



City of Rockingham

Local Commercial Strategy Review: Preparation of Needs Assessment

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1 EXECUTIVE SUMMARY

This Needs Assessment provides the City of Rockingham with guidance on the supportable level of retail and non-retail floorspace that should be located at its activity centres going forward until 2041. It should be noted that the figures for the Strategic Metropolitan Centre are for ultimate development and outline future trajectory for floorspace demand. This will guide the City in planning its activity centres and assist it in determining the most appropriate way to meet its Employment Self Sufficiency (ESS) target.

The supportable level of retail floorspace that can be located at centres has been estimated by using retail gravity modelling and benchmarked floorspace productivity estimates. This methodology ensures future floorspace estimates are supportable and will not impact the vitality of activity centres.

The supportable level of non-retail floorspace has been estimated using floorspace per person provision ratio analysis. This methodology identifies areas that are considered suitable benchmarks for the City and growing non-retail floor space to match the provision of floorspace per person by the type of non-retail floorspace.

This analysis has been undertaken for two population scenarios:

- A 'low growth' scenario based on WA Tomorrow (referred to as 'WA Tomorrow' in figures and tables) census forecasts that can account for projected population growth within the full 25km Strategic Centre catchment; and
- A 'high growth' forecast scenario (referred to as 'City of Rockingham' in figures and tables) based forecast.id population projections accounting for Structure Plan and subdivision approval data supplementing census data and considering the capacity of the adopted Local Planning Framework to support higher density development throughout the City.

1.1 Major Activity Centres Gap Analysis

The City has one strategic centre and three developed district centres. These centres support a significant number of residents within the City and the analysis has projected significant expansions in retail and non-retail floorspace for these centres in both population scenarios (Figure 1 and Figure 2).

Figure 1. Major Activity Centres Floorspace Increases – High Growth City of Rockingham Projections

City of Rockingham Population Projections						
Year	Current Floorspace (2021)			Additional Floorspace by 2036		
Centre Name	SHP Floorspace	RET Floorspace	Non-Retail Floorspace	SHP Floorspace	RET Floorspace	Non-Retail Floorspace
Rockingham	63,978	7,526	128,912	34,834	7,722	171,799
Rockingham Beach	13,848	306	35,661	4,334	265	14,152
Rockingham Strategic Centre	77,826	7,832	164,573	39,168	7,987	185,950
Warnbro	21,029	685	2,079	1,534	136	1,383
Secret Harbour	15,000	-	3,531	11,782	-	3,726
Baldivis	29,435	16,795	13,411	7,037	8,032	12,629

Source: Pracsys 2021

Note: Shop Retail = Convenience/Comparison Retail, Other Retail = Bulky Goods Retail, Non-Retail Floorspace = (Entertainment, Health, Office, Service Commercial, Storage, Manufacturing). Detailed Floorspace definitions are provided in Appendix 1, Section 10.4, PLUC Definitions

Note: Rockingham Strategic Centre = Rockingham + Rockingham Beach

Figure 2. Major Activity Centres Floorspace Increases – Low Growth WA Tomorrow Projections

WA Tomorrow Population Projections						
Year	Current Floorspace (2021)			Additional Floorspace by 2036		
Centre Name	SHP Floorspace	RET Floorspace	Non-Retail Floorspace	SHP Floorspace	RET Floorspace	Non-Retail Floorspace
Rockingham	63,978	7,526	128,912	6,212	4,441	136,615
Rockingham Beach	13,848	306	35,661	-	144	10,282
Rockingham Strategic Centre	77,826	7,832	164,573	6,212	4,585	146,896
Warnbro	21,029	685	2,079	442	109	1,269
Secret Harbour	15,000	-	3,531	6,527	-	2,755
Baldivis	29,435	16,795	13,411	2,519	6,332	10,713

Source: Pracsys 2021

Note: Shop Retail = Convenience/Comparison Retail, Other Retail = Bulky Goods Retail, Non-Retail Floorspace = (Entertainment, Health, Office, Service Commercial, Storage, Manufacturing). Detailed Floorspace definitions are provided in Appendix 1, Section 10.4, PLUC Definitions

Note: Rockingham Strategic Centre = Rockingham + Rockingham Beach

These centres will accommodate a significant amount of the overall increase in retail and non-retail floorspace and the City should closely monitor their performance to ensure other activity centres are not negatively impacting the ongoing health of these centres. It is paramount that the City assesses the health of the activity centre hierarchy and individual centres when approving centre expansions or new centres going forward. This analysis provides an estimate of supportable floorspace, however, discrete factors that cannot be modelled (centre management, tenant performance, etc) for centres are likely to impact these results. The implementation recommendations will support the City in assessing development applications and maintaining the Activity Centre Hierarchy (See Section 8.4, The City's Role).

1.2 Precinct Gap Analysis

The analysis has assessed four of the five precincts within the City of Rockingham. Precinct 5 – Karnup, has been excluded from this report due to the early stage of planning. Advice for integration of the District Structure Plan for Karnup into the Needs Assessment at an appropriate time has been provided. The viable increase in retail and non-retail floorspace and the associated employment by precinct is shown in Figure 3.

Figure 3. Viable Retail and Non-Retail Floorspace and Employment Increases in 2036 by Precinct

Precinct 1				
Floorspace Type	Shop Retail		Other Retail + Non-Retail	
Population Projection Scenario	Floorspace	Employment	Floorspace	Employment
City of Rockingham	48,308	1,862	227,366	4,477
WA Tomorrow	8,327	330	175,298	3,433
Precinct 2				
Floorspace Type	Shop Retail		Other Retail + Non-Retail	
Population Projection Scenario	Floorspace	Employment	Floorspace	Employment
City of Rockingham	4,659	189	23,638	501
WA Tomorrow	1,990	95	20,627	433
Precinct 3				
Floorspace Type	Shop Retail		Other Retail + Non-Retail	
Population Projection Scenario	Floorspace	Employment	Floorspace	Employment
City of Rockingham	21,442	799	10,497	279
WA Tomorrow	12,336	535	8,090	203
Precinct 4				
Floorspace Type	Shop Retail		Other Retail + Non-Retail	
Population Projection Scenario	Floorspace	Employment	Floorspace	Employment
City of Rockingham	29,350	1,230	53,116	1,521
WA Tomorrow	13,603	902	40,828	1,176

Source: Pracsys 2021

Note: Shop Retail = Convenience/Comparison Retail, Other Retail = Bulky Goods Retail, Non-Retail Floorspace = (Entertainment, Health, Office, Service Commercial, Storage, Manufacturing). Detailed Floorspace definitions are provided in Appendix 1, Section 10.4, PLUC Definitions



Viability has been determined based on the required Shop Retail floorspace productivity to ensure projected floorspace increases were supportable considering the size and location of centres and the expected performance by centre type. The result should contribute to a health activity centre hierarchy that attracts and retains tenants and addresses community needs for access to goods, services and employment (Figure 4).

Figure 4. Required Floorspace to productivity Ratio by Activity Centre Type

Centre Type	Required Floorspace Productivity
Strategic Metropolitan Centre (COR Scenario)	\$6,997 per m ²
Strategic Metropolitan Centre (WAT Scenario)	\$6,433 per m ²
District Centre	\$8,300 per m ²
Neighbourhood Centre	\$8,100 per m ²
Local Centre	\$8,100 per m ²
Other Retail Centre	\$6,500 per m ²

Source: Pracsys 2021

Note: The required floorspace productivity ratio by Centre Type has been estimated by assessing the productivity of other centres using the Property Council of Australia's Shopping Centre Directory and through wider research looking at shopping centre turnover.

The maps for these precincts are shown in Figure 5, Figure 6, Figure 7 and Figure 8.

Figure 5. Precinct 1 Activity Centre Map

Precinct 1-Rockingham: Employment & Floorspace Summary

Legend

- Strategic Metropolitan Centre
- Secondary Centre
- District Centre
- Neighbourhood Centre
- Local or Neighbourhood Centre
- Local Centre
- Under 1,000m2

Enterprise (Out of Centre Development)			
	2021	2036	
SHP Floorspace	7,298	8,168	
Employment	103	115	

Rockingham City			
	2021	2036	
SHP Floorspace	63,978	98,812	
SHP Employment	2,158	3,471	
RET Floorspace	7,526	15,248	
RET Employment	76	367	
Non-Retail Floorspace	128,912	300,711	
Non-Retail Employment	2,680	5,992	

Rockingham Beach			
	2021	2036	
SHP Floorspace	13,848	18,182	
Employment	775	938	

Belgravia Terrace			
	2021	2036	
SHP Floorspace	2,000	2,705	
Employment	91	123	

Shoalwater			
	2021	2036	
SHP Floorspace	3,260	4,693	
Employment	149	214	

Elanora Drive			
	2021	2036	
SHP Floorspace	1,359	1,937	
Employment	62	88	

Safety Bay			
	2021	2036	
SHP Floorspace	2,003	2,852	
Employment	106	143	

Malibu			
	2021	2036	
SHP Floorspace	1,090	1,632	
Employment	66	91	

Grange Drive			
	2021	2036	
SHP Floorspace	1,702	2,426	
Employment	189	222	

Charthouse			
	2021	2036	
SHP Floorspace	1,166	1,649	
Employment	73	95	

Waikiki Villiage			
	2021	2036	
SHP Floorspace	11,206	13,066	
Employment	287	372	



Figure 6. Precinct 2 Activity Centre Map

Precinct 2-Warnbro: Employment & Floorspace Summary

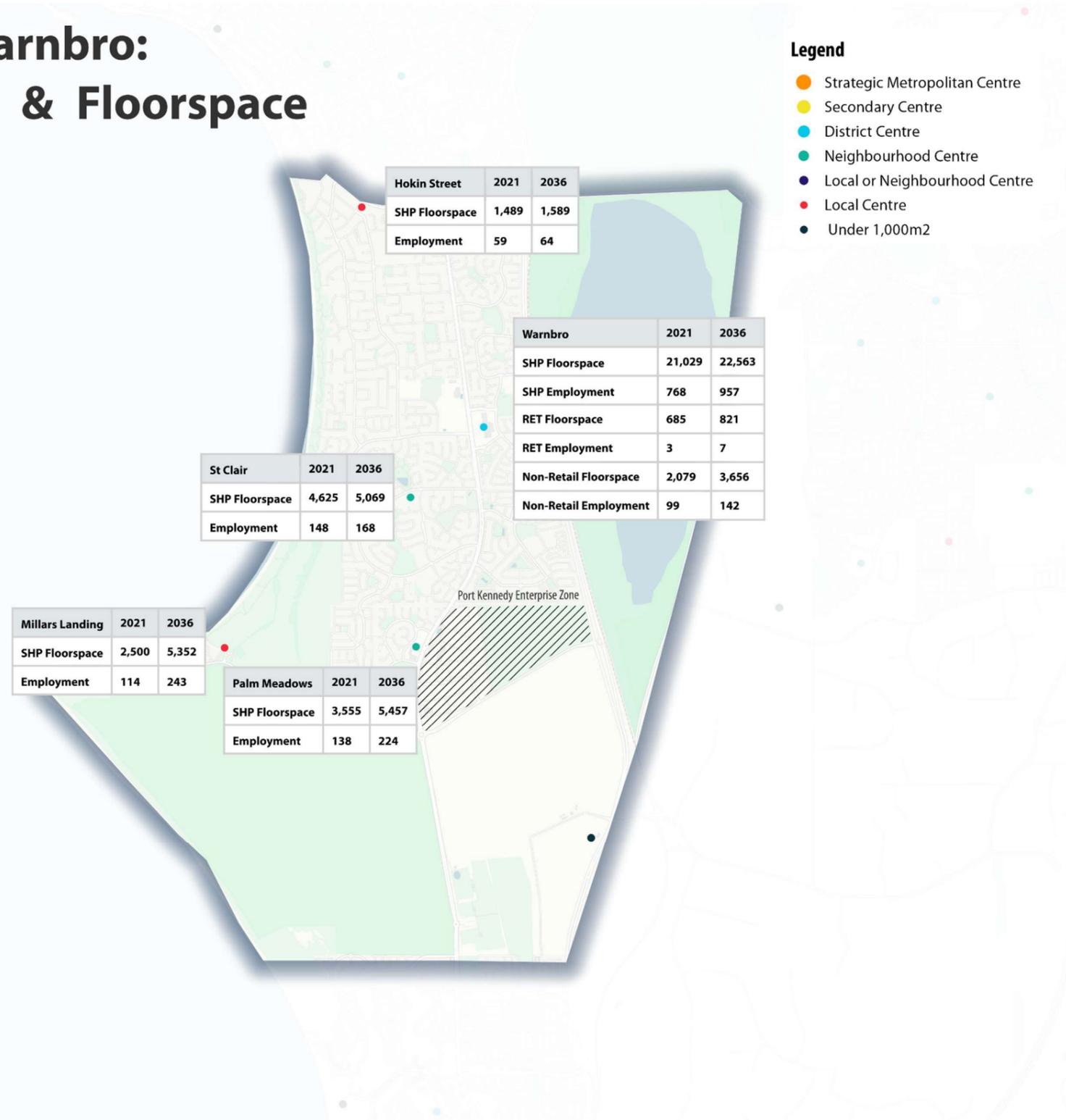


Figure 7. Precinct 3 Activity Centre Map

Precinct 3-Secret Harbour: Employment & Floorspace Summary

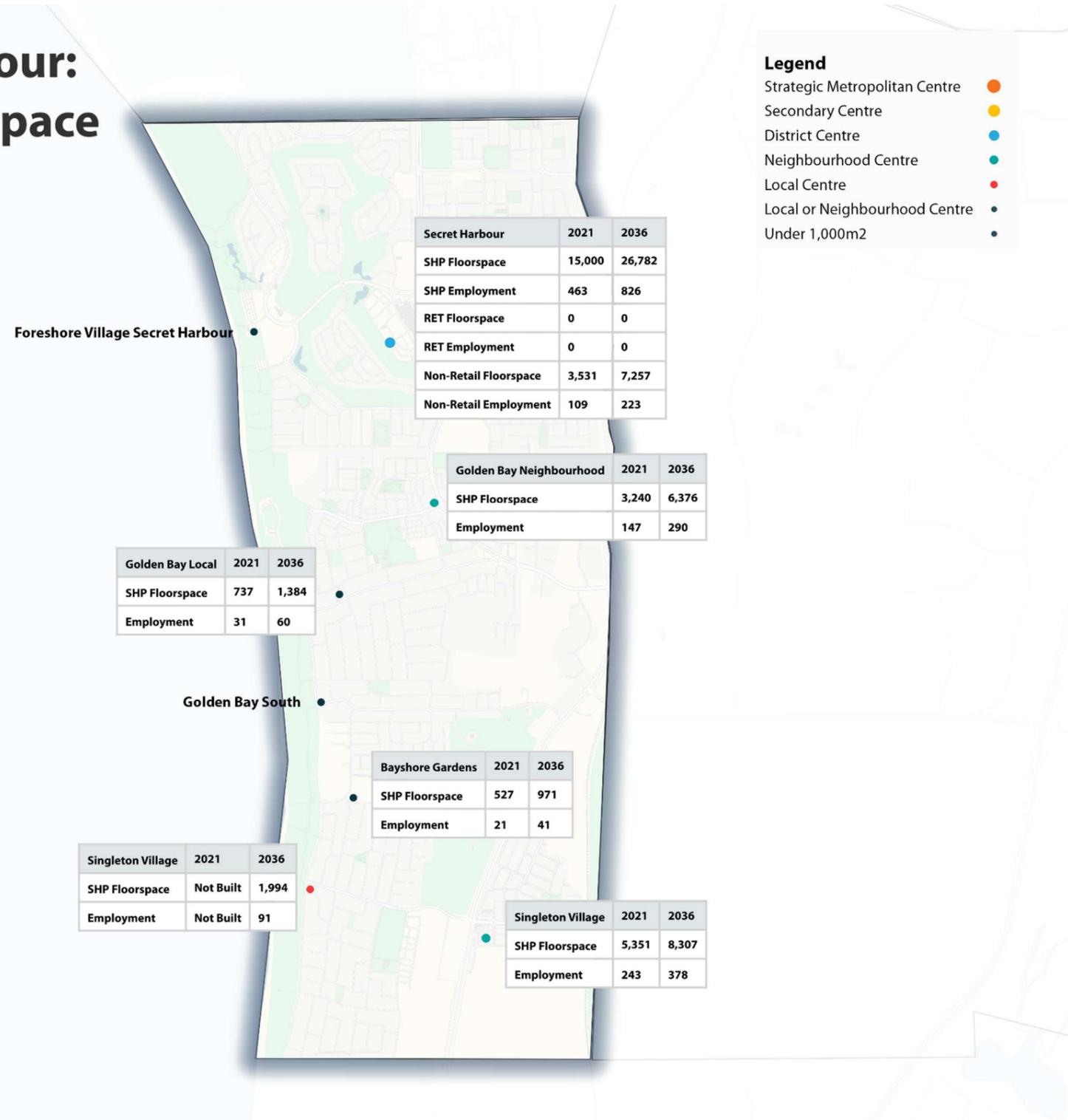
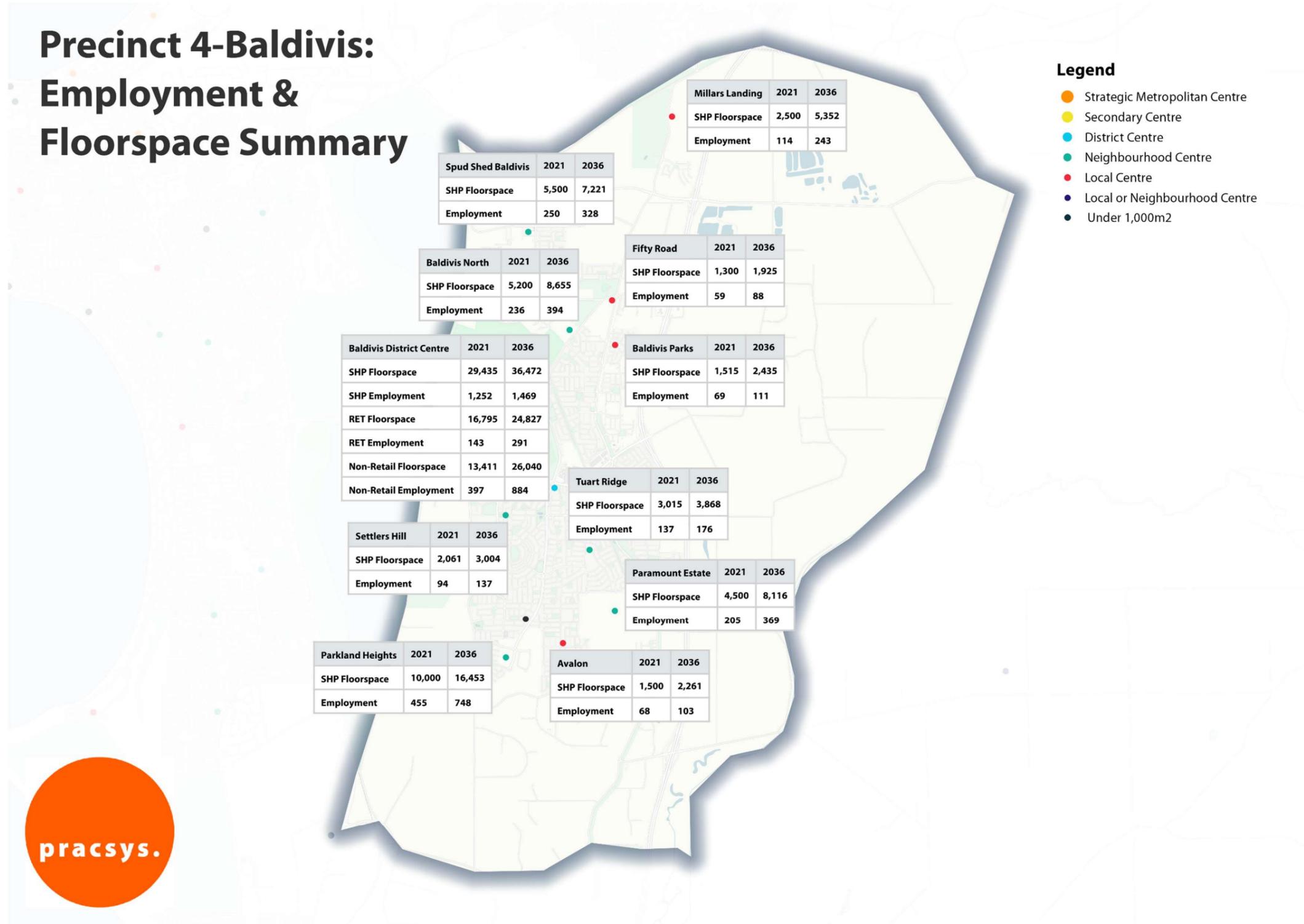


Figure 8. Precinct 4 Activity Centre Map



1.3 Employment Targets

The South Metropolitan Peel Sub-Regional Planning Framework provides Employment Self-Sufficiency (ESS) targets for the region. ESS represents the jobs available in a sub-region compared to the labour force of the sub-region. An ESS of 100% means that a sub-region has an equal number of jobs and labour force. The assessment has estimated the employment supportable at the City's Activity Centres based on population growth. The 2020 Rockingham Employment Study considered the potential employment requirements of the City with projections based on population growth and other development opportunities.

Employment estimates from the Rockingham Employment Study for non-activity centre employment have been combined with activity centre estimates to approximate the additional employment required to achieve an ESS target of 74%. The additional employment will need to be in strategic in nature and suitable to the RSMC and other employment lands such as industrial areas. The estimated gap in employment without considering future employment land (not activity centre based) and catalyst projects in the RSMC amounts to between 31,000 and 40,000 (**Figure 9**).

Figure 9. Employment Gap Without Future Employment Land

Employment Category	WAT Employment	CoR Employment
Employment Target 2041 (74% ESS)	70,833	88,292
Needs Assessment 2041 - RSMC	10,697	14,252
Needs Assessment 2041 – Other Centres	13,139	15,442
Jobs Rest of City	15,572	18,984
Gap to Target ESS	31,425	39,614

Source: Syme Marmion & Co 2020, Pracsys 2021

The Employment Study identified North-East Baldvis, Karnup (Core) and Karnup (South) as Future Employment Land. Employment in the Study was projected to 2050 and has been estimated at 2041 for the purpose of understanding implications for the Needs Assessment. These employment estimates have been used to refine the gap estimate for both scenarios (**Figure 10**).

Figure 10. Employment Gap with Future Employment Land

Employment Area	WAT (jobs)	CoR (jobs)
Gap to Target ESS	31,425	39,614
Future Employment Land	22,897	22,897
Additional RSCM Employment (based on Employment Study)	2,101	5,055
Remaining Gap	6,428	11,662

Source: Syme Marmion & Co 2020, Pracsys 2021

It is estimated that the employment gap to reach a target ESS of 74% would require an additional 2,100 to 5,100 jobs in the RSMC and 6,400 and 11,700 jobs on other employment lands. These results reflect the

importance of the RSMC in providing employment opportunities to meet Sub-regional employment targets. The Southern Metropolitan Peel Framework currently provides a target of only 12,290 jobs in the RSMC. Under the CoR scenario the RSMC will need at least 14,252 jobs to meet the goods and services needs of the surrounding population, with a total of 19,307 jobs by 2041 to contribute to an ESS of 74%. The findings of the Rockingham Employment Study and our analysis indicate that regional ESS targets would not be achievable unless a greater concentration of employment is planned for in the RSMC. This additional employment would be in line with its role as a Strategic Metropolitan Centre.

The Employment Study defines a number of employment activities in line with the Strategic Metropolitan Centre roll of the RSMC that could be targeted to achieve greater employment levels. These include:

- Primary regional institutions including a full-service university, major health campus with teaching capabilities, State government administration, and high-level arts and entertainment
- Business services for nearby industrial areas, the naval base and Westport
- Tourist activities including business travel and visitation for the surrounding area

Out of centre development will be driven by strategic employment opportunities, particularly associated with the WTC and Westport; and population-driven light industrial services for the wider sub-region.

It is estimated that the RSMC would need an additional 126,000m² to 273,000 m² in commercial floorspace to support the additional employment estimates (**Figure 11**).

Figure 11. Additional Floorspace Estimates to Meet ESS Target

Floorspace Uses	WAT Floorspace (m ²)	CoR Floorspace (m ²)
RSMC		
Education	45,600	91,200
Accommodation	48,200	96,800
Office	32,317	85,098
Other Employment Land		
Light Industrial	732,990	1,329,878

Source: Pracsys 2021, DPLH 2016

An additional 733,000m² to 1,330,000m² in light Industrial floorspace uses would be required on other employment lands. More Detailed analysis is provided in Section 6.3, Employment Targets.

1.4 Implementation Advice

The Needs Assessment provides the evidence-base for planning the City's Activity Centres. It will be integrated into the City's Local Planning Framework through:

- The Local Commercial Strategy (LCS)
- The Rockingham Strategic Metropolitan Centre Local Planning Framework (RSMCLPF)

The Needs Assessment establishes the floorspace supply of retail and non-retail uses in Activity Centres required to support identified population demand. The analysis has used population projections from WA Tomorrow and forecast.id to develop the estimates. The years associated with the projections are less important than the quantum of population itself. It is recommended that for planning purposes the Local Commercial and Activity Centre Strategy (LCACS) and RSMCLPF adopt a 'stage gate' interpretation of the results to guide decision making.

In creating an attractive business environment within the City's activity centres, the role of the City is to act as a central regulator, coordinator and facilitator, working to understand the challenges facing local businesses including; linking businesses with appropriate resources, advocating on behalf of local businesses, and supporting specific projects where appropriate. The levers available to the City can be described under the following hierarchy:



CONTROL

e.g. Establishing local policy and regulation, directing internal resources, utilisation of local government-controlled land and assets, implementing programs and events, and supporting projects with seed funding



INFLUENCE

e.g. Facilitating the strengthening of networks that encourage the sharing of knowledge and investment opportunities, and supporting communication with State and Federal governments regarding the influence of wider policy, projects or funding decisions



MONITOR

e.g. Tracking economic performance indicators and collecting feedback from businesses regarding current issues or opportunities which relies on communication channels with industry and the broader community

Using these levers, the City can actively attract and retain businesses through an understanding of the role, strengths and weaknesses of different centres and employment lands, and how they relate to a business's locational preference drivers and hence its operational productivity. These considerations differ depending on the nature of a business, with population/consumption-oriented businesses having different needs to those that operate business-to-business or are export-driven.

2 INTRODUCTION

This Needs Assessment report has been prepared for the City of Rockingham to inform the City's upcoming Local Planning Strategy (LPS); interim review of its Local Commercial and Activity Centre Strategy (LCACS) prepared in advance of the LPS; and, the Local Planning Framework for the Rockingham Strategic Metropolitan Centre.

The City is experiencing consistently high levels of population growth with an average annual growth rate of approximately 2.8% over the past decade, 57% faster than the Greater Perth average of 1.79%. The City's population is projected to grow at an average annual rate of 2.2% between 2021 and 2046, an increase of approximately 71%. The projected growth in population will create significant additional demand for retail and non-retail floorspace uses that will need to be delivered across the activity centre hierarchy.

This report addresses the elements identified in the Draft SPP4.2 Implementation Guidelines for Needs Assessments, including:

- Review of drivers of demand for retail and non-retail floorspace
- Assessment of relevant local and state planning documents
- Identification of appropriate study area
- Assessment of all retail and non-retail floorspace within the Study area
- Projection of future demand using gravity modelling and floorspace provision analysis; and
- Development of multiple future floorspace scenarios

Additionally, this Needs Assessment has been prepared to address the specific objectives the City has with regards to inputs for the LCACS review and the review of the local planning framework for the RSMC.

It should be noted that Karnup has been excluded from this report pending the preparation of the Karnup District Structure Plan. This Needs Assessment does not specify key considerations and advice for the integration of the District Structure Plan into the Needs Assessment when it is prepared.

2.1 Report Structure

Section 1 provides an overview of the report and summarises the key findings.

Section 3 provides a strategic review of relevant planning frameworks that have been used to guide analysis.

Section 4 provides an overview of the drivers underpinning floorspace demand including a demographic profile, socio-economic profile, trends analysis, businesses profile and property market profile.

Section 5 details the gap analysis for the City of Rockingham in its current state.

Section 6 provides floorspace recommendations for retail and non-retail floorspace over 5-year intervals in the City of Rockingham. This has been done for a number of scenarios.

Section 7 details the future Activity Centre Hierarchy developed for the five precincts in the City of Rockingham that have been defined in the current Local Commercial Strategy.

Section 8 provide implementation advice for the City of Rockingham in regard to this report.

Section 9 concludes the report.

Sections 10 to 13 are the appendices, providing analysis and results not included in the body of this Needs Assessment.

2.2 Rockingham Activity Centre Context

The Analysis Catchment used to guide this Needs Assessment has been defined in relation to the Rockingham Strategic Metropolitan Centre (RSMC).

The Analysis Catchment has been constructed based on the following rationale:

- **Quantum and Composition of RSMC Offering:** The large amount of retail floorspace provided within the RSMC attracts expenditure from a wide catchment. This is reflected in the Strategic Metropolitan Centre status of the Centre. Additionally, the highly diverse commercial floorspace offering of the RSMC means that users can satisfy a larger number of different shopping needs concurrently. This acts to further broaden the Centre's catchment.
- **Proximity to Local Government Areas with Limited Retail Offerings:** A portion of the Shire of Serpentine-Jarrahdale and the Shire of Murray has been included in the Analysis Catchment, as residents of these areas will likely utilise centres within the City of Rockingham due to the lack of higher-order centres provided within these Shires.
- **Retail Utilisation Patterns:** A number of the City of Rockingham's southern coastal suburbs, such as Secret Harbour, Singleton and Golden Bay, access services within the City of Mandurah in place of the City of Rockingham. The localities of Mundijong and Byford to the east/north-east have been included in the Analysis Catchment based on the fact that residents of these areas enjoy access to the Rockingham Strategic Metropolitan Centre via Mundijong Road. This will likely see them utilise centres within the City of Rockingham as well as/in addition to the Armadale Strategic Metropolitan Centre.
- **Natural Barriers:** The inclusion of the City of Mandurah in the Analysis Catchment has been truncated by the natural southern boundary of the Peel Inlet / Murray River. The inclusion of the Shire of Serpentine-Jarrahdale in the Analysis Catchment has been truncated by natural barriers and the frontier of urban development to the east. The inclusion of the Shire of Murray in the Analysis Catchment has been truncated by the natural southern boundary of the Peel Inlet / Murray River and the eastern frontier of urban development.

The resulting Analysis Catchment includes the entirety of the City of Rockingham and the City of Kwinana, as well as a portion of the City of Cockburn, the City of Mandurah, the Shire of Serpentine-Jarrahdale and the Shire of Murray (Figure 12).

Figure 12. Analysis Catchment for the Rockingham Local Commercial Strategy Needs Assessment



Source: DPLH 2016, City of Rockingham 2021, Pracsys 2021

This Analysis Catchment has been used to determine the demand for and supply of retail centres affecting the review of the City of Rockingham’s LCACS. To ensure the analysis accurately estimates the retail demand in



this Analysis Catchment, the net worker migration within the Analysis Catchment and the expected number of international visitors has also been incorporated into the demand profile.

The Analysis Catchment currently contains a total of approximately 350,000 residents and 146,000 households. The Analysis Catchment exhibits a net worker migration of approximately -27,000; 27,000 more workers leave the area than enter it for employment (see Section 6.1 for more detail).¹ An annual estimate of 24,000 international visitors² staying 23 days per trip have also been included in the demand side of the Analysis Catchment, conservatively based on the number of international visitors to the City of Rockingham (see Section 6.1 for more detail).^{3,4}

The City's activity centre hierarchy is broken down into five Precincts that have been used to report analysis findings. These are the same Precincts as the previous Local Commercial Strategy as there was no evidence identified that indicated the boundaries needed amending. These precincts are shown in Figure 13.

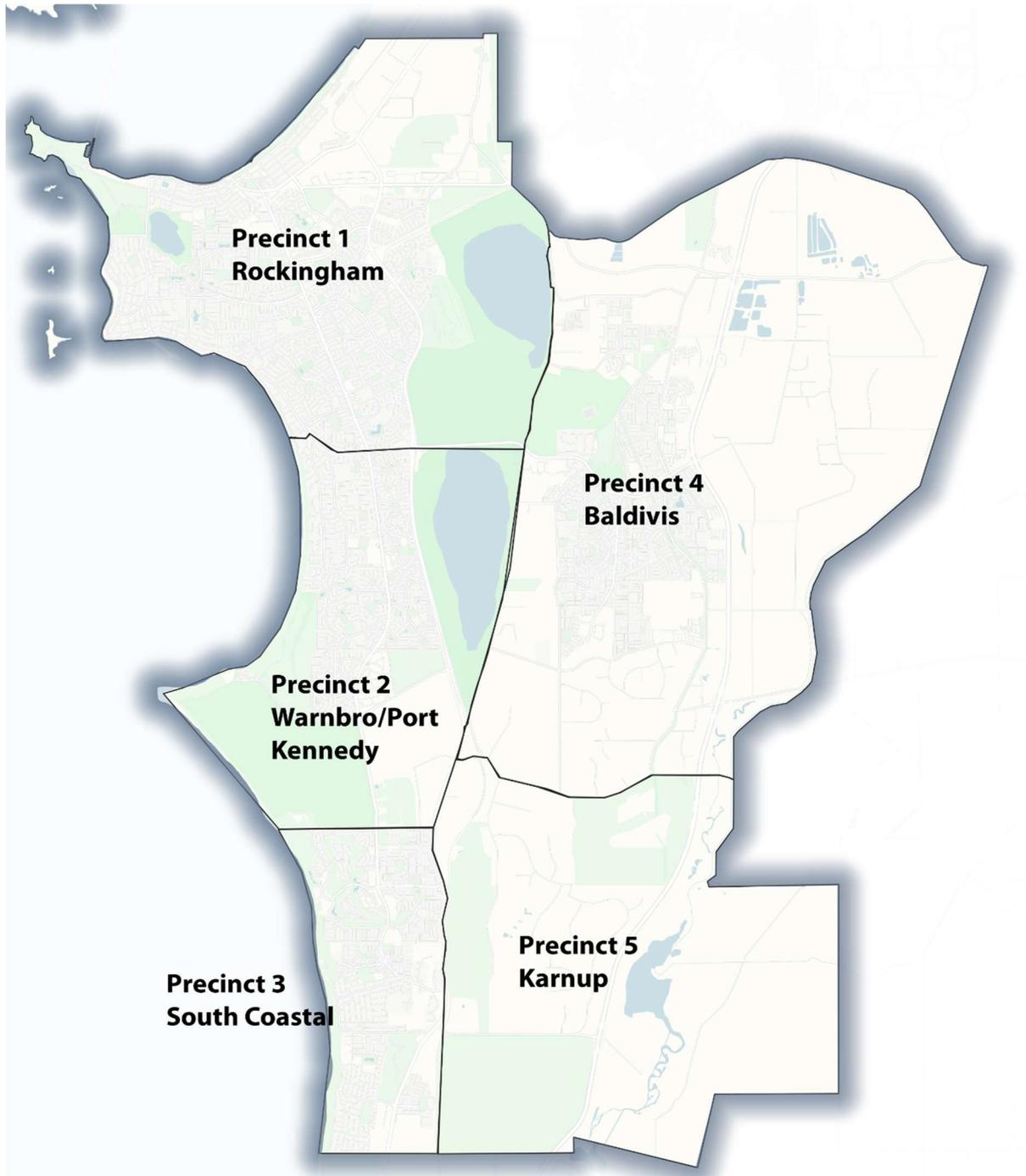
¹ ABS Census, 2016, <https://www.abs.gov.au/websitedbs/censushome.nsf/home/tablebuilder>

² Tourism WA, 2021, <https://www.ra.gov.au/>

³ Forecast ID, 2021, <https://economy.id.com.au/rockingham/tourism-visitors-nights>

⁴ For the purpose of the analysis, the number of international visitors has been conservatively assumed to remain constant over time.

Figure 13. Precincts within the City of Rockingham



Source: City of Rockingham 2013, Pracsys 2021

3 STRATEGIC CONTEXT

This section provides a review of the relevant strategic documents used to shape the analysis. It should be noted that this review will be expanded in the final report, when precinct sections are developed and the analysis assesses the appropriate design of activity centres and the activity centre hierarchy needed to support the population.

3.1 State Planning Framework

State Planning Policy 4.2 (Draft)

The Draft State Planning Policy (SPP) 4.2 provides a detailed overview of activity centre types and their appropriate hierarchy. It defines activity centres as multi-functional community focal points that vary in size and function. These activity centres should be serviced by transport networks with a focus on integrating pedestrian access and walkability. Activity centres should also include a range of land uses, including:

- Commercial uses
- Retail uses
- Food and hospitality use
- Higher density housing
- Entertainment uses
- Tourism Uses
- Civic/community uses
- Higher education uses, and
- Medical services

This planning policy is used to inform the development of planning instruments such as Local Commercial Strategies and has three specific policy objectives:

- Provide a hierarchy and network of activity centres that meet community needs and provide social, economic and environmental benefits to all Western Australians
- Enables the distribution of a broad range of goods, services and activities
- Ensure consistency and rigour in the planning and development of activity centres

To ensure a proposal meets these objectives and is approved under the SPP 4.2, it should:

- Support the overall precinct design objectives
- Deliver net community benefit and not result in a loss of community service to residents
- Provide an impact test for major developments
- Ensure the activity centre network meets different levels of community need and enables employment, goods and services to be accessed efficiently and equitably by the community

- Ensure the primacy of active centres is reinforced, and out-of-centre development that undermines the hierarchy of activity centres is discouraged
- Ensure new activity centres or the expansion and consolidation of existing activity centres does not unreasonably undermine existing centres

Draft SPP 4.2 provides implementation guidelines to support the development of planning documents and development applications. The guidelines identify two supporting documents:

- Needs Assessments to supporting strategies, structure plans and major developments
- Impact Tests to support major developments

There are specific criteria that identify when these documents are required. These will be specified as Precinct specific findings are developed.

The analysis undertaken for the Rockingham Local Commercial Strategy Review will be in line with the Draft SPP 4.2.

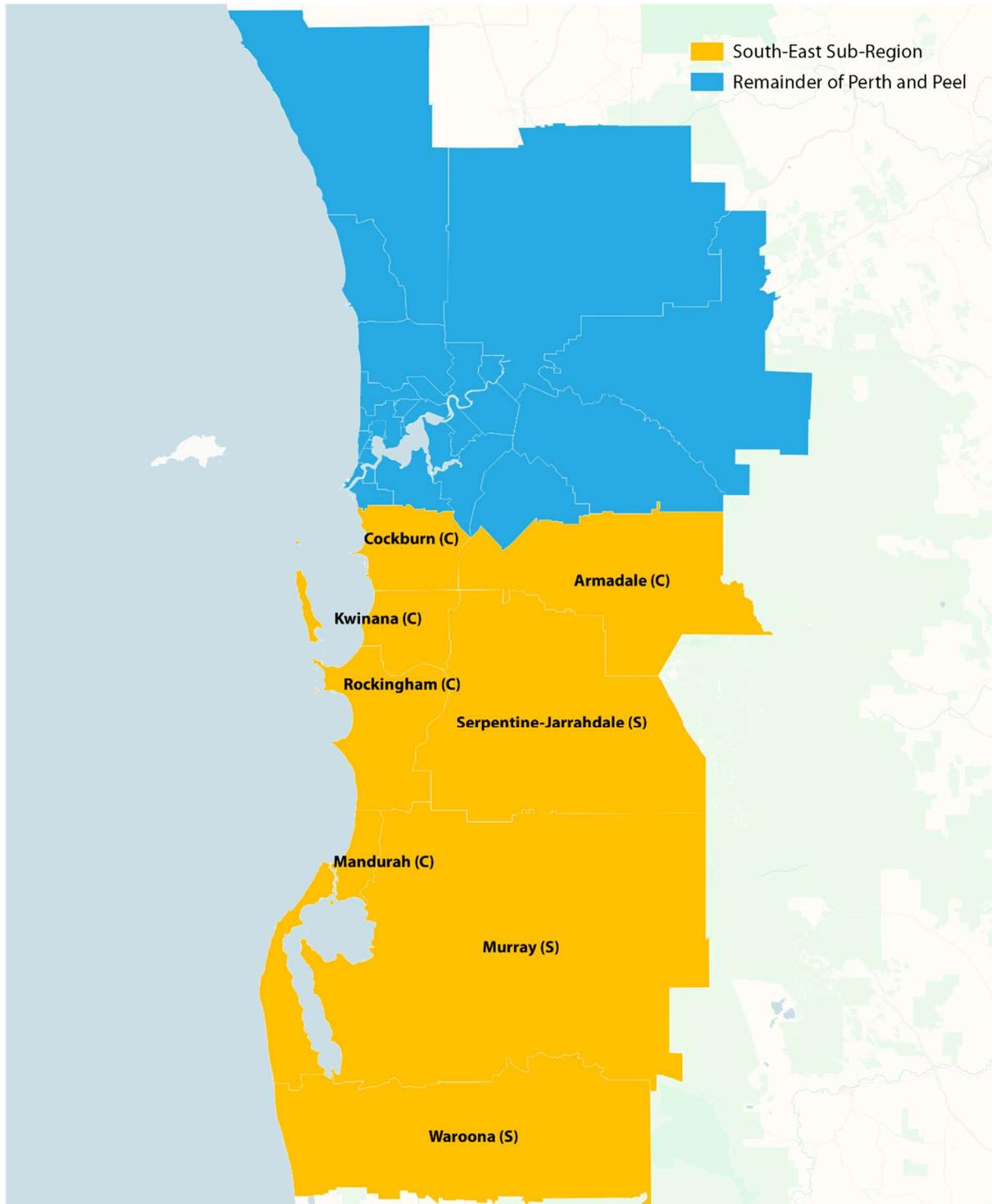
South Metropolitan Sub-Regional Planning Framework

The South Metropolitan Sub-Regional Planning Framework is a part of the Perth and Peel @3.5 million suites of land use planning and infrastructure frameworks. The South Metropolitan Peel Sub-Region covers an area of almost 5,000 km² and comprises the cities of Armadale, Cockburn, Gosnells, Kwinana, Mandurah and Rockingham, as well as the Shire of Murray, Serpentine-Jarrahdale and Waroona (Figure 14).

