



Economic Resilience Assessment Framework

City of Rockingham

3rd of November 2021

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3. PURPOSE AND SCOPE

The purpose of this draft report is to provide the City of Rockingham (the City) an economic resilience assessment as part of FAR Lane's contribution to inform the City of Rockingham's Precinct Structure Plan (PSP) for the Rockingham Strategic Centre (RSC). This includes:

- Developing a high-level Economic Resilience Assessment Framework that considers alignment with:
 - the State Planning Policy 7.2. precinct guidelines.
 - the City's Strategic documents.
 - The City's *draft* LCACS needs assessment of employment yields and floorspace demand.
- Identifying implications of alignment/gaps in performance on future investment attraction and place vibrancy.

The assessment particularly focuses on the elements of Uniqueness, Connectivity and Fit For Purpose to ensure competitiveness and resilience, creating the basis to realise economic prosperity.

The next phase of FAR Lane's work will be site-specific assessments of locations identified by the City. The consultant team will profile each strategic site, including site-specific characteristics (including testing existing planning controls), yields, and constraints while identifying what needs to be specifically addressed to best support the vision and goals of the strategy – including building resilience and competitiveness.

4. INTRODUCTION

The City of Rockingham experienced substantial population growth, a trend that is expected to continue. Its population grew by 8% between 2016 and 2021, and the City is expected to be home to an additional 93,000 people by 2041. This requires substantial planning, as the City needs to cater for additional public space, employment, services, housing, and amenities. This will create substantial challenges for the City.

To ensure future economic prosperity, two key aspects should be considered:

- **Competitiveness** - The ability of the regional economy to compete in state, national and international markets; and
- **Resilience** - The ability of the economy to respond effectively to change and shocks.

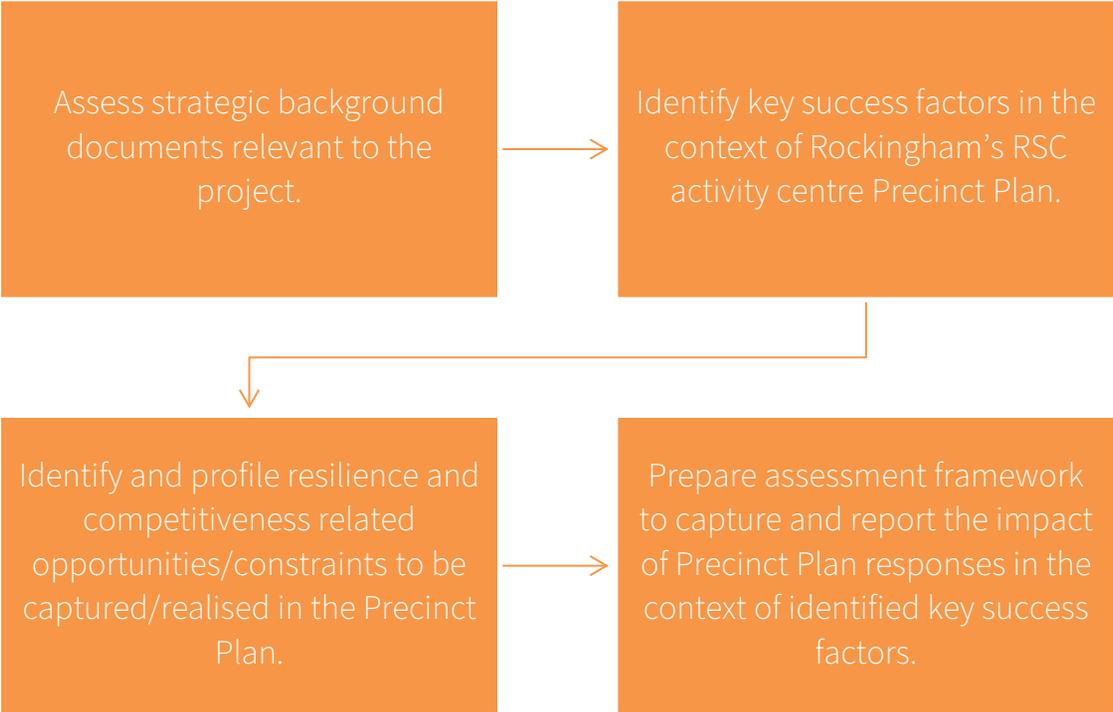
Competitiveness is the foundation for attracting and retaining investment, as well as creating wealth in an economy (Snowdon & Stonehouse, 2006). Economies evolve from being product-driven, to investment-driven, and eventually become innovation-driven (Porter, 2005). This is a process that local economies need to plan for, as it is the key challenge to achieving competitiveness.

Additionally, resilience is increasingly being recognised as a critical component of economic development. Systems and economies need to be resilient to disruptions and shock to ensure adverse impacts are minimised and can be managed effectively by promoting and sustaining diversity, innovation, competition, and entrepreneurship.

