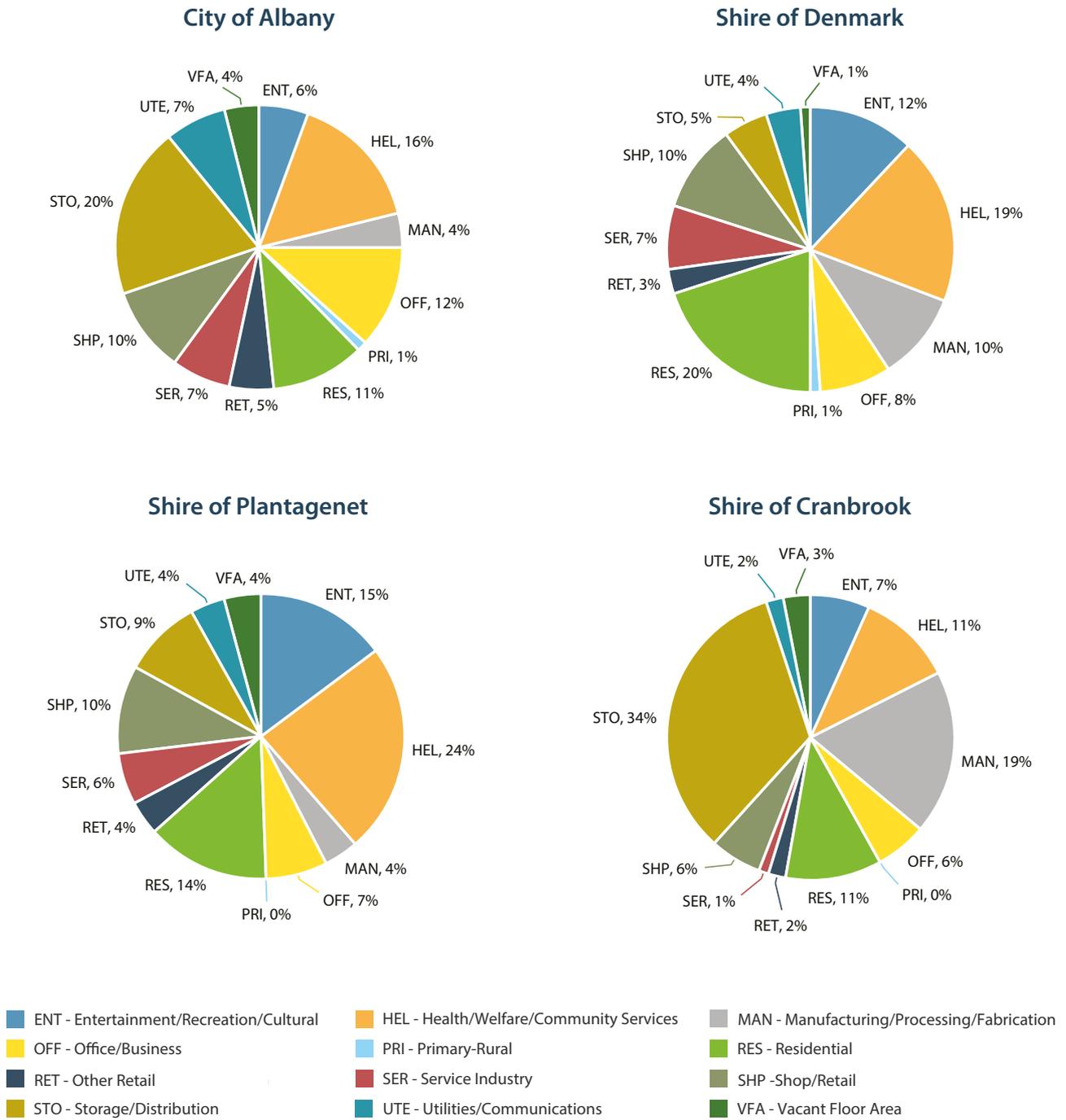


Figure 5: Land use in the City of Albany, Shire of Cranbrook, Denmark and Plantagenet

3.3 Employment

The survey recorded a total of 14,960 persons employed within the region with 54 per cent employed full time and 46 per cent part time (Figure 6). The shift to more people being employed part time can be attributed to the large number of tourism-based businesses and a general shift in employment practices within the broader economy. The City of Albany accounts for 83 per cent of the employment (12,487 persons), the Shire of Denmark for nine per cent and the Shires of Plantagenet and Cranbrook for six and one per cent, respectively. The City of Albany saw an increase of 27 per cent in employment between 1998 and 2003. There was a further 28 per cent increase from the 2003 LUES to the 2019 survey.