This framework has a number of strategic directions and priorities, including:

- Reducing the reliance on jobs outside of the South Metropolitan Sub Region as the sub-region has a considerable reliance on jobs in other locations, especially within the CBD, the Central sub-region and outside of the Perth metropolitan area with fly-in-fly-out jobs in the north-west of the State. This reliance is particularly evident in the south-eastern sector, which currently has an employment self-sufficiency of 45 per cent (2011), as well as the Peel sector
- Increasing Employment self-sufficiency levels in the South Metropolitan Peel sub-region are projected to increase from 65 percent to 83 percent in the south-western sector (Cities of Cockburn, Kwinana, Rockingham)
- Increasing employment at the Rockingham Strategic Metropolitan Centre that is identified to provide 5,500 additional jobs from 6,790 in 2011 to 12,290 by 2050
- Increase employment within the South-Western sector with 25,810 jobs within activity centres and 95,280 jobs outside of centres
- Increase manufacturing and agricultural sectors as well as **knowledge-based employment** that should be strategically located at activity and specialised centres
- Collaborate across government and with the private sector is to facilitate economic development and improved self-sufficiency within the sub-region, particularly to attract strategic economic and employment land uses into the sub-region and maximise the use of existing infrastructure

Figure 14. South Metropolitan Sub-Region



Source: DPLH 2018, Pracsys 2021

This framework sets out proposals to:

- Achieve a more consolidated urban form

- Facilitate increasing the number of people living close to where they work with the identification of suitable sites for employment within the sub-region
- Maximise the use of and add value to existing infrastructure, including transport, community/social and service infrastructure
- Promote employment nodes including activity centres, specialised centres, industrial areas, industrial expansion areas and industrial investigation areas
- Protect employment land from uses inconsistent with the employment objective by planning for ultimate development with limited interim uses
- Protect strategic industries and land classified for this purpose, together with their buffers, from the encroachment of non-strategic and/or incompatible land uses
- Improve employment self-sufficiency to reach identified targets

The City of Rockingham has been identified as a key area for housing growth due to its strategic centre and proximity to the coast. This housing growth will need significant infrastructure to support residents going forward. Rockingham is the principal centre of the south-western sector. It has a large and increasingly urban catchment. Population-driven growth will support increased retail activity and the activity centre will be the focus of office and commercial development for much of the area. The ability to attract development and investment has been constrained by the need for better connectivity between the heavy rail system and city centre. Transit corridors connecting the city centre with the surrounding urban catchment are proposed.

Additionally specialised centres focus on regionally-significant economic or institutional activities that attract substantial numbers of people. These activities will be centred on key uses and include complementary activities. The clustering of complementary activities can deliver additional economic benefits. In addition to the existing specialised activity centre at Jandakot Airport, focusing on aviation and logistic services, a new centre is proposed at Karnup. Karnup (East) is a strategic opportunity to identify a site for longer-term public uses that is centrally located in the urban system between Rockingham–Kwinana and Mandurah–Pinjarra. It is located adjacent to a rail and/or transit station and also accessible via transit corridors. A Karnup specialised activity node could provide for a range of regional public facilities which may include education, health and other future ancillary uses.

The planning framework provides context and guidance to support:

- Determination of an appropriate activity centre hierarchy
- Distribution of infrastructure throughout the City of Rockingham's centres
- Estimating employment and floorspace requirements to meet employment self-sufficiency targets

3.2 City of Rockingham Local Planning Framework

City of Rockingham Planning Policy No.3.1.2 – Local Commercial Strategy

The City of Rockingham Planning Policy No.3.1.2 – Local Commercial Strategy provides a detailed review of the existing City of Rockingham Retail Structure Plan that was updated to 1996. The purpose of this strategy is to:

- Establish the objectives, principles and key strategies for retailing and commercial development in Rockingham
- Apply the strategic planning policies set out in the State Government’s Metropolitan Centres Policy Statement (2000)
- Provide a context for the review of the City of Rockingham Town Planning Scheme No.2 in respect of provisions for retail and commercial development
- Guide private sector investment and the City’s capital works expenditure
- Provide Council with a sound basis for decision making on development applications, rezoning proposals and the provision and location of future Council services and facilities
- Identify centres and commercial locations requiring particular action, for example, where new ideas such as Community Design Codes may change the urban form of existing structure plans or for the restoration and improvement of established centres

This planning policy sets out the activity centre hierarchy for the City of Rockingham and splits the City of Rockingham into five distinct precincts, these precincts are:

- Rockingham
- Warnbro/Port Kennedy
- South Coastal
- Baldivis
- Karnup

Each of these precincts has been designated an activity centre hierarchy and provides recommendations for the appropriate floorspace of floorspace at activity centres going forward.

The work being undertaken for this Local Commercial Strategy review will build on the current Local Commercial Strategy, providing up to date and detailed insights on the appropriate provision of retail and non-retail floorspace within the City of Rockingham needed to support its growing population over time. The work undertaken will be in alignment with Draft SPP 4.2. The current LCS 3.1.2 maintains a significant amount of language from the Metropolitan Centres Policy (2000), some of which may not align with outcomes established in Draft SPP4.2. In particular, language referring to floorspace caps would be seen as inconsistent with the Draft SPP 4.2. Precinct specific sections will include language based on the Draft SPP4.2 and further guidance can be provided to ensure the final update to the LCS 3.1.2 is consistent with the current State Planning Framework.

Employment Planning Strategy

The Employment Planning Strategy undertaken by Syme, Marmion & Co assessed the current state of employment in the City of Rockingham and assessed potential employment scenarios going forward until 2050.

Currently, the City of Rockingham has a relatively high level of unemployment compared to the Greater Perth region and has a particular issue with youth unemployment. This issue is likely to be exacerbated if current trends continue, with employment opportunities in the City of Rockingham growing slower than the population. Employment opportunities in the City of Rockingham are specialised in construction and defence, reflective of the expansion in residential dwellings currently happening and due to Garden Island. To increase the current level of Employment Self-Sufficiency (ESS) in the City of Rockingham, additional strategic employment opportunities need to be generated over time.

Syme, Marmion & Co have identified a number of major employment centres that are likely to be the sites for employment growth over the next 30 years, these include:

- Rockingham City Centre
- East Rockingham Industrial Area
- Port Kennedy Industrial Area
- HMAS Stirling (Defence)
- North East Baldivis Industrial Area
- Karnup Industrial Area
- Baldivis – Kerosene Lane

The City is forecast to have high population growth, but currently only limited planning for commensurate employment growth. This being said it has a number of major advantages for employment growth:

- A major defence establishment at Garden Island
- An internationally competitive heavy industry zone at the Rockingham / Kwinana Industrial complex
- An internationally competitive naval and maritime industries construction, maintenance and services complex at Henderson in the Western Trade Coast
- A City Centre designated as the primary activity centre for a very large region, connected to regional transport systems and with an attractive ocean-front location for part of it

Despite these significant strengths, there are a number of weaknesses, including:

- Current employment-generating land is under threat from competing non-industrial uses
- The City's current planning framework for its Strategic Metropolitan Centre identifies the need to allocate more land for employment generating purposes

Based on differing scenarios for employment and population growth between now and 2050, Syme, Marmion & Co have estimated the likely ESS level in the City of Rockingham for 2050 (Figure 15).

Figure 15. Employment Self-Sufficiency Scenarios in the City of Rockingham

Scenario	1	2	3	4	5	6
Population Growth	Low	Low	Medium	Medium	High	High
Employment Growth	Low	Medium	Low	Medium	Medium	High
Town Centre Population	26,030	26,030	32,321	32,321	48,580	48,580
Jobs: Town Centre	11,193	13,693	13,898	19,307	25,262	34,422
Jobs: Rest of City	30,721	33,221	34,426	39,926	38,980	43,480
Total Jobs - Base	41,914	46,914	48,324	59,233	64,241	77,901
Additions						
North East Baldivis	8,300	8,300	8,300	8,300	8,300	8,300
Karnup (Core)	12,500	12,500	12,500	12,500	12,500	12,500
Karnup (South)	12,400	12,400	12,400	12,400	12,400	12,400
Employment Self-Sufficiency (Jobs / Workers Ratio)						
Base	0.45	0.50	0.44	0.53	0.49	0.59
With North East Baldivis	0.53	0.59	0.52	0.61	0.55	0.66
Plus Karnup (Core)	0.67	0.72	0.63	0.72	0.65	0.75
Plus Karnup (South)	0.80	0.85	0.75	0.84	0.74	0.85

Source: Syme, Marmion & Co 2020

This analysis has identified the City of Rockingham will have a relatively low level of ESS unless additional employment opportunities in industrial areas are capitalised on going forward. Additionally, Syme, Marmion & Co's report has identified that it is critical that every opportunity to increase the amount of diversity of economic activity in the Rockingham City Centre is taken.

Our analysis will use the findings of this report to estimate the appropriate provision of floorspace by type in activity centres required to help meet certain levels of ESS.

City of Rockingham Economic Development Strategy

The City of Rockingham's Economic Development Strategy 2020-2025 aims to provide strategic economic development priorities for Rockingham. This strategy reflects the Council's ongoing commitment to addressing the needs of the local business community, attracting new and diverse investment and delivering increased economic and social benefits to their community.

This Community Plan Strategy has been prepared to address Aspiration 1 – Actively Pursue Tourism and Economic Development as specified by the City's Strategic Community Plan 2019-2029, which identified actively pursuing tourism and economic development as an aspiration for the City of Rockingham. To pursue this aspiration, a number of potential actions have been identified, including:

- Promote the City as the premier metropolitan coastal tourism destination
- Attract local and international investment to the City to contribute to the local economy



-
- Develop and implement effective marketing approaches to promote the City as a destination of choice for the local community, visitors, investors and businesses
 - Seek to host iconic community events and attractions that will entice residents and visitors throughout the year
 - Lobby local, state and federal stakeholders to establish infrastructure and development opportunities for the City
 - Support business development initiatives throughout the City; and
 - Identify and attract conferences and high-profile businesses and sporting events to the City to develop its profile as a destination of choice for event organisers

These actions are required to support a number of key findings identified by the City that will provide direction on what needs to be considered going forward, including:

- The heavy reliance on the retail sector
- The importance of the defence sector
- Continued high population growth will negatively impact the City's ability to sustain its currently low level of ESS, which adds to higher unemployment levels, especially youth, with the population in Rockingham getting younger
- Inequitable infrastructure funding from Federal and State Government compared with other similar communities
- A lack of employment generating zoned land, which in turn restricts the City's ability to diversify industries and attract businesses to the area
- A lack of high-quality office space and business accommodation
- Lack of short-stay accommodation in the Waterfront Tourism Precinct and Cape Peron; and
- Underutilised tourism assets with particular emphasis on Point Peron, which offers a wide variety of opportunities for the development of formal infrastructure and amenity to support visitors to the area

The EDS, in combination with the Syme, Marmion & Co Employment Planning Strategy has identified that key avenues for employment growth in defence, tourism, general and heavy industrial, the City Centre, Westport, aged care, retirement living and local hospitality (restaurants, cafes and bars).

The findings from the EDS document will assist this report in identifying the types of land uses that should be focused on at activity centres to assist the City in catalysing economic growth.



4 FLOORSPACE DRIVERS

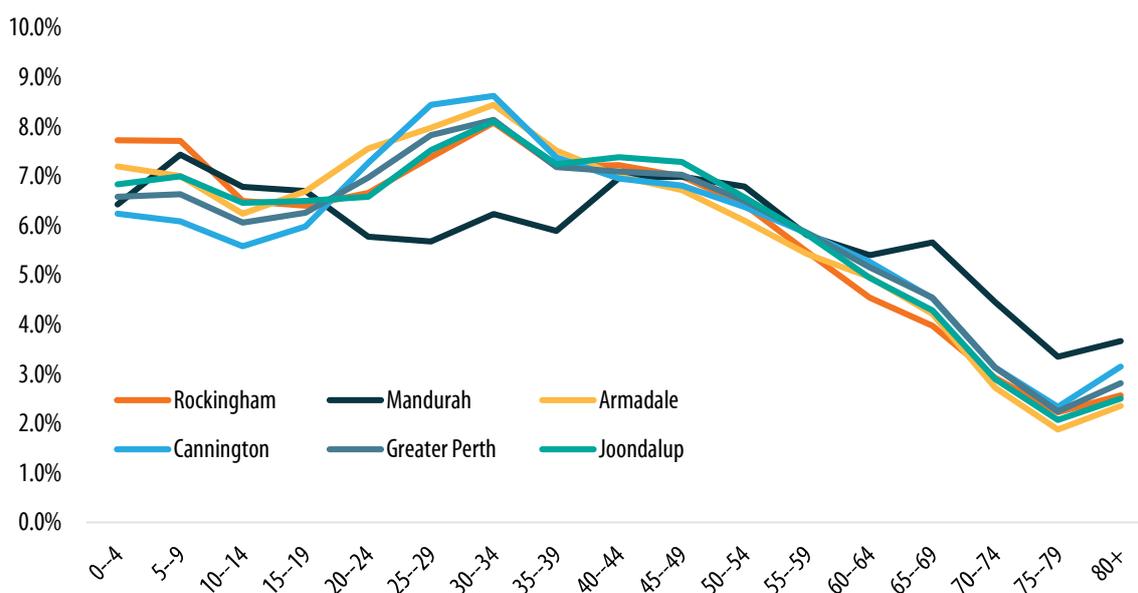
This section details the demand profile for the City’s activity centre hierarchy based on population, employment and business trends. The trends have been compared to benchmark catchments for the Mandurah, Armadale, Cannington and Joondalup strategic metropolitan centres, as well as the Greater Perth region. A 25km radius (roughly aligned to the Analysis Catchment) was set as the study area for all benchmark centres to support comparability. The benchmark catchments have been used for comparison as they will support the floorspace gap analysis.

4.1 Demographic Profile

Age Profile

The demographic analysis indicates the Analysis Catchment has a high proportion of young families, with the City having a high proportion of persons aged 0-9 and 20-40 compared to the benchmarked areas (Figure 16).

Figure 16. Age Profile of RSMC Analysis Catchment and Selected Benchmarks



Source: ABS Census 2016, Pracsys 2021

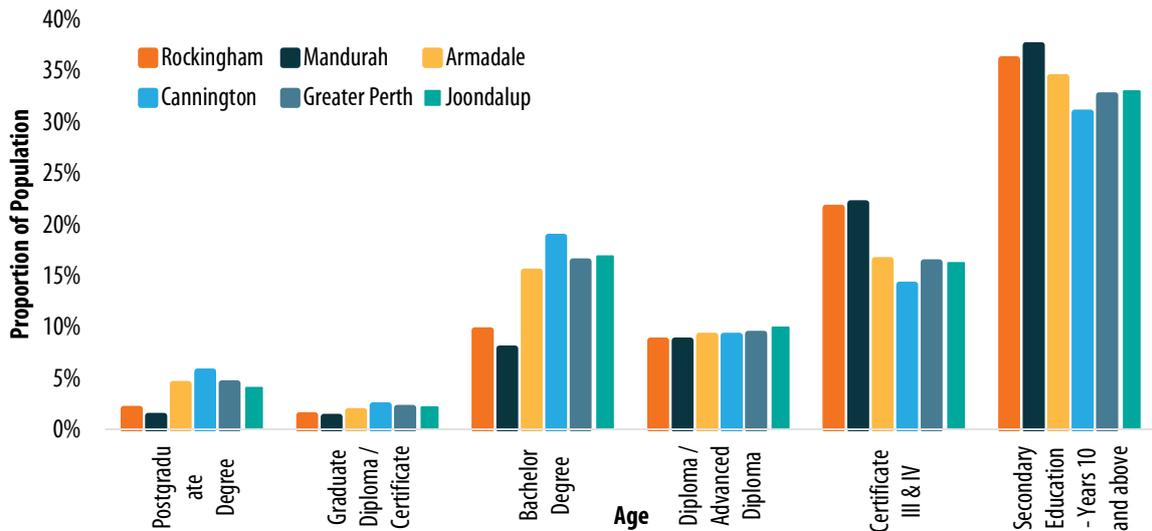
This population breakdown indicates the City of Rockingham may need to target the retail needs of young families when designing and planning activity centres. This could include providing suitable amenities such as playgrounds within viewing distance of cafes and restaurants. Additionally, the significant expected increase in dwellings for the City of Rockingham will further attract young families and activity centres designed around new dwellings should specifically target this demographic.



Education profile

There is a relatively high proportion of persons with Certificate III & IV as their highest level of educational attainment (Figure 17). This indicates that a large portion of residents work in trades, with many likely supporting the construction industry due to the high rates of residential growth. Notwithstanding, there are opportunities for wholesale and retail uses that support tradespersons and skilled professionals.

Figure 17. Education Profile

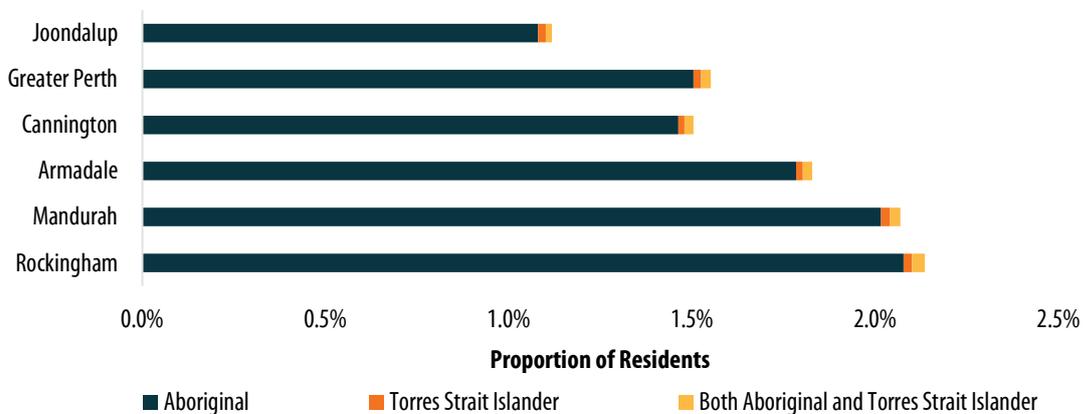


Source: ABS Census 2016, Pracsys 2021

Diversity Profile

The analysis shows that the Analysis Catchment has a slightly higher concentration of Indigenous persons than the Greater Perth region, however, it is not significantly higher and is unlikely to impact the preferred retail offerings of the overall demographic in the Analysis Catchment (Figure 18).

Figure 18. Aboriginal and Torres Strait Islander Profile

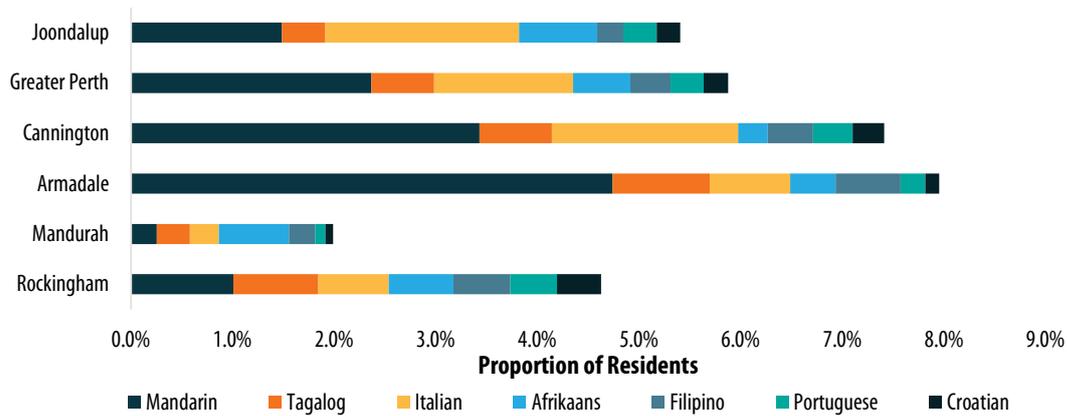


Source: ABS Census 2016, Pracsys 2021



The level of diversity in the Analysis Catchment was assessed based on the proportion of residents who speak a language other than English at home. The Analysis Catchment has a relatively low proportion of persons who speak a language other than English at home compared to the Greater Perth area (Figure 19).

Figure 19. Language Spoken at Home Profile



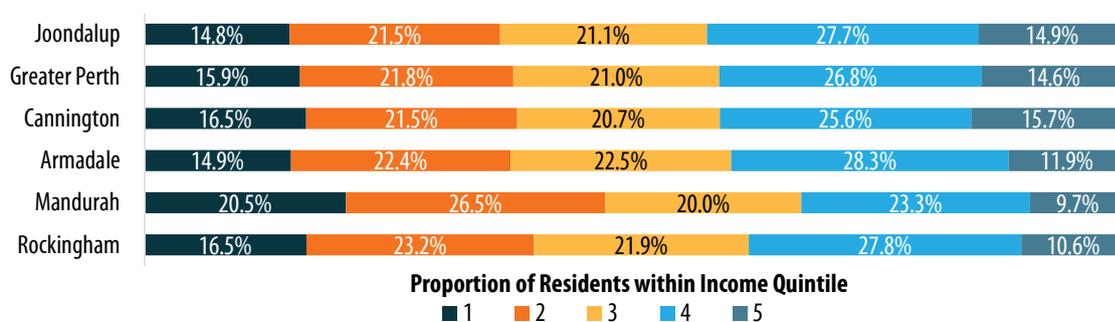
Source: ABS Census 2016, Pracsys 2021

Despite the relatively low level of diversity within the Analysis Catchment, ensuring a diverse retail offering is recommended as the high growth in dwellings for the area will likely encourage increased diversity over time.

4.2 Socio-economic Profile

The Analysis Catchment has a lower proportion of high-income earners than the Greater Perth area, with only 9.8% of households within the top income quintile compared to 12.7% for Greater Perth (Figure 20). A lower proportion of persons within the highest income quintile indicates that residents are likely to spend a greater portion of their income on convenience retail and accordingly, will spend less on comparison items. There could be a shift in income levels as Westport develops and attracts more strategic and knowledge-intensive employment to the sub-region.

Figure 20. Household Income Profile



Source: ABS Census 2016, Pracsys 2021

Note: Income quintiles for households are as follows; 1 = \$1 - \$33,799, 2 = \$33,800 - \$64,999, 3 = \$65,000 - \$103,999, 4 = \$104,000 - \$181,999, 5 = \$182,000+

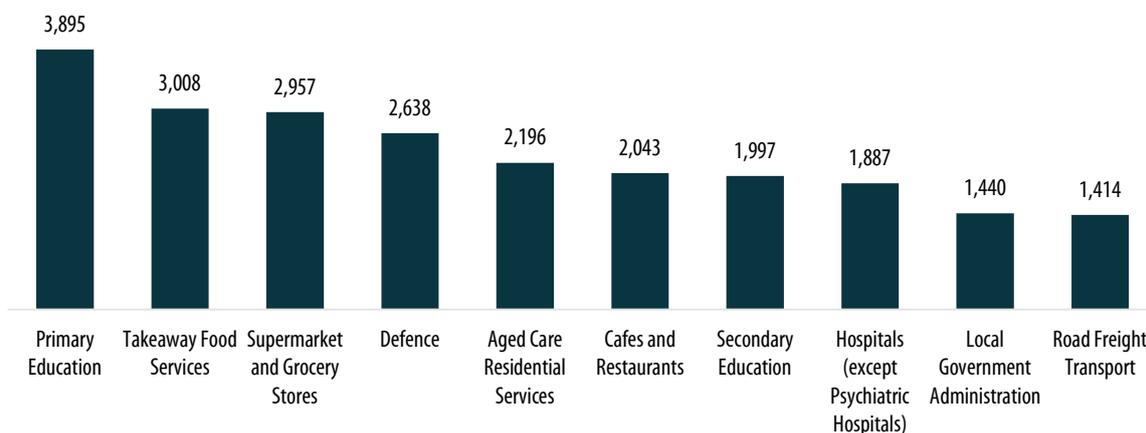


4.3 Employment Profile

The top employing industries at the Australian and New Zealand Standard Industry Classification (ANZSIC) Level 4 include Primary Education, Defence and Supermarket and Grocery Stores (Figure 21). Eight of the top ten industries are population-driven and will be expected to grow in line with the population.

Demand for employment in Secondary Education is expected to grow proportionately faster than the population as children age throughout the analysis catchment, similarly, demand for Aged Care services are expected to grow as the population ages. Defence and Road Freight Transport are strategic industries that will grow based on factors other than changes in population in the Analysis Catchment. Relevant drivers for these industries are increased federal defence spending and the development of Westport at the Western Trade Coast industrial area.

Figure 21. Top Employing Industries within the Analysis Catchment

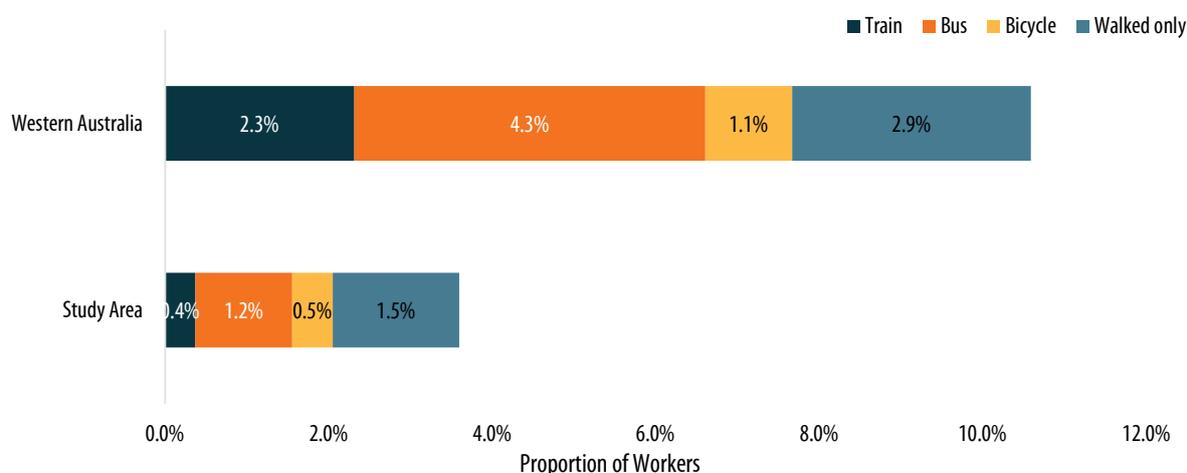


Source: ABS Census 2016, Pracsys 2021

Employees within the Analysis Catchment have been found to use a much smaller proportion of public transport than persons in Western Australia, potentially indicating that there are insufficient transport links to key employment centres within the Analysis Catchment (Figure 22).



Figure 22. Mode of Travel to Work Profile within the Analysis Catchment



Source: ABS Census 2016, Pracsys 2021

4.4 Trends Analysis

The City should encourage development within its activity centres in line with current retail trends to maximise expenditure and overall demand. This being said, the City’s main goal should be to address the policy outcomes specified in the SPP 4.2, ensuring the establishment of a hierarchy of activity centres that promotes, employment, equitable access of goods and services and primacy of activity centres.

The identified trends highlight the fast-changing nature of retail that businesses need to adapt to. It is key to ensure that planning for activity centres allows for flexibility in uses and floorspace areas. The following trends are worth considering as activation and development opportunities arise.⁵

Trend	Description	Drivers
Conscious Retail	Conscious retail is increasingly keeping customers loyal to a brand /distributor.	Many consumers have made a lifestyle choice to have a smaller global footprint, support brands that provide better conditions for factory workers in developing countries, or support local products. Consumers are often willing to pay a premium for these products.
Data Retail	‘Big Data’ is being used to continually monitor and respond to changing consumer desires, shortening the product cycle.	Collecting and analysing data on retail sales is being used to inform all parts of the retail sale process, from supply chain to understanding customer satisfaction with their purchase. Retailers who don’t use data to inform their decisions are much less likely to understand their customer’s preferences or forecast demand and may find it difficult to remain competitive with those who do.

⁵ <http://www.smartcompany.com.au/industries/retail/top-five-retail-trends-watch-2017/>;
<https://www.rangeme.com/blog/6-trends-that-will-reinvent-retail-in-2017/>;
<https://www.appearhere.co.uk/inspire/blog/the-retail-trends-with-staying-power>; <http://digitalmainstreet.ca/retail-trends-10-experts-share-their-predictions-for-2017/>; <https://www.vendhq.com/au/university/retail-trends-and-predictions-2017/>; <https://www.digitalpulse.pwc.com.au/retail-trends-2017-paul-zahra/>;
<https://www.forbes.com/sites/bernardmarr/2015/11/10/big-data-a-game-changer-in-the-retail-sector/#63dc4fbd9f37>



Trend	Description	Drivers
International Retail	The last few years have seen an influx of international brands penetrating the Australian market.	An untapped Australian market and Australian's demanding goods they can see online but cannot purchase locally. Additionally, the ability to geoblock products and charge higher prices in the Australian market has driven demand.
Omnichannel Retail	Digital marketing has been used to keep customers loyal to a brand/distributor.	The emergence of digital marketing across a range of devices, platforms and applications have provided multiple channels for retailers to market their products. Physical stores need an online presence to be competitive, as a consumer may shop using both means at different times.
Mobile Devices	Accessing retail via mobile devices and integrating mobile devices.	Mobile devices are providing unprecedented 24/7 access to retail offerings.
Subscription retail	Subscription retail allows retailers to encourage increased loyalty and connection to their brand.	Retailers need a business model that 'locks in' customers to increase the threshold of switching brand
Fast Retail	Business models comprised of virtual stores accessible from anywhere with fast distribution networks.	Technology has enabled customers to decide when, how and where to go. Consumers are no longer beholden to opening times or physical geography, consumer desires rather than retailers are driving consumption.
Retailtainment	Entertainment as an integral part of the retail experience.	The popularity of online retail channels has resulted in physical retailers needing to provide a retail experience or social experience as a point of difference. Millennials integrate retail and entertainment as a single social experience.
Small Retail	Speciality shops and smaller floorplates are becoming more popular.	Smaller stores with more curated selections, and specialty shops with niche products and more knowledgeable staff are predicted to be more competitive than larger stores where products can be harder to find.
Personal Retail	Consumers are increasingly desiring products that can be personalised.	Consumers are going shopping with a strong idea of what they want, rather than shopping to see what is available and fits their needs. They want to find a product that reflects their personal brand, and is tailored to their needs rather than generic and mass-produced.
Ethical Consumerism	Consumers are considering the ethical and environmental impact of their purchases; where the product was produced and if it reflects their values.	This has been driven by a range of factors such as COVID-19, social media raising awareness around working conditions and environmental impact, news, Oxfam and other organisations that rate brands.
Ecommerce	The rise of online shopping coincides with a rise in e-commerce. Online shopping provides the ability of consumers to stay home and e-commerce has revolutionised who can be a retailer.	This has been driven by fast-paced lives, the rise of social media, more people starting online businesses. Online shopping is what customers are doing and ecommerce is what businesses are doing. This also means in-store shopping has to be enticing or convenient enough to attract consumers.
Buying Local	Supporting local businesses and individuals	Consumers are becoming increasingly willing to purchase from small businesses and locally. This has been exacerbated by COVID-19, with small businesses struggling and a lack of imported goods.



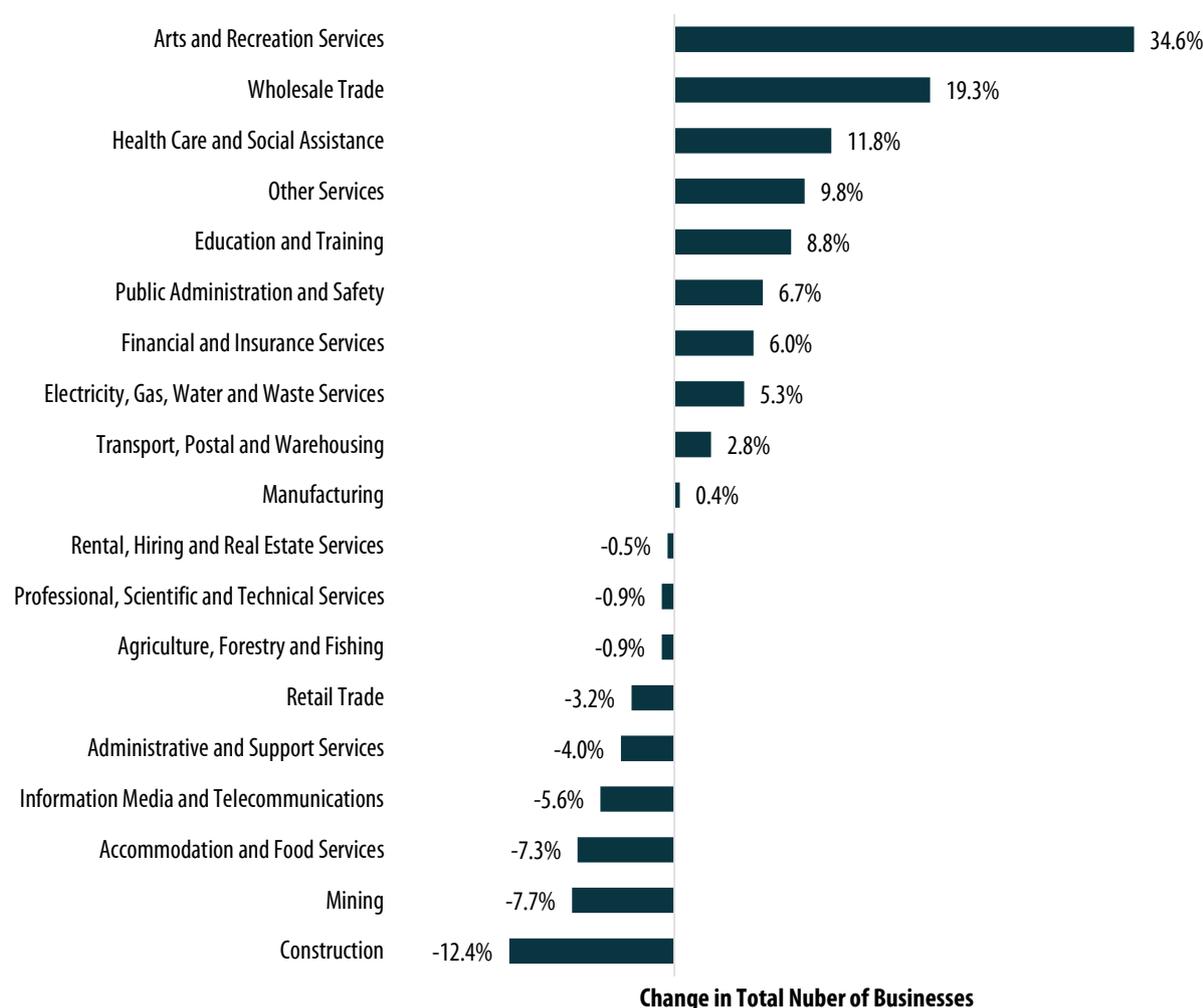
Trend	Description	Drivers
Open Air Shopping Experiences	People are starting to prefer outdoor malls rather than enclosed malls.	People wanting to be in nature, prefer to walk between shops outside rather than in a shopping centre, however, the trade area pull is larger for indoors than outdoors
Circular Fashion	More consumers are turning to be a part of a circular economy model in which they consume and give away items in a more sustainable manner.	This has been driven by second-hand ecommerce like Etsy, people both buying and selling as individuals or small 'brands' and the growth of the sharing economy.
Authenticity	Customers are increasingly wanting to feel a personal connection with brands and are becoming more aware of manipulative advertisements.	Increased availability of information is making consumers more aware of marketing tactics. This is making consumers more inclined to purchase from brands/retailers they feel are authentic.



4.5 Businesses Profile

ABS Business Entries & Exits data indicates that the total number of businesses in the City of Rockingham has declined slightly between 2018-2020 (latest available data), down from 5,564 in 2018 to 5,497 in 2020. It should be noted, however, that the construction industry has experienced a significant decline, down from 1,505 in 2018 to 1,318 in 2020. Excluding this industry, business growth has been relatively strong in the City of Rockingham between 2018-2020 (Figure 23).

Figure 23. Change in Total Number of Businesses by Industry, 2018-2020



Source: ABS 2020, Pracsys 2021

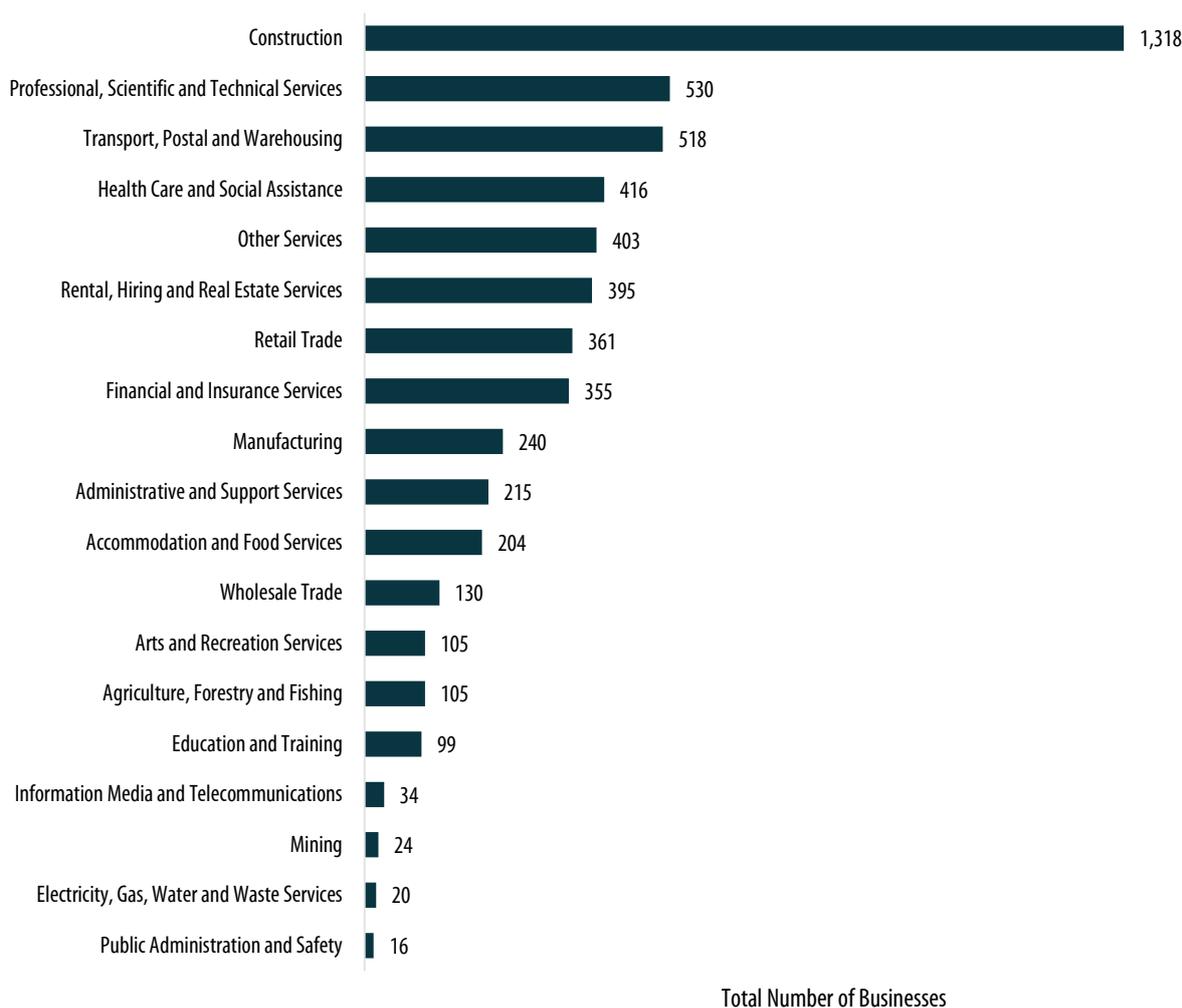
High growth in Arts and Recreation, Health and Education related businesses align with the high levels of population growth and would be expected to continue, although not at the same rate. Declines in Retail, Accommodation and Food Services are seen as temporary, and it is expected there will be business growth to support continued population growth. These businesses will develop predominantly in activity centres.



Businesses related to Westport such as those in Transport, Postal and Warehousing, and Professional, Scientific and Technical Services are expected to grow as the Westport transition occurs.

The City is forecasting significant dwellings growth over time and may attract construction businesses to grow to support this development. Employment land (i.e. light industrial land) could develop to offer services and products that directly support the significant number of construction businesses, particularly with continued residential dwelling development (Figure 24).

Figure 24. Total Number of Businesses by Industry in the City of Rockingham



Source: ABS 2020, Pracsys 2020

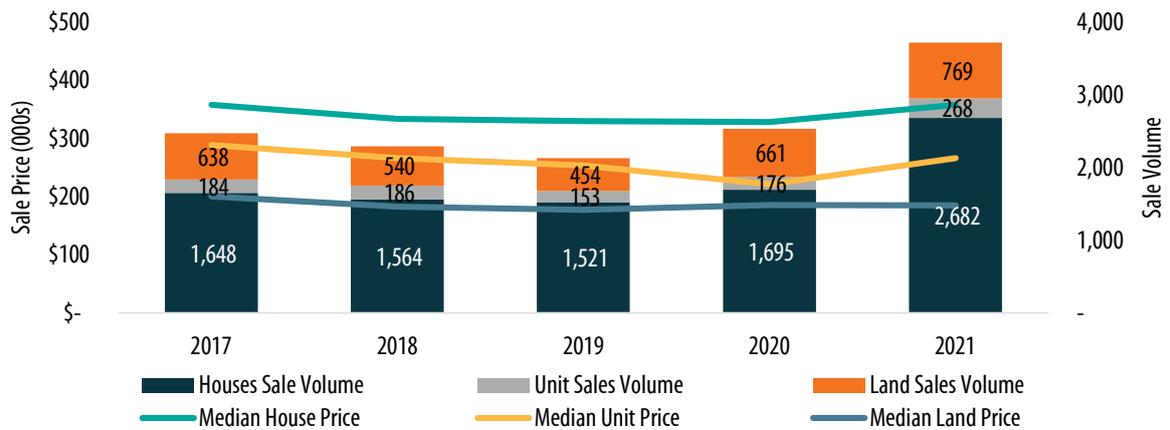


4.6 Property Market Profile

The analysis has assessed the current residential property market profile in the City of Rockingham. This includes an assessment of sale prices, sales volumes, rental prices, rental volume and rental yield at the suburb level (see Section 13). It should be noted that complete sales data was not available for all suburbs and rental yield was calculated using the average house sale price and average rental return from houses.