Competitiveness and resilience need to be considered equally in attracting and retaining investment to create jobs, boost public amenity, and create economic prosperity. Therefore, it is important to ensure proposed developments across Rockingham's RSC can positively impact one or more of these areas to ensure benefits can be accrued to the local, regional, and state economy.

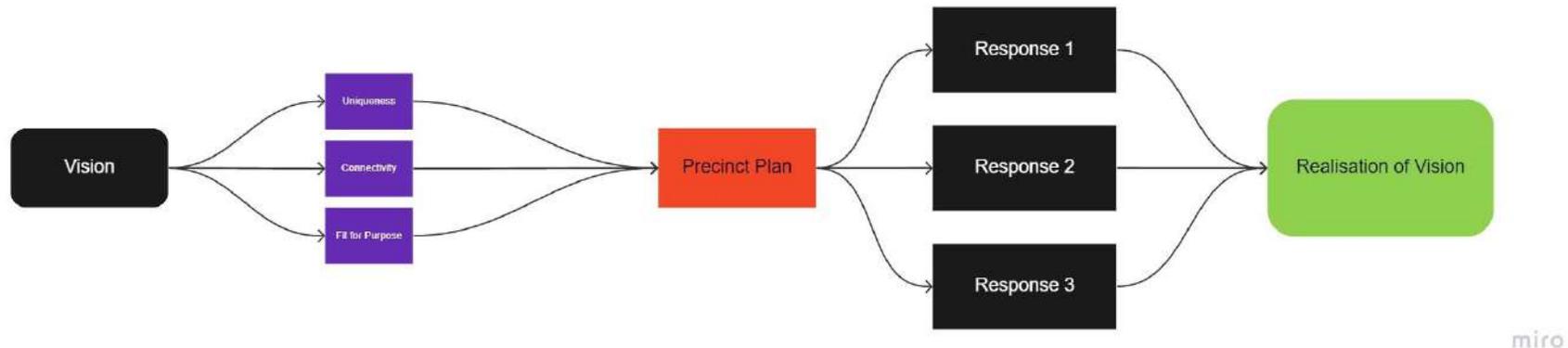
In this report, FAR Lane has developed an assessment framework that captures the above considerations. An overview of our approach to developing the framework is illustrated in Figure 1 below.

Figure 1 – FAR Lane Assessment development approach



5. ECONOMIC ASSESSMENT FRAMEWORK

Figure 2 – Economic Assessment Framework



Source: FAR lane 2021.

The assessment framework is designed to ensure the PSP addresses the City’s vision for the RSC. It consists of the following steps:

1. Understand the City’s vision for the RSC and region.
2. Assess the RSC against the key criteria of Uniqueness, being Fit For Purpose, and Connectivity (see below) to determine alignment with the vision.
3. Outline the key responses in the PSP that will have the most impact in achieving the City’s vision.

Examining the Precinct Structure Plan’s Uniqueness, Connectivity, and whether it is Fit For Purpose allows us to assess whether it will increase the RSC’s competitiveness and resilience, and therefore its likelihood of achieving the City’s strategic vision.

Uniqueness - What a centre, place or economy has that others do not.

Uniqueness is an important foundation for utilising competitive advantages in industry specialisation (see below). Uniqueness is also important in terms of cultural diversification, including different lifestyles, preferences and needs of a population. Therefore, it is important to not impose a one-size-fits-

all approach to ensure all sections of society are catered for, and to create different and unique places. This results in increased and higher quality social and economic transactions. Uniqueness also provides a foundation to ensure a vibrant local business community that attracts start-ups and events, minimising consequences from external shocks. The Precinct Plan should therefore consider:

- What are the existing characteristics that can be leveraged to enhance its Uniqueness in the future? And on this basis:
- Does the proposed development contribute and enhance the economy and centre's Uniqueness?

Connectivity - How the resident catchment and other businesses interact and connect with the centre.

Connectivity is important for precinct development as it ensures local catchment residents can efficiently connect with businesses and services, and that the workforce can efficiently access their place of work. This supports a broader range of local employment options, resulting in increased competitiveness and resilience to shocks. The PSP should therefore consider:

- Does the proposed project have adequate public transport connection, footpaths, cycling infrastructure and roads?
- Does the proposed project enhance Connectivity to other precincts?
- Does the proposed project facilitate new, or utilise existing, infrastructure to meet the needs of current and future types of businesses?
- What are the Connectivity barriers related to the proposed project that could hinder access to markets?

Fit For Purpose - How a centre, place or economy meets the specific needs of a centre's residents, workers, businesses, and visitors.

For a centre to be Fit For Purpose, it needs adequate infrastructure, configuration and alignment that meets local needs and attracts activity to the centre. This helps provide a strong foundation for competitiveness. The PSP should therefore consider:

- Do the centre's current activities meet catchment residents' demands, and provide businesses and the workforce with adequate development opportunities?
- Does the current infrastructure and services attract and support investment?
- How does the centre align with Rockingham's activity centre hierarchy and economic development goals and objectives?