Office/business and shop/retail land use categories generate the greatest amount of employment (28 and 25 per cent respectively). This is likely due to the concentrated working environments of both industries, where a retail outlet or office, for example, will employ a high number of staff for a small floor area. Within the Lower Great Southern region, the City of Albany accounts for 84 per cent and 83 per cent of office/business and shop/retail employment, respectively.

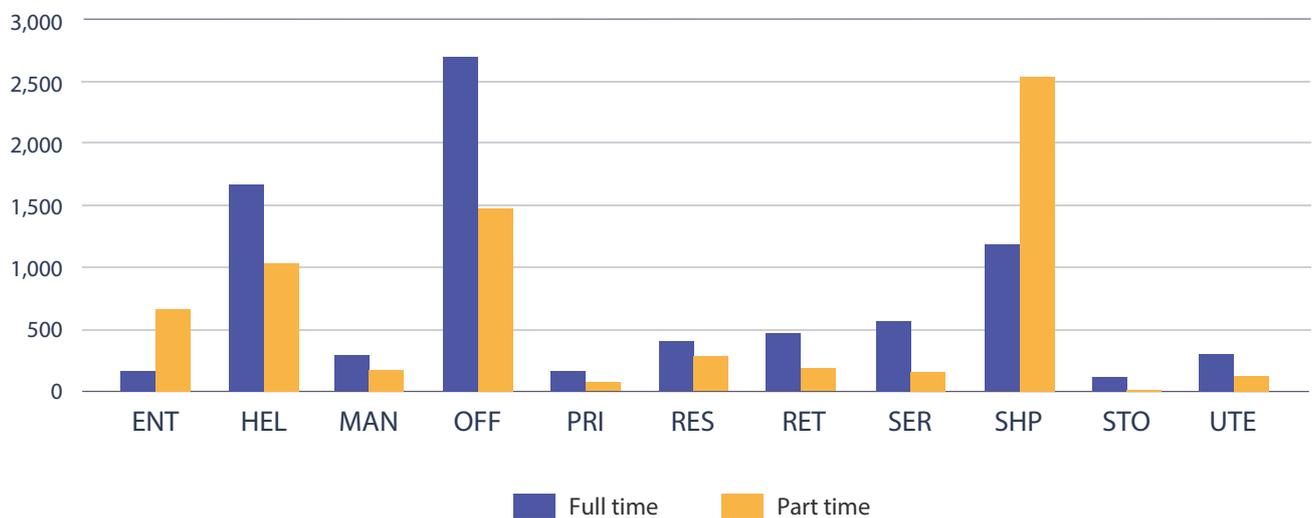


Figure 6: Number of employees in the Lower Great Southern by land use

Figure 7 highlights that the opposite is true for storage and distribution, where the proportion of total employment is far smaller than the proportion of total land use. The nature of these land uses is such that only a small number of employees are required to operate a large facility such as the port in Albany and grain storage (CBH).