Sales Analysis

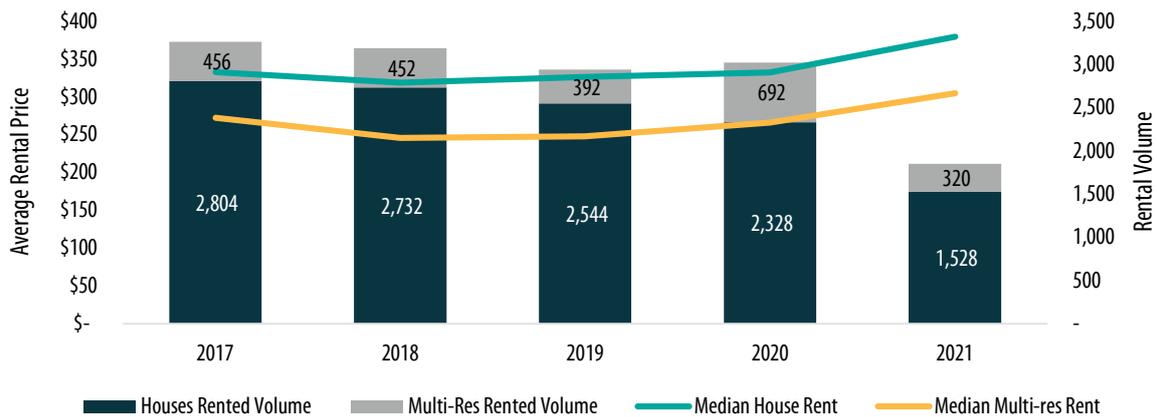
Figure 25. City of Rockingham Residential Sales Prices and Volumes



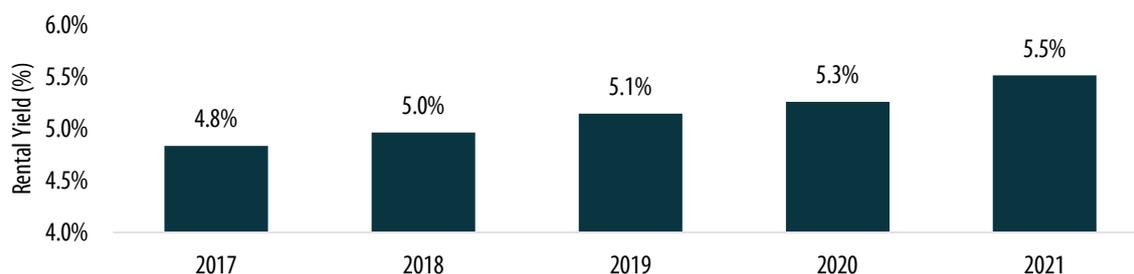
Source: REIWA 2021, Pracsys 2021

Rental Analysis

Figure 26. City of Rockingham Residential Rental Prices and Volumes



Source: REIWA 2021, Pracsys 2021

Figure 27. City of Rockingham Rental Yield for Houses

Source: REIWA 2021, Pracsys 2021

The assessment of the residential property market in the City has identified that it is experiencing increased property demand. Between 2017 and 2021;

- Total houses purchased have increased by 63%
- House prices have remained constant
- Total units purchased have increased by 46%
- The median unit price declined by approximately \$23,000⁶
- Total land purchased it up by 21%
- Land prices have declined by approximately \$15,000⁷

Encouragingly, despite the significant increase in greenfield development and the number of properties being constructed, prices have only fallen slightly and demand has increased sharply. It should be noted that this increase is considered significant, as data for 2021 is only a portion of the full year.

For rental properties in 2021, compared to 2017:

- 46% fewer houses have been rented
- The average rental price for houses has increased by approximately \$50 per week
- 30% fewer multi-residential properties have been rented
- The average rental price for multi-residential properties has increased by approximately \$30 per week

It should be noted that these decreases are not considered significant, due to the data for 2021 only being a portion of the full year and rental restrictions associated with COVID being in place until March 2021. This being said, the number of houses rented in 2020 was down by approximately 17% compared to 2017 and the number of multi-residential properties being rented increased by approximately 250.

The relatively consistent house prices and the increase in rental prices have increased the rental yield of properties in the City, with the rental yield increasing from 4.8% in 2017 to 5.5% in 2021. Increased rental yield is an encouraging sign for investors and reflects the increased demand for properties in the City. It could raise questions of affordability however, and housing affordability should be considered when preparing the LPS.

⁶ This could reflect smaller or more affordable apartments becoming available

⁷ This could reflect the wider trend for smaller lots being sold

4.7 Floorspace Drivers Summary

This section considers some of the key drivers of floorspace. A summary of findings, includes:

- Age demographics indicate the City of Rockingham may need to target the retail needs of young families when designing and planning activity centres. This could include providing suitable amenities such as playgrounds within viewing distance of cafes and restaurants. Additionally, the significant expected increase in dwellings for the City of Rockingham will further attract young families and activity centres designed around new dwellings should specifically target this demographic
- There are opportunities for wholesale and retail uses that support tradespersons and skilled professionals. These are relevant to Other Retail centres
- A lower proportion of persons within the highest income quintile indicates that residents are likely to spend a greater portion of their income on convenience retail and accordingly, will spend less on comparison items. There could be a shift in income levels as Westport develops and attracts more strategic and knowledge-intensive employment to the sub-region. Private industry will likely adapt to changing purchasing behaviour and there could therefore be changes in floorspace requirements
- High growth in Arts and Recreation, Health and Education related businesses align with the high levels of population growth and would be expected to continue, although not at the same rate.
- Declines in Retail, Accommodation and Food Services are seen as temporary, and it is expected there will be business growth to support continued population growth. These businesses will develop predominantly in activity centres.
- Businesses related to Westport such as those in Transport, Postal and Warehousing, and Professional, Scientific and Technical Services are expected to grow as the Westport transition occurs. These businesses should develop in strategic industrial areas and the RSMC.
- The City is forecasting significant dwellings growth over time and may attract construction businesses to support this development. Employment land (i.e. light industrial land) could develop to offer services and products that directly support the significant number of construction businesses, particularly with continued residential dwelling development
- The relatively consistent house prices and the increase in rental prices have increased the rental yield of properties in the City, with the rental yield increasing from 4.8% in 2017 to 5.5% in 2021. Increased rental yield is an encouraging sign for investors and reflects the increased demand for properties in the City. It could raise questions of affordability however, and housing affordability should be considered when preparing the LPS.

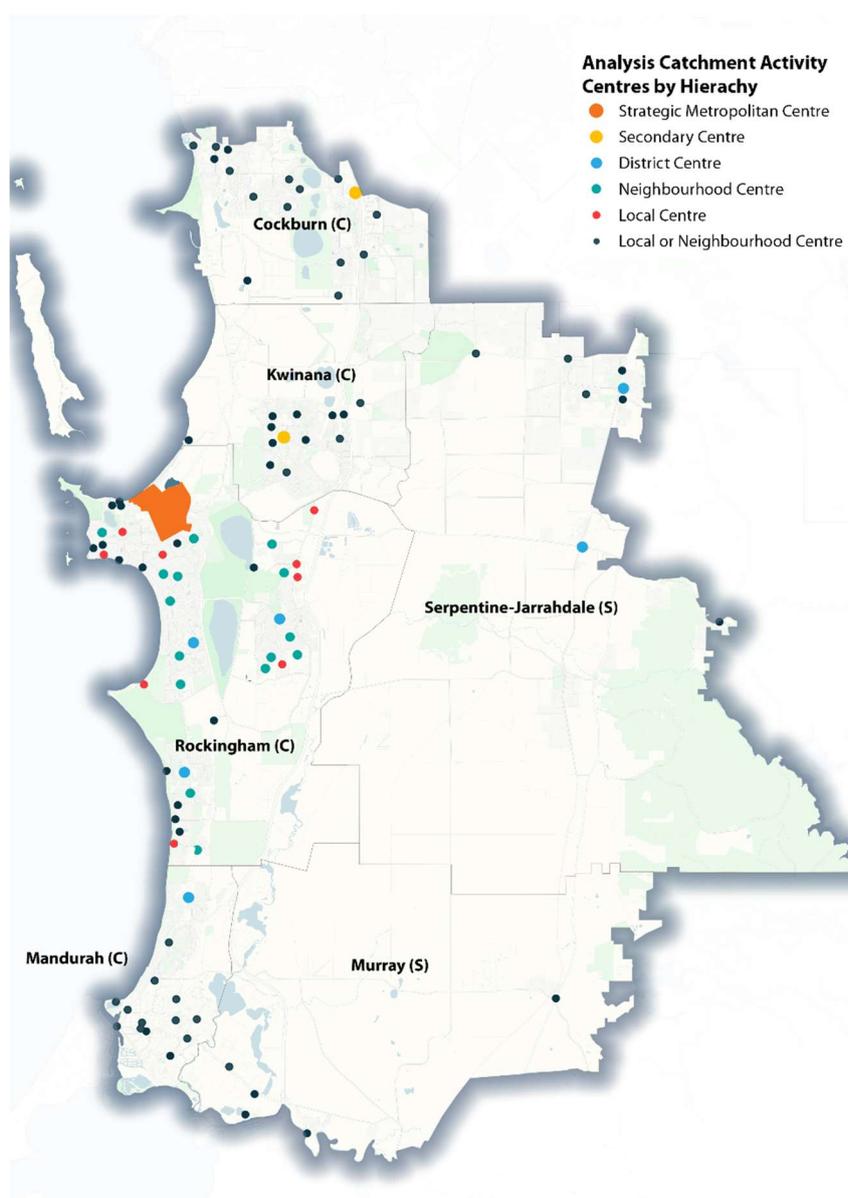
5 CURRENT GAP ANALYSIS

The current gap analysis was developed through consideration of both access to centres and the quantum of floorspace provided. This allowed for consideration of where new centres may be required and the additional floorspace that could be supported based on the City’s population.

5.1 Current Activity Centre Hierarchy

The Analysis Catchment’s current and future supply profile is mapped with based on centre type (Figure 28).

Figure 28. Analysis Catchment Activity Centres by Hierarchy



Source: DPLH 2016, City of Rockingham 2021, Pracsys 2021

Note: Centres were listed as ‘Local or Neighbourhood Centre’ if they were outside the City of Rockingham or their established position in the activity centre hierarchy was unclear.

Activity centres in the Analysis Catchment provide a total of approximately 1,200,000 m² of commercial floorspace (Figure 29).

Figure 29. Commercial Floorspace in the Analysis Catchment

Area	Shop/Retail	Other Retail	Non-Retail
City of Rockingham Centres	207,000	85,000	235,000
Centres Outside of City ⁸	295,000	78,000	297,000

Source: DPLH 2016

Note: Shop Retail = Convenience/Comparison Retail, Other Retail = Bulky Goods Retail, Non-Retail Floorspace = (Entertainment, Health, Office, Service Commercial, Storage, Manufacturing). Detailed Floorspace definitions are provided in Appendix 1, Section 10.4, PLUC Definitions

The City's current supply of floorspace has been summarised by precinct with a detailed centre floorspace supply table provided in Section 12 (Figure 30). Precincts are based on previous classification in planning frameworks.

Figure 30. Commercial Floorspace by Precinct

Area	Shop/Retail	Other Retail	Non-Retail
Precinct 1 – Rockingham	112,000	48,000	175,000
Precinct 2 – Warnbro	31,000	18,000	12,000
Precinct 3 – Secret Harbour	23,000	0	10,000
Precinct 4 – Baldivis	41,000	18,000	37,000

Source: DPLH 2016

Note: Shop Retail = Convenience/Comparison Retail, Other Retail = Bulky Goods Retail, Non-Retail Floorspace = (Entertainment, Health, Office, Service Commercial, Storage, Manufacturing). Detailed Floorspace definitions are provided in Appendix 1, Section 10.4, PLUC Definitions

This current supply of floorspace in the Analysis Catchment has been assessed using service ratio modelling and retail gravity modelling (see Section 10) to determine the gaps in floorspace provision for the City's activity centre hierarchy.

5.2 Provision of Centres

The provision of centres was assessed to identify any potential gaps in the activity centre hierarchy. Distance to access centres from where residents live was used to assess the provision of centres. A number of iterations were undertaken to assess the provision of centres:

- **Minimum Access:** The spatial area has overall access to at least one centre and can therefore access a minimum standard of retail service. This was measured based on approximate catchment boundaries (i.e. 10km for a district centre)

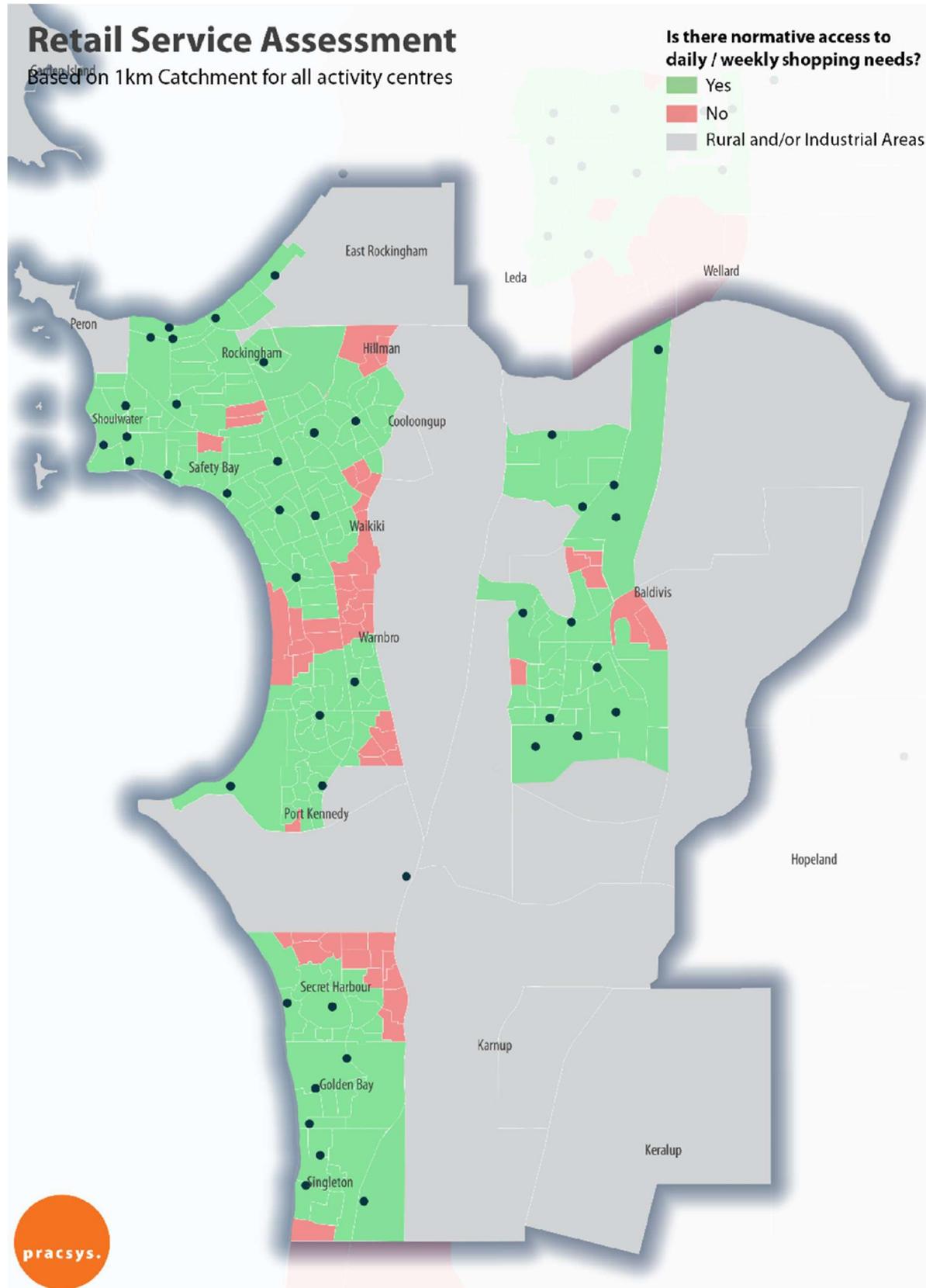
⁸ These activity centres sit within the entirety of the City of Kwinana and portions of the City of Cockburn, the City of Mandurah and the Shire of Serpentine-Jarrahdale.



-
- Daily/Weekly Access: The spatial area has overall access to at least one Neighbourhood or Local centre (or larger) and can therefore access an activity centre that provides for daily / weekly shopping needs. This was assessed based on a 1km radius around all centres
 - Walkable Access: The spatial area has walkable access to at least one centre (this was assessed at 200m to 800m walkable catchments)

It was decided that 1km was a reasonable distance to assess provision given the suburban nature of Rockingham. This means that any ABS SA1 spatial areas that were more than 1km from an activity centre would be identified as having an underprovision. (Figure 31).

Figure 31. Access to Centres Providing for Daily / Weekly Shopping Needs in the City of Rockingham



Source: DPLH & WAPC State Planning Policy 4.2 2020, Pracsys 2021



Within the City, an estimated 35,000 residents do not currently enjoy normatively adequate walkable access to an activity centre providing for their daily/weekly shopping needs, with this number set to grow to 60,000 by 2041 (Figure 32).

Figure 32. Persons Without Normatively Adequate Access to Daily / Weekly Shopping Needs

Area	2021	2026	2031	2036	2041
City of Rockingham	35,000	40,000	45,000	52,000	60,000
Analysis Catchment	108,000	127,000	146,000	169,000	196,000

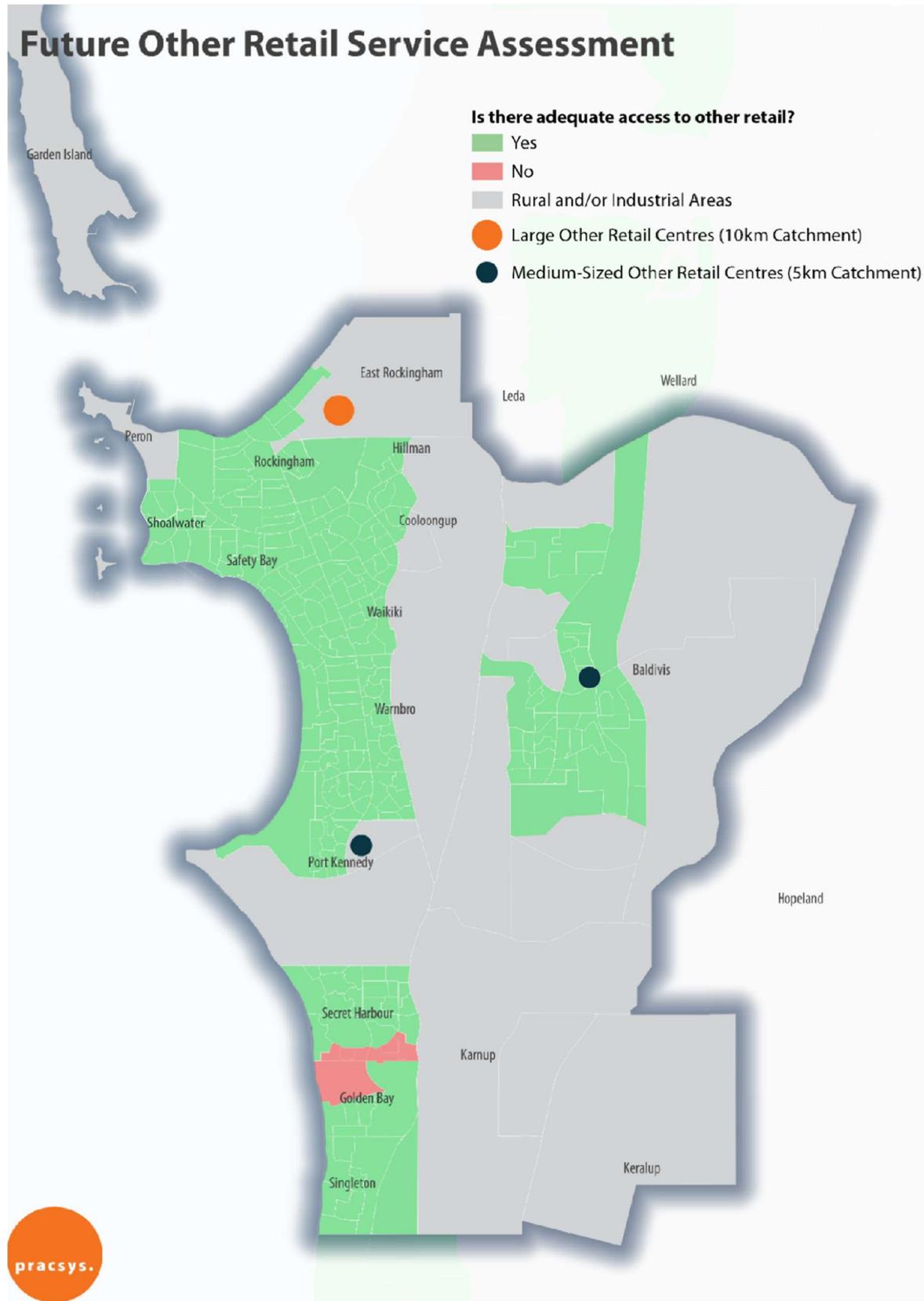
Source: ABS 2016, WA Tomorrow 2018, DPLH & WAPC State Planning Policy 4.2 2020, City of Rockingham 2021, Pracsys 2021

Other Retail Centres

Other retail (bulky goods) centres were assessed based on adequate driveable distance. For Other Retail centres, the analysis has assumed that large centres are accessible if they are within 10km and medium centres are accessible if they are within 5km. Based on this, the analysis shows that the majority of the City of Rockingham has adequate access to an Other retail centre, with a potential gap in the Secret Harbour area (Precinct 3) (Figure 33).

To be considered a 'large' Other Retail centre, it must be a significant employment node and provide bulky goods shopping needs for both residents and businesses. 'Medium' sized Other Retail centres are smaller in size primarily provide bulky goods retailing for residents in the proximate area. The City currently has one large Other Retail centre, located along Dixon Road and Patterson Road and two medium sized Other Retail Centres, located in Baldivis and Port Kennedy.

Figure 33. Access to Other Retail Activity Centres within the City of Rockingham



Source: DPLH & WAPC State Planning Policy 4.2 2020, Pracsys 2022

5.3 Floorspace Gap Analysis

The provision of floorspace across the City's activity centres was compared to the identified benchmarks to determine and quantify current gaps by PLUC floorspace use. Detailed floorspace gaps were also identified at a Western Australian Land Use Category (WASLUC) level; these gaps should provide an indication of uses that could be targeted (see Section 12). Gaps were quantified using the following methods:

Shop/Retail and Other Retail Gaps

The gap in Shop/Retail and Other Retail floorspace was assessed by estimating expenditure at each activity centre through gravity modelling. This expenditure was then divided by the required floorspace to productivity ratio for activity centres to ensure adequate retention of tenants (Figure 34).

Figure 34. Required Floorspace to productivity Ratio by Activity Centre Type

Centre Type	Required Floorspace Productivity
Strategic Metropolitan Centre (Upper Limit)	\$6,997 per m ²
Strategic Metropolitan Centre (Lower Limit)	\$6,433 per m ²
District Centre	\$8,300 per m ²
Neighbourhood Centre	\$8,100 per m ²
Local Centre	\$8,100 per m ²
Other Retail Centre	\$6,500 per m ²

Source: Pracsys 2021

Note: The required floorspace productivity ratio by Centre Type has been estimated by assessing the productivity of other centres using the Property Council of Australia's Shopping Centre Directory and through wider research looking at shopping centre turnover.

Based on this, the level of supportable floorspace at each activity centre was calculated. This was compared to the current provision of floorspace at each centre to identify centres that could be expanded. Using this methodology, the current gap in Shop Retail (SHP) and Other Retail (RET) by Precinct has been estimated (Figure 35).

Figure 35. Current Shop Retail and Other Retail Floorspace Gap by Precinct

Precinct	SHP	RET	Total
Precinct 1 – Rockingham	11,736	3,765	15,500
Precinct 2 – Warnbro	4,200	2,402	6,602
Precinct 3 – Secret Harbour	2,942	-	2,942
Precinct 4 - Baldivis	7,770	214	7,984
Total	26,647	6,380	33,027

Source: Pracsys 2021

Note: Figures are based on the City of Rockingham Population Projection Scenario. This scenario assumes higher floorspace productivity for Strategic Activity Centres than the WA Tomorrow Projections.

More detailed information showing the identified gap by activity centre for the City of Rockingham and WA Tomorrow Population Projections are detailed in Section 11.

Non-Retail Gaps

Non-Retail Floorspace gaps were calculated by identifying a suitable floorspace per person ratio by PLUC code based on a number of benchmarked areas. The areas used as benchmarks were 25km catchments from the Mandurah, Armadale and Joondalup Strategic Activity Centres. Based on these benchmarks, the following provision ratios were identified (Figure 36) for Entertainment (ENT), Health/Welfare/Community (HEL), Manufacturing (MAN), Office (OFF), Service (SER) and Storage (STO).

Figure 36. Provision Ratio Benchmarks for Non-Retail Analysis

Spatial Area	PLUC Code					
	ENT	HEL	MAN	OFF	SER	STO
RSMC Study Area	0.30	0.42	0.02	0.43	0.06	0.17
Mandurah Catchment	0.23	0.12	0.06*	0.34	0.07*	0.16*
Armadale Catchment	0.31*	0.23	0.08*	0.49*	0.16*	0.23*
Joondalup Catchment	0.35*	0.57*	0.06*	0.57*	0.17*	0.32*
Analysis Benchmark	0.33	0.57	0.07	0.54	0.15	0.26
Floorspace Provision Gap	-0.03	-0.15	-0.05	-0.11	-0.09	-0.09

Source: DPLH 2017, Pracsys 2021

Note: Figures with an Asterix were used to calculate the Analysis Benchmark. Analysis Benchmarks are weighted averages.

The identified Floorspace Provision Gap was then multiplied by the population in the City at each time interval assessed to determine the current gap in Non-Retail Floorspace. The floorspace gap by PLUC Code and Precinct is shown in Figure 37.

Figure 37. Current Non-Retail Floorspace Gaps by PLUC Code and Precinct

Year	ENT	HEL	MAN	OFF	SER	STO	Total
Precinct 1	7,070	46,084	6,175	16,415	8,141	4,090	87,976
Precinct 2	792	288	457	1,170	1,665	1,316	5,687
Precinct 3	82	644	116	698	-	1,846	3,386
Precinct 4	2,001	494	893	3,937	3,383	7,955	18,663
Total	9,944	47,510	7,641	22,221	13,189	15,207	115,712

Source: DPLH 2017, Pracsys 2021

It should be noted that the majority of the Health floorspace gap has been assigned to Precinct 1 - Rockingham. This is due to the Joondalup Strategic Centre being utilised as the Health floorspace benchmark. Accordingly, the analysis assumes that the majority of additional health floorspace would be placed in proximity to the Rockingham Strategic Metropolitan Centre.

These floorspace gaps have been distributed to activity centres based on the activity centres current share of floorspace by PLUC Code in the City (i.e. if the Rockingham Strategic Metropolitan Centre has 25% of the total

Entertainment floorspace in the City, it will be allocated 25% of the overall gap in Entertainment floorspace). More detailed information showing the identified gap by activity centre for the City of Rockingham and WA Tomorrow Population Projections are detailed in Section 11.

5.4 Gap Analysis Summary

The Gap Analysis considered both access to centres and gaps in the provision of floorspace. The key findings include:

- Using a 1km walkable catchment from all centres, an estimated 35,000 residents do not currently enjoy normatively adequate walkable access to an activity centre providing for their daily/weekly shopping needs, with this number set to grow to 60,000 by 2041
- The analysis shows that the majority of the City of Rockingham has adequate access to an Other retail centre, with a potential gap in the Secret Harbour area (Precinct 3)
- An assessment of detailed floorspace uses identified gaps in retail and non-retail uses (for detailed floorspace gaps see Section 11).
 - The retail gaps indicate that there are certain specific uses that could improve the diversity in the City's centres. The quantum of retail floorspace gaps has been further assessed through gravity modelling, see Section 6
 - There is a total non-retail floorspace gap of 115,712m² based on benchmark analysis

6 FLOORSACE AND EMPLOYMENT PROJECTIONS

Floorspace projections for Shop/Retail and Other Retail floorspace was assessed by estimating expenditure at each activity centre through gravity modelling. Population projections provided by the City of Rockingham and from WA Tomorrow were then used to project retail demand going forward. This expenditure was then divided by the required floorspace to productivity ratio for activity centres to ensure adequate retention of tenants (Figure 34). Using this methodology, the level of supportable Shop Retail and Other Retail floorspace was estimated in 5-year intervals until 2041, which is the ultimate development scenario for the City Centre.

Floorspace projections for Non-Retail floorspace were estimated by using floorspace per person provision ratio analysis (Figure 36). The identified benchmarked ratios were then used to estimate the floorspace gap based on population projections provided by the City of Rockingham and from WA Tomorrow. The total identified gap in the City was then distributed to activity centres based on each centres share of floorspace by PLUC Code. The estimated change in the activity centres relative provision of Shop/Retail floorspace going forward compared to other centres in the City of Rockingham. For example, if the Rockingham Strategic Metropolitan Centre has 25% of the total Entertainment floorspace in Rockingham, it will be allocated 25% of the overall gap in Entertainment floorspace. However, if the Rockingham Strategic Metropolitan Centre's supply of Shop/Retail floorspace doubled by 2041 and all other centres floorspaces were unchanged, the Rockingham Strategic Centre would be allocated 50% of the gap in Entertainment floorspace in 2041.

The population projections provided by the City are shown in Figure 38 and population projections based on WA Tomorrow projections are shown in Figure 39.⁹

Figure 38. Population Projection based on City of Rockingham Projections

Area	2016	2021	2026	2031	2036	2041
Rockingham Strategic Metropolitan Centre Study Area	237,721	275,899	323,651	371,975	430,349	501,057
Rockingham LGA Population	125,069	142,002	163,062	185,190	212,302	245,632

Source: City of Rockingham 2021, WA Tomorrow 2016, Pracsys 2021

Figure 39. Population Projection based on WA Tomorrow Projections

Area	2016	2021	2026	2031	2036	2041
Rockingham Strategic Metropolitan Centre Study Area	237,721	275,899	314,534	353,017	398,544	452,485
Rockingham LGA Population	125,069	142,002	153,946	166,233	180,497	197,060

Source: WA Tomorrow 2016, Pracsys 2021

Floorspace projections have been developed based on population projections for the Analysis Catchment with specific density targets for the City's Centres.

⁹ Forecast.id forecast projections were not used as they were not available for all areas in the catchment. WA Tomorrow may also be preferable for planning purposes as the projections are for the whole of WA, meaning growth in one Local Government accounts for growth in surrounding Local Governments.

6.1 Retail Floorspace Projections

The analysis has assessed residents, workers and international visitors to model the demand over time for convenience and comparison retail in the Analysis Catchment between 2021 and 2041.

Residential demand

To assess the resident retail demand within the Analysis Catchment the analysis has combined WA Tomorrow projections with expected dwelling increases provided by the City of Rockingham.

The City of Rockingham data provided was specifically for expected dwellings proximate to activity centres and in some instances does not reflect the likely increase in the wider area. To counter this issue, the analysis has used the highest estimate for each spatial area.

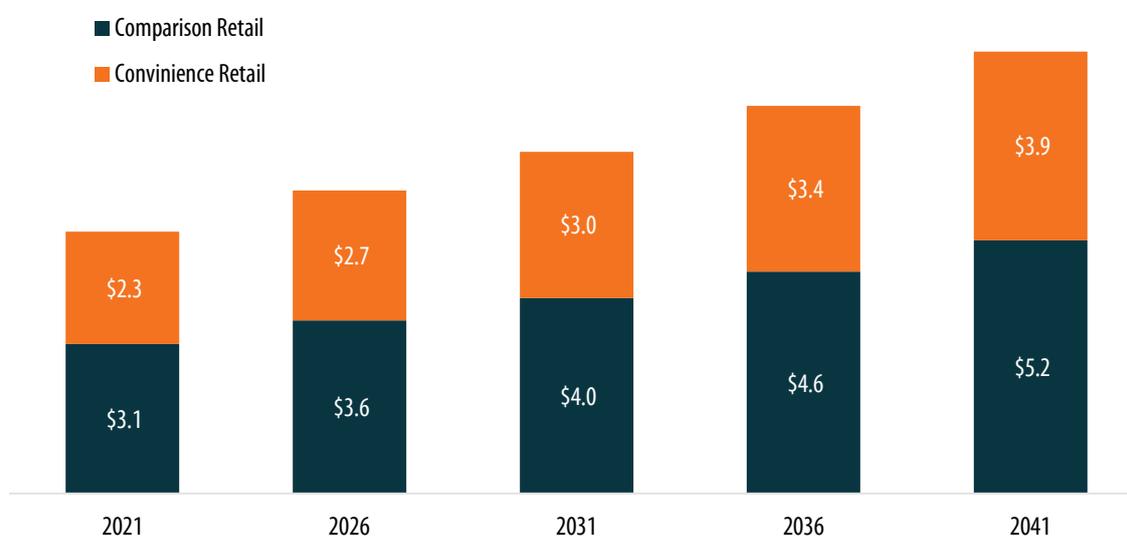
Using this methodology, the analysis estimates a total retail demand from residents within the Analysis Catchment of \$5.4 billion, increasing to \$9.9 billion in 2041. This has been compared to just the WA Tomorrow projections to provide a conservative and aspirational level of expected retail demand (Figure 40).

Figure 40. Total Resident Retail Demand with City of Rockingham Projections (\$ billions)



Source: WA Tomorrow 2016, City of Rockingham 2021, Pracsys 2021

In total, using the City of Rockingham targets for dwelling growth, the analysis estimates that there will be an additional \$0.8 billion in retail expenditure compared to WA Tomorrow projections in 2041 (Figure 41).

Figure 41. Total Resident Retail Demand with WA Tomorrow Projections (\$ billions)

Source: WA Tomorrow 2016, City of Rockingham 2021, Pracsys 2021

These projections demonstrate a significant increase in retail goods demand over the next 20 years, indicating there is the potential for significant growth in retail floorspace in the Analysis Catchment. This projected growth in retail goods demand will require the provision of additional floorspace within new and established activity centres.

Visitor and Worker Retail Demand

The analysis has estimated the amount of retail demand that will be derived from visitors and workers over the next twenty years.

International Visitor Demand

Using data provided by the City of Rockingham, it is estimated there is an average of approximately 24,000 international visitors per year. Forecast ID estimates that these visitors on average stay for 22.7 days and Tourism WA estimates they spend \$62 per day on their trip in total.¹⁰¹¹ Of this \$62, the analysis estimates approximately \$37 is retail expenditure. This results in a per-day visitor spend of \$8.50 on comparison retail and \$28.76 on convenience expenditure by assessing the breakdown of visitor expenditure from Tourism WA.¹² In total, this results in \$4.6 million expenditure on comparison items and \$15.5 million on convenience items from international visitors per year.

¹⁰ Forecast ID, 2021, <https://economy.id.com.au/rockingham/tourism-visitors-nights>

¹¹ Tourism WA, 2020, <https://www.tourism.wa.gov.au/Publications%20Library/Markets%20and%20research/2019/Ad-hoc/LGA%20Factsheets/LGA%20Visitor%20Factsheet%202019%20-%20City%20of%20Rockingham.pdf>

¹² Tourism WA, 2021, <https://www.tra.gov.au/data-and-research/reports/national-visitor-survey-results-march-2021/national-visitor-survey-results-march-2021>



Worker Demand

The analysis has estimated the net flow of expenditure from workers in the Analysis Catchment by subtracting the expenditure from residents in the Analysis Catchment who work outside the Analysis Catchment from persons who live outside of the Analysis Catchment but work within the Analysis Catchment.

Net Worker Flow

=

(Residents who work outside of catchment)

–

(Workers in catchment who do not reside in catchment)

The analysis has assumed the portion of residents who work outside of the Analysis Catchment remains constant as the population grows, resulting in retail expenditure leakage from workers increasing with the population.

For persons who live outside of the Analysis Catchment but work within the Analysis Catchment, the analysis assumes that the number of people doing so will expand proportionally with Analysis Catchment residential population growth.

This reflects the fact that the total number of workers in the Analysis Catchment economy is likely to grow in line with the floorspace demands of the residential population. In total, there are an estimated 43,000 workers who live in the Analysis Catchment but work outside of it and 16,000 workers who live outside of the Analysis Catchment but work inside of it.¹³ For workers, research indicates that the average worker spends \$142 per week on Shop/Retail during work hours.¹⁴

In total, this results in an estimated inflow of \$111.1 million in retail expenditure and an outflow of \$294.4 million per year in the Analysis Catchment in 2021. This inflow is expected to grow over time to \$203.7 million by 2041, with worker expenditure outflow estimated to increase to \$549.1 million (Figure 42).

¹³ ABS Census, 2016, <https://www.abs.gov.au/websitedbs/censushome.nsf/home/tablebuilder>

¹⁴ International Council of Shopping Centers, 2012, <http://www.southfieldcitycentre.com/wp-content/uploads/2012/06/Office-Worker-Retail-Spending-in-a-Digital-Age.pdf>



Figure 42. Worker Expenditure Flow with City of Rockingham Projections Over Time (\$ millions)



Source: WA Tomorrow 2016, City of Rockingham 2021, Pracsys 2021

Using conservative population estimates from WA Tomorrow, this outflow is estimated to be \$525.3 million in 2041 (Figure 43).

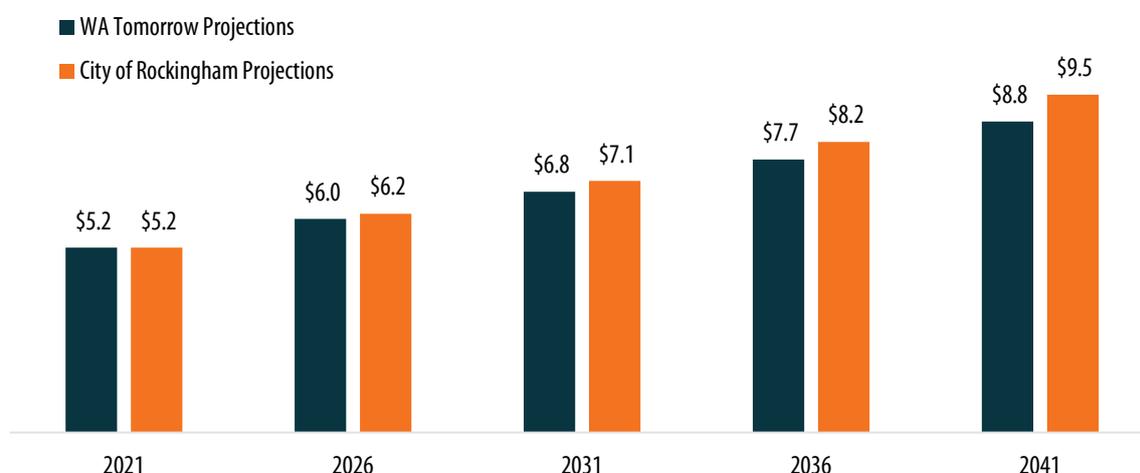
Figure 43. Worker Expenditure Flow with WA Tomorrow Projections Over Time (\$ millions)



Source: WA Tomorrow 2016, City of Rockingham 2021, Pracsys 2021

Spatial-Longitudinal Demand Projections

In total, the analysis estimates retail expenditure within the Analysis Catchment to be \$5.2 billion in 2021, with this expenditure growing to \$9.5 billion in 2041 using City of Rockingham dwelling projections or \$8.8 billion using WA Tomorrow population projections (Figure 44).

Figure 44. Total Retail Expenditure in the Analysis Catchment Over Time

Source: WA Tomorrow 2016, City of Rockingham 2021, Pracsys 2021

Section 10.1, Figure 80, Figure 81, Figure 82 and Figure 83 illustrate how household retail demand is expected to change spatially over time at the SA1 level as the Analysis Catchment's population expands and densifies.

The current and future household demand for retail within the Analysis Catchment has been mapped at detailed spatial areas through the use of the Pracsys Retail Gravity Model.

Based on this analysis, the total supportable increase in Shop Retail and Other Retail floorspace over time has been estimated (Figure 45).

Figure 45. Total Supportable Increase in Shop Retail and Other Retail Floorspace Over Time

City of Rockingham Population Projections Scenario				
Year	Shop Retail	Other Retail	Total	Estimated Population
2021	20,889	6,380	27,270	142,002
2026	26,954	18,634	45,588	163,062
2031	58,976	33,720	92,696	185,190
2036	102,759	52,051	154,810	212,302
2041	157,438	74,398	231,836	245,632
WA Tomorrow Population Projections Scenario				
Year	Shop Retail	Other Retail	Total	Estimated Population
2021	26,647	6,380	33,027	142,002
2026	20,628	14,602	35,231	153,946
2031	36,692	25,352	62,044	166,233
2036	58,759	38,022	96,780	180,497
2041	84,844	52,975	137,819	197,060

Source: Pracsys 2021

It should be noted that in 2026 a number of future centres are included in the modelling and accordingly, the supportable increase in the WA Tomorrow Population Projections supportable Shop Retail floorspace decreases from 2021 – 2026. These future centres are not part of the increases stated.

The City of Rockingham can viably increase floorspace by the amounts stated in Figure 45 under the premise that the population estimates detailed in Figure 38 and Figure 39 are met within the City of Rockingham and wider study area. If the City does not meet a particular population target, the level of additional supportable Shop Retail and Other Retail floorspace can be estimated based on the population target that is closest to reality (i.e. if the City of Rockingham has only 185,000 residents in 2041, which was the target for 2031, the 2031 increase in Shop Retail and Other Retail floorspace is applicable).

6.2 Non-Retail Floorspace Projections

As detailed in Section 5.3, the level of supportable Non-Retail floorspace has been estimated based on floorspace provision per person ratio analysis and a number of benchmarked areas. Using this methodology, the analysis demonstrates that the City of Rockingham can significantly increase Non-Retail floorspace in both the City of Rockingham Population Projection and the WA Tomorrow Population Projection scenarios (Figure 46).

