

2022/24 Perth and Peel Land Use and Employment Survey

This report summarises responses from the 2022/24 Land Use and Employment Survey for Perth and Peel. The Survey is part of an ongoing program monitoring development and employment trends in employment-generating land in Western Australia's urban centres. Information collected through the survey supports strategic land use planning, policy development/review and land use forecasting to inform infrastructure delivery.

Survey coverage includes all land zoned for commercial, industrial, public purpose or recreation purposes across the Perth and Peel metropolitan area. Information is collected for the number and type of individual establishments, floorspace usage and the workforce associated with each activity undertaken at survey sites. These three main variables are coded according to the Western Australian Standard Land Use Classification codes and Planning Land Use Codes.

1 Land use

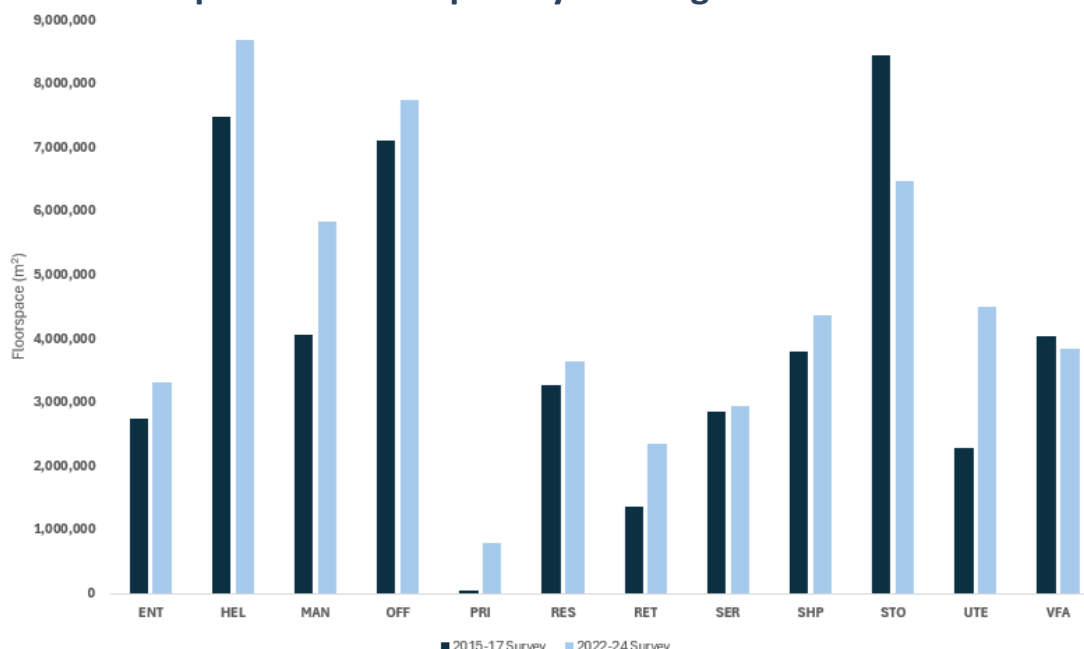
The 2022-24 survey captured a total floorspace of 54.5 million m², an increase of just over 7 million m² (15%) since the 2015/17 survey. Captured floorspace volumes increased across all land uses except Storage | Distribution (-23%) and Vacant Floor Area (-5%).

Approximately 53 per cent of the floorspace captured in the survey was located in the Central sub-region, up from 42 per cent in the 2015/17 survey. The growth in floorspace in the Central sub-region was boosted by factors such as the redevelopment of major shopping centres like Carousel and Karrinyup, and the new development at Elizabeth Quay.