The three above characteristics can create a **comparative advantage** that leverages Rockingham's economy, eliciting an advantage in producing goods and services. Creating economic impact from exports or place-related opportunities depends on the local economy's capacity to leverage/develop comparative advantages. Therefore, supporting and developing sustainable comparative advantages is crucial to ensuring Rockingham's economy can

remain competitive (across both local and traded economies) and be **resilient** to future shocks. For Rockingham, this is particularly the case for further developing Defence and Road Freight industries.

The PSP should therefore consider:

- Does the activity enhance the industry's comparative advantages (existing or emerging) to support traded economy opportunities?
- Does the proposed centre enhance the characteristics and skillsets of the local workforce through infrastructure and employment?
- Does the proposal contribute to local land and natural resources that are relevant to industry comparative advantages?
- Does the proposal support productive and dynamic efficiency of businesses, effective density, anchor businesses/industries and amenities for business, workers, and residents?

6. CITY OF ROCKINGHAM STRATEGIC INTENT

The alignment of the precinct performance will be guided by the State Planning Policy 7.2. *Precinct Design Guidelines* as well as the City's strategic documents.

State Planning Policy 7.2. Precinct Design Guidelines

The policy gives a framework to the development of desired quality outcomes from the planning and design of projects across Western Australia. The planned developments need to be based upon a clear understanding of the overall feasibility of delivery. Feasibility concerns how a new or redeveloped precinct is responsive to the site, context, precinct vision and stakeholder expectations and should consider social and environmental elements as part of the site and context analysis process. The feasibility component needs to be considered throughout the development of the PSP and work as a guideline for decision making. The plan should consider both long- and short-term options as well as reflect the **market**, such as land economic factors, current development proposal as well as employment and business influences. **Physical elements** such as the existing landscape, infrastructure and existing built form and character should also be considered (DPLH, 2021).

The guidelines identify the following desired characteristics for Strategic Metropolitan Centres:

- An activity centre is supposed to provide for a diversity of uses.

- Full range of economic and community services necessary for the community and catchment residents.
- Focus on public transport networks.
- Wide range of retail types.
- Major offices and state government agencies.
- Walkable catchment – 800 metres.

The City of Rockingham Economic Development Strategy (2020-2025)

The City of Rockingham Economic Development Strategy aims to achieve a long-term economic vision for Rockingham. It includes the following strategic actions:

- **Investment Attraction** - Market and promote the City as a coastal tourism destination that is progressive, active and investment-ready local government to attract both local and international investment.
- **Strategic Metropolitan Centre** - Establish Rockingham as the Capital City of the South West Metropolitan Corridor as part of the South Metropolitan Sub-Regional Planning Framework, which includes:
 - Achieving a more consolidated urban form.
 - Facilitating an increased number of people both living and working in the same place.
 - Protecting employment land from other competing land uses.
 - Maximising the use of and value to existing infrastructure, including transport community/social and service infrastructure.
- **Local Business Development** - Continue to support the growth and development of local businesses and industries through initiatives in the City, and by identifying and attracting high profile businesses and events.
- **Advocacy and Lobbying** - Facilitate growth of the Rockingham region and economy through strategic advocacy and lobbying programs to establish infrastructure and development opportunities.

City of Rockingham Strategic Community Plan (2019-2029)

The vision of the future Rockingham includes actively pursuing tourism and economic development; growth and community connectivity, wellbeing, planning for future generations, and delivering quality leadership and business expertise. This involves the following actions:

- **Coastal destination:** Promote the City as a premier metropolitan coastal tourism destination.
- **Investment attraction:** Attract local and international investment to the City to contribute to the local economy.
- **Marketing and promotion:** Develop and implement effective marketing approaches to promote the City as a destination of choice for the local community, visitors, investors, and businesses.
- **Attractions and events:** Seek to host iconic community events and attractions that will entice residents and visitors throughout the year.
- **Infrastructure investment** – local, regional, and state: Lobby local, state and federal stakeholders to establish infrastructure and development opportunities for the City.
- **Business development:** Support business development initiatives throughout the City.
- **MICE (meetings, incentives, conferences and events):** Identify and attract conferences and high-profile business and sporting events to the City to develop its profile as a destination of choice for event organisers.

City of Rockingham *Draft* LCACS assessment

City of Rockingham's draft LCACS assessment themes which will need to be addressed in the Precinct Structure Plan include:

- The current reliance on the retail sector.
- The importance of the defence sector.
- High population growth.
- Lack of high-quality office space.
- Lack of short-stay accommodation in the Waterfront Tourism Precinct.
- Underutilised tourism assets with particular emphasis on Point Peron, which offers a wide variety of opportunities for the development of formal infrastructure and amenities to support visitors to the area.

The draft LCACS, in combination with Syme, Marmion and Co's employment planning strategy, has identified that key avenues for employment growth will be through the defence, tourism, general industries and heavy industries.

The strategies align with facilitating for the following future themes:

- Increased population.

- Increased visitation/tourism by capitalising on the City's favourable location.
- Increased employment and enhanced local business environment by strengthening the relationship between Rockingham RSC and surrounding traded activities.