Figure 46. Total Supportable Increase in Non-Retail Floorspace Over Time

City of Rockingham Population Projections Scenario								
Year	ENT	HEL	MAN	OFF	SER	STO	Total	Estimated Population
2021	9,944	47,510	7,641	22,221	13,189	15,207	115,712	142,002
2026	16,997	63,321	9,092	33,493	16,347	20,674	159,923	163,062
2031	24,407	79,663	10,617	45,337	19,665	26,418	206,106	185,190
2036	33,486	99,563	12,485	59,847	23,730	33,456	262,566	212,302
2041	44,647	123,873	14,781	77,687	28,728	42,108	331,824	245,632
WA Tomorrow Population projections Scenario								
Year	ENT	HEL	MAN	OFF	SER	STO	Total	Estimated Population
2021	9,944	47,510	7,641	22,221	13,189	15,207	115,712	142,002
2026	13,944	59,505	8,464	28,614	14,980	18,307	143,814	153,946
2031	18,058	71,728	9,310	35,190	16,822	21,497	172,607	166,233
2036	22,835	86,250	10,293	42,825	18,961	25,200	206,365	180,497
2041	28,382	103,534	11,434	51,690	21,445	29,499	245,984	197,060

Source: Pracsys 2021

Note: ENT = Entertainment/Recreation/Cultural, HEL = Health/Welfare/Community Services, MAN = Manufacturing/Processing/Fabrication, OFF = Office/Business, SER = Service Industrial, STO = Storage/Distribution

The City of Rockingham can viably increase floorspace by the amounts stated in Figure 46 under the premise that the population estimates detailed in Figure 38 and Figure 39 are met within the City of Rockingham and

wider study area. If the City does not meet a particular population target, the level of additional supportable Non-Retail floorspace can be estimated based on the population target that is closest to reality.

6.3 Employment Targets

The South Metropolitan Peel Sub-Regional Planning Framework provides Employment Self-Sufficiency (ESS) targets for the region. ESS represents the jobs available in a sub-region compared to the labour force of the sub-region. An ESS of 100% means that a sub-region has an equal number of jobs and labour force. The assessment has estimated the employment supportable at the City's Activity Centres based on population growth. This section considers the additional employment requirements to achieve a targeted ESS in the City. The broader South Metropolitan Peel ESS target for 2050 is 74%. By 2050, the target for the south west sector (the Cities of Cockburn, Kwinana and Rockingham) are to provide for a total of 195,115 jobs, which is an additional 121,090 or 108% increase from 2011 figures. Based on the anticipated population for the South west sector of 478,120, the ESS target is 83% by 2050.

The City's ESS was approximately 50% in 2016, indicating the City provided jobs for half of its total labour force. There is a requirement for significant employment growth in order for the City to reach the identified ESS targets. Strategic employment opportunities associated with the RSMC and development of Westport will be key in supporting this employment growth. The 2020 Rockingham Employment Study considered the potential employment requirements of the City with projections based on population growth and other development opportunities.

Employment estimates from the Rockingham Employment Study for non-activity centre employment have been combined with activity centre estimates to approximate the additional employment required to achieve an ESS target of 74%.

The Employment Study identified three population growth scenarios:

- Low: estimated total City population of 214,000 in 2050
- Medium: estimated total City population of 248,000 in 2050
- High: estimated total City population of 298,000 in 2050

Population growth from the Employment Study was aligned with population growth estimates from the WA Tomorrow (WAT) and City of Rockingham (COR) scenarios in the Needs Assessment to identify suitable comparisons (Figure 47).

Figure 47. Needs Assessment Alignment to Employment Study Scenarios

Scenario	Employment Area	Employment Study Equivalent	Reasoning
WAT	RSMC	Low Population / Medium Employment	The Low population growth scenario reaches a population of approximately 200,000 in 2041 which aligns with the WA Tomorrow projections (See Figure 3.4, Page 33 of the Employment Study). The Medium Employment scenario reflects slightly higher than population

Scenario	Employment Area	Employment Study Equivalent	Reasoning
			growth employment in the RSMC providing an understanding of the additional employment that the RSMC could support.
WAT	Other Employment Land	Low Population Growth/Low Employment Scenario adjusted to 2041 population	The Low population growth scenario reaches a population of approximately 200,000 in 2041 which aligns with the WA Tomorrow projections (See Figure 3.4, Page 33 of the Employment Study). The Low employment scenario is based on population growth only which aligns with the Needs Assessment assumptions outside of the RSMC.
CoR	RSMC	Medium Population / Medium Employment	The medium population growth scenario in the Employment Study results in a population of approximately 250,000 which aligns with the CoR estimate of 248,000. The Medium Employment scenario reflects slightly higher than population growth employment in the RSMC providing an understanding of the additional employment that the RSMC could support.
CoR	Other Employment Land	Medium Population Growth / Low Employment	The medium population growth scenario in the Employment Study results in a population of approximately 250,000 which aligns with the CoR estimate of 248,000. The Low employment scenario is based on population growth only which aligns with the Needs Assessment assumptions outside of the RSMC.

Source: Syme Marmion & Co 2020, Pracsys 2021

This alignment was used to estimate the total employment (at activity centres and on other employment lands) that could be expected outside of the RSMC based on population growth. It is also used to estimate the additional employment that could be supported at the RSMC based on potential catalytic projects, above that calculated in the Needs Assessment (Figure 48).

Figure 48. Relevant Employment Study Estimates

Scenario	Employment Area	Employment Study Estimate
WAT	Jobs RSMC	12,797
	Jobs Rest of City	28,711
COR	Jobs RSMC	19,307
	Jobs Rest of City	34,426

Source: Syme Marmion & Co 2020, Pracsys 2021

The estimated gap in employment without considering future employment land and catalyst projects in the RSMC amounts to between 31,000m² and 40,000m² (Figure 49).

Figure 49. Employment Gap Without Future Employment Land

Employment Category	WAT Employment	CoR Employment
Employment Target 2041 (74% ESS)	70,833	88,292
Needs Assessment 2041 - RSMC	10,697	14,252
Needs Assessment 2041 – Other Centres	13,139	15,442
Jobs Rest of City	15,572	18,984



Employment Category	WAT Employment	CoR Employment
Gap to Target ESS	31,425	39,614

Source: Syme Marmion & Co 2020, Pracsys 2021

The Employment Study identified North-East Baldivis, Karnup (Core) and Karnup (South) as future employment areas.¹⁵ Employment was projected to 2050 and has been estimated at 2041 for the purpose of understanding implications for the Needs Assessment (Figure 50).

Figure 50. Employment Study - Future Employment Land Estimates

Future Employment Land	Employment Adjusted to 2041 (jobs)
North East Baldivis	5,724
Karnup (Core)	8,621
Karnup (South)	8,552

Source: Syme Marmion & Co 2020, Pracsys 2021

These employment estimates have been used to refine the gap estimate for both scenarios (Figure 51).

Figure 51. Employment Gap with Future Employment Land

Employment Area	WAT (jobs)	CoR (jobs)
Gap to Target ESS	31,425	39,614
Future Employment Land	22,897	22,897
Additional RSCM Employment (based on Employment Study)	2,101	5,055
Remaining Gap	6,428	11,662

Source: Syme Marmion & Co 2020, Pracsys 2021

It is estimated that the employment gap to reach a target ESS of 74% would require an additional 2,100 to 5,100 jobs in the RSMC and 6,400 and 11,700 jobs on other employment lands. These results reflect the importance of the RSMC in providing employment opportunities to meet Sub-regional employment targets. The Southern Metropolitan Peel Framework currently provides a target of only 12,290 jobs in the RSMC. Under the CoR scenario the RSMC will need at least 14,252 jobs to meet the goods and services needs of the surrounding population, without further contributing to ESS targets. The findings of the Rockingham Employment Study and our analysis indicate that regional ESS targets are not likely to be achieved without a greater concentration of employment in the RSMC.

Employment Drivers to Achieve Additional RSMC Employment

The additional employment at the RSMC would need to come from catalytic projects that support strategic employment opportunities. The Employment Study defines employment activities in line with the Strategic

¹⁵ Considerations to support the development of the Karnup DSP are provided in Section 8.5, Karnup DSP.



Metropolitan Centre roll of the RSMC that could be targeted to achieve greater employment levels. These include:¹⁶

- Primary regional institutions including a full-service university, major health campus with teaching capabilities, State government administration, and high-level arts and entertainment
- Business services for nearby industrial areas, the naval base and defence industries, and Westport
- Tourist activities including business travel and visitation for the surrounding area

The significant population relying on the RSMC as their primary Strategic Metropolitan Centre would benefit from having access to higher-order services such as a university, reducing their need to travel significant distances to access the services elsewhere in the Metropolitan area. It would also facilitate access to residents of surrounding areas that have lower socio-economic status and may be limited in their ability to access services elsewhere.

Westport and Western Trade Coast

The announcement of Westport at the WTC is a significant opportunity for development at the RSMC, which is the closest higher order centre. The Employment Study identified a significant proportion of office floorspace currently at the WTC. Strategic port-related uses will create significant demand for land as Westport develops and will likely lead to a transition of uses in the WTC. The uses that are most likely to transfer are those that are population-related and/or do not need to be located on strategic industrial land. The RSMC is ideally located near the WTC to attract office related uses.

Employment Drivers to Achieve Remaining Out of Centre Employment

Out of centre development will be driven by strategic employment opportunities, particularly associated with defence, the WTC and Westport; and population-driven light industrial services for the wider sub-region. The City has a range of current and potential future employment land to accommodate this development including the strategic East Rockingham industrial area and future potential industrial areas such as North East Baldivis and potential employment land in Karnup.

The strategic East Rockingham area should see significant land demand as Westport develops. These uses are likely to be heavy industrial in nature and land-intensive. The Employment Study indicates this land could support an additional 5,900 jobs. Another strategic industrial opportunity identified in the Employment Study is HMAS Stirling, which is identified as having the potential to expand to 7,000 jobs in the medium term.

Light industrial uses are driven by population growth. Latitude 32 is a major industrial land holding with approximately 1,400ha of developable land. Much of the Latitude 32 industrial area has been planned as light industrial; however, the introduction of Westport is likely to increase the need for strategic industrial land to support heavy industrial uses at Latitude 32. This means that light industrial land uses for the wider sub-region will need to locate in other suitable locations. The future employment land (i.e. North East Baldivis and Karnup)

¹⁶ More detailed drivers and opportunities for employment growth are provided in the Rockingham Employment Study 2020

identified in the Employment Study are suitable to accommodating these light industrial uses, particularly given their location adjacent to the Kwinana Freeway.¹⁷ The Employment Study indicated that Future Employment Land could support a total of almost 23,000 jobs in the long term.

Employment Distribution Within the RSMC

The RSMC is made up of eleven individual sectors that provide a mix of employment and non-commercial opportunities. Certain sections are more suited to meeting the needs of different users such as residents, visitors and workers. The following table summarises the types of employment that should be targeted by sector (Figure 52).

Figure 52. Employment Activities Aligned with RSMC Sectors

Sector	Employment Opportunity
City Centre	<ul style="list-style-type: none"> Office based employment – Private (i.e. regional offices for businesses in the WTC) Office based employment – Public (i.e. State Administration) Shop Retail uses catering to the wider RSMC catchment Entertainment uses catering to the wider RSMC precinct (i.e. small bars, clubs, etc.) Shop Retail uses catering to high-density development within the RSMC Health and community services catering to high-density development within the RSMC
Waterfront and North Waterfront	<ul style="list-style-type: none"> Accommodation (i.e. short stay, hotels, etc.) Tourism uses (i.e. Shop Retail, Entertainment and Recreation activities aimed at tourists) Cultural and creative uses catering to the wider RSMCs catchment and tourists (i.e. theatre, spaces for buskers, etc.) Entertainment uses catering to the wider RSMC catchment and tourists (i.e. small bars, clubs, etc.) Shop Retail uses catering to high-density development within the sector Non-Retail uses catering to high-density development within the sector Some office floorspace – less of a priority than for the City Centre but the location may attract interest from larger organisations
Smart Village and Campus	<ul style="list-style-type: none"> Tertiary education services for the wider RSMC catchment Creative employment linked to education Health services that may benefit from proximity to tertiary education facilities Shop Retail uses catering to residents, workers and visitors to the sector Secondary education services for some of the City of Rockingham population

¹⁷ The Karnup DSP will investigate the scale and suitability of commercial uses over the Karnup area. See Section 8.5, Karnup DSP for recommendations to support the DSP.

Sector	Employment Opportunity
	Recreation services for some of the City of Rockingham population
Eastern	Shop Retail uses catering to residential development within the sector Limited non-retail uses (i.e. similar provision to a local centre) (i.e. office, recreation and health) catering to residential development within the sector
Southern Gateway and Rockingham Station	Limited shop Retail uses (i.e. similar provision to a local centre) catering to residential development within the sector
Leeuwin	Shop Retail uses catering to residential development within the sector Uses or clear pathway that connects the City Centre to the waterfront sectors

Source: Pracsys 2022

This table does not summarise all employment activities that will locate in these areas. For instance, regional recreation facilities will likely need to be either expanded or provided to cater for the additional population in the RSMC, however, they might not be provided for within the centre. The proposed opportunities will need to be considered within the context of the draft RSMC Planning Framework with some uses potentially constrained or prioritised in different sectors.

Additional Floorspace Requirements

Additional floorspace will be necessary to support the employment required to meet an ESS target of 74%. High-level floorspace estimates have been developed using benchmarks and assumptions. Floorspace related to the RSMC has been modelled based on additional Education, Accommodation and Office floorspace (health was not modelled as the Needs Assessment already incorporated a higher benchmark for health floorspace uses) (Figure 53). Other employment land was modelled using an aggregate benchmark for light industrial uses (Figure 54).

Figure 53. Benchmarks for Additional RSMC Employment

Benchmark	Assumption	Measure	Note
Employment			
Future ECU Perth City	Education	WAT: 600 COR: 1,200	50% of benchmark achieved in WAT
Bunbury CBD	Accommodation	WAT: 154 COR: 309	50% of benchmark achieved in WAT
It is assumed that office employment will be the difference required to achieve the additional required employment.		WAT: 1,347 COR: 3,546	N/A
Floorspace to Employment Ratio			
Murdoch	Education	76m ² per employee	This was in between estimates for UWA and Curtin



Benchmark	Assumption	Measure	Note
Average Industrial Total	Office	24m ² per employee	Slightly higher than the average for commercial floorspace (20m ²). Representative of office for business services related to WTC and Westport
Scarborough	Accommodation	313m ² per employee	Centre with predominantly commercial accommodation related Residential floorspace

Source: DPLH 2016, WA State Government 2021

Figure 54. Benchmarks for Additional Out of Centre Employment

Benchmark	Assumption	Measure	Note
Bibra Lake Industrial Area	Light Industrial Uses	135m ² per employee	The average of these was used to estimate additional floorspace requirements
Malaga Industrial Area	Light Industrial Uses	92m ² per employee	

Source: DPLH 2016

Applying these benchmarks, it is estimated that the RSMC would need an additional 126,000m² to 273,000 m² in commercial floorspace to support the additional employment estimates (Figure 55).

Figure 55. Additional Floorspace Estimates to Meet ESS Target

Floorspace Uses	WAT Floorspace (m ²)	CoR Floorspace (m ²)
RSMC		
Education	45,600	91,200
Accommodation	48,200	96,800
Office	32,317	85,098
Other Employment Land		
Light Industrial	732,990	1,329,878

Source: Pracsys 2021, DPLH 2016

An additional 733,000m² to 1,330,000m² in light Industrial floorspace uses would be required on other employment lands. This floorspace represents a subcomponent of the employment identified in the Employment Study and identified future employment land should be able to accommodate the required development. Should additional employment lands need to be identified in the long term, some key economic considerations include:

- Proximity to relevant customer (i.e. population – light industry, businesses – heavy industry)
- Appropriate road and/or freight access
- Compatible uses (i.e. heavy industry uses are not compatible with residential development)
- Access to necessary infrastructure (i.e. special waste disposal requirements, etc.)
- Land constraints (if site works will be too expensive, commercial uses may not be viable)

Private industry will likely indicate appropriate locations for additional employment land through development applications. Appropriate analysis and planning should be commissioned by the City when the current provision of future employment land is approaching full capacity.

6.4 Scenario Assessment

Based on the floorspace and employment projections the analysis has estimated the level of floorspace and employment that will be supportable at each precinct in the City of Rockingham (Figure 56).

Figure 56. Supportable Additional Employment and Floorspace by Precinct and Scenario in 2041

Precinct 1				
Floorspace Type	Shop Retail + Other Retail		Non-Retail	
Population Projection Scenario	Floorspace	Employment	Floorspace	Employment
City of Rockingham	122,615	2,921	248,239	5,776
WA Tomorrow	40,237	444	183,384	4,141
Additional Floorspace on Future Employment Land and in Precinct 1 to Meet ESS Target				
Floorspace Type	Light Industrial		Education/Accommodation/Office	
Population Projection Scenario	Floorspace	Employment	Floorspace	Employment
City of Rockingham: Additional to meet ESS Target	1,329,878	11,662	273,106	5,055
WA Tomorrow: Additional to meet ESS Target	732,990	6,428	126,165	2,101
Precinct 2				
Floorspace Type	Shop Retail + Other Retail		Non-Retail	
Population Projection Scenario	Floorspace	Employment	Floorspace	Employment
City of Rockingham	21,851	264	14,458	614
WA Tomorrow	16,402	130	12,391	534
Precinct 3				
Floorspace Type	Shop Retail + Other Retail		Non-Retail	
Population Projection Scenario	Floorspace	Employment	Floorspace	Employment
City of Rockingham	30,105	1,114	13,965	357
WA Tomorrow	16,624	714	9,891	249
Precinct 4				
Floorspace Type	Shop Retail + Other Retail		Non-Retail	
Population Projection Scenario	Floorspace	Employment	Floorspace	Employment
City of Rockingham	57,265	1,813	55,161	1,966
WA Tomorrow	30,618	1,289	40,318	1,467

Source: Pracsys 2021

A more detailed breakdown of this analysis by year and activity centre is provided in Section 7.

6.5 Floorspace and Employment Projection Summary

The floorspace and employment projections provide an understanding of the floorspace required to support population demand for goods and services. They also estimate the additional employment and floorspace required for the City to achieve an ESS of 74%. Key findings from the section include:

- There is an estimated total retail demand from residents within the Analysis Catchment of \$5.4 billion, increasing to \$9.9 billion in 2041
- There is an estimated \$20 million in retail expenditure from international visitors per year
- Through worker movements into and out of the Analysis Catchment, there is an estimated inflow of \$111.1 million in retail expenditure and an outflow of \$294.4 million per year in the Analysis Catchment in 2021. This inflow is expected to grow over time to \$203.7 million by 2041, with worker expenditure outflow estimated to increase to \$549.1 million. The expenditure outflow would be reduced if an ESS of 74% was achieved
- Total additional retail floorspace in the City is estimated to be between 138,000m² and 232,000m²
- Total additional non-retail floorspace in the City is estimated to be between 246,000m² and 333,000m²
- It is estimated that the employment gap to reach a target ESS of 74% would require an additional 2,100 to 5,100 jobs in the RSMC and 6,400 and 11,700 jobs on other employment lands. These results reflect the importance of the RSMC in providing employment opportunities to meet Sub-regional employment targets. The Southern Metropolitan Peel Framework currently provides a target of only 12,290 jobs in the RSMC. Under the CoR scenario the RSMC will need at least 14,252 jobs to meet the goods and services needs of the surrounding population, without further contributing to ESS targets. The findings of the Rockingham Employment Study and our analysis indicate that regional ESS targets are not likely to be achieved without a greater concentration of employment in the RSMC.
- The significant population relying on the RSMC as their primary Strategic Metropolitan Centre would benefit from having access to higher-order services such as a university, reducing their need to travel significant distances to access the services elsewhere in the Metropolitan area. It would also facilitate access to residents of surrounding areas that have lower socio-economic status and may be limited in their ability to access services elsewhere.
- The strategic East Rockingham area should see significant land demand as Westport develops. These uses are likely to be heavy industrial in nature and land intensive. The Employment Study indicates this land could support an additional 5,900 jobs. Another strategic industrial opportunity identified in the Employment Study is HMAS Stirling, which is identified as having the potential to expand to 7,000 jobs in the medium term.
- The Employment Study indicated that Future Employment Land could support a total of almost 23,000 jobs in the long term.



-
- it is estimated that the RSMC would need an additional 126,000m² to 273,000 m² in commercial floorspace to support the additional employment estimates to achieve an ESS of 74%
 - An additional 733,000m² to 1,330,000m² in light Industrial floorspace uses would be required on other employment lands to achieve an ESS of 74%
 - Should additional employment lands need to be identified in the long term, some key economic considerations include:
 - Proximity to relevant customer (i.e. population – light industry, businesses – heavy industry)
 - Appropriate road and/or freight access
 - Compatible uses (i.e. heavy industry uses are not compatible with residential development)
 - Access to necessary infrastructure (i.e. special waste disposal requirements, etc.)
 - Land constraints (if site works will be too expensive, commercial

7 ACTIVITY CENTRE HIERARCHY

The Activity Centre Hierarchy for the City of Rockingham has been developed based on the City of Rockingham population projections and the modelling detailed above. This hierarchy has been split by precinct.

This section provides estimates for the level of supportable floorspace at each activity centre going forward until 2041. It should be noted that the level of supportable floorspace is dependent on population and the City of Rockingham should increase the provision of floorspace at activity centre when certain thresholds of population within a precinct are achieved. The population levels used to guide this analysis are shown in Figure 57.

Figure 57. Population by Precinct Over Time

Precinct	2021	2026	2031	2036	2041
Precinct 1 – Rockingham	46,491	54,021	61,387	71,139	84,042
Precinct 2 – Warnbro	23,996	24,039	24,202	24,377	24,562
Precinct 3 – Secret Harbour	23,186	28,600	34,717	42,143	51,159
Precinct 4 - Baldivis	46,324	54,063	62,194	71,548	82,308

Source: City of Rockingham 2021, Pracsys 2021

Additionally, if centres are not able to grow, their estimated supportable increase in floorspace should be distributed throughout other centres in their precinct. Further recommendations regarding implementation of the Needs Assessment are included in Section 8, Implementation.

7.1 Potential Activity Centre Hierarchy Changes

There are a number of centres that could potentially change centre classification based on projected growth (Figure 58). These changes have been assessed and recommendations provided.

Figure 58. Activity Centre Hierarchy Assessment

Centre and Current Classification	Floorspace change to 2036 (m ²)	Comment
Baldivis Town Centre District Centre	+7,000m ² Shop Retail +8,032m ² Other Retail +12,629m ² Non-Retail	The analysis does not account for activity centres (including a potential district centre) being developed in Karnup. These future centres will likely support some goods and service needs of population growth in South Baldivis, reducing the pressure on the BTC to transition into a Secondary Centre. It is recommended that no change to classification be considered at this point. Analysis for the Karnup DSP should include the BTC and consider the need for a change in future.
Parkland Heights Neighbourhood Centre	+6,500m ² Shop Retail +5,000m ² Non-Retail	The analysis does not account for activity centres (including a potential district centre) being developed in Karnup. These future centres will likely support some goods and



Centre and Current Classification	Floorspace change to 2036 (m ²)	Comment
		service needs of population growth in South Baldivis, reducing the pressure on Parkland Heights to transition into a District Centre. It is recommended that no change to classification be considered at this point. Analysis for the Karnup DSP should include Parkland Heights and consider the need for a change in future.
Local Centres – Most notably Millars Landing	A number of local centres could expand beyond the notional Shop Retail provision of 1,500m ² for a local centre. Millars Landing is expanding from 2,500m ² to over 5,000m ² Shop Retail floorspace.	SPP4.2 (2010) identified local centres as supporting up to 1,500m ² Shop Retail floorspace. This is not intended to be a cap as can be seen by a number of local centres within the City's current activity centre hierarchy that contain greater than 1,500m ² Shop Retail floorspace. Where the role of the centre does not change it is recommended that the classification of Local Centre can remain. The Millars Landing centre appears to be the only Local Centre who's role could change. Its Shop Retail floorspace will almost double and would likely include the provision of additional supermarket or department store floorspace to support any additional specialty retail. This type of change would expand the catchment of the centre with a selection of goods and services that could cater more for the weekly shopping requirements of the surrounding population. While this expansion may be justified, it is recommended that any proposed expansions should clearly identify the need for a change in centre classification and be assessed against the criteria provided in Section 8, Implementation.

Source: Pracsys 2022

7.2 Precinct 1 – Rockingham Centre Catchment

Precinct 1 is the most significant precinct in the City of Rockingham due to it containing the Rockingham Strategic Metropolitan Centre, Rockingham District Hospital, the Enterprise Service Commercial precinct and East Rockingham Industrial Area. The Rockingham Strategic Metropolitan Centre is expected to grow significantly over time and will accommodate an additional 14,000 dwellings by 2041. Due to this, significant employment and floorspace increases have been attributed to this precinct. It should be noted that significant employment and floorspace are attributed to the Centre's function in the hierarchy as a Strategic Centre for the sub-region.

Figure 59. Precinct 1 Activity Centre Map

Precinct 1-Rockingham: Employment & Floorspace Summary

Legend

- Strategic Metropolitan Centre
- Secondary Centre
- District Centre
- Neighbourhood Centre
- Local or Neighbourhood Centre
- Local Centre
- Under 1,000m²

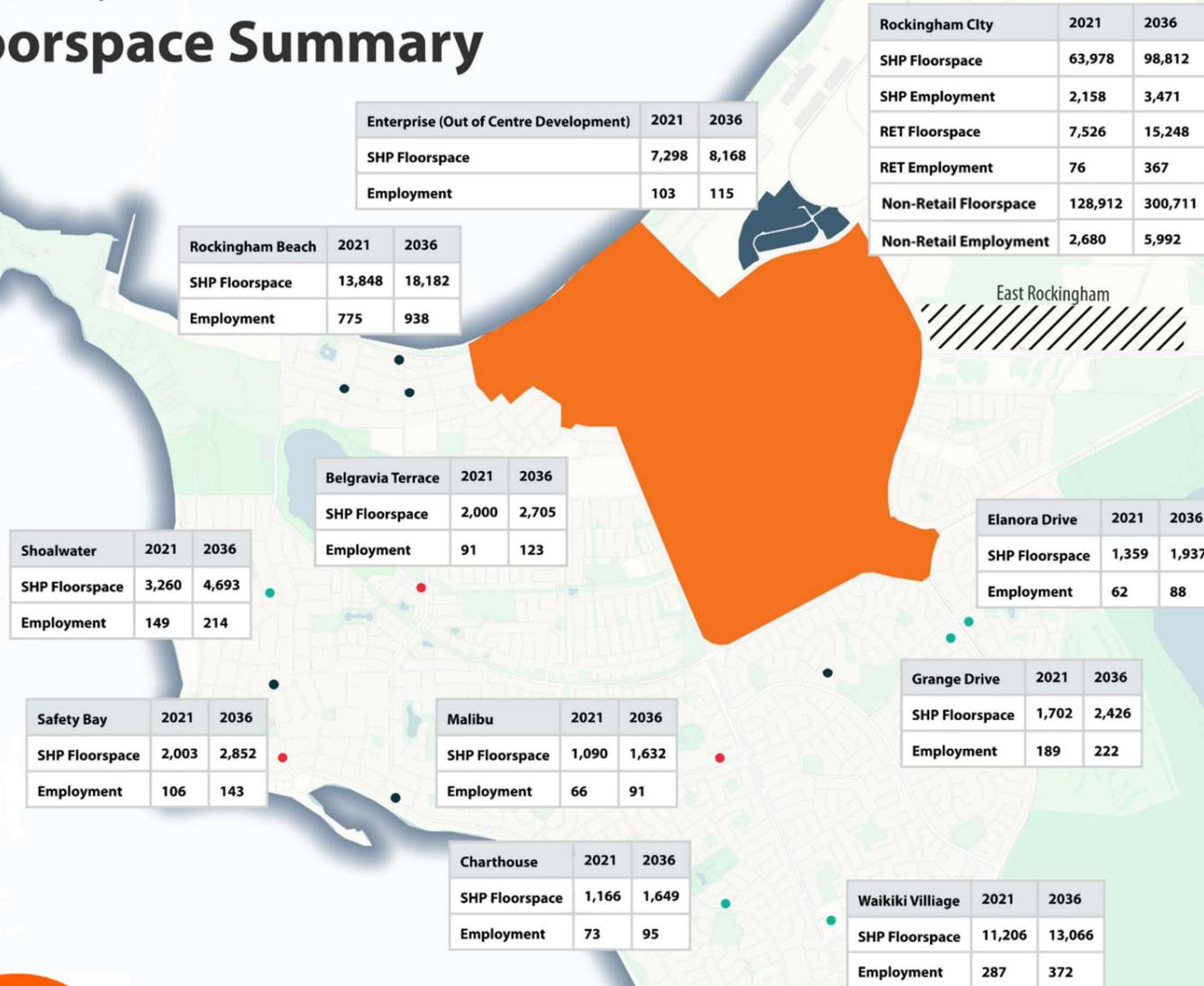




Figure 60. Precinct 1 Activity Centres - Supportable Additional Floorspace (Not Cumulative)

Centre Type	Centre Name	Estimated Floorspace			2021 (Additional)			2026 (Additional)			2031 (Additional)			2036 (Additional)			2041 (Additional)		
		SHP Floorspace	RET Floorspace	Non-Retail Floorspace	SHP Floorspace	RET Floorspace	Non-Retail Floorspace	SHP Floorspace	RET Floorspace	Non-Retail Floorspace	SHP Floorspace	RET Floorspace	Non-Retail Floorspace	SHP Floorspace	RET Floorspace	Non-Retail Floorspace	SHP Floorspace	RET Floorspace	Non-Retail Floorspace
Service Commercial	Enterprise	7,298	17,368	2,787	-	1,704	1,027	-	5,596	1,354	-	9,219	1,599	870	13,679	2,011	2,430	19,189	2,617
Strategic Metropolitan Centre	Rockingham	63,978	7,526	128,912	1,764	1,801	77,846	8,402	3,679	105,508	19,665	5,463	135,299	34,834	7,722	171,799	54,546	10,591	217,278
Strategic Metropolitan Centre	Rockingham Beach	13,848	306	35,661	-	33	5,621	-	107	7,789	1,345	177	10,348	4,334	265	14,152	8,220	377	18,980
Neighbourhood Centre	Charthouse	1,166	-	-	395	-	-	346	-	-	403	-	-	483	-	-	583	-	-
Neighbourhood Centre	Elanora Drive	1,359	-	-	333	-	-	289	-	-	410	-	-	578	-	-	787	-	-
Neighbourhood Centre	Grange Drive	1,702	-	1,394	417	-	381	362	-	647	513	-	846	724	-	1,063	986	-	1,306
Neighbourhood Centre	Shoalwater	3,260	219	1,254	322	34	334	486	73	551	887	110	752	1,433	159	984	2,146	221	1,263
Neighbourhood Centre	Waikiki Village	11,206	330	1,310	1,542	82	421	1,138	97	602	1,437	110	722	1,860	127	835	2,389	148	945
Local Centre	Arcadia Drive	382	218	274	94	85	241	-	136	295	-	188	336	-	248	372	18	319	422
Local Centre	Belgravia Terrace	2,000	-	913	-	-	348	110	-	480	362	-	632	705	-	816	1,157	-	1,045
Local Centre	Bell Street	98,611	-	489	68	-	147	106	-	232	204	-	315	336	-	415	507	-	538
Local Centre	Bent Street	570	-	-	50	-	-	51	-	-	90	-	-	145	-	-	216	-	-
Local Centre	Fisher street	200	-	-	12	-	-	23	-	-	54	-	-	97	-	-	152	-	-
Local Centre	Malibu	1,090	-	912	337	-	158	336	-	328	423	-	446	542	-	570	695	-	705
Local Centre	McLarty Street	482	-	-	50	-	-	42	-	-	79	-	-	130	-	-	195	-	-
Local Centre	Parkin Street	246	-	130	36	-	13	53	-	32	96	-	51	154	-	73	230	-	101
Local Centre	Safety Bay	2,033	-	961	442	-	785	412	-	1,094	583	-	1,277	819	-	1,478	1,123	-	1,709
Local Centre	Safety Bay Road	548	-	192	116	-	310	119	-	429	175	-	500	253	-	581	353	-	678
Local Centre	Soyara Place	70	-	150	1	-	278	1	-	337	5	-	403	11	-	479	19	-	568
Local Centre	Waikiki Hotel	-	138	40	-	26	65	-	38	73	-	50	79	-	65	83	-	84	86
Other Retail Centre	East Rockingham	-	22,049	-	-	-	-	-	1,289	-	-	4,916	-	-	9,392	-	-	14,934	-
Total		112,049	48,154	175,378	5,978	3,765	87,976	12,277	11,013	119,750	26,732	20,233	153,606	48,308	31,657	195,709	76,752	45,863	248,239

Pracsys 2021



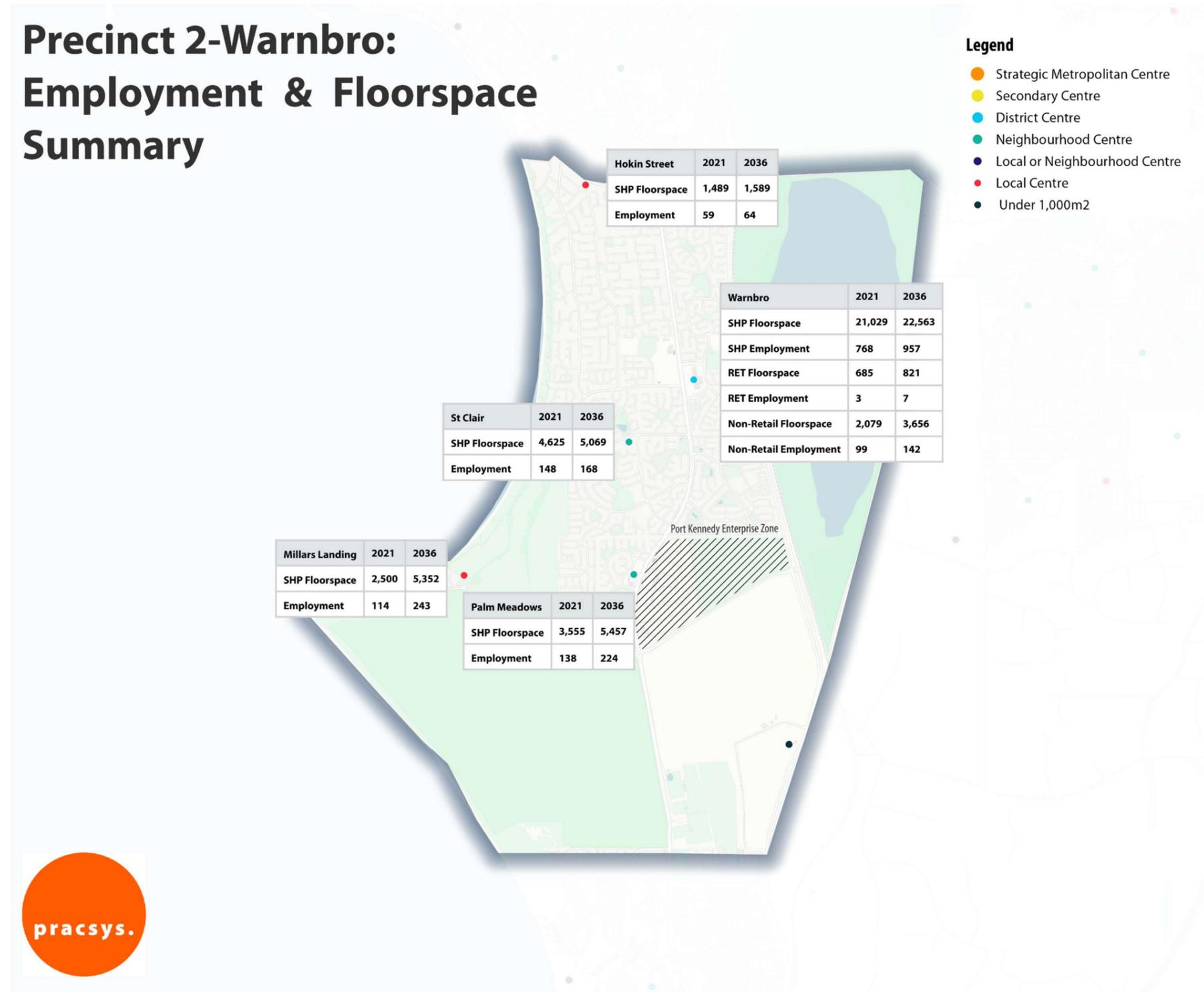
Figure 61. Precinct 1 Activity Centres - Supportable Total Floorspace

Centre Type	Centre Name	Estimated Floorspace			2021			2026			2031			2036			2041		
		SHP Floorspace	RET Floorspace	Non-Retail Floorspace	SHP Floorspace	RET Floorspace	Non-Retail Floorspace	SHP Floorspace	RET Floorspace	Non-Retail Floorspace	SHP Floorspace	RET Floorspace	Non-Retail Floorspace	SHP Floorspace	RET Floorspace	Non-Retail Floorspace	SHP Floorspace	RET Floorspace	Non-Retail Floorspace
Neighbourhood Centre	Enterprise	7,298	17,368	2,787	7,298	19,072	3,814	7,298	22,964	4,141	7,298	26,587	4,386	8,168	31,047	4,798	9,728	36,557	5,404
Strategic Metropolitan Centre	Rockingham	63,978	7,526	128,912	65,742	9,327	206,758	72,380	11,205	234,420	83,643	12,989	264,211	98,812	15,248	300,711	118,524	18,117	346,190
Strategic Metropolitan Centre	Rockingham Beach	13,848	306	35,661	13,848	339	41,282	13,848	413	43,450	15,193	483	46,009	18,182	571	49,813	22,068	683	54,641
Neighbourhood Centre	Charthouse	1,166	-	-	1,561	-	-	1,512	-	-	1,569	-	-	1,649	-	-	1,749	-	-
Neighbourhood Centre	Elanora Drive	1,359	-	-	1,692	-	-	1,648	-	-	1,769	-	-	1,937	-	-	2,146	-	-
Neighbourhood Centre	Grange Drive	1,702	-	1,394	2,119	-	1,775	2,064	-	2,041	2,215	-	2,240	2,426	-	2,457	2,688	-	2,700
Neighbourhood Centre	Shoalwater	3,260	219	1,254	3,582	253	1,588	3,746	292	1,805	4,147	329	2,006	4,693	378	2,238	5,406	440	2,517
Neighbourhood Centre	Waikiki Village	11,206	330	1,310	12,748	412	1,731	12,344	427	1,912	12,643	440	2,032	13,066	457	2,145	13,595	478	2,255
Local Centre	Arcadia Drive	382	218	274	476	303	515	382	354	569	382	406	610	382	467	645	400	537	696
Local Centre	Belgravia Terrace	2,000	-	913	2,000	-	1,261	2,110	-	1,392	2,362	-	1,545	2,705	-	1,729	3,157	-	1,957
Local Centre	Bell Street	611	-	489	679	-	636	717	-	721	815	-	804	947	-	904	1,118	-	1,027
Local Centre	Bent Street	570	-	-	620	-	-	621	-	-	660	-	-	715	-	-	786	-	-
Local Centre	Fisher street	200	-	-	212	-	-	223	-	-	254	-	-	297	-	-	352	-	-
Local Centre	Malibu	1,090	-	912	1,427	-	1,070	1,426	-	1,240	1,513	-	1,358	1,632	-	1,482	1,785	-	1,617
Local Centre	McLarty Street	482	-	-	532	-	-	524	-	-	561	-	-	612	-	-	677	-	-
Local Centre	Parkin Street	246	-	130	282	-	143	299	-	162	342	-	181	400	-	203	476	-	231
Local Centre	Safety Bay	2,033	-	961	2,475	-	1,746	2,445	-	2,055	2,616	-	2,238	2,852	-	2,439	3,156	-	2,670
Local Centre	Safety Bay Road	548	-	192	664	-	502	667	-	621	723	-	692	801	-	773	901	-	870
Local Centre	Soyara Place	70	-	150	71	-	428	71	-	487	75	-	553	81	-	629	89	-	718
Local Centre	Waikiki Hotel	-	138	40	-	164	105	-	176	113	-	188	119	-	203	123	-	222	126
Other Retail Centre	East Rockingham	-	22,049	-	-	22,049	-	-	23,338	-	-	26,965	-	-	31,441	-	-	36,983	-
Total		112,049	48,154	175,378	118,027	51,919	263,354	124,326	59,167	295,129	138,780	68,387	328,985	160,356	79,812	371,087	188,801	94,017	423,618

In total, the Rockingham Strategic Centre is estimated to be able to support 140,000m² of Shop Retail, 18,000m² of Other Retail and 400,000m² of Non-Retail floorspace in 2041.