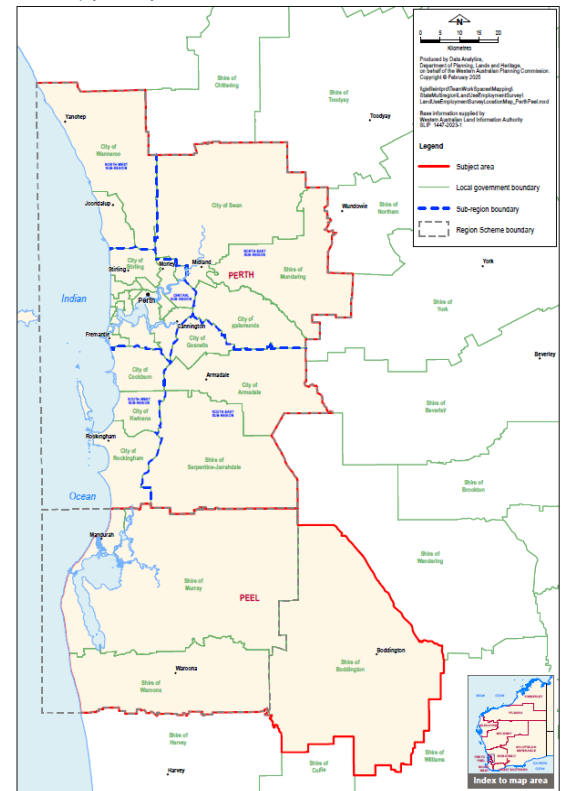
Health | Welfare | Community Services accounted for the largest share of total floorspace (8.7 million m²). High volumes of floorspace captured under this Planning Land Use Code includes schools and hospitals. More than half of the floorspace captured under these uses was located in the Central sub-region.

Land uses classified under the Office | Business Planning Land Use Code accounted for the second largest share of total floorspace (just over 7.75 million m²). The majority of Office | Business floorspace was in the Central sub-region (67%) with 25 per cent located in the Perth CBD. Hotels, short stay accommodation and parking facilities also comprise a significant proportion of the floorspace in the CBD.

Comparison of Floorspace by Planning Land Use Code



Land Use Employment Survey - Perth and Peel



Location Map

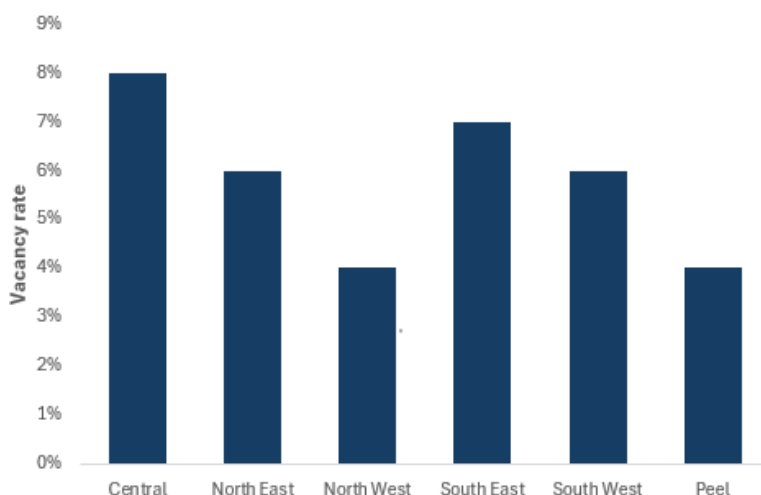
2 Vacant floorspace

Approximately 3.8 million m² of vacant floorspace was captured across Perth and Peel, representing seven per cent of total recorded floorspace. This represents a 22 per cent decrease from the 2015/17 survey.

The Central sub-region recorded the highest vacancy rate, with eight per cent (approximately 2.4 million m²) of total captured floorspace identified as vacant floor area.

The lowest vacancy rate was recorded in the Peel region, with only four per cent (just over 108,700m²). Overall, vacancy rates declined by two per cent in the Perth and Peel regions from 2015/17 to 2022/24.