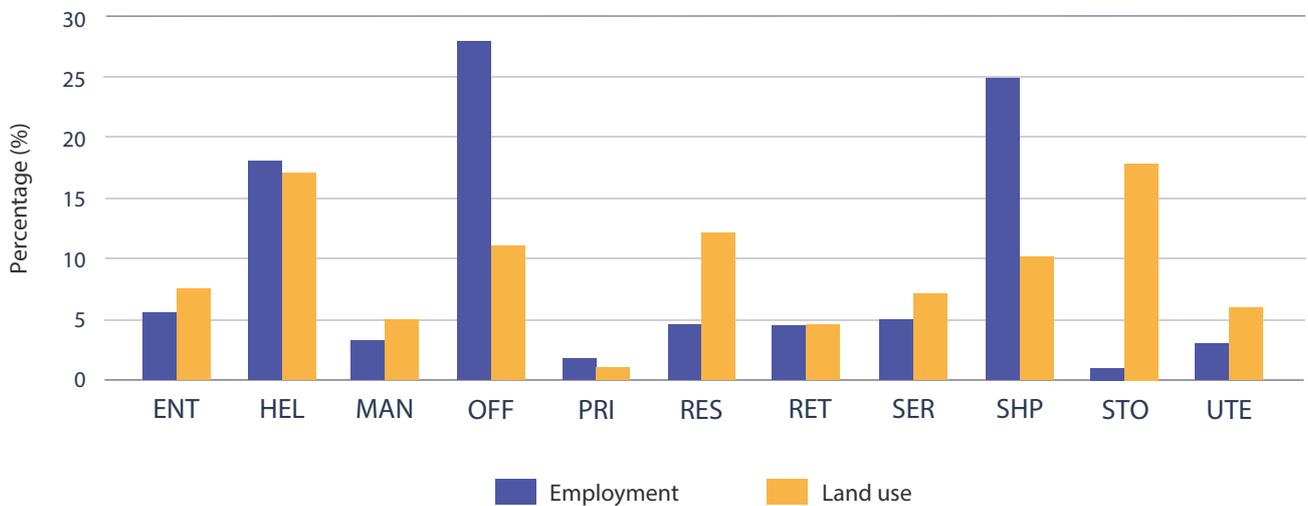


Figure 7: Percentage of employment and land use comparison

Appendices

Appendix A – Planning Land Use Category (PLUC)

PRI – Primary-Rural

Land use activities which usually involve the use of large areas of land, including mining, agriculture, fishing and nature conservation. The function of many of these activities is to make use of, or extract from, the land in its natural state. Since such activities are the first step in the production process they are quite distinct from the other categories.

MAN – Manufacturing/Processing/Fabrication

This category includes land use activities involving the manufacture, processing and fabrication of all general goods. Both the scale and associated environmental impact of these activities separate them from other land use categories.

STO – Storage/Distribution

Any land use activity which involves the storage, warehousing or wholesaling of goods usually conducted from large structures, or involving large bulk goods, but does not include activities that attract the general retail trade activities.

SER – Service Industry

This category includes service industries offering a range of services. The scale and environmental impact of such activities require their separation from other land uses. These services include film processing, cleaning, motor vehicle and other repair services, and other servicing activities, including some construction activities.

SHP – Shop/Retail

Any activity which involves the sale of goods from a shop located separate to, and/or in, a shopping centre other than those included in Other Retail.

RET – Other Retail

Many of these activities are not normally accommodated in a shopping centre. By virtue of their scale and special nature the goods of these activities separate them from the Shop/Retail category (e.g. car sales yard, carpet showroom).

OFF – Office/Business

Administrative, clerical, professional and medical offices are activities which do not necessarily require the land area/floor space or exposure of other land uses. Although offices require building and parking facilities, these needs are quite distinct from those of commercial uses and service industries.

HEL – Health/Welfare/Community Services

Includes government, government subsidised and non-government activities, which provide the community with a specific service, such as hospitals, schools, personal services and religious activities.

ENT – Entertainment/Recreation/Cultural

Activities which provide entertainment, recreation and culture for the community and which occur in buildings and/or on land, such as passive and active sports venues, museums, amusements and gambling services.

RES – Residential

Includes all types of residential land use ranging from single housing to nursing homes for the aged, residential hotels, motels, other holiday housing, institutions and religious housing.

UTE – Utilities/Communications

All forms of local, state national and international communication, transportation and other utilities (e.g. electricity, gas, water, sewerage, roads, parking and other transport or communications related activities) covering the public and private sectors.

VFA – Vacant Floor Area

This category accounts for vacant floor areas of buildings, including both non-residential and residential.

VLA – Vacant Land Area

Includes land which has not been improved by development and remains unused.