7.3 Precinct 2 – Warnbro District Centre Catchment

Figure 62. Precinct 2 Activity Centre Map





Pracsys 2021

Figure 63. Precinct 2 Activity Centres - Supportable Additional Floorspace (Not Cumulative)

Centre Type	Centre Name	Estimated Floorspace			2021 (Additional)			2026 (Additional)			2031 (Additional)			2036 (Additional)			2041 (Additional)		
		SHP Floorspace	RET Floorspace	Non-Retail Floorspace	SHP Floorspace	RET Floorspace	Non-Retail Floorspace	SHP Floorspace	RET Floorspace	Non-Retail Floorspace	SHP Floorspace	RET Floorspace	Non-Retail Floorspace	SHP Floorspace	RET Floorspace	Non-Retail Floorspace	SHP Floorspace	RET Floorspace	Non-Retail Floorspace
District Centre	Warnbro	21,029	685	2,079	1,912	28	743	-	60	1,081	673	95	1,186	1,534	136	1,383	2,547	186	1,577
Neighbourhood Centre	Palm Meadows	3,555	-	6,280	1,653	-	2,345	1,170	-	4,229	1,500	-	5,442	1,902	-	6,715	2,373	-	8,087
Neighbourhood Centre	St Clair	4,625	-	560	512	-	529	84	-	615	245	-	687	444	-	753	674	-	816
Local Centre	Hokin Street	1,489	460	2,762	122	102	1,809	50	116	2,288	69	130	2,619	100	146	2,909	138	168	3,185
Local Centre	Kennedy Bay	1,500	-	684	Not Built	Not Built	Not Built	350	-	421	497	-	535	680	-	658	897	-	793
Other Retail Centre	Port Kennedy Enterprise Park	-	17,139	-	-	2,272	-	-	4,907	-	-	7,655	-	-	10,938	-	-	14,868	-
Total		32,198	18,284	12,365	4,200	2,402	5,426	1,654	5,083	8,634	2,985	7,879	10,469	4,659	11,221	12,418	6,629	15,221	14,458

Pracsys 2021

Figure 64. Precinct 2 Activity Centres - Supportable Total Floorspace

Centre Type	Centre Name	Estimated Floorspace			2021			2026			2031			2036			2041		
		SHP Floorspace	RET Floorspace	Non-Retail Floorspace	SHP Floorspace	RET Floorspace	Non-Retail Floorspace	SHP Floorspace	RET Floorspace	Non-Retail Floorspace	SHP Floorspace	RET Floorspace	Non-Retail Floorspace	SHP Floorspace	RET Floorspace	Non-Retail Floorspace	SHP Floorspace	RET Floorspace	Non-Retail Floorspace
District Centre	Warnbro	21,029	685	2,079	22,941	713	2,822	21,029	745	3,160	21,702	780	3,265	22,563	821	3,462	23,576	871	3,656
Neighbourhood Centre	Palm Meadows	3,555	-	6,280	5,208	-	8,625	4,725	-	10,509	5,055	-	11,722	5,457	-	12,995	5,928	-	14,367
Neighbourhood Centre	St Clair	4,625	-	560	5,137	-	1,089	4,709	-	1,175	4,870	-	1,247	5,069	-	1,313	5,299	-	1,376
Local Centre	Hokin Street	1,489	460	2,762	1,611	562	4,571	1,539	576	5,050	1,558	590	5,381	1,589	606	5,671	1,627	628	5,947
Local Centre	Kennedy Bay	1,500	-	684	Not Built	Not Built	Not Built	1,850	-	1,105	1,997	-	1,219	2,180	-	1,342	2,397	-	1,477
Other Retail Centre	Port Kennedy Enterprise Park	-	17,139	-	-	2,272	-	-	22,046	-	-	24,794	-	-	28,077	-	-	32,007	-
Total		64,396	50,482	44,563	36,398	34,600	37,624	33,852	23,367	21,000	35,183	26,163	22,834	36,857	29,505	24,783	38,827	33,505	26,823

Pracsys 2021

7.4 Precinct 3 – Secret Harbour District Centre Catchment

Figure 65. Precinct 3 Activity Centre Map

Precinct 3-Secret Harbour: Employment & Floorspace Summary





Figure 66. Precinct 3 Activity Centres - Supportable Additional Floorspace (Not Cumulative)

Centre Type	Centre Name	Estimated Floorspace			2021 (Additional)			2026 (Additional)			2031 (Additional)			2036 (Additional)			2041 (Additional)		
		SHP Floorspace	RET Floorspace	Non-Retail Floorspace	SHP Floorspace	RET Floorspace	Non-Retail Floorspace	SHP Floorspace	RET Floorspace	Non-Retail Floorspace	SHP Floorspace	RET Floorspace	Non-Retail Floorspace	SHP Floorspace	RET Floorspace	Non-Retail Floorspace	SHP Floorspace	RET Floorspace	Non-Retail Floorspace
District Centre	Secret Harbour	15,000	-	3,531	2,300	-	994	3,388	-	1,769	7,177	-	2,643	11,782	-	3,726	17,366	-	5,059
Neighbourhood Centre	Bayshore Gardens	527	-	559	95	-	168	144	-	288	280	-	413	444	-	564	643	-	746
Neighbourhood Centre	Golden Bay Neighbourhood	3,240	-	1,478	Not Built	Not Built	Not Built	1,155	-	999	2,050	-	1,416	3,136	-	1,924	4,452	-	2,545
Neighbourhood Centre	Singleton Village	5,351	-	-	-	-	-	493	-	-	1,607	-	-	2,956	-	-	4,582	-	-
Local Centre	Foreshore Village Secret Harbour	330	-	400	70	-	41	86	-	102	171	-	170	274	-	252	399	-	353
Local Centre	Golden Bay Local	737	-	707	189	-	212	213	-	369	409	-	531	647	-	727	935	-	964
Local Centre	Golden Bay South	307	-	-	10	-	-	30	-	-	99	-	-	182	-	-	283	-	-
Local Centre	Mandurah Road	150	-	3,160	-	-	1,233	-	-	1,674	1	-	2,030	26	-	2,704	55	-	3,506
Local Centre	Singleton	Not Built	Not Built	Not Built	Not Built	Not Built	Not Built	1,397	-	774	1,667	-	903	1,994	-	1,058	2,390	-	1,247
Total		25,642	-	9,836	2,663	-	2,647	6,907	-	5,975	13,461	-	8,106	21,442	-	10,954	31,105	-	14,422

Pracsys 2021

Figure 67. Precinct 3 Activity Centres - Supportable Total Floorspace

Centre Type	Centre Name	Estimated Floorspace			2021			2026			2031			2036			2041		
		SHP Floorspace	RET Floorspace	Non-Retail Floorspace	SHP Floorspace	RET Floorspace	Non-Retail Floorspace	SHP Floorspace	RET Floorspace	Non-Retail Floorspace	SHP Floorspace	RET Floorspace	Non-Retail Floorspace	SHP Floorspace	RET Floorspace	Non-Retail Floorspace	SHP Floorspace	RET Floorspace	Non-Retail Floorspace
District Centre	Secret Harbour	15,000	-	3,531	17,300	-	4,525	18,388	-	5,300	22,177	-	6,175	26,782	-	7,257	32,366	-	8,591
Neighbourhood Centre	Bayshore Gardens	527	-	559	622	-	727	671	-	847	807	-	972	971	-	1,123	1,170	-	1,305
Neighbourhood Centre	Golden Bay Neighbourhood	3,240	-	1,478	Not Built	Not Built	Not Built	4,395	-	2,478	5,290	-	2,895	6,376	-	3,402	7,692	-	4,024
Neighbourhood Centre	Singleton Village	5,351	-	-	5,351	-	-	5,844	-	-	6,958	-	-	8,307	-	-	9,933	-	-
Local Centre	Foreshore Village Secret Harbour	330	-	400	400	-	441	416	-	502	501	-	570	604	-	652	729	-	753
Local Centre	Golden Bay Local	737	-	707	926	-	919	950	-	1,076	1,146	-	1,238	1,384	-	1,434	1,672	-	1,671
Local Centre	Golden Bay South	307	-	-	317	-	-	337	-	-	406	-	-	489	-	-	590	-	-
Local Centre	Mandurah Road	150	-	3,160	150	-	4,393	150	-	4,834	151	-	5,190	176	-	5,864	205	-	6,666
Local Centre	Singleton	Not Built	Not Built	Not Built	Not Built	Not Built	Not Built	1,397	-	774	1,667	-	903	1,994	-	1,058	2,390	-	1,247
Total		25,642	-	10,292	28,305	-	12,483	32,549	-	15,811	39,103	-	17,942	47,084	-	20,790	56,747	-	24,258

Source: Pracsys 2021

7.5 Precinct 4 – Baldivis District Centre Catchment

Figure 68. Precinct 4 Activity Centre Map

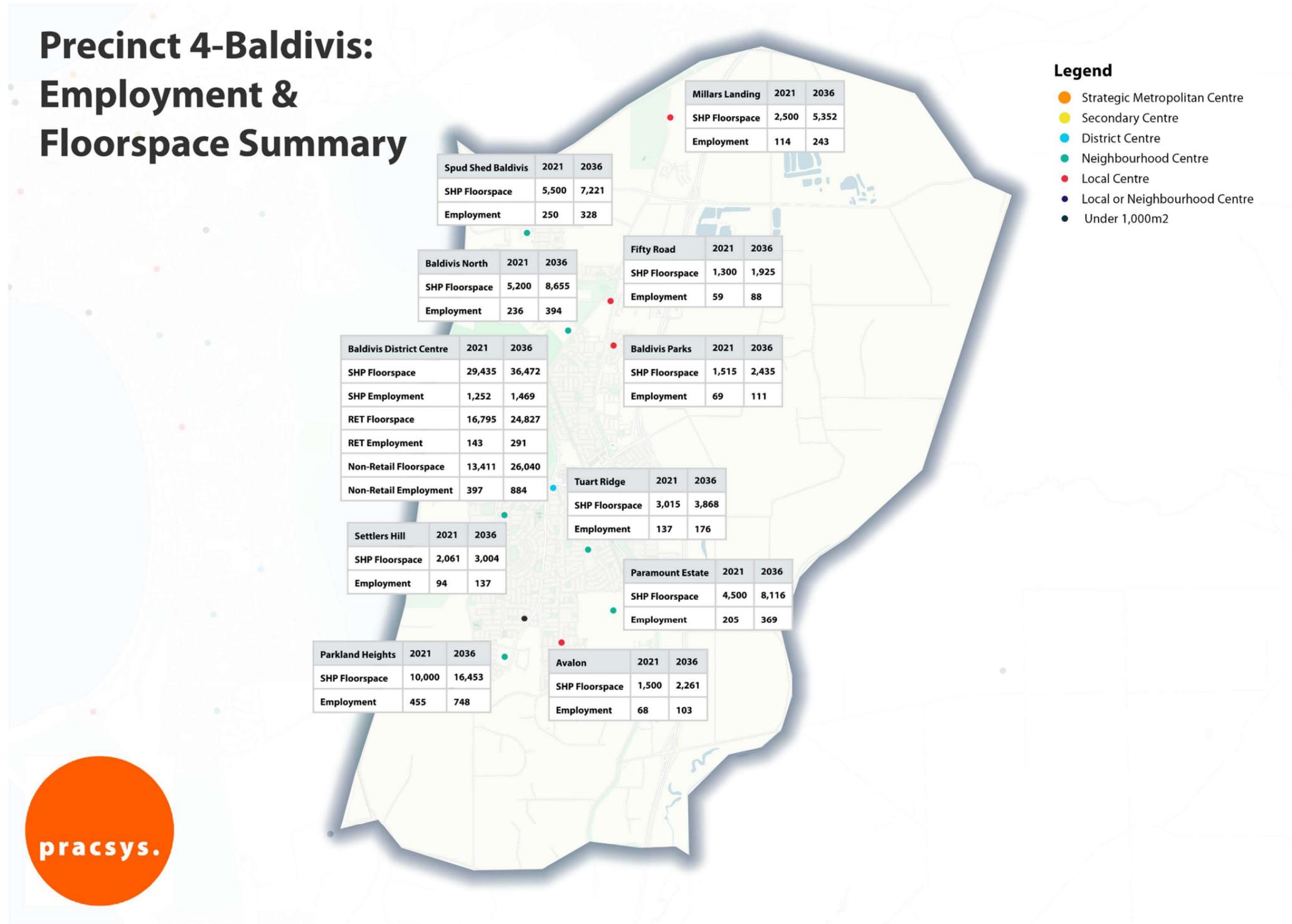




Figure 69. Precinct 4 Activity Centres - Supportable Additional Floorspace (Not Cumulative)

Centre Type	Centre Name	Estimated Floorspace			2021 (Additional)			2026 (Additional)			2031 (Additional)			2036 (Additional)			2041 (Additional)		
		SHP Floorspace	RET Floorspace	Non-Retail Floorspace	SHP Floorspace	RET Floorspace	Non-Retail Floorspace	SHP Floorspace	RET Floorspace	Non-Retail Floorspace	SHP Floorspace	RET Floorspace	Non-Retail Floorspace	SHP Floorspace	RET Floorspace	Non-Retail Floorspace	SHP Floorspace	RET Floorspace	Non-Retail Floorspace
District Centre	Baldivis	29,435	16,795	13,411	3,179	-	6,134	-	2,036	7,860	2,317	4,811	9,866	7,037	8,032	12,629	12,474	11,773	15,779
Neighbourhood Centre	Baldivis North	5,200	-	2,373	Not Built	Not Built	Not Built	1,551	-	1,535	2,351	-	2,022	3,455	-	2,611	4,741	-	3,289
Neighbourhood Centre	Paramount Estate	4,500	-	2,053	Not Built	Not Built	Not Built	1,706	-	1,411	2,583	-	1,896	3,616	-	2,448	4,808	-	3,080
Neighbourhood Centre	Parkland Heights	10,000	-	4,563	Not Built	Not Built	Not Built	2,605	-	2,866	4,375	-	3,849	6,453	-	4,963	8,851	-	6,237
Neighbourhood Centre	Settlers Hills	2,061	1,179	7,384	1,914	84	6,494	232	294	8,855	560	511	11,532	943	762	14,610	1,385	1,054	18,176
Neighbourhood Centre	Spud Shed	5,500	-	2,510	1,447	-	958	197	-	1,295	786	-	1,683	1,721	-	2,178	2,828	-	2,755
Neighbourhood Centre	Tuart Ridge	3,015	-	1,376	859	-	525	-	-	686	349	-	901	853	-	1,167	1,432	-	1,472
Local Centre	Avalon	1,500	-	684	Not Built	Not Built	Not Built	236	-	395	477	-	529	761	-	682	1,088	-	856
Local Centre	Baldivis parks	1,515	-	691	Not Built	Not Built	Not Built	371	-	429	605	-	568	920	-	735	1,285	-	926
Local Centre	Fifty Road	1,300	-	593	Not Built	Not Built	Not Built	209	-	343	377	-	449	625	-	581	916	-	733
Local Centre	Lakeside Caravan Park	360	-	-	228	-	-	10	-	-	57	-	-	114	-	-	179	-	-
Local Centre	Millars Landing	2,500	-	1,141	Not Built	Not Built	Not Built	Not Built	Not Built	Not Built	1,962	-	575	2,852	-	771	3,935	-	1,213
Local Centre	The Ridge	583	333	418	143	129	368	-	207	451	-	287	513	-	379	567	27	487	644
	Total	67,469	18,307	37,197	7,770	214	14,480	7,116	2,537	26,126	16,799	5,609	34,382	29,350	9,173	43,943	43,951	13,314	55,161

Pracsys 2021



Figure 70. Precinct 4 Activity Centres - Supportable Total Floorspace

Centre Type	Centre Name	Estimated Floorspace			2,21			2026			2031			2036			2041		
		SHP Floorspace	RET Floorspace	Non-Retail Floorspace	SHP Floorspace	RET Floorspace	Non-Retail Floorspace	SHP Floorspace	RET Floorspace	Non-Retail Floorspace	SHP Floorspace	RET Floorspace	Non-Retail Floorspace	SHP Floorspace	RET Floorspace	Non-Retail Floorspace	SHP Floorspace	RET Floorspace	Non-Retail Floorspace
District Centre	Baldivis	29,435	16,795	13,411	32,614	16,795	19,545	29,435	18,831	21,271	31,752	21,606	23,277	36,472	24,827	26,040	41,909	28,568	29,190
Neighbourhood Centre	Baldivis North	5,200	-	2,373	Not Built	Not Built	Not Built	6,751	-	3,908	7,551	-	4,394	8,655	-	4,984	9,941	-	5,662
Neighbourhood Centre	Paramount Estate	4,500	-	2,053	Not Built	Not Built	Not Built	6,206	-	3,465	7,083	-	3,950	8,116	-	4,502	9,308	-	5,133
Neighbourhood Centre	Parkland Heights	10,000	-	4,563	Not Built	Not Built	Not Built	12,605	-	7,430	14,375	-	8,412	16,453	-	9,526	18,851	-	10,800
Neighbourhood Centre	Settlers Hills	2,061	1,179	7,384	3,975	2,145	8,556	2,293	1,473	16,239	2,621	1,690	18,916	3,004	1,941	21,994	3,446	2,233	25,560
Neighbourhood Centre	Spud Shed	5,500	-	2,510	6,947	5,500	6,458	5,697	-	3,805	6,286	-	4,193	7,221	-	4,688	8,328	-	5,265
Neighbourhood Centre	Tuart Ridge	3,015	-	1,376	3,874	3,015	3,540	3,015	-	2,061	3,364	-	2,276	3,868	-	2,543	4,447	-	2,847
Local Centre	Avalon	1,500	-	684	Not Built	Not Built	Not Built	1,736	-	1,079	1,977	-	1,214	2,261	-	1,366	2,588	-	1,541
Local Centre	Baldivis parks	1,515	-	691	Not Built	Not Built	Not Built	1,886	-	1,120	2,120	-	1,259	2,435	-	1,426	2,800	-	1,618
Local Centre	Fifty Road	1,300	-	593	Not Built	Not Built	Not Built	1,509	-	936	1,677	-	1,042	1,925	-	1,174	2,216	-	1,327
Local Centre	Lakeside Caravan Park	360	-	-	588	360	360	370	-	-	417	-	-	474	-	-	539	-	-
Local Centre	Millars Landing	2,500	-	1,141	Not Built	Not Built	Not Built	Not Built	Not Built	Not Built	4,462	-	1,716	5,352	-	1,912	6,435	-	2,354
Local Centre	The Ridge	583	333	418	726	712	950	583	790	1,033	583	620	931	583	713	985	610	820	1,062
	Total	67,469	18,307	37,197	75,239	67,683	81,949	74,585	70,006	93,595	84,268	23,916	71,579	96,819	27,481	81,140	111,420	31,621	92,358

Source: Pracsys 2021

8 IMPLEMENTATION

8.1 Current State Planning Framework

The Needs Assessment has been developed based on the Draft SPP4.2 (2020). The City's current local planning framework retains language from the Metropolitan Centres Policy (2000) that is inconsistent with the current planning policy. It is recommended that all references to the previous policy be removed with the following notes:

- The previous LCS included a discussion of retail floorspace caps/limits. The current planning policy does not support the use of caps as it can lead to under-provision of floorspace, for instance, if higher than expected population growth occurs. The effect of the previous caps can be seen by the significant expansion of retail centres that occurred when SPP4.2 (2010) was implemented. It is recommended that floorspace amounts allocated to centres in the Needs Assessment be used as a target to support the population benchmarks listed in Figure 38 and Figure 39. Developments that may exceed these amounts should be assessed on a case-by-case basis with evidence provided by applicants required to demonstrate the need for goods and services and consideration of the impact on the activity centre hierarchy
- The Draft SPP4.2 provides guidelines that can be implemented into the local planning framework to support decision making. This includes defining when tools such as a Needs Assessment or Impact Test are required and recommended methodology inclusions. Needs Assessments and Impact Tests are tools that can be required by the City at a development application level to support decision making. They are currently included in the LCS but the triggers for when they are used and how they are developed should be updated to align with Draft SPP4.2 requirements. It is recommended that retail gravity modelling be identified as a preferred method given it was used in the Needs Assessment (it is not recommended to make retail gravity modelling compulsory)
- The Draft SPP4.2 defines different levels of impact to guide the assessment of proposed developments. As a general rule, significant impacts are over 10% and are grounds to consider rejecting a potential expansion or new development depending on the broader level of community benefit. It is recommended that language from the Draft SPP4.2 regarding significant impacts be adopted in the local planning framework to ensure any evidence provided to support a development uses standardised language and metrics. For moderate impacts (5%-9.9%) the City should assess the health of surrounding centres and assess if a proposed developments impact is likely to reduce trading levels below a supportable level for proximate centres.

These considerations have been applied through the following sections, where relevant, to support recommendations for integration of the findings from this report with the City's Local Planning Framework.

8.2 Integrating Needs Assessment Findings

The Needs Assessment provides the evidence-base for planning the City's Activity Centres. It will be integrated into the City's Local Planning Framework through:

- The Local Commercial and Activity Centre Strategy (LCACS)
- Local Planning Strategy (LPS - to be prepared in 2022/23 incorporating LCACS findings)
- The Rockingham Strategic Metropolitan Centre Local Planning Framework (RSMCLPF)

The Needs Assessment establishes the floorspace supply of retail and non-retail uses in Activity Centres required to support identified population demand. The analysis has used population projections from WA Tomorrow to develop the estimates. The years associated with the projections are less important than the quantum of population themselves. It is recommended that for planning purposes the LCACS and RSMCLPF adopt a 'stage gate' interpretation of the results to guide decision making.

A number of considerations have been developed to support the integration of the Needs Assessment with these planning documents and to maximise viability and resilience of activity centres across the hierarchy:

- The floorspace projections in this analysis provide guidance for the City to understand the potential quantum of floorspace that may be demanded at a certain time point. Reaching a certain population or year does not automatically mean a centre should expand. The City can take into account this analysis and will need to consider other factors affecting the activity centre hierarchy at the time of receiving an application (i.e. future developments that may not be in this analysis, changing floorspace per population requirements, etc.) in order to assess whether additional floorspace is required in future
- The floorspace projections (by centre), population projections (by precinct) and dwelling density targets (for relevant centres) in the reported years (i.e. 2026, 2031, 2036, 2041) should be used to monitor the provision of uses across the activity centre network. When a population level is reached in a precinct and/or target density is reached at a centre, this is an indication that further floorspace can be considered if private interest arises; even if this occurs prior to the year identified in the Needs Assessment. Interest from private industry can be an indicator of current or future potential demand and should be considered as part of the overall decision-making process. This being said, private interest may undermine the activity centre hierarchy and appropriate measures should be used to ensure development applicants have demonstrated an actual need for additional goods or services (see following dot points). If a population level does not occur by an identified year, the population level should be the guiding factor for potential development and not the year
- The Needs Assessment provides floorspace quantum estimates for individual centres. These should not be treated as strict floorspace caps but as targeted supportable floorspace with some flexibility for small under or over provisions (the under or over provision should be based on identified need at the time, see dot points below for the evidence needed to support new/expanded centres)

- With regards to the City's planning of activity centres, new local centres should be considered in areas where the normative daily/weekly shopping needs of the population (access to a centre within a 1km radius) are not being met (see Section 5.2, Figure 31) **and** there is sufficient demand to support a centre (to be demonstrated by a development applicant – see dot points below). Where new residential developments occur (e.g. Karnup), the City should ensure that planning of new centres addresses the normative daily/weekly shopping needs of residents through an appropriate distribution of high and lower order centres
- Potential changes to activity centre classifications in the Baldivis area (Precinct 4) should be dependent on the findings of the Karnup DSP. The Karnup DSP should consider current and planned centres in Precinct 4 to ensure that overall development supports a viable and vibrant activity centre hierarchy. For further detail regarding potential changes to activity centre classifications, see Section 7.1
- The City should consider a number of factors when assessing the potential for a **large expansion of a current centre** (see Draft SPP4.2, Table 2: Major activity centre use floorspace thresholds) or for a **proposed new centre**. There should be robust evidence that:
 - There is a need (i.e. high population growth within the centre's catchment)
 - There is alignment with Draft SPP4.2 objectives (i.e. walkable catchment, public transport access, etc.)
 - The development would not affect the viability of the activity centre hierarchy
 - The proposed uses are viable (i.e. if a supermarket is proposed the applicant's evidence must demonstrate there is sufficient demand for that offering). Where the demand for uses can be demonstrated, there should be flexibility to allow for a variety of uses across all centre types to enable operators to meet specific and potentially changing needs of consumers
 - There are wider community benefits such as improved service, increased employment, reduced travel times, etc.
- A current centre in a fully developed area should not be allowed to justify an expansion on the basis that another centre has not expanded to the level identified in the Needs Assessment at a given timepoint. This may be reconsidered in developing areas where another centre is constrained and there has been population growth within the catchment (robust evidence should be required as per the previous dot point)
- New centres may be allowed to incorporate additional floorspace where a current centre cannot expand due to land or other constraints, with some caveats:
 - The new centre should be in a location that provides suitable access to residents of the current centre's catchment
 - The new centre needs to demonstrate the same robust evidence as above

These considerations should allow the City the flexibility to decide when development is appropriate and ensure that development benefits the community without unduly impacting the surrounding activity centre hierarchy.

Considerations have also been developed for service commercial and light industrial developments:¹⁸

- Shop Retail uses should only be allowed in service commercial and light industrial areas where an applicant can be shown they are providing for demand from local workers and visitors to businesses in the commercial centre
- Service commercial and light industrial uses should be focussed in identified employment centres (see Section 5.2, Figure 32) or in future employment areas (i.e. Nort East Baldivis and Karnup)
- There is the opportunity to consider provision of bulky goods retail uses near Secret Harbour (see Section 5.2, Figure 32)
- The following elements should be used to assess any proposed developments for these uses in new locations:
 - Is there sufficient space for the use in a current employment centreIf there is not, then does the proposed location have the following attributes:
 - Proximity to relevant consumer/customer (i.e. population – light industry, businesses – heavy industry)
 - Appropriate road and/or freight access
 - Compatible surrounding uses (i.e. heavy industry uses are not compatible with residential development)
 - Access to necessary infrastructure (i.e. special waste disposal requirements, etc.)
 - Land constraints (if site works will be too expensive, commercial uses may not be viable)
- The type of uses allowed in service commercial and light industrial areas should be flexible as these areas span both business to consumer and business to business supply chains. The primary goal for the City in planning these areas should be to minimise the encroachment of uses that are most appropriate for Activity Centres (i.e. Shop Retail) unless supporting the employee and visitor populations.

8.3 Supporting Centre Development

It is assumed the City will facilitate employment growth through an understanding of the key drivers that attract businesses to the City's centres. Any strategy to reimagine the function, scale or use of the centres should respond to the 'felt needs' of the user groups it caters for, including:

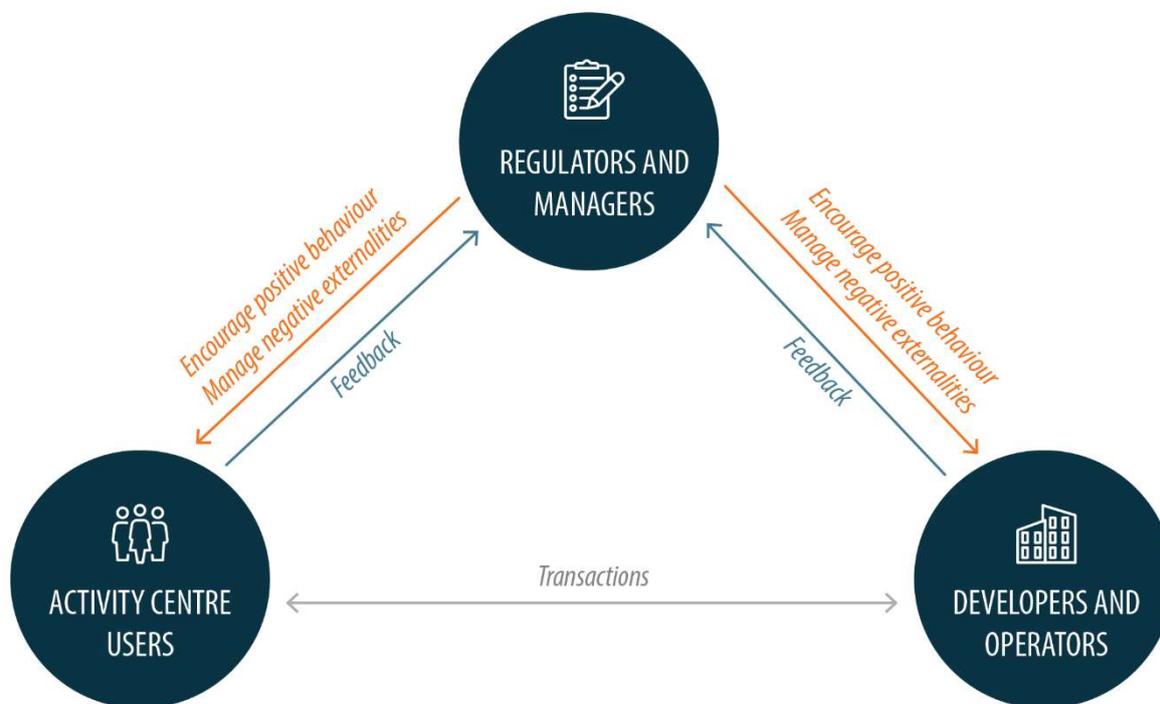
- Activity centre users
- Enterprise developers/operators (and the workers)

¹⁸ Please note these considerations are for population driven centres only and do not apply to strategic industrial land such as the Rockingham Industrial Area in the Western Trade Coast.

- Regulators/managers

Decisions are made to benefit one or more of the user groups in the context of an overarching strategic vision.

Figure 71. User group interactions



Understanding the drivers of user behaviour is required to achieve vibrant and viable activity centres across the City’s activity centre hierarchy. Regulators and managers (e.g. State and Local government and other authorities) can generally only encourage or influence certain behaviours, rather than control them. Ultimately the market and centre users will decide what activity is viable for the centres, with regulators and managers able to exert influence toward the desired approach. It is therefore paramount that the planning for the City’s activity centre hierarchy aligns with desired outcomes of users and employment providers.

There are a number of key drivers for population-driven industries that need to be considered when planning for activity centres (Figure 72 and Figure 73).

Figure 72. Example demand drivers for population-driven businesses

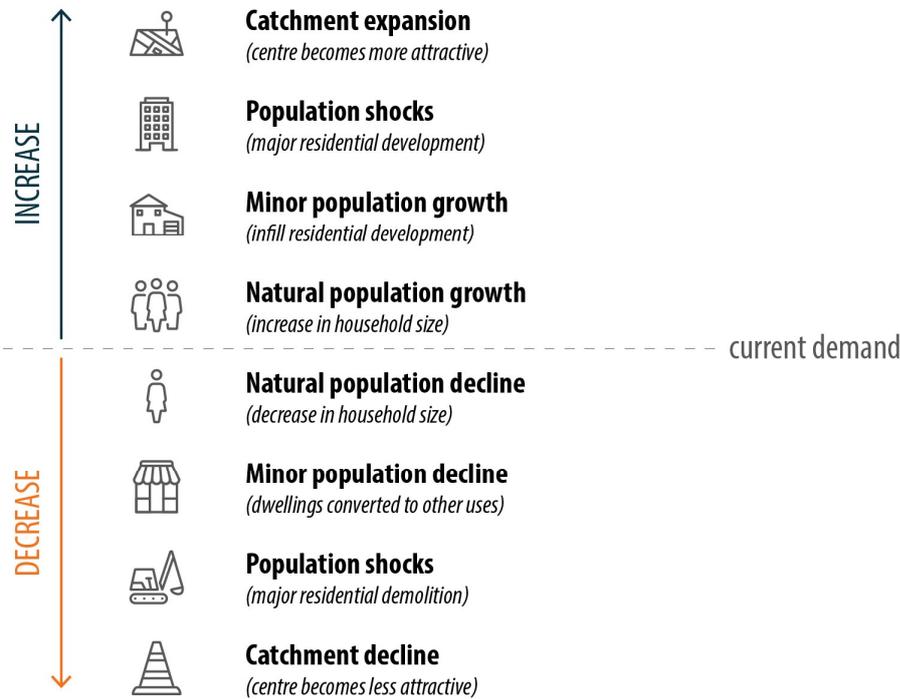
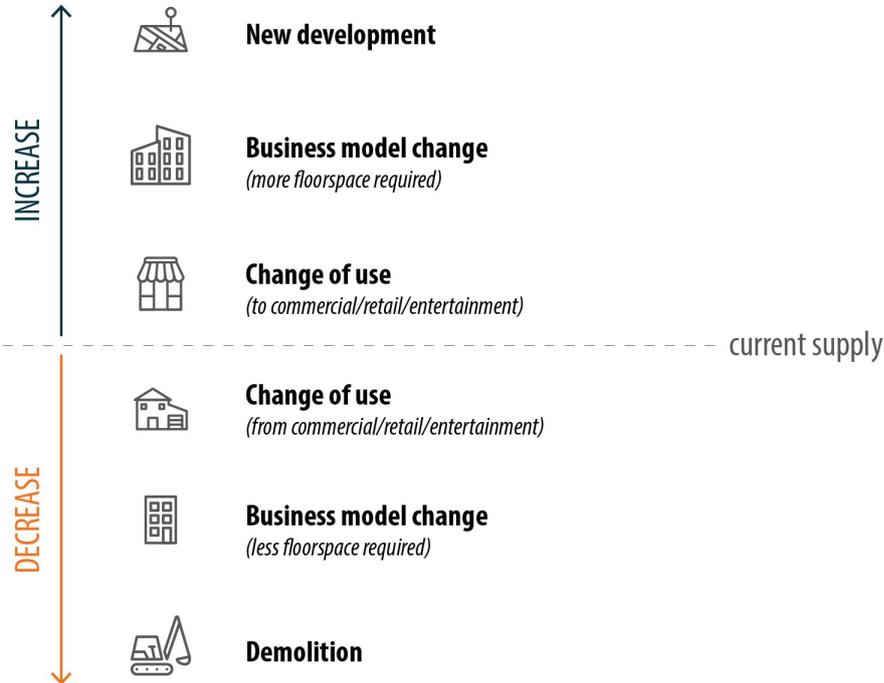


Figure 73. Example supply drivers for population-driven businesses



A change in any of the above characteristics will promote a change in floorspace and interest from the market for redevelopment. For example, on the demand side, an increase in the level of density surrounding the centre increases the effective userbase and proportion of expenditure that is likely to be directed and



captured by the centre, this will provoke a competitive response from developers in which investment will be made to capture this extra expenditure pool.

Similarly, a change in the urban fabric (on the supply side) that makes the centre more attractive will increase the catchment of the centre. This could, for example, be improved streetscaping or connectivity, activation and event strategies within the centre or improved connection to the local tourism areas. This will provoke a similar competitive response from developers wishing to take advantage of the extra expenditure pool.

Strategic Employment

When considering strategic employment, the relevant industries are largely exogenous to changes in these drivers and principally rely on the comparative advantages of an area (i.e. resources, location) and individual decisions of businesses. Changes in strategic employment can be affected through promoting the unique advantages of the area to businesses, encouraging business collaboration and other business-friendly policies. Typical considerations include travel time to the CBD or major employment centres such as the WTC (to access clients), travel time to work for employees and the cost of the premises. The City's Employment Study (2020) and Economic Development Strategy provide the foundation for economic development that is not population-driven, opportunities include:¹⁹

- Primary regional institutions including a full-service university, major health campus with teaching capabilities, State government administration, and high-level arts and entertainment
- Business services for nearby industrial areas, the naval base and defence industries, and Westport
- Tourist activities including business travel and visitation for the surrounding area
- Defence, heavy industry and port related uses

The primary locations that can accommodate strategic employment with the City are the RSMC and Rockingham Industrial Area. The role of the City in encouraging uses is considered in Section 8.4.

¹⁹ A summary of the drivers for strategic employment is provided in Section 6.3, Employment Targets; detailed drivers are provided in the Rockingham Employment Study 2020.

8.4 The City’s Role

In creating an attractive business environment within the City’s activity centres, the role of the City is to act as a central regulator, coordinator and facilitator, working to understand the challenges facing local businesses including; linking businesses with appropriate resources, advocating on behalf of local businesses, and supporting specific projects where appropriate. The levers available to the City can be described under the following hierarchy:



CONTROL

e.g. Establishing local policy and regulation, directing internal resources, utilisation of local government-controlled land and assets, implementing programs and events, and supporting projects with seed funding



INFLUENCE

e.g. Facilitating the strengthening of networks that encourage the sharing of knowledge and investment opportunities, and supporting communication with State and Federal governments regarding the influence of wider policy, projects or funding decisions



MONITOR

e.g. Tracking economic performance indicators and collecting feedback from businesses regarding current issues or opportunities which relies on communication channels with industry and the broader community

Using these levers, the City can actively attract and retain businesses through an understanding of the role, strengths and weaknesses of different centres and employment lands, and how they relate to a business’s locational preference drivers and hence its operational productivity. These considerations differ depending on the nature of a business, with population/consumption-oriented businesses having different needs to those that operate business-to-business or are export-driven. The City can effect these levers through the Local Planning and Economic Development Frameworks.

The City’s activity centres are almost solely population-driven with the RSMC being an exception due to its significant role in providing access to goods, services and employment for the wider Study Area. The levers available to the City can be considered in terms of centre and employment land type (Figure 74).

Figure 74. Role of City in Supporting Development by Centre and Employment Type

Lever	Centre Type	Application
Control	RSMC	<p>The City can control the population-driven uses (i.e. shop/retail) available in the RSMC through planning and policy measures. It is recommended that these uses be allowed flexibility to develop based on private industry interest in the RSMC particularly with the significant potential population increase in the CoR scenario.</p> <p>The City has less control over the attraction of strategic uses in the centre and needs to develop a planning approach that incentivises</p>



Lever	Centre Type	Application
		investment (i.e. allows for flexibility with regards to development considerations such as height and mix of appropriate uses).
	Other Activity Centres (i.e. district, neighbourhood, etc.)	The City's has greater control of development at its smaller order centres and can use evidence-based decision making (see Section 8.2) to ensure the centres are capable of meeting the needs of the current and future population while also maintaining a viable activity centre hierarchy. The Needs Assessment provides the evidence base with which the City and commercial stakeholders can understand markers for additional floorspace requirements. It is recommended that the floorspace estimates in this report be used as targets and not floorspace caps/limits due to the evolving nature of industries (particularly retail) and the changing nature of consumer demand.
	Heavy Industrial Land	The City has limited ability to control the development of strategic industries at heavy industrial areas such as the East Rockingham Industrial Area; these should be allowed to develop based on industry demand. The main control the City should apply to these areas is to ensure that strategic industrial land is not taken up by less strategic, light industrial uses. This is particularly the case for any developable land in East Rockingham that may be suitable to support uses related to Westport and the wider WTC area.
	Light Industrial Land	The City should look to control the uptake of Shop Retail uses in light industrial areas. These areas generally provide cheaper land and high levels of parking but do not support activated centres, the use of public transport and walkability. Bulky Goods Retail (Other Retail) can be suited to these areas; however, it should not be allowed to develop to a point that it constrains the development of light industrial uses (i.e. uses that require warehousing, large storage, large truck access, separation from residential developments, etc.). The Employment Study highlights the protection of light industrial employment land such as North East Baldivis and potentially Karnup for employment uses with appropriate planning controls.
Influence	RSMC	The City has an important role in influencing development in the RSMC, particularly for catalyst projects and more strategic uses. The Employment Study identifies a number of potential strategies for supporting the development of the RSMC including collaboration at a regional level, advocacy and communication with key stakeholders.
	Other Activity Centres (i.e. district, neighbourhood, etc.)	Other centres should not require much influence to develop. They are driven by population growth that creates private developer interest. Should the City in the future wish to change the role of a centre it may need to use influencing tactics such as communication and advocacy.
	Heavy Industrial Land	The Employment Strategy identifies dialogue, collaboration and advocacy as key roles for the City in influencing development in areas such as the Naval Base and East Rockingham Industrial Area.
	Light Industrial Land	These land uses are similar in nature to those in activity centres, with population growth being the primary driver. There is an unlikely need for the City to influence the uptake of these areas.

Lever	Centre Type	Application
Monitor	RSMC	Ongoing monitoring should be undertaken to ensure that the activity centres and employment land in the City are meeting desired objectives. The Needs Assessment provides the evidence base for monitoring the change in floorspace across the Activity Centre hierarchy with an understanding of population levels at different time points that may indicate the need for additional floorspace. The City's Employment Study and Economic Development Strategy should be used to monitor industry development, particularly for catalyst projects (i.e. a university) and strategic uses, based on economic development objectives. The City should ensure that it communicates with key stakeholders to understand the needs of businesses associated with Westport and the support that it can offer (i.e. information, planning/policy incentives, etc.) to facilitate business growth.
	Other Activity Centres (i.e. district, neighbourhood, etc.)	
	Heavy Industrial Land	
	Light Industrial Land	

8.5 Karnup DSP

The analysis undertaken for the Needs Assessment has not included the potential population and activity centre development at Karnup in Precinct 5. A District Structure Plan (DSP) is going to be developed for Karnup and will identify the potential dwelling and employment land yield for the area.

Recommendations to Support Preparation of the DSP

The development of the Karnup DSP will be guided by the State Planning Framework, with the following policies most relevant to retail and economic considerations:

- State Planning Policy 7.2 Precinct Design
- Draft State Planning Policy 4.2 Activity Centres

These policies require certain analyses to be undertaken to support precinct planning and are interlinked. SPP 7.2 requires land use analysis to support precinct design considerations. Specifically, it recommends an **Economic, Retail and Employment Strategy** (ERE Strategy) be developed as a technical document to support a precinct plan. ERE Strategies incorporate economic analysis including identification of priority industries and economic development considerations; and, floorspace analysis to understand current and future gaps in floorspace provision. The policy indicates that a precinct plan which includes an activity centre defined in Draft SPP4.2 must also address the requirements of that policy.

The Implementation Guidelines of Draft SPP4.2 identify the requirement of a Needs Assessment to support precinct planning. Where the potential development would occur outside of a currently defined activity centre and includes greater than 500m² Shop/Retail floorspace, there may be a requirement for an Impact

Test. The Draft SPP4.2 provides guidance for both Needs Assessments and Impact Tests; these guidelines will need to be adhered to when developing the analysis for the DSP. The DSP findings should be incorporated into the next review of the Needs Assessment / Local Commercial Strategy and allow for refined estimates of future floorspace demand across the activity centre hierarchy.

Key considerations for the ERE Strategy to support the Karnup DSP have been developed based on an understanding of SPP7.2 and SPP4.2 requirements and the documentation/analysis that has already been developed to support the City's policies and strategies (Figure 75).

Figure 75. Recommendations to Support DSP Development

Strategy Component	Recommendation
Catchment Development	Modelling, particularly for retail floorspace, should be undertaken using a catchment size relevant to the potential size of the activity centre(s) (i.e. a large district centre would likely require a catchment that encompasses all of the City of Rockingham and some areas outside the City). There may need to be iterations between the potential developable size and the size supportable based on population demand.
Strategic Context	Consider the development of the precinct against strategic objectives in the State planning framework and local planning framework, ensuring it aligns. The Strategic Context should also consider economic development policy at both a State (i.e. Diversify WA) and Local (i.e. Rockingham Economic Development Strategy) level.
Population and Economic Analysis	Socio-economic, employment and industry analysis should be undertaken to understand the drivers, opportunities and constraints for different industries and floorspace in the catchment. Should the DSP be developed before Census 2021 data becomes available, the Needs Assessment, Rockingham Employment Study and Economic Development Strategy would likely have the most up to date analysis. Should Census 2021 data be available, the analysis should be revised based on the identified catchment.
Land Use Analysis	<p>Should new Department of Planning, Lands and Heritage Land Use and Employment Survey data be available when undertaking the Karnup DSP, it should be used to identify the current gap in uses relevant to the Karnup DSP. The current gap for the precinct should be relatively limited due to the low-density nature of the area.</p> <p>The current gap in floorspace identified in the Needs Assessment for other centres would likely be sufficient for undertaking the DSP, although it should be updated based on new LUES data when the Needs Assessment / Local Commercial Strategy is reviewed.</p> <p>The focus of the Karnup DSP analysis relating to activity centre uses should be on the floorspace requirements of the future population that could be accommodated in the DSP area and the potential size of the activity centre(s) included. Retail gravity modelling is recommended due to its objective nature with floorspace provision ratio modelling used for non-retail uses.</p> <p>The number and distribution of future activity centres should be developed based on the final distribution of dwellings and meeting objectives identified in Draft SPP4.2 such as walkable catchments and access to public transport. The size of the centres should be based primarily on retail modelling as it is the main attractor for activity centres. This should support centre size(s) that is(are) viable and do not have a significant impact on current centres (levels of impact are defined in the Draft SPP4.2 Implementation Guidelines).</p> <p>Industry analysis for other employment lands (such as employment land for light industrial uses) should follow from analysis in the Employment Study which discusses potentially developable land and indicates that this land should be protected for</p>



Strategy Component	Recommendation
	employment uses to ensure capacity for future development. The size of land allocated for employment in this context should be based on supporting employment targets.
Scenario Analysis	<p>Scenarios should be developed as per Draft SPP4.2 to identify a possible range of outcomes and how they affect:</p> <ul style="list-style-type: none"> • Demand for floorspace uses from the DSP's population yield • Impact on floorspace sizes and viability of other centres • Contribution to employment targets • Contribution to strategic objectives (i.e. community, economic development, etc.)
Recommendations	<p>The ERE Strategy should clearly state the role of proposed activity centre(s) in providing access to goods, services and employment; and, how the centre(s) integrate into the activity centre hierarchy. It should also define the role of other employment lands (i.e. light industrial areas in achieving economic development objectives) and should draw from the Employment Study and Economic Development Strategy to identify relevant implementation actions that apply to the DSP area.</p> <p>Draft SPP7.2 identifies ongoing evaluation and monitoring as part of the planning process. From a retail and economic perspective, this would include aligning the DSP with specific outcomes that can be measured over time (i.e. employment, population, number of businesses, diversity of businesses, education services, etc.) to ensure the implementation of the DSP delivers the desired benefits for the community.</p>

Integration with the Needs Assessment / LCS Review

The findings of the DSP will need to be integrated with the Needs Assessment and LCS Review to refine medium to long term floorspace considerations for the activity centre hierarchy. The DSP should be developed before any potential changes to activity centre classifications in Precinct 4 are considered.²⁰ Development related to the DSP is not likely to take place in the short term, therefore it is expected that the Needs Assessment estimates for activity centre floorspace distribution will hold for 2026 and potentially 2031. It is recommended that the findings of the DSP be incorporated into the Needs Assessment / LCS Review at the time they are next updated/reviewed; it is assumed that such documents would be updated every five years or so.