Vacancy rate by sub-region



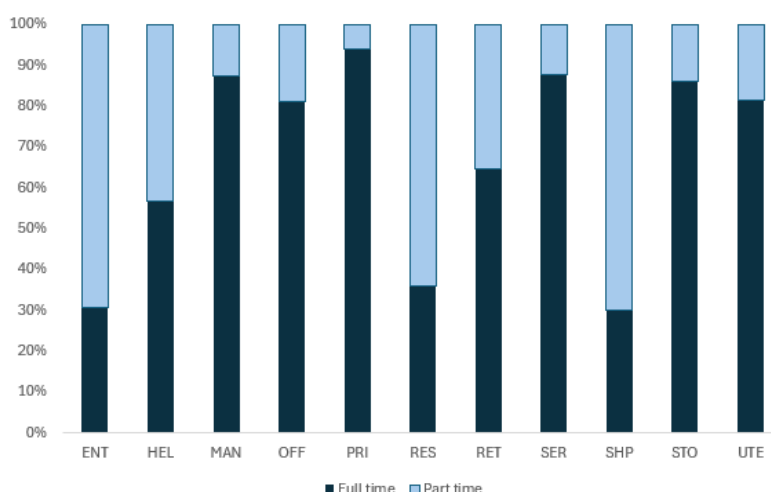
3 Employment

The 2022/24 Land Use and Employment Survey captured approximately 821,000 jobs in Perth and Peel. Around 64 per cent of jobs were classed as full time and 36 per cent as part time. The rate of part time employment was highest for workers in Entertainment | Recreation | Cultural and Shop | Retail land uses.

Industries categorised under the Office | Business Planning Land Use Code employed the largest share of workers in the Perth and Peel regions (41 per cent), followed by the Shop | Retail Planning Land Use Code, with 18 per cent of employment and Health | Welfare | Community Services (16 per cent).

Most of the employment captured was in the Central sub-region (64 per cent). Although the volume of workers based in the Central sub-region has increased since the previous survey, the sub-region's share of total employment decreased slightly from 66 to 64 per cent.

Comparison between employment type



5 Activity centres

Activity centres comprise uses such as commercial, retail, higher-density housing, entertainment, tourism, civic/ community, higher education and medical services. Activity centres vary in size and diversity and are designed to be well-served by public transport. The Perth and Peel @ 3.5million suite of Planning Frameworks provides employment estimates for strategic metropolitan activity centres at 2011 and for 2050. These estimates have been compared with data collected for the 2022/24 Land Use and Employment Survey. Development is yet to commence on the Yanchep Strategic Metropolitan Centre so no employment was captured through the survey.

Strategic Metropolitan Centres		2011 Estimated Employment	2050 Estimated Employment	2022/24 LUES
North East	Midland	6,670	17,170	10,280
North West	Joondalup	14,180	30,180	18,000
North West	Yanchep	0	8,280	0
Central	Cannington	5,140	7,180	9,340
Central	Fremantle	13,150	18,910	14,070
Central	Morley	6,170	9,130	6,390
Central	Stirling	7,950	14,340	9,060
South East	Armadale	3,060	5,210	3,760
South West	Rockingham	6,790	12,290	6,030
Peel	Mandurah	3,470	10,280	6,230