7. ROCKINGHAM CONTEXT

FAR Lane's previous work of the general context of Rockingham RSC and the City of Rockingham is compared in Table 1. It shows that 25% of all jobs exist within the RSC precinct, which is dominated by Retail Trade. Data also suggest a lack of public transport linkages, as well as a lack of diversified employment opportunities as a large proportion of residents, drive to work.

Table 1 – Snapshot overview of Rockingham RSC and City of Rockingham

Metric	Rockingham RSC	City of Rockingham
Population	4,352	138,581
Local Jobs	9,174	35,871
Largest Industry (by employment) <i>Place of Work</i>	<ul style="list-style-type: none"> Retail Trade (19%) Public Administration and Safety (12%) Health Care and Social Assistance (10%) 	<ul style="list-style-type: none"> Public Administration and Safety (16%) Retail Trade (14%) Health Care and Social Assistance (14%)
Largest industry (by businesses)	Data is not available for the RSC precinct.	<ul style="list-style-type: none"> Construction (24%) Professional, Scientific and Technical Services (10%) Transport, Postal and Warehousing (9%).
Local businesses	600	5,500
Employed residents	1,500	66,200
Key demographics	17% aged between 0-15 24% aged 65 and over	22% aged between 0-15 12.3% aged 65 and over
Method of travel to work	76% drive to work	69% drive to work

Source: ABS Census 2016. Profile.id 2021.

The City of Rockingham's Economy

By identifying the local and traded industries within the City of Rockingham, industries that have a competitive advantage and contributed to significant economic growth were identified. Specialised industries tend to be traded industries. They are associated with higher average wages and higher

productivity compared to local industries. These industries are also more likely to support employment through supply chain linkages.

FAR Lane examined the City's industries' Employment Concentration Factors, which indicates when a local economy is exporting goods produced by a particular industry, they are therefore globally competitive. The only traded industry identified with a significant ECF was the **defence** industry. The advantages that make Rockingham a desirable location for defence industry activities may represent an opportunity for a significant source of additional jobs and attract other related businesses to the area – taking advantage of their market position. Therefore, it is important to consider linkages and enabling infrastructure that can benefit the local defence industry's business environment and community.

Start-ups also play a significant role in economic growth and prosperity by creating jobs and supporting local employment through innovation and competition. New entrepreneurs can bring new ideas that enhance innovation and generate competition, which is essential for a prosperous economy. Therefore, Precinct Plans should consider how best to facilitate a business environment that attracts entrepreneurs to the area.

Rockingham is the SW corridor's strategic metropolitan centre with a significant role in supporting a growth corridor whose future growth will be underpinned by major investment in projects and precincts including:

- **Kwinana Strategic Industrial Area** – WA's most important strategic industrial area as part of the premier heavy industrial zone.¹
- **Australian Marine Complex** - Located in Henderson driving an additional 600 construction jobs. The initiative of the AMC is to create a key defence hub enhancing Australia's reputation in defence to help grow WA's economy.²
- **West Port** – Perth's future container port located in Kwinana.³

Table 2 summarises the economy of the City of Rockingham.

¹ Department of Jobs, Tourism, Science and Innovation, 2020. *Kwinana Strategic Industrial Area*.

² Government of Western Australia, 2021. *Contract awarded for \$87.6 million defence infrastructure projects*.

³ Department of Transport, 2021. *Westport*.