The key elements that will need integration include:

- Activity centres and floorspace quantum by retail and non-retail uses
- Dwelling projections and locations
- Estimated timing of population development
- Estimated timing of commercial floorspace development

Depending on the quantum of population growth, the distribution of this population, and the size and role of the potential activity centre(s) in Karnup, there may be a shift in the quantum of floorspace supportable in surrounding centres. Centres in Precinct 3 (Secret Harbour) and Precinct 4 (Baldivis) are most likely to be affected. In particular the higher-order centres: Secret Harbour and Baldivis Town Centre.

²⁰ For further detail regarding potential changes to Activity Centre classifications, see Section 7.1

Reductions in long-term floorspace at these centres due to the development of activity centres in Precinct 5 should be considered based on the community benefit achieved. For instance, Baldivis Town Centre is the largest centre along the freeway would attract greater expenditure from high population growth in South Baldivis. Where the population is closer to a potential future centre in Karnup it may be desirable for their expenditure to be captured at that activity centre should it both not have a significant negative impact on the developed Baldivis Town Centre and reduce the distance residents need to drive to access goods and services by a sufficient amount.

Considerations such as these will need to be assessed upon review of the Needs Assessment / LCS to revise the floorspace distribution of the activity centre hierarchy so that centres are viable and achieve the highest and best outcome for the community.

8.6 Implementation Summary

The Needs Assessment will support the development and implementation of the City's LCACS, LPF and RSMCLPF. Key implementation points include:

- The Needs Assessment has been developed based on the Draft SPP4.2 (2020). The City's current local planning framework retains language from the Metropolitan Centres Policy (2000) that is inconsistent with the current planning policy. It is recommended that all references to the previous policy be removed and aligned to the Draft SPP4.2
- The Needs Assessment establishes the floorspace supply of retail and non-retail uses in Activity Centres required to support identified population demand. The analysis has used population projections from WA Tomorrow to develop the estimates. The years associated with the projections are less important than the quantum of population themselves. It is recommended that for planning purposes the LCACS and RSMCLPF adopt a 'stage gate' interpretation of the results to guide decision making
- An evidence-based approach to activity centre development is recommended. This approach is aligned with Draft SPP4.2 and provides the City with the flexibility to assess applications on a case by case basis to ensure the viability and vibrancy of the activity centre hierarchy is maintained
- The role of the City is to act as a central regulator, coordinator and facilitator, working to understand the challenges facing local businesses to support sustainable activity centre development
- The City has three levers that it can effect through the Local Planning and Economic Development Frameworks, these include Control (i.e. planning regulations), Influence (i.e. advocacy), and Monitor (i.e. measurable outcomes to inform progress towards desired future)
- The City's activity centres are almost solely population-driven with the RSMC being an exception due to its significant role in providing access to goods, services and employment for the wider Study Area
- An **Economic, Retail and Employment Strategy** (ERE Strategy) is recommended to be developed as a technical document to support the Karnup DSP



-
- The Draft SPP4.2 provides guidance for both Needs Assessments and Impact Tests; these guidelines will need to be adhered to when developing the analysis for the DSP. The DSP findings should be incorporated into the next review of the Needs Assessment / Local Commercial Strategy and allow for refined estimates of future floorspace demand across the activity centre hierarchy
 - The DSP should be developed before any potential changes to activity centre classifications in Precinct 4 are considered²¹

²¹ For further detail regarding potential changes to Activity Centre classifications, see Section 7.1

9 CONCLUSION

This Needs Assessment provides the City of Rockingham with guidance on the supportable level of retail and non-retail floorspace that should be located at its activity centres going forward until 2041. It should be noted that the figures for the Strategic Metropolitan Centre are for ultimate development and outline future trajectory for floorspace demand. This will guide the City in planning its activity centres and assist it in determining the most appropriate way to meet its Employment Self Sufficiency (ESS) target.

The supportable level of retail floorspace that can be located at centres has been estimated with consideration of floorspace drivers and by using retail gravity modelling and benchmarked floorspace productivity estimates. This methodology ensures future floorspace estimates are supportable and will not impact the vitality of activity centres.

The supportable level of non-retail floorspace has been estimated using floorspace per person provision ratio analysis. This methodology identifies areas that are considered suitable benchmarks for the City and growing non-retail floor space to match the provision of floorspace per person by the type of non-retail floorspace.

This analysis has been undertaken for two population scenarios:

- A 'low growth' scenario based on WA Tomorrow (referred to as 'WA Tomorrow' in figures and tables) census forecasts that can account for projected population growth within the full 25km Strategic Centre catchment; and
- A 'high growth' forecast scenario (referred to as 'City of Rockingham' in figures and tables) based forecast.id population projections accounting for Structure Plan and subdivision approval data supplementing census data and considering the capacity of the adopted Local Planning Framework to support higher density development throughout the City.

The Needs Assessment provides floorspace projections linked to population projections for each of the City's Precincts²² at five-year intervals (see Section 7). It is recommended the City adopt a 'stage gate' interpretation of the results to guide decision making. An evidence-based approach is recommended for assessing future developments to ensure the viability and vibrancy of the activity centre hierarchy are maintained (see Section 8.2). Potential changes to activity centre classifications have been identified, particularly in Precinct 4 (see Section 7.1). It is recommended that the Karnup DSP be undertaken prior to any re-classification of centres in Precinct 4 (see Section 8.5). The Karnup DSP should be informed by an Economic, Retail and Employment Strategy with findings integrated into the Needs Assessment and LCACS upon their next review.

Employment Self-Sufficiency (ESS) targets are assessed to understand the strategic employment required to achieve an ESS of 74% in the City (see Section 6.3).²³ It is estimated that the employment gap to reach a target ESS of 74% would require an additional 2,100 to 5,100 jobs in the RSMC and 6,400 and 11,700 jobs on other

²² Precincts 1 through 4, Precinct 5 (Karnup) has been excluded as a District Structure Plan is to be undertaken to inform the development potential of Karnup

²³ The Southern Metropolitan Peel average ESS target is 74%



employment lands. These results reflect the importance of the RSMC in providing employment opportunities to meet Sub-regional employment targets. The Southern Metropolitan Peel Framework currently provides a target of only 12,290 jobs in the RSMC. Under the CoR scenario the RSMC will need at least 14,252 jobs to meet the goods and services needs of the surrounding population, without further contributing to ESS targets. The findings of the Rockingham Employment Study and our analysis indicate that regional ESS targets are not likely to be achieved without a greater concentration of employment in the RSMC.

The implementation role of the City is to act as a central regulator, coordinator and facilitator, working to understand the challenges facing local businesses to support sustainable activity centre development. The City has three levers that it can effect through the Local Planning and Economic Development Frameworks, these include Control (i.e. planning regulations), Influence (i.e. advocacy), and Monitor (i.e. measurable outcomes to inform progress towards desired future). The City will predominantly need to use the Control lever to ensure activity centre development contributes to a viable activity centre hierarchy. The influence lever will be key to attracting strategic employment to the RSMC with some elements of control providing capacity for the relevant uses (i.e. allowing for office development in the RSMCLPF). Monitoring will be key to ensuring the City's overarching planning and economic development objectives are being achieved. Detailed directions for the City's role in implementation are provided in Section 8.4

10 APPENDIX 1: MODELLING INFORMATION

10.1 Gravity Modelling Methodology

Gravity models allow for the measurement of spatial interaction as a function of distance to determine the probability of a given customer shopping at a centre and provide an approximation of trade area and sales potential for development. This modelling technique uses the distance between a household and each centre, and a measure of 'attractiveness' to define the probability model. The 'attractiveness' of a centre has been defined by total floorspace and the distance has been calculated by measuring straight-line distances between each centre and population. The gravity model probability formula is shown in Figure 76.

Figure 76. Gravity Model Probability Formula

$$P_{ij} = \frac{\frac{A_{jk}^a}{D_{ij}^\beta}}{\sum_{j=1}^m \frac{A_{jk}^a}{D_{ij}^\beta}}$$

P_{ij} = Probability of customer living/working in statistical area i shopping at complex j.
 A_i = Area of floorspace in centre, j in square metres, according to the type of supply, k.
 D_{ij} = Distance between statistical area of households, i and complex j.
 a = Area exponent
 β = Distance exponent
 k = Type of supply or expenditure, either Convenience or Comparison
 i = Statistical area ($i=1, \dots, n$)
 j = Complexes ($j=1, \dots, m$)

Source: Carter, C (1993) 'Assumptions Underlying the Retail Gravity Model', *Appraisal Journal*, Vol 61, No 4, pp510; Pracsys (2020)

Figure 77. Gravity Model Demand Formula

$$D_{kj} = \sum_{i=1}^n (P_{ij} * E_i)$$

D_{kj} = Demand for retail category k, at centre j.
 E_i = Expenditure pool of statistical area i.

Source: Carter, C (1993) 'Assumptions Underlying the Retail Gravity Model', *Appraisal Journal*, Vol 61, No 4, pp510; Pracsys (2020)

Figure 77 shows that the demand for retail category k²⁴, at centre j, is equal to the sum of the probabilities of customers living in statistical areas i to n, multiplied by the expenditure pool of statistical area i. In other words, the demand for retail is a function of the probability of customers from a particular statistical area attending the centre multiplied by the expenditure pool of that statistical area. The expenditure pool is derived through the population multiplied by its income distribution.

In its core form gravity modelling provides a clearer, reproducible outcome that can be easily assessed. However, it does not consider local factors, including:

- The comparative value proposition of centres (e.g. the presence of an 'anchor' attractor that draws significant market share);
- The brand preference of users; or
- The efficiency of transport networks, as well as geographical barriers (e.g. in some cases it may be easier for customers to access a centre that lies physically further away).

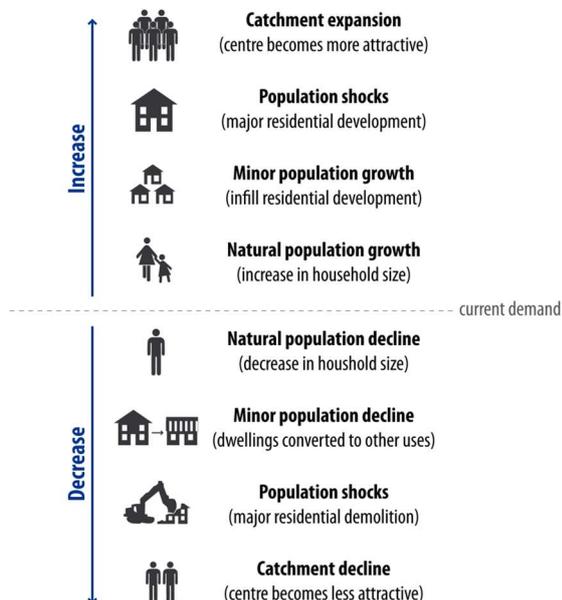
Drivers of Retail Floorspace Supply and Demand

Demand changes can result in increased or decreased expenditure. The potential causes of demand changes are shown in Figure 78. These largely show that an increasing population increases demand, and vice versa. There are significant amounts of commercial floorspace, especially office floorspace, flagged for the central sub-region of Perth and beyond. There will also be significant numbers of new dwellings provided across Perth. This increase in residents has the potential to boost demand for goods and services in the area.

Demand can also increase from rising incomes, or wealth, because people have more disposable income to spend on retail. Demand can also be increased by reducing leakage. Leakage for retail is largely caused by online retail, as well as travelling.

²⁴ Retail categories are determined by their PLUC code and whether they are convenience or comparison goods. Convenience goods are day-to-day items such as groceries, pharmaceuticals and fast food. Comparison goods are items where consumers are willing to travel further distances, and are bought less frequently such as clothing, furniture, electronics, or other household items.

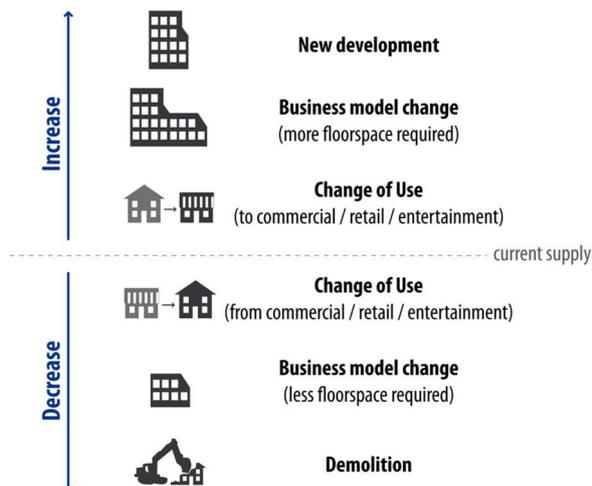
Figure 78. Drivers of Retail Floorspace Demand



Source: Pracsys 2020

Supply changes can result in increased or decreased retail floorspace. The potential causes of supply changes are shown in Figure 79.

Figure 79. Drivers of Retail Floorspace Supply



Source: Pracsys 2020

Spatial Retail Demand Projections

The estimated retail demand for the WA Tomorrow and City of Rockingham Population projection scenarios are shown in Figure 80, Figure 81, Figure 82 and Figure 83.

Figure 80. Future Retail Demand from WA Tomorrow Population Projections (2021)

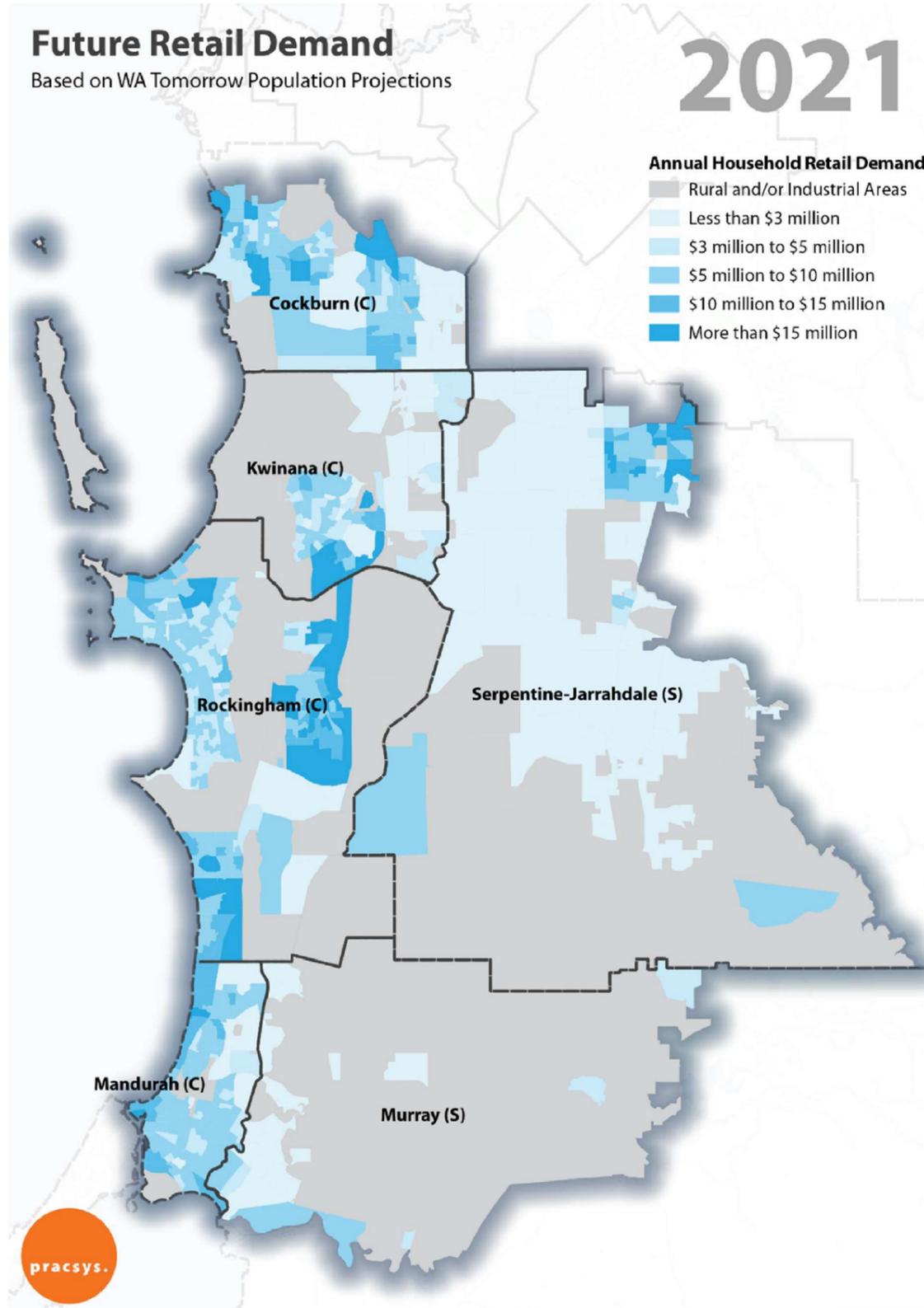


Figure 81. Future Retail Demand from WA Tomorrow Population Projections (2041)

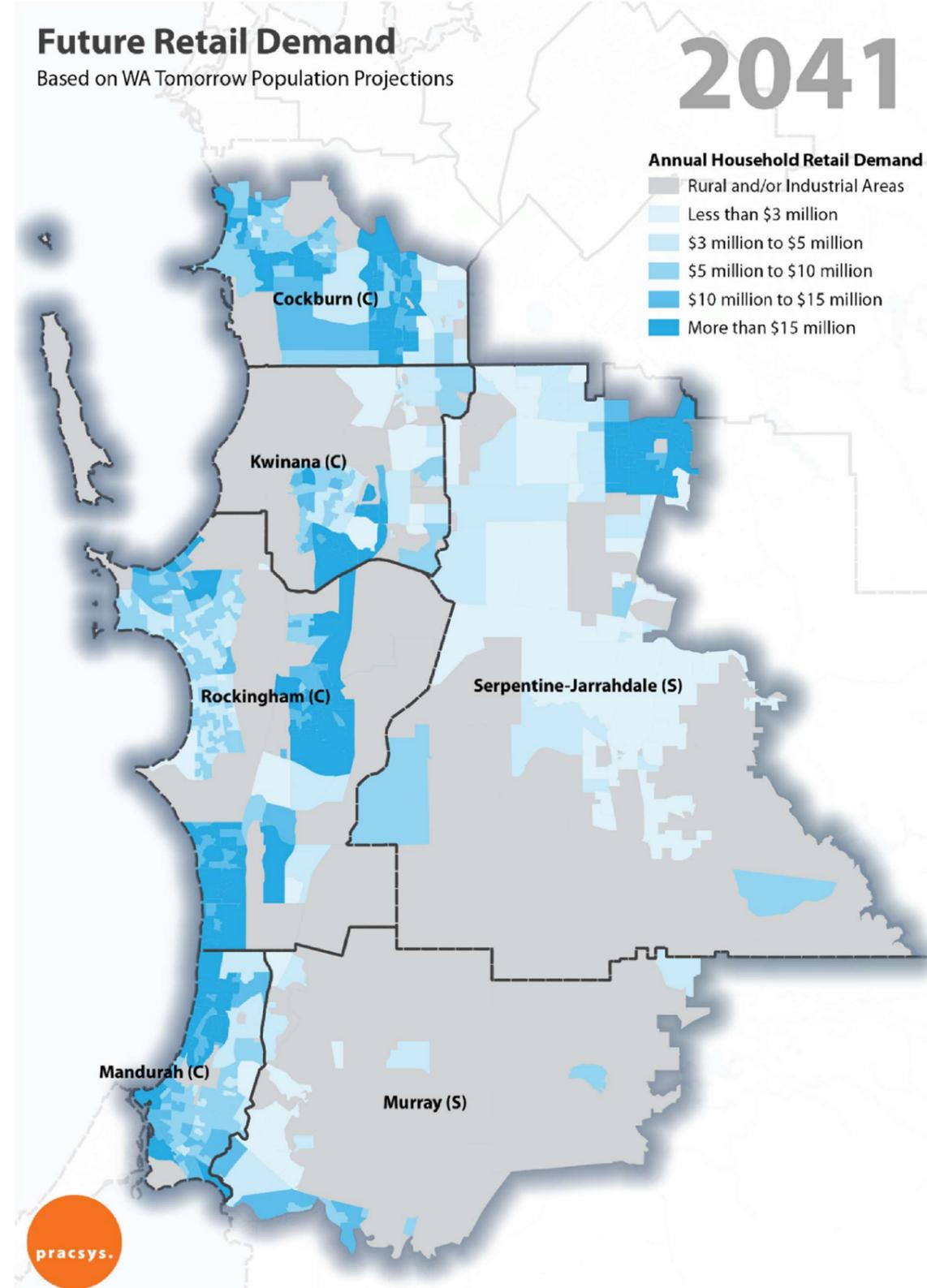


Figure 82. Future Retail Demand from City of Rockingham Population Projections (2021)

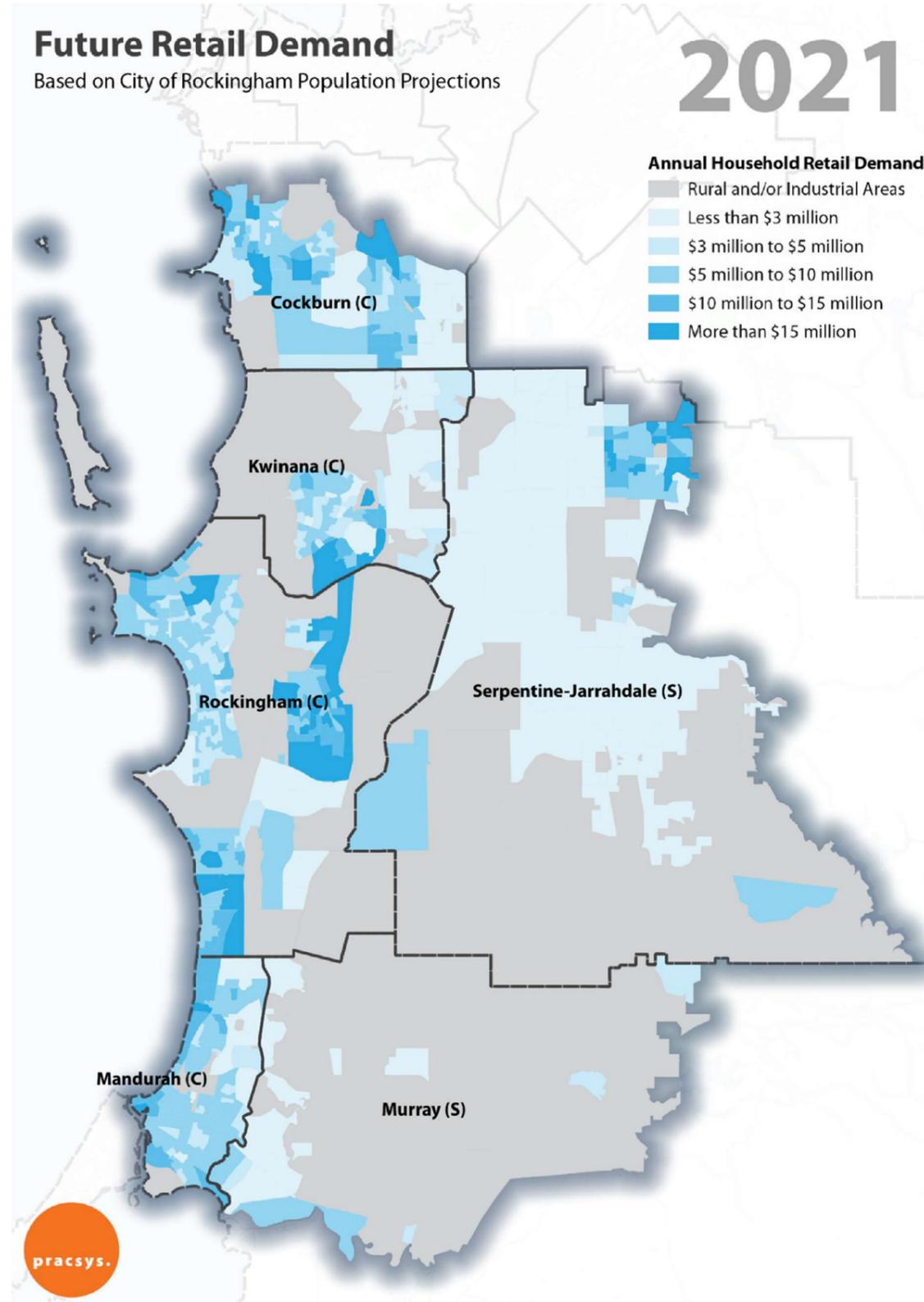
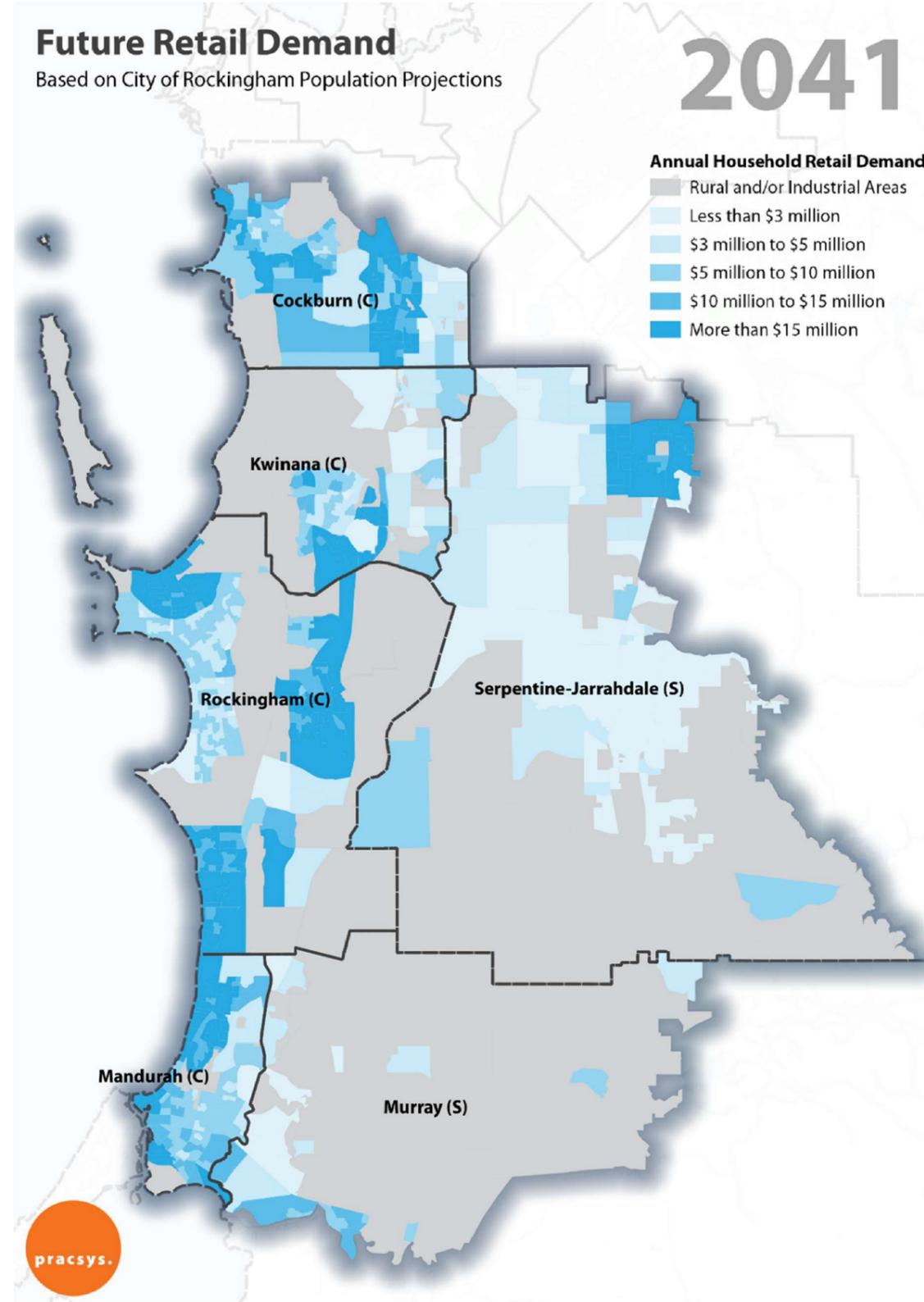


Figure 83. Future Retail Demand from City of Rockingham Population Projections (2041)



10.2 Floorspace Supply Used in Analysis

Current Supply – City of Rockingham

The City of Rockingham has a significant number of activity centres, with a total of approximately 240,000m² of retail floorspace (Figure 84).

Figure 84. Activity Centres Within the City of Rockingham by Hierarchy

LUES Activity Centre Name	Activity Centre Name Used in Report	Total SHP Floorspace (m2)	Total RET Floorspace (m2)	Activity Centre Hierarchy
ENTERPRISE	Enterprise	7,298	17,368	Strategic Metropolitan Centre
ROCKINGHAM BEACH	Rockingham Beach	13,848	306	
ROCKINGHAM CITY	Rockingham	63,978	7,526	
BALDIVIS TOWN CENTRE	Baldivis	29,435	16,795	District Centre
SECRET HARBOUR GOLF LINKS	Secret Harbour	15,000		District Centre
WARNBRO AVE	Warnbro	21,029	685	District Centre
BAYSHORE GARDEN	Bayshore Gardens	527		Neighbourhood Centre
CHARTHOUSE WAIKIKI	Charthouse	1,166		Neighbourhood Centre
COOLOONGUP	Grange Drive	1,702		Neighbourhood Centre
COOLOONGUP	Elanora Drive	1,359		Neighbourhood Centre
ISOLATED SERVICE STATIONS	Singleton Village	5,351		Neighbourhood Centre
Not Listed	Spud Shed	5,500		Neighbourhood Centre
Not Listed	Tuart Ridge	3,015		Neighbourhood Centre
PORT KENNEDY	Palm Meadows	3,555		Neighbourhood Centre
READ ROAD	Waikiki Village	11,206	330	Neighbourhood Centre
ROCKINGHAM ISOLATED USES	Settlers Hills	2,061	1,179	Neighbourhood Centre
SHOALWATER	Shoalwater	3,260	219	Neighbourhood Centre
ST CLAIR	St Clair	4,625		Neighbourhood Centre
BELL	Bell Street	611		Local Centre
BALDIVIS	Lakeside Caravan Park	360		Local Centre
BAYSIDE	Safety Bay	2,033		Local Centre
BENT STREET	Bent Street	570		Local Centre
DAMPIER DRIVE	Golden Bay Local	737		Local Centre
FISHER	Fisher street	200		Local Centre
FORESHORE VILLAGE	Foreshore Village Secret Harbour	330		Local Centre
GOLDEN BAY	Golden Bay South	307		Local Centre
MALIBU	Malibu	1,090		Local Centre
MANDURAH ROAD	Mandurah Road	150		Local Centre
McLARTY	McLarty Street	482		Local Centre
Not Listed	Belgravia Terrace	2,000		Local Centre
PARKIN STREET	Parkin Street	246		Local Centre
SAFETY BAY ROAD	Safety Bay Road	548		Local Centre
SINGLETON	Singleton	1,000		Local Centre



LUES Activity Centre Name	Activity Centre Name Used in Report	Total SHP Floorspace (m2)	Total RET Floorspace (m2)	Activity Centre Hierarchy
SORAYA PLACE	Soyara Place	70		Local Centre
ROCKINGHAM ISOLATED USES	The Ridge	583	333	Local Centre
ROCKINGHAM ISOLATED USES	Arcadia Drive	382	218	Local Centre
WAIKIKI	Waikiki Hotel	-	138	Local Centre
WARNBRO	Hokin Street	1,489	460	Local Centre
Total		207,103	45,557	

Note: Enterprise, Rockingham and Rockingham Beach make up the Rockingham Strategic Metropolitan Centre.

Source: DPLH 2016, City of Rockingham 2021, Pracsys 2021

These activity centres are used in the Retail Gravity Modelling to estimate current demand for retail in the City of Rockingham from the wider Analysis Catchment. SHP and RET floorspace have been modelled separately. Future activity centres are also included in gravity modelling after their expected completion date.

Future Supply – City of Rockingham

The City of Rockingham has planned the development of a number of activity centres to support its growing population. In total, there is approximately 31,000m² of additional retail floorspace planned for the City of Rockingham (Figure 85).

Figure 85. Future Activity Centres within The City of Rockingham by Hierarchy

LUES Activity Centre Name	Activity Centre Name Used in Report	Total Retail Floorspace (m ²)	Activity Centre Hierarchy
Not Listed	Baldivis North	5,200	Neighbourhood Centre
Not Listed	Golden Bay Neighbourhood	3,240	Neighbourhood Centre
Not Listed	Paramount Estate	4,500	Neighbourhood Centre
Not Listed	Parkland Heights	10,000	Neighbourhood Centre
Not Listed	Avalon	1,500	Local Centre
Not Listed	Baldivis parks	1,515	Local Centre
Not Listed	Fifty Road	1,300	Local Centre
Not Listed	Kennedy Bay	1,500	Local Centre
Not Listed	Millars Landing	2,500	Local Centre
Total		31,255	

Source: DPLH 2016, City of Rockingham 2021, Pracsys 2021

Note* A District Centre and Specialised Centre in Karnup is also planned, however, this analysis does not assess Karnup and has excluded these activity centres from the analysis

Floorspace from these yet to be developed activity centres will be included in the Retail Gravity Modelling after their expected date of completion. Additionally, if the analysis identifies the potential to expand or develop additional centres to what is currently planned, these centres will also be included in the analysis.

Floorspace Diversity – City of Rockingham

The floorspace diversity of activity centres within the City of Rockingham has been calculated and compared to the hierarchy level-specific benchmark diversity ratios contained in State Planning Policy 4.2 (Figure 86).

Figure 86. Floorspace Diversity Performance of City of Rockingham Activity Centres

Activity Centre	Level in SPP Hierarchy	Shop/Retail Floorspace	Other Non-Residential Land Uses	Diversity Ratio	SPP Benchmark Ratio	Diversity Result
Rockingham	Strategic Metropolitan Centre	63,978	134,013	0.48	1	More Diverse than SPP 4.2 Guideline
Rockingham Beach	Strategic Metropolitan Centre	13,848	19,680	0.70	1	More Diverse than SPP 4.2 Guideline
Enterprise	Strategic Metropolitan Centre	7,298	20,155	0.36	1	More Diverse than SPP 4.2 Guideline
Baldivis	District Centre	29,435	17,206	1.71	2	More Diverse than SPP 4.2 Guideline
Warnbro	District Centre	21,029	2,764	7.61	2	Less Diverse than SPP 4.2 Guideline
Secret Harbour	District Centre	15,000	3,531 ²⁵	15.35	2	Less Diverse than SPP 4.2 Guideline
Waikiki Village	Neighbourhood Centre	6,635	1,310	5.06	Not Applicable	Not Applicable
St Clair	Neighbourhood Centre	4,625	560	8.26	Not Applicable	Not Applicable
Settlers Hills	Neighbourhood Centre	3,602	7,022	0.51	Not Applicable	Not Applicable
The Ridge	Neighbourhood Centre	3,602	7,022	0.51	Not Applicable	Not Applicable
Arcadia Drive	Neighbourhood Centre	3,602	7,022	0.51	Not Applicable	Not Applicable
Palm Meadows	Neighbourhood Centre	3,555	6,280	0.57	Not Applicable	Not Applicable
Shoalwater	Neighbourhood Centre	3,260	1,473	2.21	Not Applicable	Not Applicable
Grange Drive	Neighbourhood Centre	1,702	1,394	1.22	Not Applicable	Not Applicable
Elanora Drive	Neighbourhood Centre	1,702	1,394	1.22	Not Applicable	Not Applicable
Charthouse	Neighbourhood Centre	1,166	0	Not Applicable	Not Applicable	Not Applicable
Singleton Village	Neighbourhood Centre	800	4,551	0.18	Not Applicable	Not Applicable
Bayshore Gardens	Neighbourhood Centre	527	559	0.94	Not Applicable	Not Applicable
Lakeside Caravan Park	Local Centre	2,081	1,991	1.05	Not Applicable	Not Applicable
Safety Bay	Local Centre	2,033	961	2.12	Not Applicable	Not Applicable
Hokin Street	Local Centre	1,489	3,222	0.46	Not Applicable	Not Applicable
Malibu	Local Centre	1,090	912	1.20	Not Applicable	Not Applicable
Golden Bay Local	Local Centre	737	707	1.04	Not Applicable	Not Applicable

²⁵ Actual not available, estimated based on provision in similar centre types



Activity Centre	Level in SPP Hierarchy	Shop/Retail Floorspace	Other Non-Residential Land Uses	Diversity Ratio	SPP Benchmark Ratio	Diversity Result
Bell Street	Local Centre	611	489	1.25	Not Applicable	Not Applicable
Bent Street	Local Centre	570	0	Not Applicable	Not Applicable	Not Applicable
Safety Bay Road	Local Centre	548	192	2.85	Not Applicable	Not Applicable
Foreshore Village Secret Harbour	Local Centre	330	400	0.83	Not Applicable	Not Applicable
Golden Bay South	Local Centre	307	0	Not Applicable	Not Applicable	Not Applicable
Parkin Street	Local Centre	246	130	1.89	Not Applicable	Not Applicable
Fisher street	Local Centre	200	0	Not Applicable	Not Applicable	Not Applicable
Soyara Place	Local Centre	70	150	0.47	Not Applicable	Not Applicable
Mandurah Road	Local Centre	0	3,310	No Shop/Retail	Not Applicable	Not Applicable
McLarty Street	Local Centre	0	482	No Shop/Retail	Not Applicable	Not Applicable
Waikiki Hotel	Local Centre	0	178	No Shop/Retail	Not Applicable	Not Applicable

Note: Enterprise, Rockingham and Rockingham Beach make up the Rockingham Strategic Metropolitan Centre.

Source: DPLH 2016, City of Rockingham 2021, Pracsys 2021

The Analysis Catchment used in the analysis extends beyond the City of Rockingham and accordingly, a number of current and planned activity centres that are outside of the City are included in the supply profile for the Analysis Catchment.

Current Supply – Outside the City of Rockingham

There is currently a total of 352,000m² of retail floorspace within the Analysis Catchment from outside the City of Rockingham (Figure 87). These activity centres sit within the entirety of the City of Kwinana and portions of the City of Cockburn, the City of Mandurah and the Shire of Serpentine-Jarrahdale.