5 Employment densities

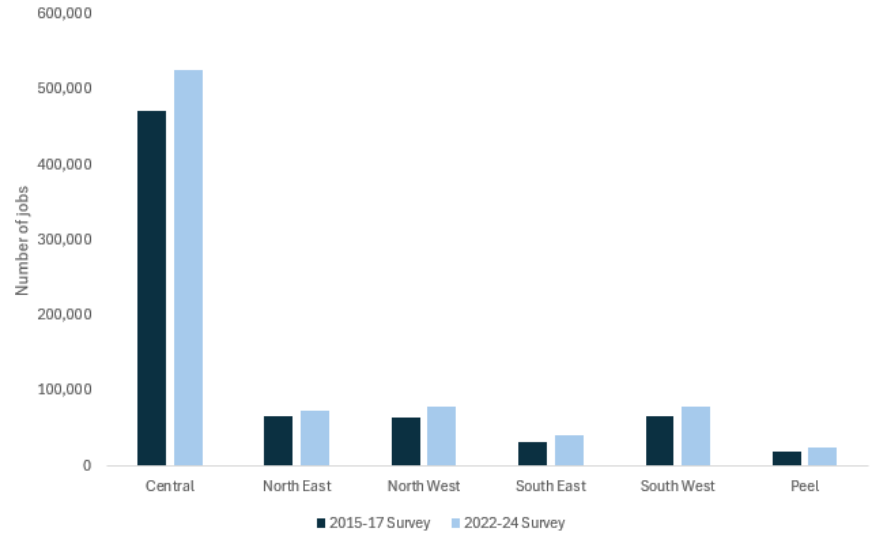
Employment density refers to the average floorspace (in m²) per employee. Floorspace per employee ratios provide Government and servicing agencies with an understanding of employment yields likely to occur based on development proposals. The overall employment density changed from 42m² per employee in 2015/17, to 55m² per employee in 2022/24. This represents a decrease in how many employees there are for the captured floorspace.

For the 2022/24 Survey, average employment densities range from 27m² per employee for Office | Business uses to 640m² for Storage | Distribution. Storage | Distribution and Manufacturing | Processing | Fabrication captured large changes in employee density, an increase of 233m² and 192m² respectively.

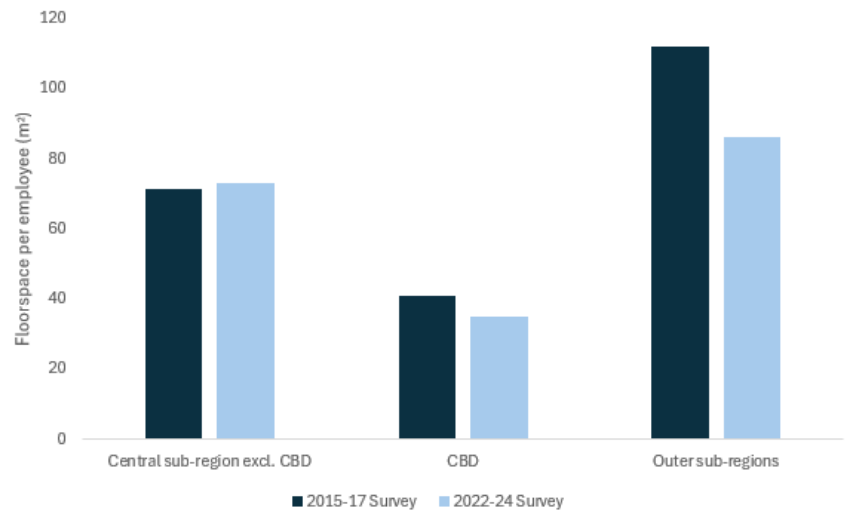
The Perth Central Business District (CBD) is the hub of employment within the Perth and Peel regions. The CBD contains nine per cent of total floorspace and 18 per cent of total employment. This represents minimal change from the 2015/17 survey, where the CBD made up 11 per cent of the floorspace and 18 per cent of the employment.

The employment density in the CBD has changed from 41m² per employee in 2015/17 to 35m² per employee in 2022/24. This is an increase in the number of employees for the floorspace captured within the CBD.