Table 2 - City of Rockingham Economic Snapshot

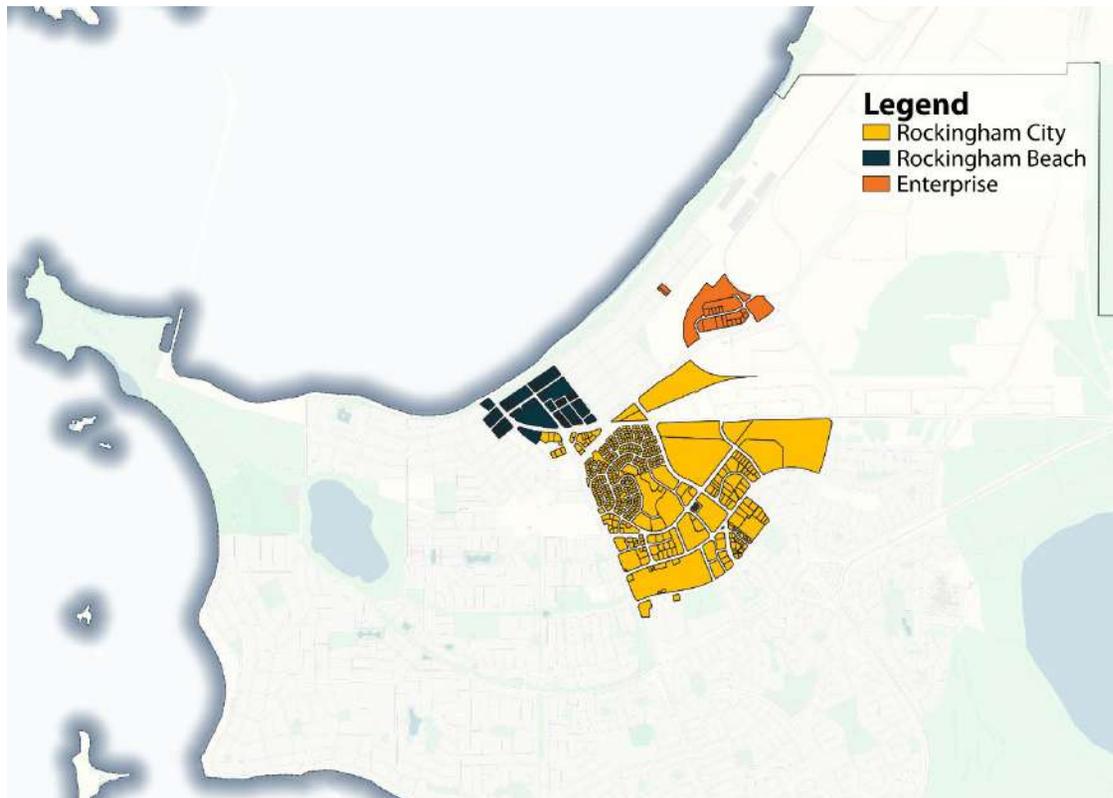
Metric	Trends
Businesses	<ul style="list-style-type: none"> • The number of total businesses was 5,500 in 2020. • The number of businesses in Rockingham has been increasing since June 2018. The increase of businesses is demonstrated by a decreased number of cancelled businesses, and a stagnant number of new GST registration each year. If the trend continues, additional economic output will result. • Construction businesses dominate in Rockingham (24% of all businesses), followed by Professional, Scientific and Technical Services (10%); and Transport, Postal and Warehousing (9%).
Important traded industries for the City	<ul style="list-style-type: none"> • The defence industry provides approximately 2,500 jobs and has an Employment Concentration Factor of 11.53, which is an indication that the City has a regional advantage in this industry. • The future of Westport in Kwinana has the opportunity to create another regional competitive advantage driving employment.
Important local industries for the City	<ul style="list-style-type: none"> • Local Education and Training. • Local Households Goods and Services. • Local Hospitality Establishments. • Local Food and Beverage Processing and Distribution. • Local Retailing of Clothes and General Merchandise. <p>Together, these industries provide 10,300 jobs.</p>

Source: ABS census 2016. Economy.id. 2020.

Floor space

There are two commercial complexes within the boundary area of RSC - Rockingham City and Rockingham Beach (see Map 1). Rockingham City is the biggest activity centre, consisting of the Rockingham Centre which is a large shopping centre offering a wide range of stores, entertainment, and dining options. Rockingham Beach is located by Rockingham's foreshore and has more residential floor space than any other precinct, offering a more diverse set of business offerings. The floorspace breakdown by planning land use category (PLUC) code is shown in Table 3 and illustrated in Figure 3.

Map 1 – Commercial complexes within Rockingham RSC.



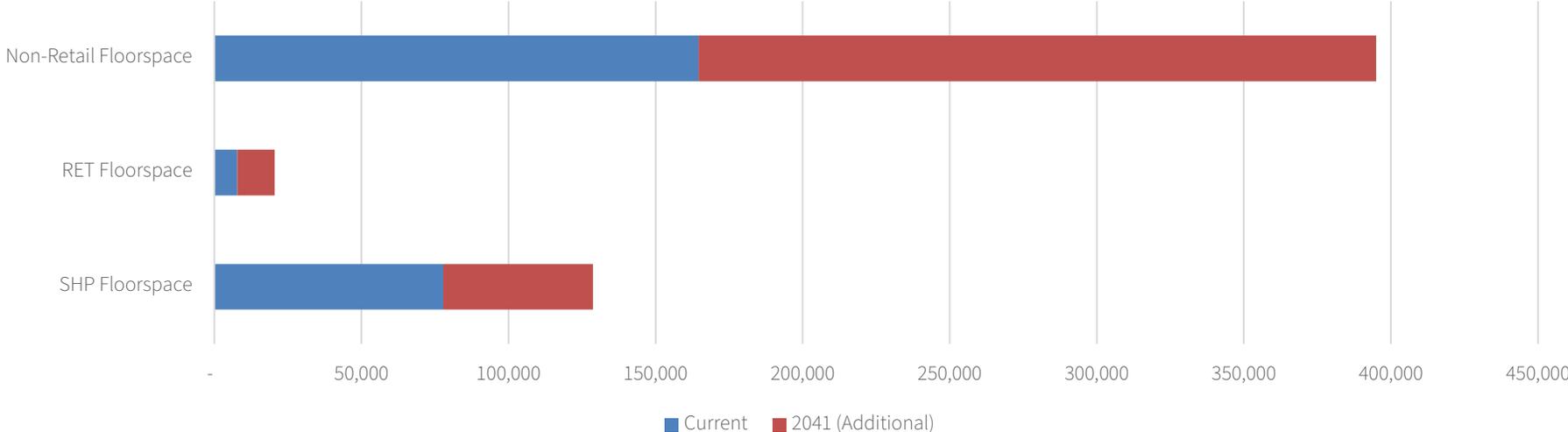
Source: City of Rockingham 2021.