Figure 87. Other Activity Centres within the Analysis Catchment by Local Government Area

LUES Activity Centre Name	Activity Centre Name Used in Report	Total Retail Floorspace (m ²)	Activity Centre Hierarchy
City of Cockburn			
GATEWAY	Cockburn Central	55,200	Secondary Centre
ATWELL	Stargate Shopping Centre - Atwell	1,443	Local or Neighbourhood Centre
CCC SPEARWOOD ET AL	Beeliar Village	9,015	Local or Neighbourhood Centre
COCKBURN LIQUOR	Cockburn Liquor	465	Local or Neighbourhood Centre
HAMILTON ROAD	Coogee Shopping Centre	755	Local or Neighbourhood Centre
JANDAKOT NORTH	Jandakot North	1,646	Local or Neighbourhood Centre
LYON ROAD	Harvest Lakes Shopping Centre	3,628	Local or Neighbourhood Centre
SPEARWOOD ROAD	Stargate Shopping Centre - Spearwood	3,089	Local or Neighbourhood Centre
THE GRANGE	Beeliar Shopping Centre	2,064	Local or Neighbourhood Centre
WATTLEUP	Wattelup Shopping Centre	180	Local or Neighbourhood Centre
YANGEBUP	Swallow Dr	1,539	Local or Neighbourhood Centre
YANGEBUP SHOPPING	Yangebup Rd/Dunraven Dr	1,041	Local or Neighbourhood Centre
Not Listed	The Park Hive	2,913	Local or Neighbourhood Centre
Not Listed	Port Coogee Village Shopping Centre	5,500	Local or Neighbourhood Centre
Total		88,478	
City of Kwinana			
KWINANA CENTRE	Kwinana Town Centre	32,922	Secondary Centre
CALISTA AVENUE	Calista Avenue	153	Local or Neighbourhood Centre
CASUARINA	Casuarina	1,515	Local or Neighbourhood Centre
LEDA	Stargate Shopping Centre - Leda	1,028	Local or Neighbourhood Centre
ORELIA	Orelia Shopping Centre	354	Local or Neighbourhood Centre
PACE ROAD	Pace Road	627	Local or Neighbourhood Centre
PARMELIA	Parmelia Ave / Sutherland Parade	521	Local or Neighbourhood Centre
SUMMERTON	Summerton	394	Local or Neighbourhood Centre
THOMAS RD/HOLDEN CL	Thomas Rd/Holden Cl	350	Local or Neighbourhood Centre
Not Listed	Kwinana Beach Road Thirsty Camel	600	Local or Neighbourhood Centre
Not Listed	Wellard Square	6,500	Local or Neighbourhood Centre
Total		44,964	
City of Mandurah			
MANDURAH FORUM	Mandurah Forum	52,072	Strategic Metropolitan Centre



LUES Activity Centre Name	Activity Centre Name Used in Report	Total Retail Floorspace (m ²)	Activity Centre Hierarchy
Not Listed	Lakelands Shopping Centre	21,170	District Centre
MEADOW SPRINGS	Meadow Springs Shopping Centre	8,585	Local or Neighbourhood Centre
NORTH MANDURAH	North Mandurah	45,455	Local or Neighbourhood Centre
MARINA	Mandurah Marina	5,710	Local or Neighbourhood Centre
SANDS	Mandurah Beach	2,700	Local or Neighbourhood Centre
MISSISSIPPI	Greenfields Shopping Centre	1,506	Local or Neighbourhood Centre
LAKES	Mandurah Hospital	1,565	Local or Neighbourhood Centre
AQUATIC CENTRE	Mandurah Aquatic Centre	310	Local or Neighbourhood Centre
DUDLEY PARK	Dudley Park	200	Local or Neighbourhood Centre
MANDURAH CENTRAL	Mandurah Central	24,329	Local or Neighbourhood Centre
MANDURAH EAST	Mandurah East	7,010	Local or Neighbourhood Centre
BIRD CAMERON	Bird Cameron	8,058	Local or Neighbourhood Centre
Not Listed	ALDI Mandurah	1,350	Local or Neighbourhood Centre
Not Listed	Mandurah Greenfields Shopping Centre	4,950	Local or Neighbourhood Centre
Total		184,970	
Shire of Murray			
NTH DANDALUP	Nth Dandalup	430	Local or Neighbourhood Centre
BARRAGUP	Barragup	2,732	Local or Neighbourhood Centre
CALTEX YUNDERUP	Caltex Yunderup	480	Local or Neighbourhood Centre
NORTH YUNDERUP ROAD	North Yunderup Road	340	Local or Neighbourhood Centre
RAVENSWOOD	Ravenswood Caravan Park	555	Local or Neighbourhood Centre
Total		4,537	
Shire of Serpentine Jarrahdale			
BYFORD	Byford Village Shopping Centre	19,497	District Centre
MUNDIJONG	Mundijong Shopping Centre	1,445	District Centre
SERPENTINE	Serpentine	1,130	Local or Neighbourhood Centre
GEORGE RD	George Rd	395	Local or Neighbourhood Centre
ATKINS STREET	Atkins Street	62	Local or Neighbourhood Centre
Not Listed	Thomas Rd/Kardan Blvd	1,350	Local or Neighbourhood Centre
Not Listed	South Western Highway/Nettleton Road	2,500	Local or Neighbourhood Centre
Not Listed	Lakeside Shopping Centre	2,700	Local or Neighbourhood Centre
Total		20,097	

Source: DPLH 2016, City of Rockingham 2021, Pracsys 2021

Future Supply – Outside the City of Rockingham

There is a total of 121,500m² of future retail floorspace within the Analysis Catchment from outside the City of Rockingham, with the vast majority of this floorspace coming from the Cockburn Central expansion (Figure 88). These activity centres sit within the entirety of the City of Kwinana and portions of the City of Cockburn, the City of Mandurah and the Shire of Serpentine-Jarrahdale. It should be noted that for LGAs where only portions of the LGA are included in the Analysis Catchment, only activity centres planned for the portion in the Analysis Catchment are included.

Figure 88. Future Other Activity Centres within the Analysis Catchment by Local Government Area

LUES Activity Centre Name	Activity Centre Name Used in Report	Total Retail Floorspace (m ²)	Activity Centre Hierarchy
City of Cockburn			
GATEWAY	Cockburn Central	Expansion of 90,000	Secondary Centre
Not Listed	Entrance Road Activity Centre	TBD - Assumed 1,500	Local Centre
Not Listed	Hammond Road Local Centre	TBD - Assumed 8,100	Local Centre
Total		TBD - Assumed 99,600	
City of Kwinana			
Not Listed	Wandi District Centre	16,000	District Centre
Not Listed	Bertram Neighbourhood Centre	900	Local Centre
Total		16,900	
Shire of Serpentine-Jarrahdale			
Not Listed	Thomas Road	TBD - Assumed 5,000	Neighbourhood Centre

Source: DPLH 2016, City of Rockingham 2021, Pracsys 2021

Note: It has been assumed that future centres identified as local centres will have approximately 1,500m² of retail floorspace and future centres identified as neighbourhood centres will have approximately 5,000m² of retail floorspace.

Activity Centre Hierarchy

Activity centres under SPP 4.2 are defined under the activity centre hierarchy, which splits activity centres into seven distinct groups:

- Capital City
- Primary Centres
- Strategic Metropolitan Centres
- Secondary Centres
- District Centres
- Neighbourhood Centres
- Local Centres

Each of these centre types has a specific purpose and is considered complementary to the other groups in the hierarchy. The typical characteristics of each activity centre type are described in Figure 89. It should be noted that the City of Rockingham does not have any centres that come under 'Capital City' or 'Primary Centres' and accordingly, these centre types are not included in Figure 89.



Figure 89. Activity Centre Characteristics

Typical Characteristics	Strategic Metropolitan Centres	Secondary Centres	District Centres	Neighbourhood Centres	Local Centres
Main Role/Function	Strategic metropolitan centres are the main regional activity centres. They are multipurpose centres that provide a diversity of uses. These centres provide the full range of economic and community services necessary for the communities in their catchments.	Secondary centres share similar characteristics with strategic metropolitan centres but serve smaller catchments and offer a more limited range of services, facilities and employment opportunities. They perform an important role in the city's economy, and provide essential services to their catchments.	District centres have a greater focus on servicing the daily and weekly needs of residents. Their relatively smaller scale catchment enables them to have a greater local community focus and provide services, facilities and job opportunities that reflect the particular needs of their catchments.	Neighbourhood centres provide for daily and weekly household shopping needs, community facilities and a small range of other convenience services.	Local centres provide for some daily and weekly convenience shopping needs.
Transport connectivity and accessibility	Important focus for passenger rail and high frequency bus networks.	Important focus for passenger rail and high frequency bus networks.	Focal point for bus network.	Stopping/transfer point for bus network.	Stopping/transfer point for bus network.
Typical retail types	<ul style="list-style-type: none"> • Department stores • Discount department stores • Supermarkets • Full range of specialty shops 	<ul style="list-style-type: none"> • Department stores • Discount department stores • Supermarkets • Specialty shops 	<ul style="list-style-type: none"> • Discount department stores • Supermarkets • Convenience goods • Small scale comparison shopping • Personal services • Some specialty shops 	<ul style="list-style-type: none"> • Supermarkets • Personal services • Convenience shops 	<ul style="list-style-type: none"> • Convenience shops • Take away food
Typical Office development	<ul style="list-style-type: none"> • Major offices • State government agencies 	<ul style="list-style-type: none"> • Major offices • Professional and service businesses 	<ul style="list-style-type: none"> • District level office development • Local professional services 	<ul style="list-style-type: none"> • Local professional services 	<ul style="list-style-type: none"> • None
Walkable Catchment	800 metres	800 metres	400 metres	200 metres	200 metres

Source: Department of Planning, Lands and Heritage, 2010, Pracsys 202



10.3 Floorspace Productivity

The floorspace productivity rates required to ensure reasonable retention rates by shop type are shown in **Figure 90**.

Figure 90. Required Floorspace Productivity for Business Retention

Retail Category	Productivity (\$/m ²)
Take-Home Food	\$ 10,000
Take-Home Liquor	\$ 9,000
Dine Out Food	\$ 6,500
Clothing/Footwear	\$ 5,000
Convenience Retail	\$ 7,000
Bulky Goods Retail	\$ 5,500

Source: Colliers 2017

10.4 PLUC Definitions

Planning Land Use Category (PLUC) Code		Description
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.



Planning Land Use Category (PLUC) Code		Description
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 (for example car sales yard or 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	Government, government-subsidised and non-government activities that provide the community with a specific service, including 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 (for example, 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 that has not been improved by development and remains unused.

11 APPENDIX 2: FLOORSPACE GAPS BY ACTIVITY CENTRE

11.1 Precinct 1

City of Rockingham Population Projections Floorspace Gap in 2021

Centre Type	Centre Name	SHP Floorspace	RET Floorspace	Non-Retail Floorspace
Strategic Metropolitan Centre	Enterprise	-	1,704	1,027
Strategic Metropolitan Centre	Rockingham	1,764	1,801	77,846
Strategic Metropolitan Centre	Rockingham Beach	-	33	5,621
Neighbourhood Centre	Charthouse	395	-	-
Neighbourhood Centre	Elanora Drive	333	-	-
Neighbourhood Centre	Grange Drive	417	-	381
Neighbourhood Centre	Shoalwater	322	34	334
Neighbourhood Centre	Waikiki Village	1,542	82	421
Local Centre	Arcadia Drive	94	85	241
Local Centre	Belgravia Terrace	-	-	348
Local Centre	Bell Street	68	-	147
Local Centre	Bent Street	50	-	-
Local Centre	Fisher street	12	-	-
Local Centre	Malibu	337	-	158
Local Centre	McLarty Street	50	-	-
Local Centre	Parkin Street	36	-	13
Local Centre	Safety Bay	442	-	785
Local Centre	Safety Bay Road	116	-	310
Local Centre	Soyara Place	1	-	278
Local Centre	Waikiki Hotel	-	26	65
Other Retail Centre	East Rockingham	-	-	-
	Total	5,978	3,765	87,976

WA Tomorrow Population Projections Floorspace Gap in 2021

Centre Type	Centre Name	SHP Floorspace	RET Floorspace	Non-Retail Floorspace
Strategic Metropolitan Centre	Enterprise	-	1,704	1,024
Strategic Metropolitan Centre	Rockingham	4,513	1,801	77,664
Strategic Metropolitan Centre	Rockingham Beach	-	33	5,588
Neighbourhood Centre	Charthouse	237	-	-
Neighbourhood Centre	Elanora Drive	200	-	-
Neighbourhood Centre	Grange Drive	250	-	380
Neighbourhood Centre	Shoalwater	193	34	333

Centre Type	Centre Name	SHP Floorspace	RET Floorspace	Non-Retail Floorspace
Neighbourhood Centre	Waikiki Village	925	82	419
Local Centre	Arcadia Drive	56	85	239
Local Centre	Belgravia Terrace	-	-	345
Local Centre	Bell Street	41	-	146
Local Centre	Bent Street	30	-	-
Local Centre	Fisher street	7	-	-
Local Centre	Malibu	202	-	157
Local Centre	McLarty Street	30	-	-
Local Centre	Parkin Street	21	-	13
Local Centre	Safety Bay	265	-	779
Local Centre	Safety Bay Road	70	-	310
Local Centre	Soyara Place	0	-	275
Local Centre	Waikiki Hotel	-	26	65
Other Retail Centre	East Rockingham	-	-	-
	Total	7,041	3,765	87,737

11.2 Precinct 2

City of Rockingham Population Projections Floorspace Gap in 2021

Centre Type	Centre Name	SHP Floorspace	RET Floorspace	Non-Retail Floorspace
District Centre	Warnbro	1,912	28	743
Neighbourhood Centre	Palm Meadows	1,653	-	2,345
Neighbourhood Centre	St Clair	512	-	529
Local Centre	Hokin Street	122	102	1,809
Local Centre	Kennedy Bay	Not Built	Not Built	Not Built
Other Retail Centre	Port Kennedy Enterprise Park	-	2,272	-
	Total	4,200	2,402	5,426

WA Tomorrow Population Projections Floorspace Gap in 2021

Centre Type	Centre Name	SHP Floorspace	RET Floorspace	Non-Retail Floorspace
District Centre	Warnbro	1,147	28	741
Neighbourhood Centre	Palm Meadows	992	-	2,327
Neighbourhood Centre	St Clair	307	-	524
Local Centre	Hokin Street	73	102	1,806
Local Centre	Kennedy Bay	Not Built	Not Built	Not Built
Other Retail Centre	Port Kennedy Enterprise Park	-	2,272	-
	Total	2,520	2,402	5,398

11.3 Precinct 3

City of Rockingham Population Projections Floorspace Gap in 2021

Centre Type	Centre Name	SHP Floorspace	RET Floorspace	Non-Retail Floorspace
District Centre	Secret Harbour	2,300	-	994
Neighbourhood Centre	Bayshore Gardens	95	-	168
Neighbourhood Centre	Golden Bay Neighbourhood	Not Built	Not Built	Not Built
Neighbourhood Centre	Singleton Village	-	-	-
Local Centre	Foreshore Village Secret Harbour	70	-	41
Local Centre	Golden Bay Local	189	-	212
Local Centre	Golden Bay South	10	-	-
Local Centre	Mandurah Road	-	-	1,233
Local Centre	Singleton	278	-	174
	Total	2,942	-	2,821

WA Tomorrow Population Projections Floorspace Gap in 2021

Centre Type	Centre Name	SHP Floorspace	RET Floorspace	Non-Retail Floorspace
District Centre	Secret Harbour	1,380	-	984
Neighbourhood Centre	Bayshore Gardens	57	-	167
Neighbourhood Centre	Golden Bay Neighbourhood	Not Built	Not Built	Not Built
Neighbourhood Centre	Singleton Village	-	-	-
Local Centre	Foreshore Village Secret Harbour	42	-	41
Local Centre	Golden Bay Local	113	-	211
Local Centre	Golden Bay South	6	-	-
Local Centre	Mandurah Road	-	-	1,221
Local Centre	Singleton	167	-	173
	Total	1,765	-	2,797

11.4 Precinct 4

City of Rockingham Population Projections Floorspace Gap in 2021

Centre Type	Centre Name	SHP Floorspace	RET Floorspace	Non-Retail Floorspace
District Centre	Baldivis	3,179	-	6,134
Neighbourhood Centre	Baldivis North	Not Built	Not Built	Not Built
Neighbourhood Centre	Paramount Estate	Not Built	Not Built	Not Built
Neighbourhood Centre	Parkland Heights	Not Built	Not Built	Not Built
Neighbourhood Centre	Settlers Hills	1,914	84	6,494
Neighbourhood Centre	Spud Shed	1,447	-	958
Neighbourhood Centre	Tuart Ridge	859	-	525
Local Centre	Avalon	Not Built	Not Built	Not Built
Local Centre	Baldivis parks	Not Built	Not Built	Not Built



Centre Type	Centre Name	SHP Floorspace	RET Floorspace	Non-Retail Floorspace
Local Centre	Fifty Road	Not Built	Not Built	Not Built
Local Centre	Lakeside Caravan Park	228	-	-
Local Centre	Millars Landing	Not Built	Not Built	Not Built
Local Centre	The Ridge	143	129	368
	Total	7,770	214	14,480

WA Tomorrow Population Projections Floorspace Gap in 2021

Centre Type	Centre Name	SHP Floorspace	RET Floorspace	Non-Retail Floorspace
District Centre	Baldivis	1,907	-	6,109
Neighbourhood Centre	Baldivis North	Not Built	Not Built	Not Built
Neighbourhood Centre	Paramount Estate	Not Built	Not Built	Not Built
Neighbourhood Centre	Parkland Heights	Not Built	Not Built	Not Built
Neighbourhood Centre	Settlers Hills	1,149	84	6,438
Neighbourhood Centre	Spud Shed	868	-	950
Neighbourhood Centre	Tuart Ridge	515	-	521
Local Centre	Avalon	Not Built	Not Built	Not Built
Local Centre	Baldivis parks	Not Built	Not Built	Not Built
Local Centre	Fifty Road	Not Built	Not Built	Not Built
Local Centre	Lakeside Caravan Park	137	-	-
Local Centre	Millars Landing	Not Built	Not Built	Not Built
Local Centre	The Ridge	86	129	364
	Total	4,662	214	14,382

12 APPENDIX 3: FLOORSPACE PROFILE

12.1 Total Commercial Supply

Figure 91. Activity Centres Within the City of Rockingham by Hierarchy

LUES Activity Centre Name	Activity Centre Name Used in Report	Total SHP Floorspace (m2)	Total RET Floorspace (m2)	Activity Centre Hierarchy
ENTERPRISE	Enterprise	7,298	17,368	Strategic Metropolitan Centre
ROCKINGHAM BEACH	Rockingham Beach	13,848	306	
ROCKINGHAM CITY	Rockingham	63,978	7,526	
BALDIVIS TOWN CENTRE	Baldivis	29,435	16,795	District Centre
SECRET HARBOUR GOLF LINKS	Secret Harbour	15,000		District Centre
WARNBRO AVE	Warnbro	21,029	685	District Centre
BAYSHORE GARDEN	Bayshore Gardens	527	-	Neighbourhood Centre
CHARTHOUSE WAIKIKI	Charthouse	1,166	-	Neighbourhood Centre
COOLOONGUP	Grange Drive	1,702	-	Neighbourhood Centre
COOLOONGUP	Elanora Drive	1,359	-	Neighbourhood Centre
ISOLATED SERVICE STATIONS	Singleton Village	5,351	-	Neighbourhood Centre
Not Listed	Spud Shed	5,500	-	Neighbourhood Centre
Not Listed	Tuart Ridge	3,015	-	Neighbourhood Centre
PORT KENNEDY	Palm Meadows	3,555	-	Neighbourhood Centre
READ ROAD	Waikiki Village	11,206	330	Neighbourhood Centre
ROCKINGHAM ISOLATED USES	Settlers Hills	2,061	1,179	Neighbourhood Centre
SHOALWATER	Shoalwater	3,260	219	Neighbourhood Centre
ST CLAIR	St Clair	4,625	-	Neighbourhood Centre
BELL	Bell Street	611	-	Local Centre
BALDIVIS	Lakeside Caravan Park	360	-	Local Centre
BAYSIDE	Safety Bay	2,033	-	Local Centre
BENT STREET	Bent Street	570	-	Local Centre
DAMPIER DRIVE	Golden Bay Local	737	-	Local Centre
FISHER	Fisher street	200	-	Local Centre
FORESHORE VILLAGE	Foreshore Village Secret Harbour	330	-	Local Centre
GOLDEN BAY	Golden Bay South	307	-	Local Centre
MALIBU	Malibu	1,090	-	Local Centre
MANDURAH ROAD	Mandurah Road	150	-	Local Centre
McLARTY	McLarty Street	482	-	Local Centre
Not Listed	Belgravia Terrace	2,000	-	Local Centre
PARKIN STREET	Parkin Street	246	-	Local Centre
SAFETY BAY ROAD	Safety Bay Road	548	-	Local Centre
SINGLETON	Singleton	1,000	-	Local Centre

LUES Activity Centre Name	Activity Centre Name Used in Report	Total SHP Floorspace (m2)	Total RET Floorspace (m2)	Activity Centre Hierarchy
SORAYA PLACE	Soyara Place	70	-	Local Centre
ROCKINGHAM ISOLATED USES	The Ridge	583	333	Local Centre
ROCKINGHAM ISOLATED USES	Arcadia Drive	382	218	Local Centre
WAIKIKI	Waikiki Hotel	-	138	Local Centre
WARNBRO	Hokin Street	1,489	460	Local Centre
Total		207,103	45,557	

Note: Enterprise, Rockingham and Rockingham Beach make up the Rockingham Strategic Metropolitan Centre.

Source: DPLH 2016, City of Rockingham 2021, Pracsys 2021

These activity centres are used in the Retail Gravity Modelling to estimate current demand for retail in the City of Rockingham from the wider Analysis Catchment. SHP and RET floorspace have been modelled separately. Future activity centres are also included in gravity modelling after their expected completion date.

The City of Rockingham has planned the development of a number of activity centres to support its growing population. In total, there is approximately 31,000m² of additional Shop/Retail floorspace planned for the City of Rockingham (Figure 92).²⁶

Figure 92. Future Activity Centres within The City of Rockingham by Hierarchy

LUES Activity Centre Name	Activity Centre Name Used in Report	Total Retail Floorspace (m ²)	Activity Centre Hierarchy
Not Listed	Baldivis North	5,200	Neighbourhood Centre
Not Listed	Golden Bay Neighbourhood	3,240	Neighbourhood Centre
Not Listed	Paramount Estate	4,500	Neighbourhood Centre
Not Listed	Parkland Heights	10,000	Neighbourhood Centre
Not Listed	Avalon	1,500	Local Centre
Not Listed	Baldivis parks	1,515	Local Centre
Not Listed	Fifty Road	1,300	Local Centre
Not Listed	Kennedy Bay	1,500	Local Centre
Not Listed	Millars Landing	2,500	Local Centre
Total		31,255	

Source: DPLH 2016, City of Rockingham 2021, Pracsys 2021

Note* A District Centre and Specialised Centre in Karnup is also planned, however, this analysis does not assess Karnup and has excluded these activity centres from the analysis.

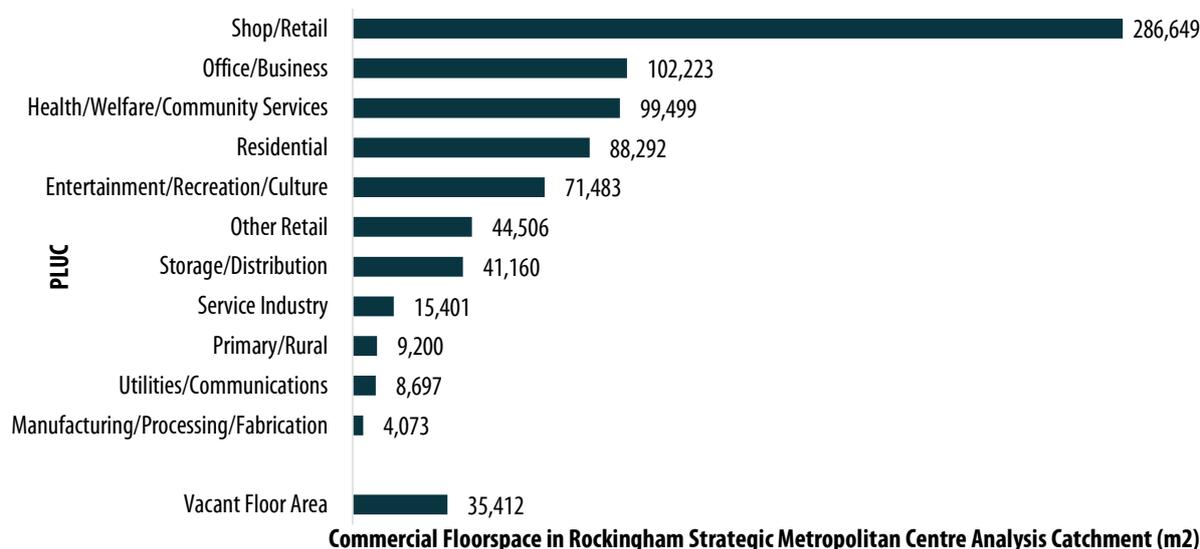
Floorspace from these yet to be developed activity centres will be included in the Retail Gravity Modelling after their expected date of completion. Additionally, if the analysis identifies potential to expand or develop additional centres to what is currently planned, these centres will also be included in the analysis.

²⁶ Only Shop/Retail figures were available for planned centres. Estimates of Non-Retail provision were developed based on current provision by centre type and included into modelling of future non-retail floorspace.



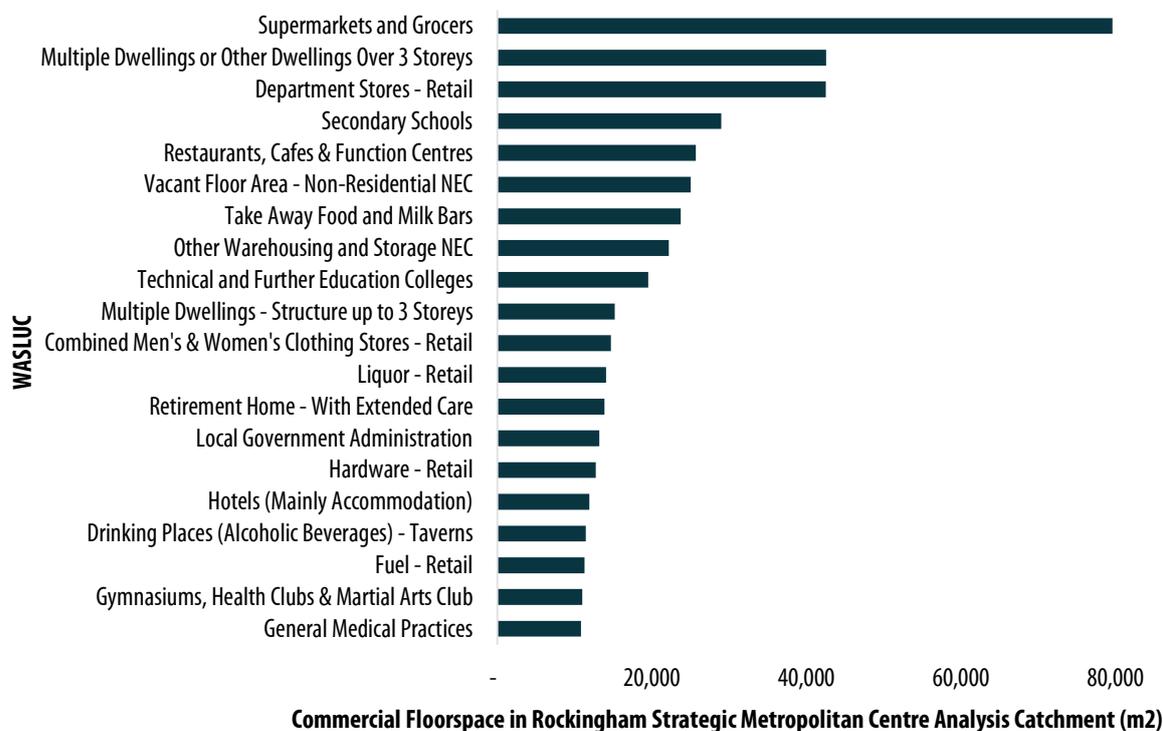
12.2 Commercial Floorspace

Figure 93. Commercial Floorspace in the Rockingham Strategic Metropolitan Centre (RSMC) 25km Catchment by PLUC



Source: DPLH 2016, Pracsys 2021

Figure 94. Commercial Floorspace in the RSMC 25km Catchment by WASLUC

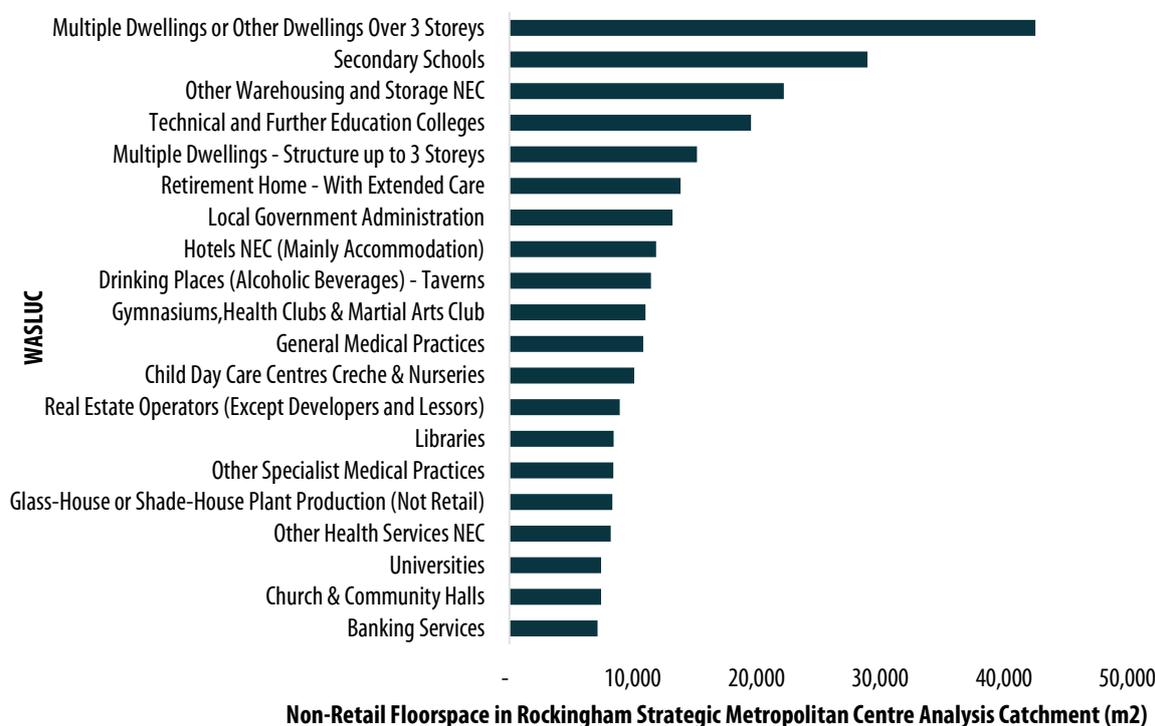


Note: Only top floorspaces and centres are illustrated.

Source: DPLH 2016, Pracsys 2021



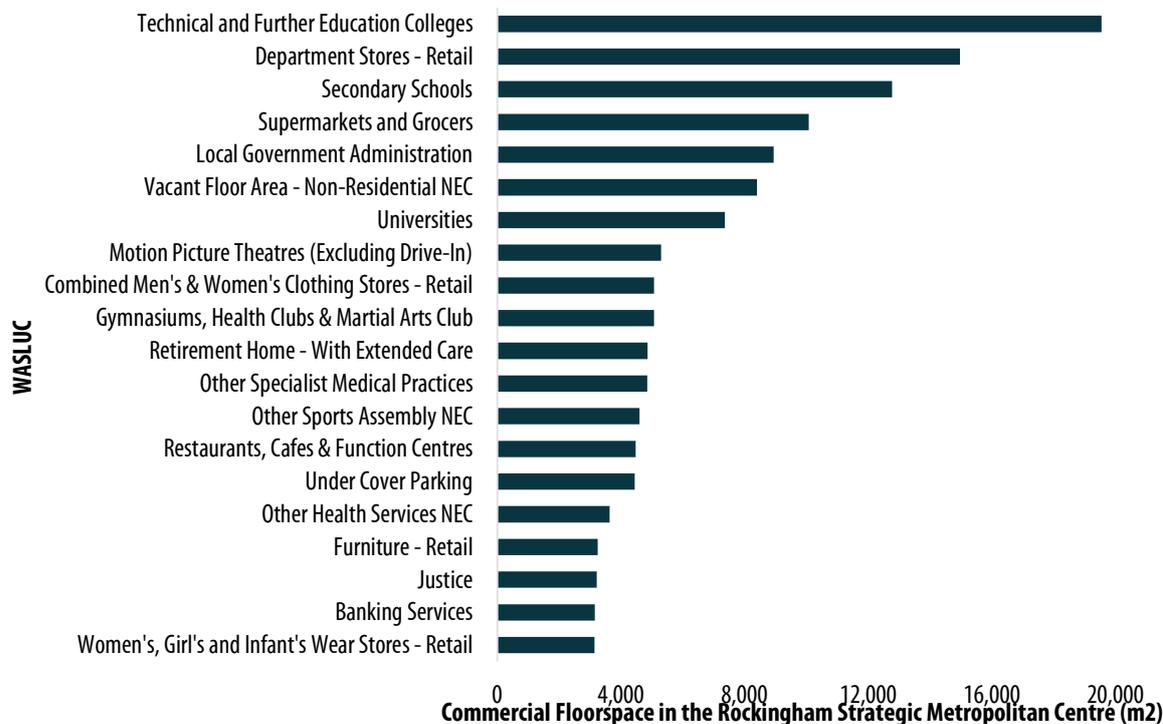
Figure 95. Non-Retail Floorspace in the RSMC 25km Catchment by WASLUC



Note: Only top floorspaces are illustrated.

Source: DPLH 2016, Pracsys 2021

Figure 96. Commercial Floorspace in the RSMC by WASLUC

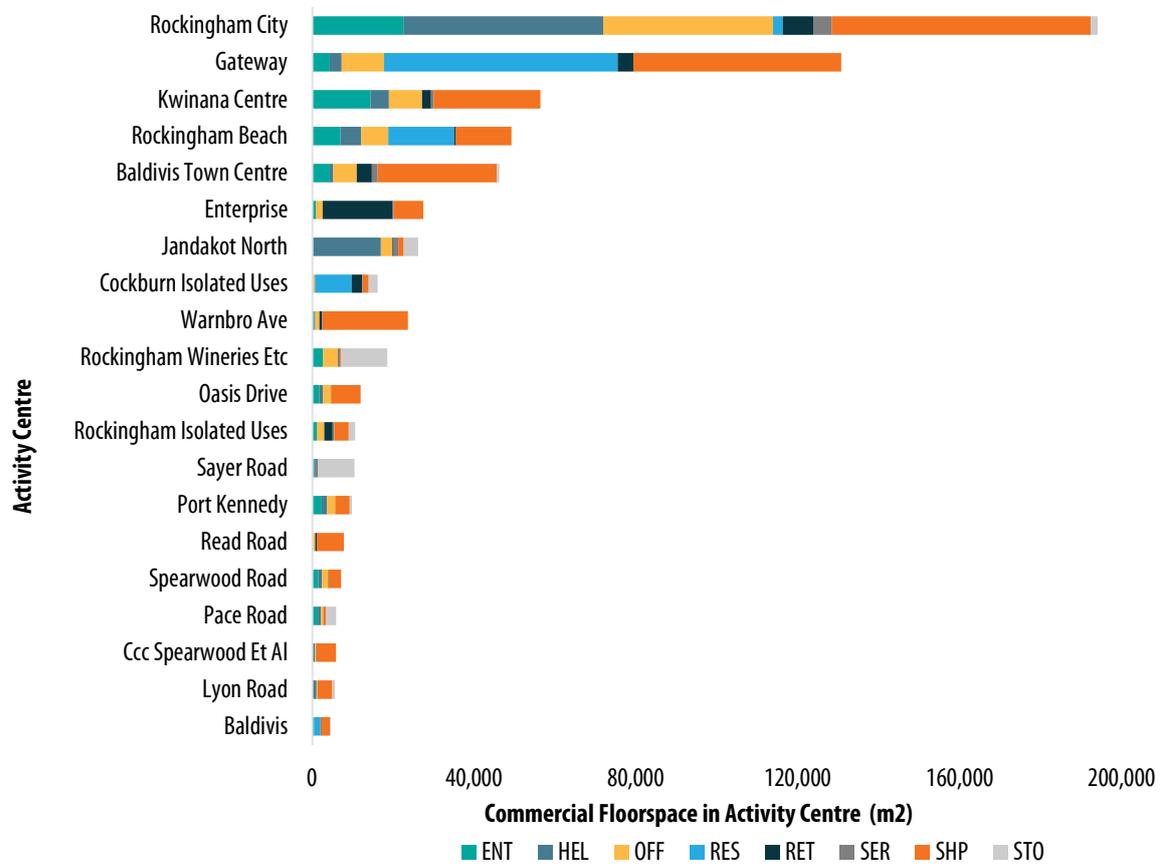


Note: Only top floorspaces are illustrated.

Source: DPLH 2016, Pracsys 2021



Figure 97. Commercial Floorspace in RSMC 25km Catchment Activity Centres by PLUC

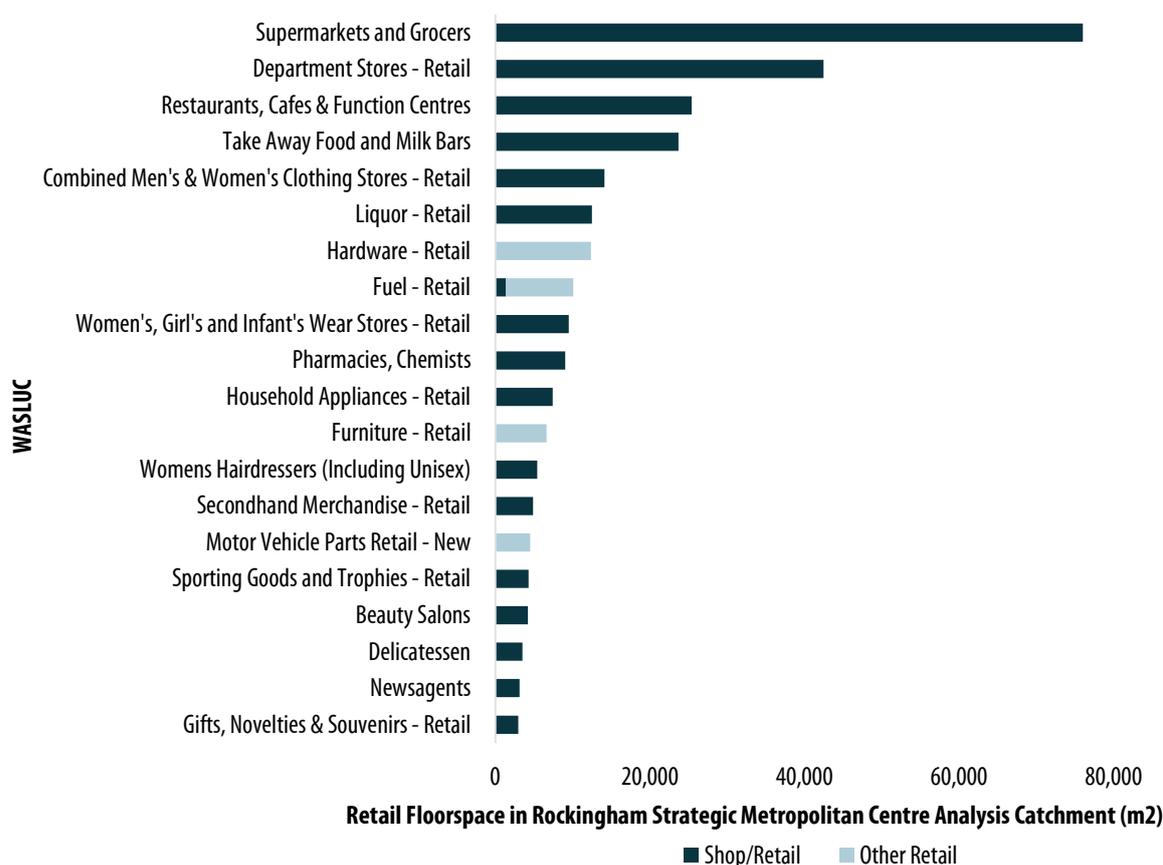


Note: Only top floorspaces and centres are illustrated.

Source: DPLH 2016, Pracsys 2021

12.3 Retail Floorspace

Figure 98. Retail Floorspace in the RSMC 25km Catchment by WASLUC



Note: Only top floorspaces illustrated.