Employment comparison



Employment density comparison between Central, Outer, and CBD

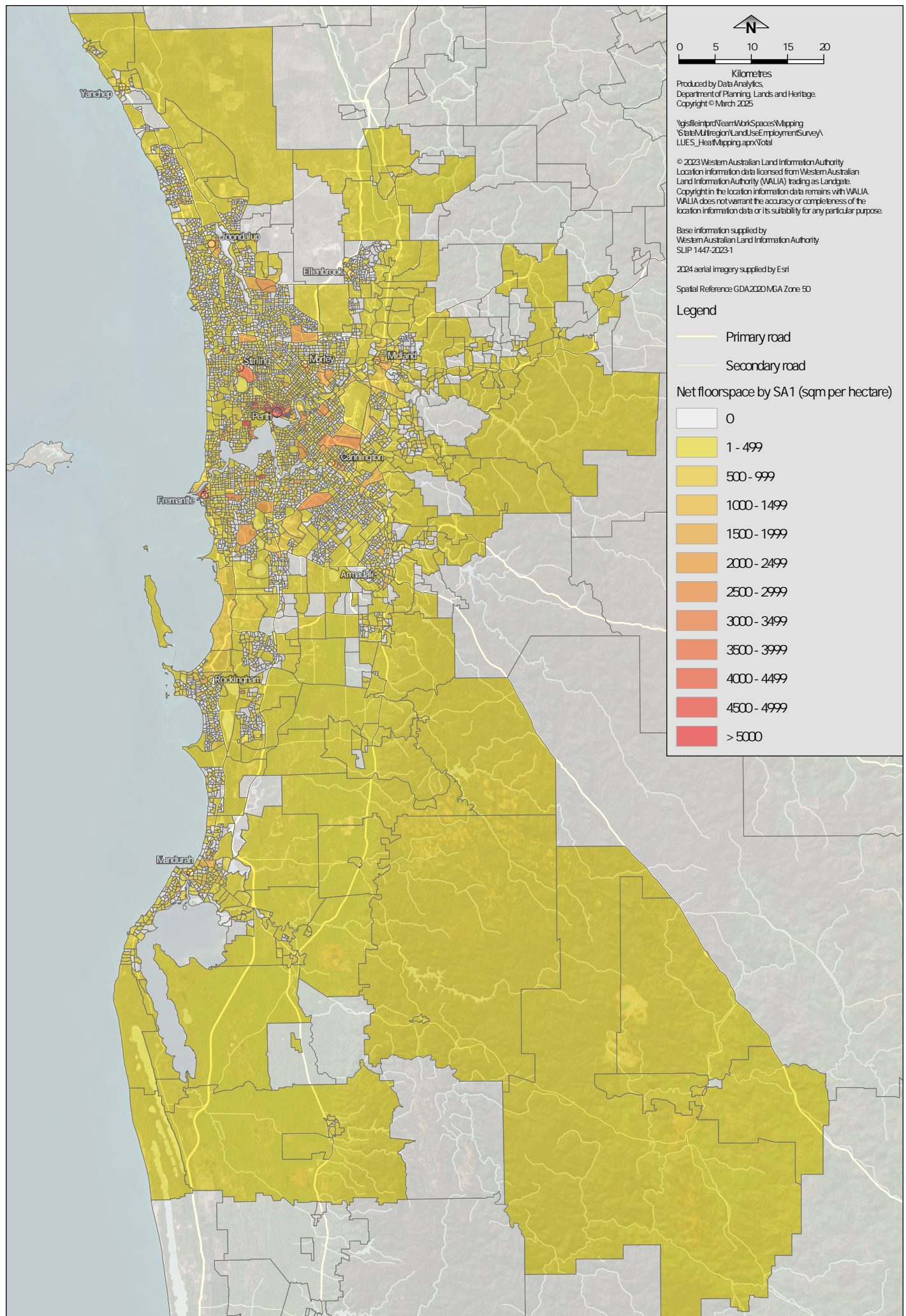


4 Floorspace per employee by land use (m²)



Sub-region	ENT	HEL	MAN	OFF	PRI	RES	RET	SER	SHP	STO	UTE
Central	72	58	135	21	33	157	77	77	26	317	245
North East	97	65	172	33	159	117	88	88	33	200	189
North West	73	74	103	23	219	112	71	80	27	357	111
South East	226	90	221	29	829	103	115	98	34	701	300
South West	212	75	271	34	396	211	137	103	36	422	232
Peel	162	86	1,317	24	1,952	438	95	136	36	1,845	430
Average	140	75	370	27	598	190	97	97	32	640	251

Land Use Employment Survey



Total employment net floorspace density