Table 3- Current breakdown of floor space in Rockingham RSC by planning land use category (PLUC).

PLUC	Code	Rockingham Beach	Rockingham City
Entertainment/Recreation/Culture	ENT	14%	11%
Health/Welfare/Community Services	HEL	10%	25%
Manufacturing/Processing/Fabrication	MAN	1%	0%
Office/Business	OFF	13%	21%
Residential	RES	33%	1%
Other Retail	RET	1%	4%
Service Industry	SER	0%	2%
Shop/Retail	SHP	28%	32%
Storage/Distribution	STO	0%	1%
Utilities/Communications	UTE	0%	3%
TOTAL OCCUPIED FLOORSPACE (sqm)		49,815	200,416
TOTAL VACANT FLOORSPACE (sqm)		4,230	8,397

Source: DPLH 2016.

Figure 2- Floors space needed in the MNC based on current ratios by 2041



Source: DPLH 2016, City of Rockingham Draft LCACS assessment 2021.

For the City to keep these ratios constant, they need to accommodate an additional 294,000 m² of floor space to be distributed throughout the precinct based on the City’s population forecast; or 171,200 m² based on the WA tomorrow’s forecast. It is important to meet these targets to ensure that there will be sufficient floor space to accommodate future residents, workers, and visitors. If the City fails to keep these ratios, it may lose its ability to accommodate and service the additional population.

8. DEFINING SUCCESS

Environmental scan

This chapter explores alignment between strategic priorities identified in Chapter 2 and the resilience themes from FAR Lane's assessment. For an activity centre to be successful, potential future impacts play a significant role. Therefore, it is important to have a good understanding of the external environment and ongoing trends that will impact the demand for future activity centres various offerings.

General points to consider include:

- **Current environment** – COVID-19 has changed the world, particularly regarding online offerings (see below) and a strong increase in the number of people working from home.
- **Technological forces** – Technology has made it more viable for people to access services and offerings online, which has significantly impacted the way people shop. For example, people can get anything from groceries to clothes online. The pandemic has strengthened this trend, which has impacted demand for many retailers in activity centres.
- **Sociocultural factors** – Demographics must be considered. This includes population growth, age, sex distribution, immigration rates, and changes to personal incomes that influence demand for types of services, retail, recreational and service offerings.
- **Environmental factors** – The importance of the environment and sustainability has been a growing theme around the world. People tend to be more aware of our planet and are valuing ethical and sustainable products more highly.

Determining Rockingham's Uniqueness, Connectivity, and whether it is Fit-for-purpose

As outlined in Section 4 above, competitiveness is the foundation for attracting and retaining investment and creating wealth in an economy; while resilience allows economies to sustain themselves through external shocks and economic disruptions. Examining the Precinct Structure Plan's Uniqueness, Connectivity and whether it is Fit For Purpose allows us to assess whether it will increase the RSC's competitiveness and resilience, and therefore its likelihood of achieving the City's strategic vision.

Rockingham's Uniqueness

Uniqueness is a driver that has a strong differentiating effect, creating authenticity and character for a precinct and attracting visitors.

Current state

Rockingham RSC has several factors that make it unique:

- A recently revitalised foreshore precinct on a calm, family-friendly beach that is Perth's primary north-facing waterfront area.
- Being a jump-off point for accessing Cape Peron, Penguin Island and other nearby islands.
- Proximity to Garden Island Naval Base.
- Access to major logistics and industrial hubs, including Kwinana and Henderson.

Desired future state

- To be a premier coastal destination by diversifying the City's economy and unique offerings.
- To support business development initiatives throughout the City.
- To identify and attract conferences and high-profile business and sporting events to the City.

Key success factors for the Precinct Structure Plan

The City is already actively emphasising and promoting its most unique feature – its popular beach foreshore. Potential exists to further leverage its beachfront location by developing unique offerings (shops, experiences, recreations facilities, events, etc.) that are not available at other rival beachfront locations in Perth. Therefore, the PSP should consider floor space and recreational area allocations that promote smaller retail spaces and activities that promote boutique micro-retail offerings.

Rockingham's beachfront infrastructure is not well connected to other Rockingham hubs, particularly the Rockingham Centre and train centre. Therefore, the PSP should promote land use for high-density residential uses (including apartments and aged care facilities) to fill in currently vacant spaces between the two hubs. Increasing available residential options would also provide choices for workers who wish to live locally and commute to the Kwinana and Henderson industrial centres, and Garden Island Naval Base.

Rockingham's Connectivity

Connectivity makes precincts more easily accessible for residents, workers, and tourists. This includes public transport networks, pedestrian and bike paths, accessibility through universal design, and digital connectivity.

Current state

- Rockingham has good public transport connections to the greater Perth area via the Mandurah train line, as well as the high-frequency shuttle services providing regular links between the train station, Rockingham Centre, and the beachfront. However, within the RSC, 76% of employed persons drive to work, likely resulting from insufficient public transport linkages and a lack of a diverse set of employment opportunities.
- The current PSP is misaligned with the desire for a high-density centre by not utilising existing land (noting that some are put aside for longer-term developments). Higher density will help create vibrancy by making amenities and services more cost-effective.
- The City considers some universal design aspects through its Disability Access and Inclusion Plan, including beach access, charging stations for mobility scooters, and auditing infrastructure accessibility.
- The NBN is available in Rockingham, predominantly through fibre-to-the-node technology.

Desired future state

- A well-connected city with strong public transport options and bike paths, including employment centres in Kwinana and Henderson.
- Alignment with CoR's forthcoming Disability Access and Inclusion Plan 2022-2026, including universally accessible infrastructure.
- Strong digital connectivity, including facilitating fibre-to-the-premises and free public Wi-Fi in key precincts, to support business development and public engagement.

Key success factors for the Precinct Structure Plan

- Allow interim uses for empty lots for sites current set aside for long term development.
- Supporting public transport and bike lane infrastructure both to and within the RSC, and beyond.
- Developing universally accessible infrastructure to help Rockingham tap potential residential aged care and disability services markets, as well as allowing current ageing residents to age locally.

Rockingham being Fit For Purpose

Being Fit For Purpose means ensuring a place has the right quality products, services, infrastructure to deliver on its vision. While Rockingham's unique attributes (including its beachfront location) will attract people, being Fit For Purpose means visitors and residents will be more inclined to spend their time, money and energy in Rockingham.

Current state

Rockingham's beachfront hub is well designed to support tourists and residents. However, as noted above, it is disconnected from the rest of the City. The Rockingham Centre, while functional, does not differentiate itself from other large shopping centres.

Desired future state

- Facilities and services that build on Rockingham's current attractions and allow visitors to increase both the number and duration of their trips.
- Amenities that result in residents not having to leave Rockingham to fill currently unmet needs.
- Meeting the needs of an increasing population in terms of local employment targets, social services, and other demands from residents and workers.

Key success factors for the Precinct Structure Plan

- Promoting short stay accommodation options near the beachfront to encourage overnight tourism.
- Increasing diversity in housing options to provide greater lifestyle options at different life points.
- Targeted infrastructure that maximises and supports events.
- Creating interim uses for sites current set aside for long term development.
- As noted above, creating sufficient additional floor space uses (both near the beach, and in other parts of the RSC) to realise a diverse and unique set of offerings for a wide range of users, including boutique micro-retail offerings. Indicative ratios of the need for future floorspace (by 2041) have been calculated based on population numbers and are identified in Table 4 below.

Table 4 – Additional retail and non-retail floorspace needed by PLUC 2041 based on WA Tomorrow forecast and CoR forecast

	Shop/Retail		Other Retail		Non-Retail Floorspace		Total	
	Low	High	Low	High	Low	High	Low	High
Enterprise	-	620	8,376	14,175	1,880	2,241	10,256	17,037
Rockingham City	2,238	45,329	6,352	12,247	150,887	212,556	159,477	270,133
Rockingham Beach	-	5,588	173	386	11,554	17,839	11,727	23,813
Total	2,238	51,538	14,901	26,809	164,321	232,636	181,460	310,982

Source: WA Tomorrow 2015, DPLH 2016, City of Rockingham 2021.

Low forecasts in Table 4 are based on WA Tomorrow's population forecast, while high forecasts are based on the City of Rockingham's forecasts.

9. IMPACT ASSESSMENT

Having reviewed the City's strategic documents and considered the relevant data, FAR Lane considers the following to be the key economic issues for the RPSP to address:

1. Lack of density.
2. Meeting the needs of a growing population.
3. Increasing employment needs.
4. Underdeveloped tourism visitation.

FAR Lane has examined these four issues based on the above framework to examine their key success factors, potential PSP Responses, and impacts. The results are summarised in Table 5.

Table 5 – Economic Impact Assessment

Issue	Key Success Factor	PSP Response	Impact
Lack of density			
<ul style="list-style-type: none"> • Currently, the RSC is underutilising space, which discourages vibrancy. • Rockingham's beachfront infrastructure is not well connected to other Rockingham hubs, particularly the City Centre and Rockingham Station. 	<ul style="list-style-type: none"> • Using available land for high-density purposes, including consideration for interim uses on key developments sites to stimulate activity. • Supporting public transport and active transport infrastructure both to and within the RSC and beyond. • Diversity of offerings for residents, workers and visitors. 	<ul style="list-style-type: none"> • Supporting high-density development. • Provide enhanced pedestrian, bike and public transport infrastructure providing better connectivity between key precincts throughout the RSC. • Better utilisation of unused land by introducing interim uses for long-term development sites. 	<ul style="list-style-type: none"> • Improved housing density and diversity, leading to a greater range of amenities, activities, and increased vibrancy. • Improved employment opportunities. • Increased tourism visitation and spend.
Meeting the needs of a growing population			

<ul style="list-style-type: none"> • Insufficient capacity to service an extra 93,000 residents by 2041. Including: • Demand for secondary schooling and aged care. • Service and retail needs for young families. • A retail floor space gap between 17,140 m² (WA Tomorrow) and 78,300 m² (City forecast). 	<ul style="list-style-type: none"> • Being able to meet the demand for a growing population by providing a diversified set of offerings and services for the local community. • Ensuring that there will be sufficient floor space to cater for the needs of an increased population. • Developing universally accessible infrastructure. 	<ul style="list-style-type: none"> • Provide diversified floorspace with emphasis on fit-for-purpose, accessible and unique offers. • Planning for required amenities including schools and medical facilities. • Plan for a population with a lower proportion of high-income earners compared to Greater Perth. • Provide a range of housing options, including high and medium density. • Planning that requires universal accessibility. 	<ul style="list-style-type: none"> • A precinct that meets the residential, retail, and employment requirements for its increasing number of residents. • Increased economic activity through new retail opportunities, and tapping aged care and other emerging markets.
<p>Increasing employment needs</p>			
<ul style="list-style-type: none"> • A gap in office floor space gap between 30,500m² (WA Tomorrow) and 52,700 m² (City forecast). • Current lack of office space and start-up infrastructure. • Employment opportunities are concentrated among a few industries making the RSC vulnerable to external shocks. 	<ul style="list-style-type: none"> • Supporting business environment, including for startups. • Creating sufficient additional floor space (in employment precincts) to realise a diverse and unique set of offerings for a wide range of users, including boutique micro-retail offerings. • Office and event space with good linkages to other 	<ul style="list-style-type: none"> • Plan for office precincts and environments which promote creativity, startups, and innovation. • Providing land opportunities for businesses to create jobs by leveraging the local defence industry; and Kwinana and Henderson supply chains. 	<ul style="list-style-type: none"> • More businesses want to operate in the RSC due to the favourable business environment which exists there. • A variety of new businesses and startups emerge. • The City becomes an important hub for the defence industry that brings professionals and skills from across the world.

	<p>business precincts as well as to transport linkages.</p> <ul style="list-style-type: none"> • Space where local businesses can network and meet. 		<ul style="list-style-type: none"> • New businesses have been established due to supply chain opportunities from Kwinana and Henderson. • New infrastructure that maximises and supports events creates new jobs.
Underdeveloped tourism visitation			
<ul style="list-style-type: none"> • Insufficient supply of short-stay accommodation in the RSC. • Non-unique tourism attractions. • Lack of infrastructure for major conferences. 	<ul style="list-style-type: none"> • Short and long-term accommodation options. • Unique tourism attractions and event conference facilities, underpinned by the City’s coastal location, and are not found in other Perth beachfront locations. 	<ul style="list-style-type: none"> • Plan for increased short stay accommodation. • Diversity in floorspace with emphasis on uses, including boutique micro-retail offerings. • Promoting the development of major conference facilities. 	<ul style="list-style-type: none"> • Increased tourism, including overnight stays. • Major conferences are held in the RSC.

Source: WA tomorrow 2015, ABS Census 2016, City of Rockingham *draft* LCACS assessment.

Full non-retail floorspace breakdown is provided below in the Technical appendices.

By addressing the four key issues as outlined above, PSP will help the RSC’s economy to be resilient and competitive, and thereby deliver long-term economic prosperity.

10. TECHNICAL APPENDICES

Below is the full breakdown of additional expected non-retail floorspace by 2041 based on WA tomorrow's forecast being **low**, and the City of Rockingham's forecast is **high**.

Table 5 – Breakdown of non-retail floorspace needed by 2041

	Entertainment/Recreation/Culture		Health/Welfare/Community Services		Manufacturing/Processing/Fabrication		Office/Business		Service Industry		Storage/Distribution		Total	
	Low	High	Low	High	Low	High	Low	High	Low	High	Low	High	Low	High
Rockingham	12,424	23,438	92,576	109,614	5,783	8,699	25,632	45,536	9,948	16,238	4,524	9,031	150,887	212,556
Rockingham Beach	3,664	5,955	1,936	3,150	1,812	2,348	3,905	5,977	-	-	237	407	11,554	17,839
Total	16,088	29,393	94,511	112,765	7,595	11,047	29,538	51,513	9,948	16,238	4,760	9,438	162,441	230,395

Source: WA tomorrow 2015, DPLH 2016, City of Rockingham 2021.

11. REFERENCE LIST

Porter, M., (1990). "The Competitive Advantage of Nations". *Harvard Business Review*. Retrieved from: <https://hbr.org/1990/03/the-competitive-advantage-of-nations>