Source: DPLH 2016, Pracsys 2021

Retail Floorspace Diversity

Figure 99. Floorspace Diversity Ratio in the RSMC 25km Catchment

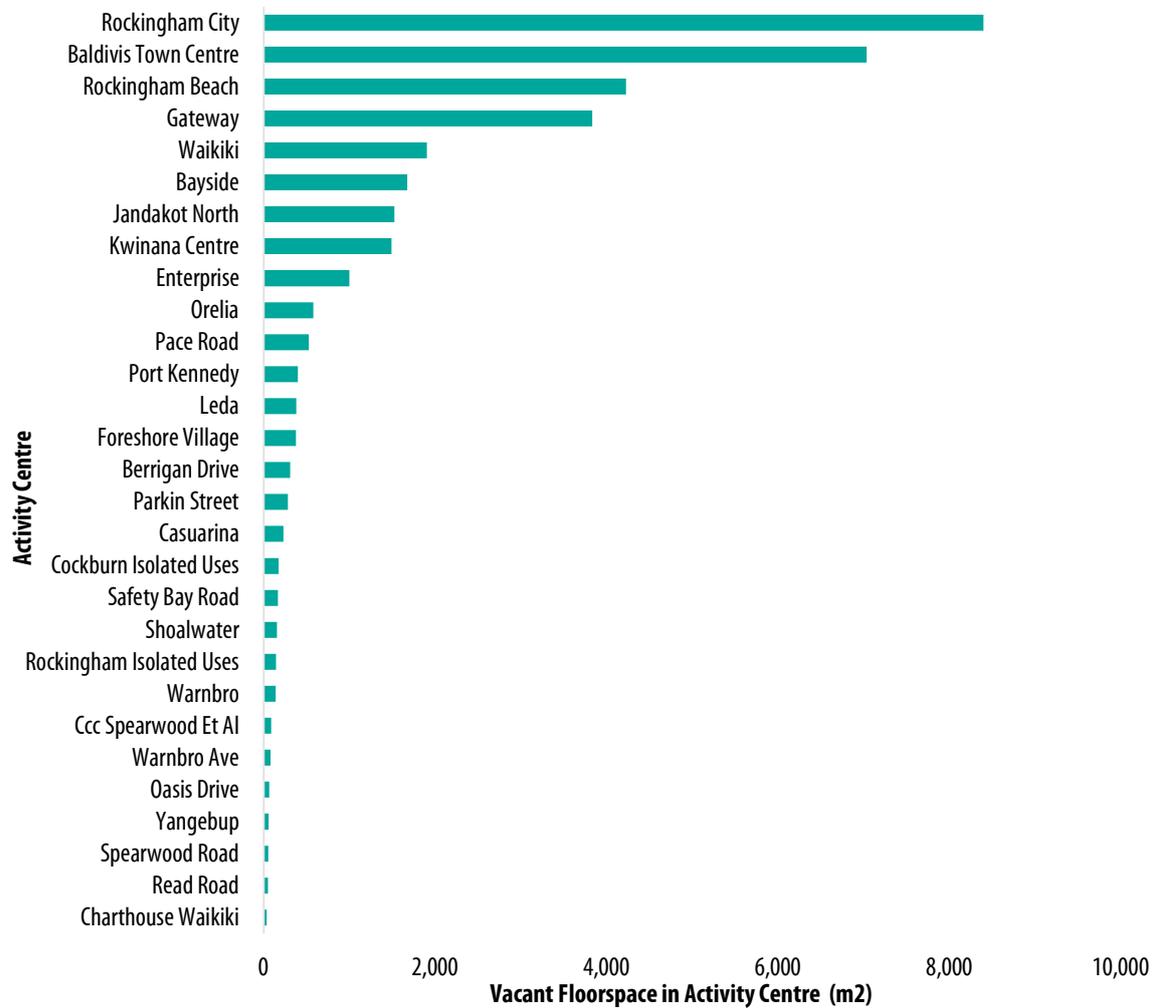
	RSMC	RSMC 25km Catchment
Shop/Retail Floorspace	63,978	286,649
Other Non-Residential Land Uses	134,013	396,242
Diversity Ratio	0.48 : 1	0.72 : 1
State Planning Policy Benchmark Ratio	1 : 1	1 : 1
Diversity Variance	-0.52 : 1	-0.28 : 1

Source: DPLH 2016, Pracsys 2021



12.4 Vacant Floorspace

Figure 100. Vacant Floorspace in RSMC 25km Catchment Activity Centres (m²)

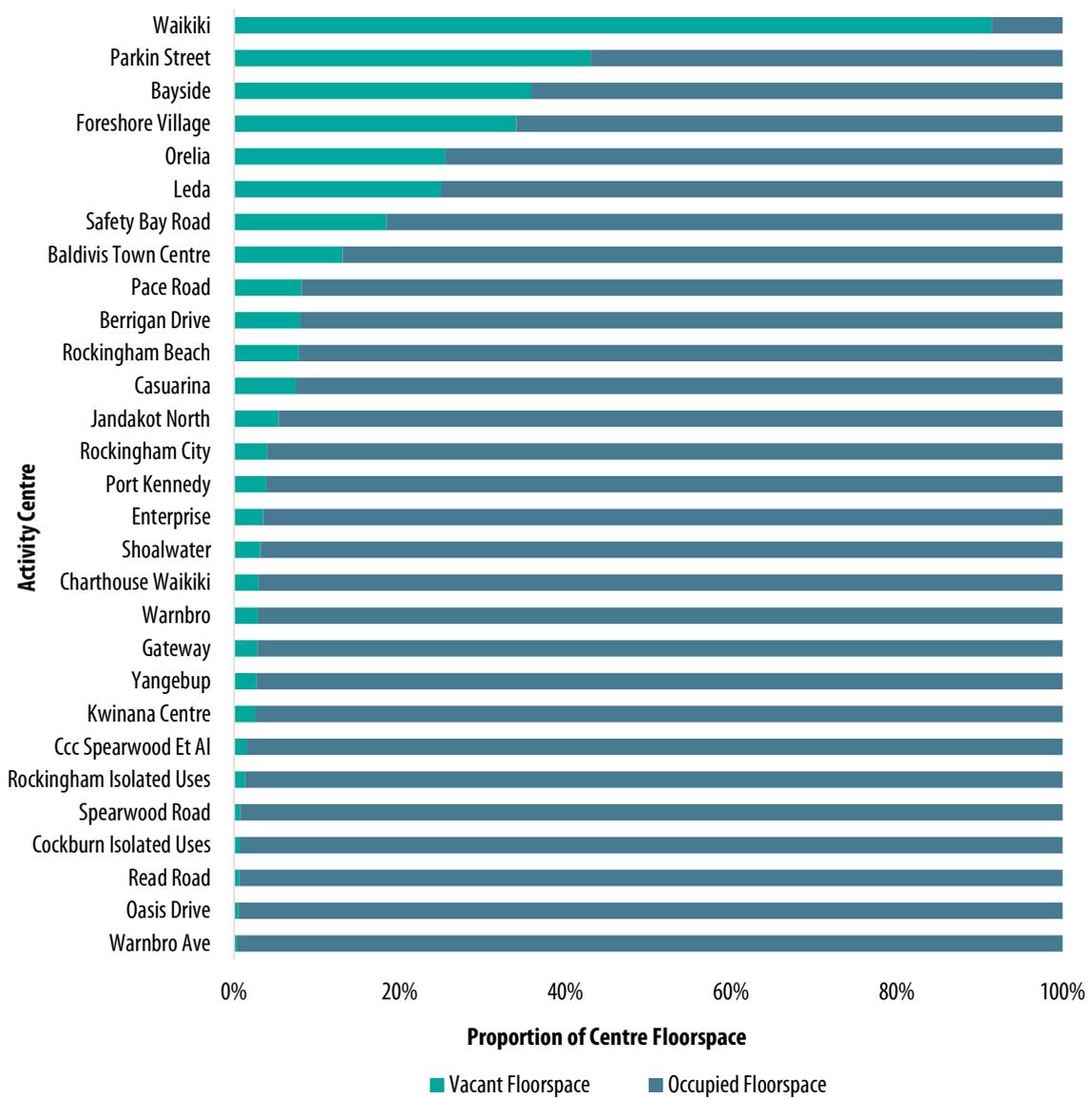


Note: Only those centres with Vacant Floor Area are illustrated.

Source: DPLH 2016, Pracsys 2021



Figure 101. Vacant Floorspace in the RSMC 25km Catchment Activity Centres (Proportion)



Note: Only those centres with Vacant Floor Area are illustrated.

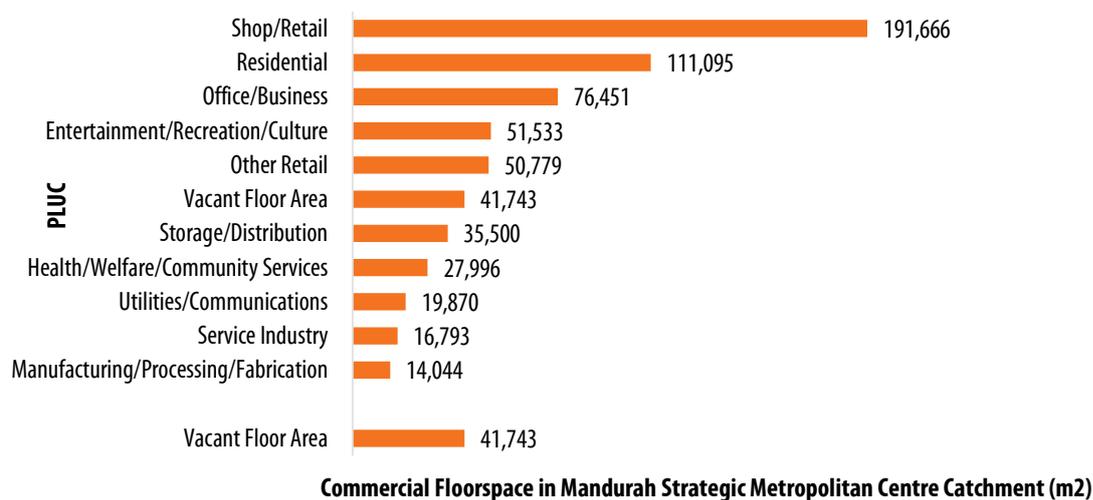
Source: DPLH 2016, Pracsys 2021



12.5 Strategic Centre Benchmarking

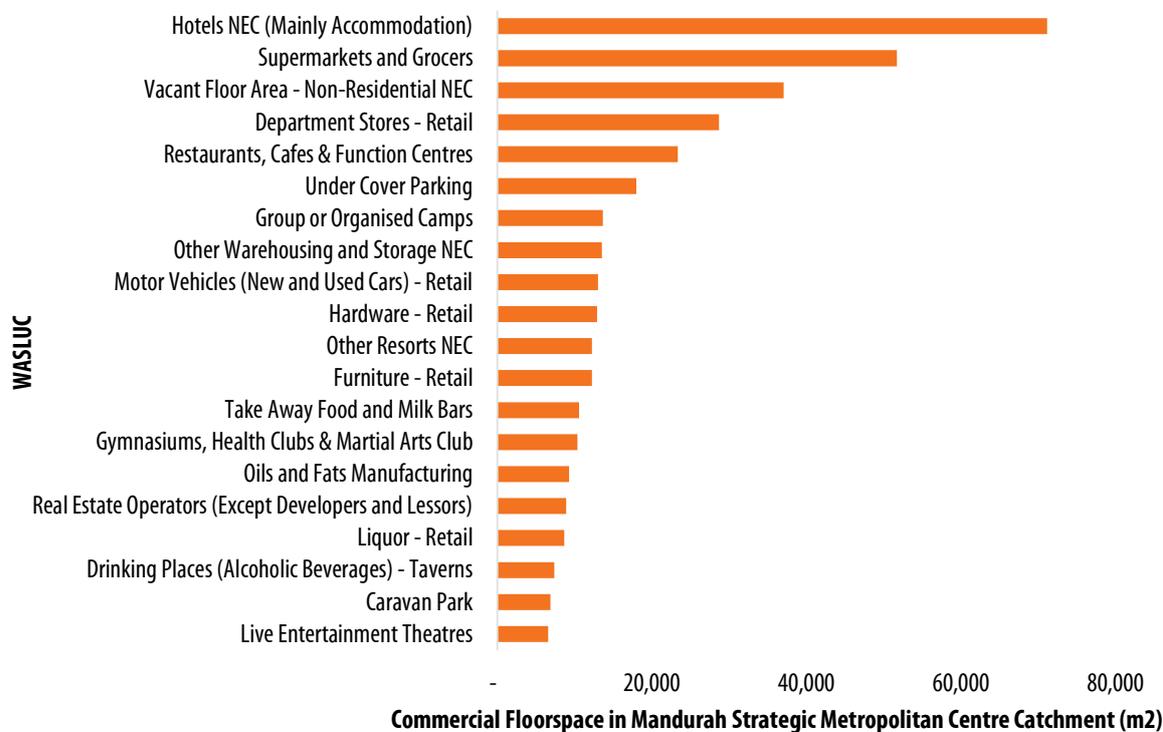
Mandurah Strategic Metropolitan Centre

Figure 102. Commercial Floorspace in Mandurah Strategic Metropolitan Centre Catchment by PLUC



Source: DPLH 2016, Pracsys 2021

Figure 103. Commercial Floorspace in Mandurah Strategic Metropolitan Centre Catchment by WASLUC

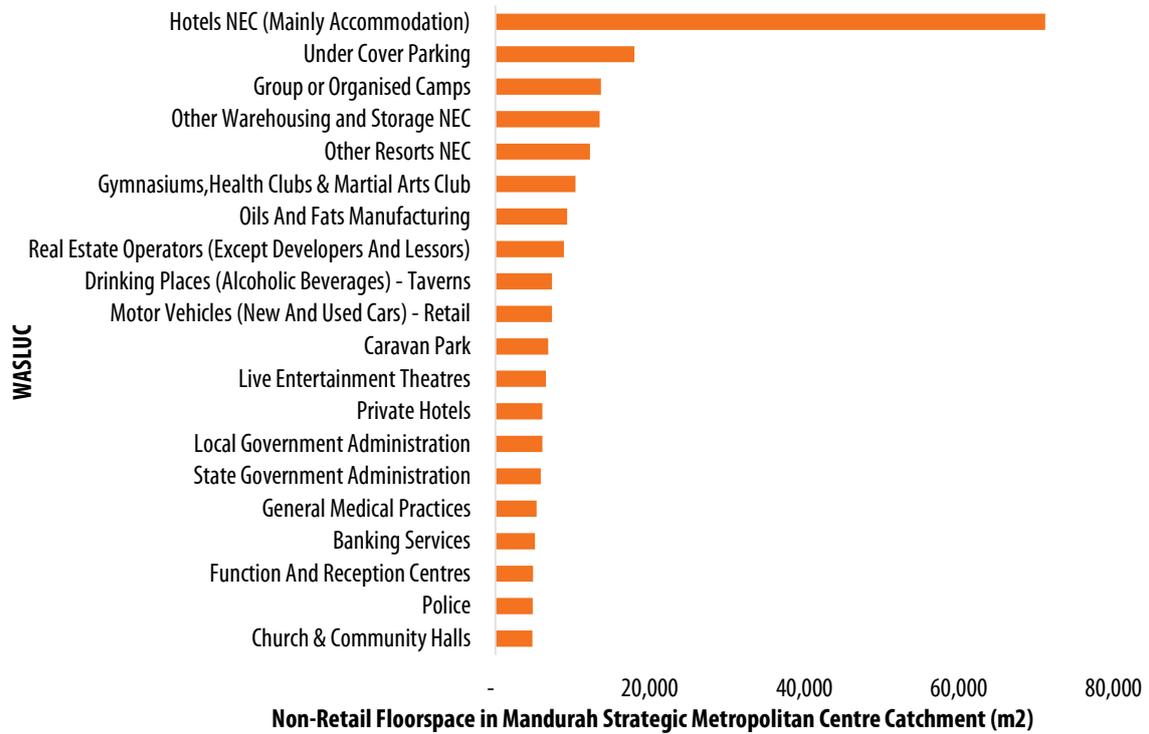


Note: Only top floorspaces are illustrated.

Source: DPLH 2016, Pracsys 2021



Figure 104. Non-Retail Floorspace in Mandurah Strategic Metropolitan Centre Catchment by WASLUC



Note: Only top floorspaces are illustrated.

Source: DPLH 2016, Pracsys 2021

Figure 105. Commercial Floorspace in the Mandurah Strategic Metropolitan Centre by WASLUC

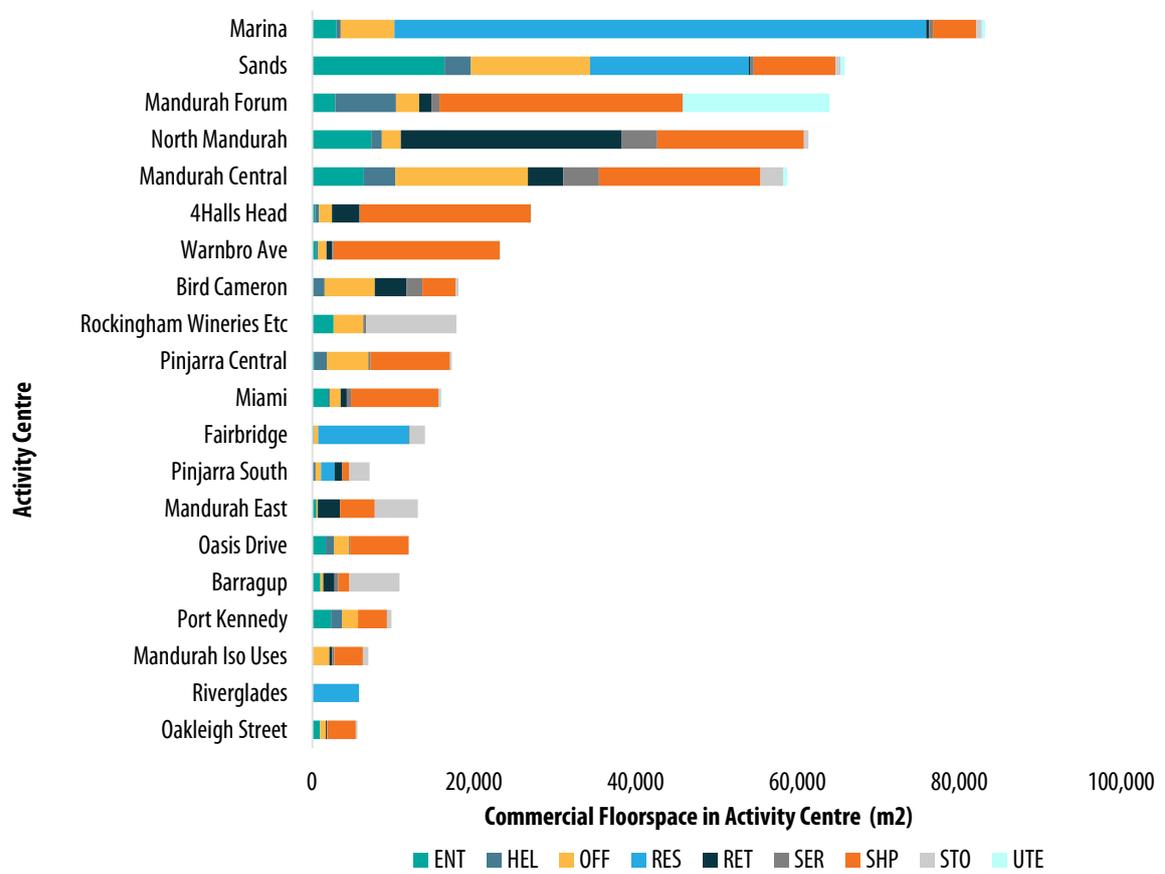


Note: Only top floorspaces are illustrated.



Source: DPLH 2016, Pracsys 2021

Figure 106. Commercial Floorspace in Mandurah Catchment Activity Centres by PLUC

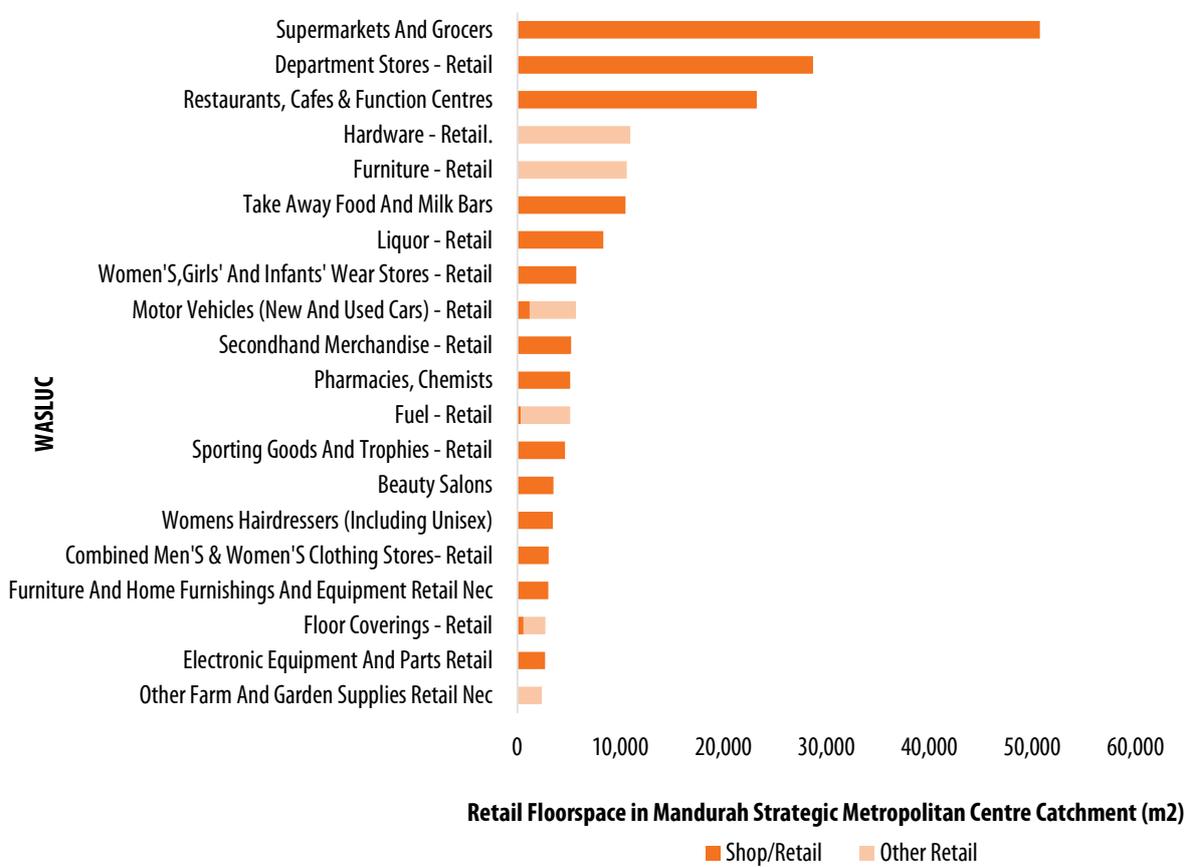


Note: Only top floorspaces and centres are illustrated.

Source: DPLH 2016, Pracsys 2021



Figure 107. Retail Floorspace in Mandurah Strategic Metropolitan Centre Catchment by WASLUC



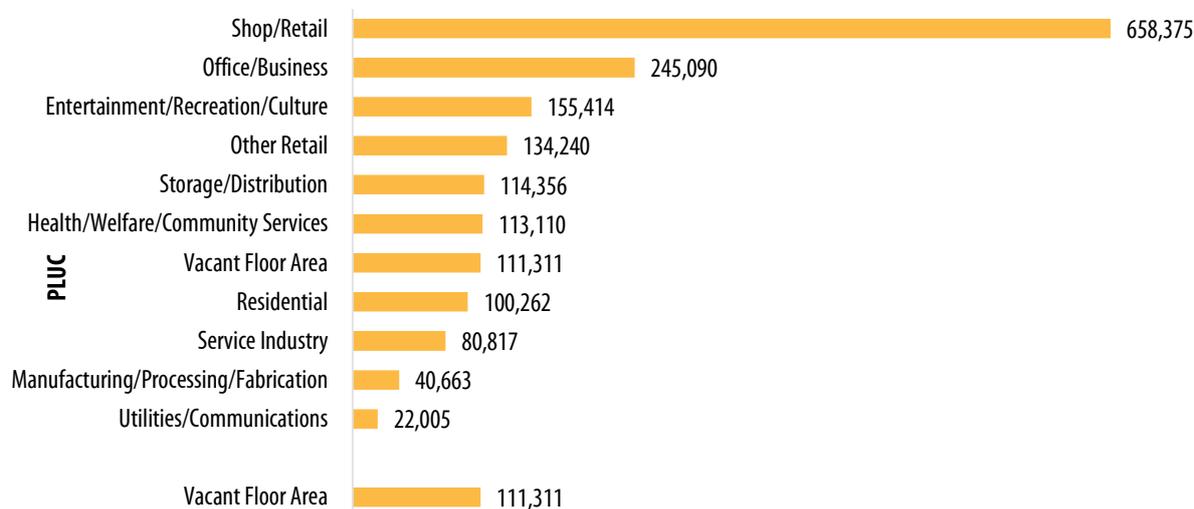
Note: Only top floorspaces are illustrated.

Source: DPLH 2016, Pracsys 2021



Armada Strategic Metropolitan Centre

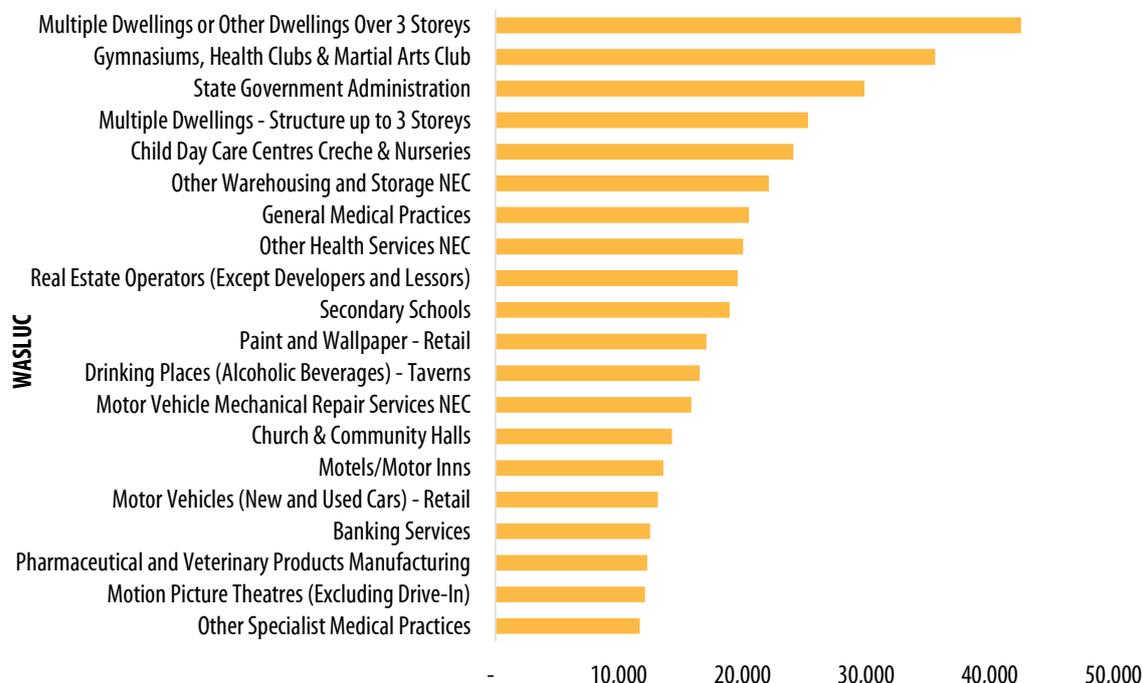
Figure 108. Commercial Floorspace in Armada Strategic Metropolitan Centre Catchment by PLUC



Commercial Floorspace in Armada Strategic Metropolitan Centre Catchment (m²)

Source: DPLH 2016, Pracsys 2021

Figure 109. Non-Retail Floorspace in Armada Strategic Metropolitan Centre Catchment by WASLUC



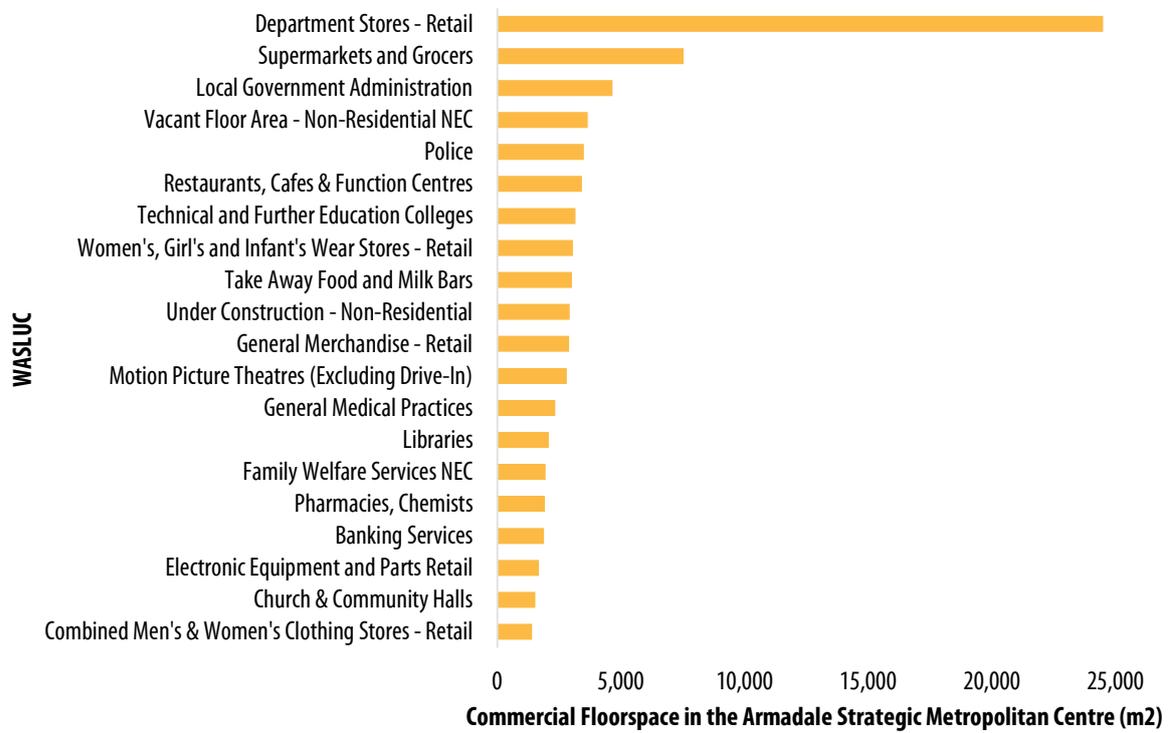
Non-Retail Floorspace in Armada Strategic Metropolitan Centre Catchment (m²)

Note: Only top floorspaces are illustrated.

Source: DPLH 2016, Pracsys 2021



Figure 110. Commercial Floorspace in the Armadale Strategic Metropolitan Centre by WASLUC

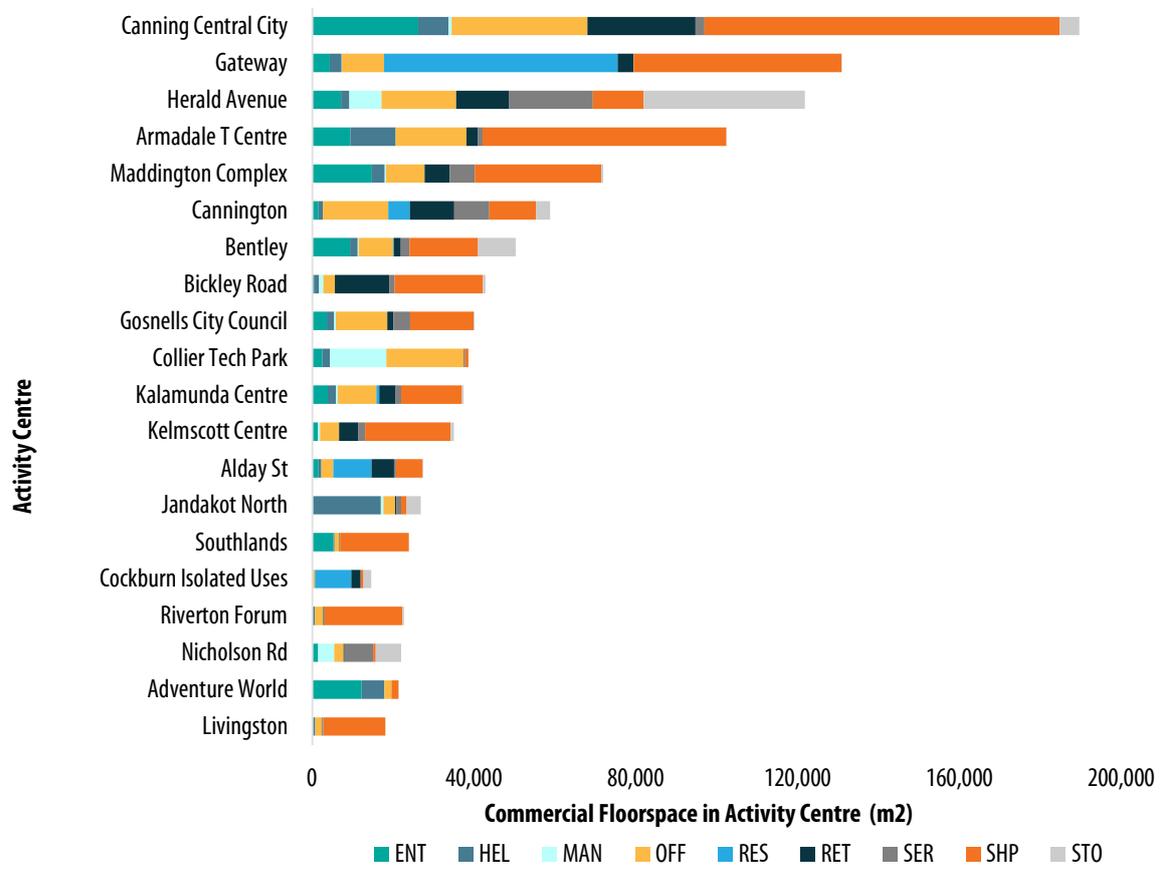


Note: Only top floorspaces are illustrated.

Source: DPLH 2016, Pracsys 2021



Figure 111. Commercial Floorspace in Armadale Catchment Activity Centres by PLUC

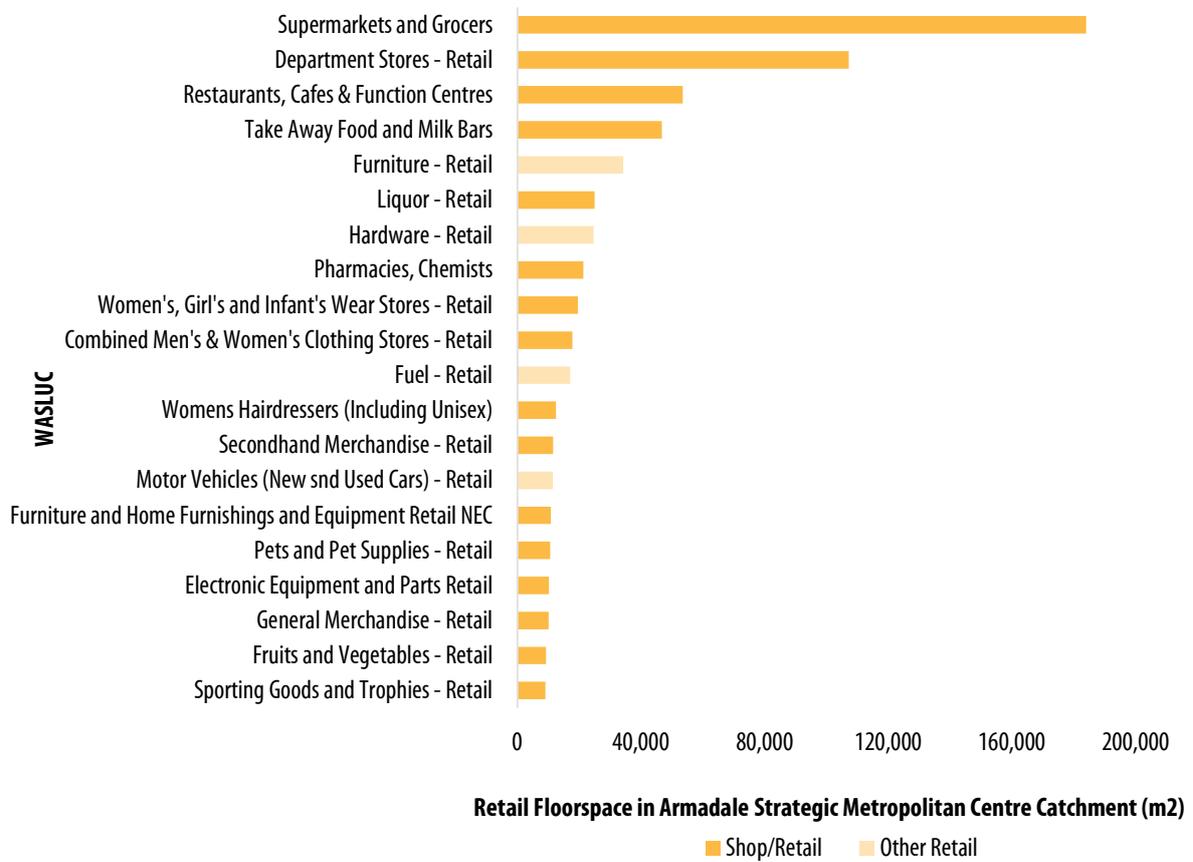


Note: Only top floorspaces and centres are illustrated.

Source: DPLH 2016, Pracsys 2021



Figure 112. Retail Floorspace in Armadale Strategic Metropolitan Centre Catchment by WASLUC



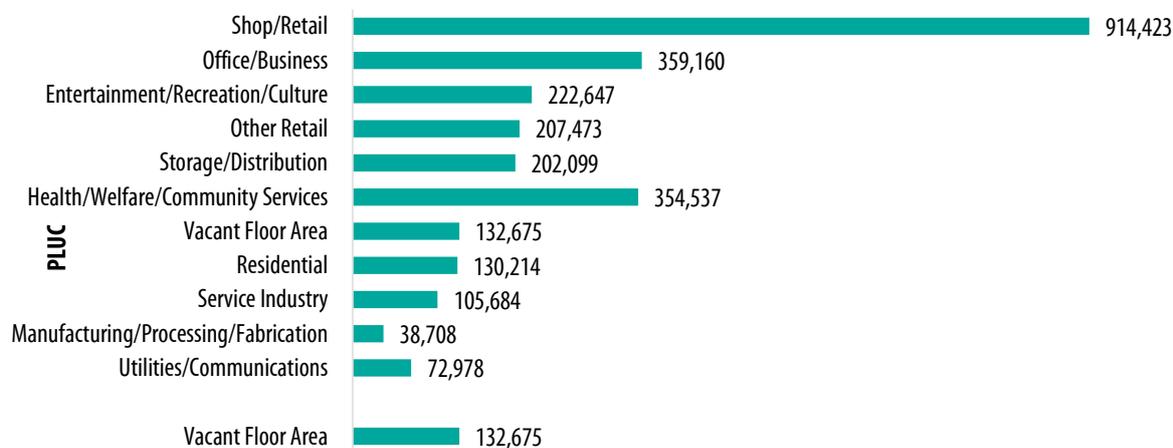
Note: Only top floorspaces are illustrated.

Source: DPLH 2016, Pracsys 2021



Joondalup Strategic Metropolitan Centre

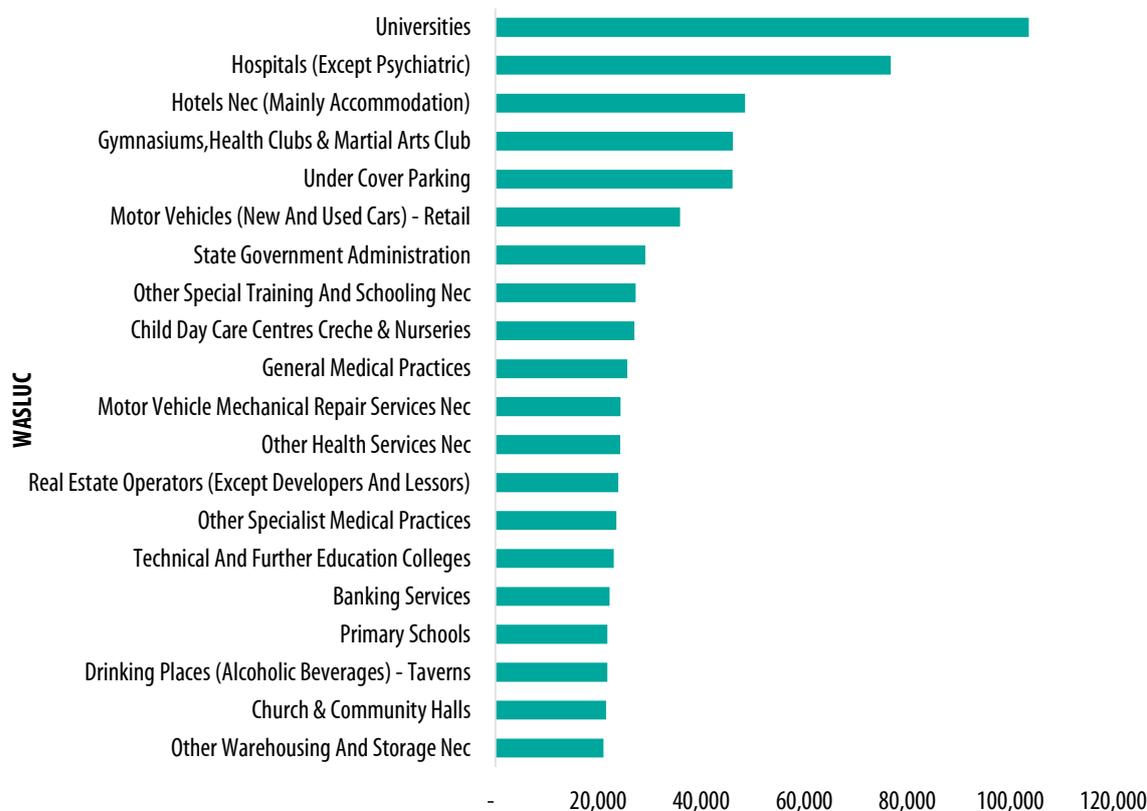
Figure 113. Commercial Floorspace in Joondalup Strategic Metropolitan Centre Catchment by PLUC



Commercial Floorspace in Joondalup Strategic Metropolitan Centre Catchment (m2)

Source: DPLH 2016, Pracsys 2021

Figure 114. Non-Retail Floorspace in Joondalup Strategic Metropolitan Centre Catchment by WASLUC



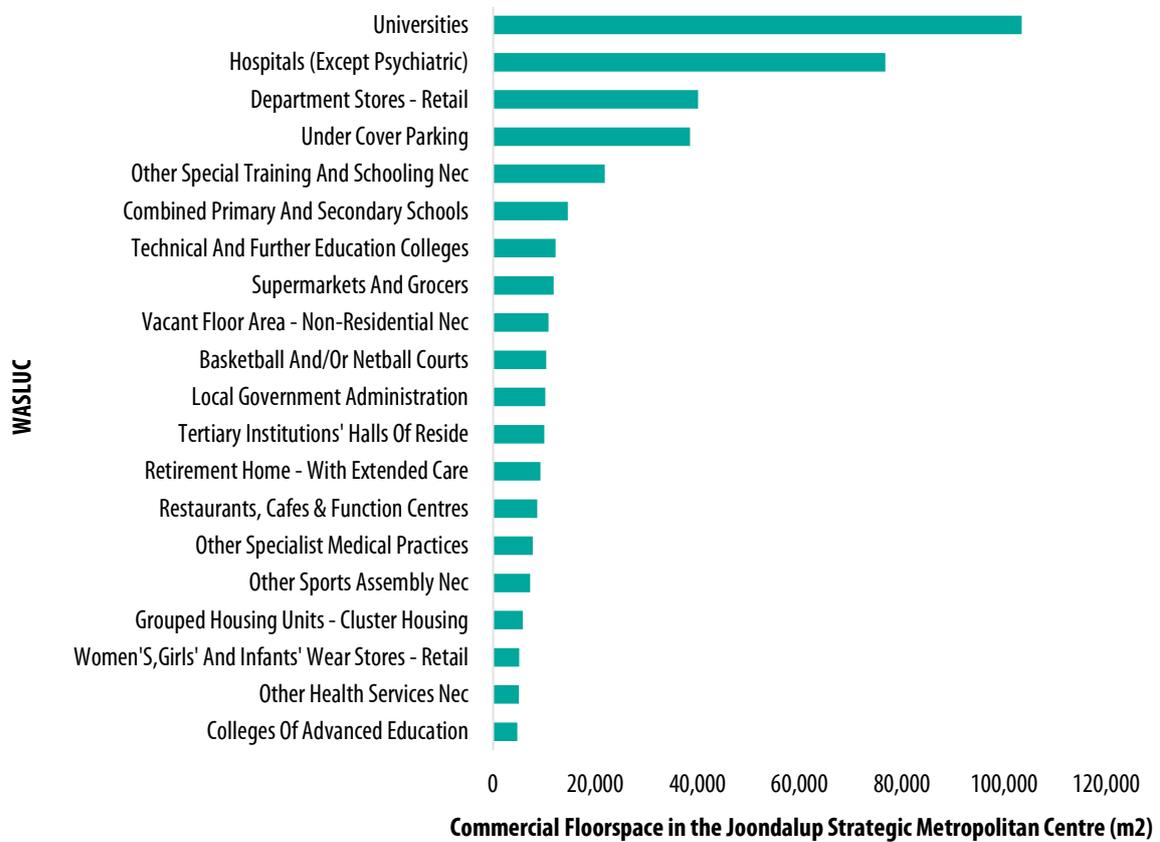
Non-Retail Floorspace in Joondalup Strategic Metropolitan Centre Catchment (m2)

Note: Only top floorspaces are illustrated.

Source: DPLH 2016, Pracsys 2021



Figure 115. Commercial Floorspace in the Joondalup Strategic Metropolitan Centre by WASLUC

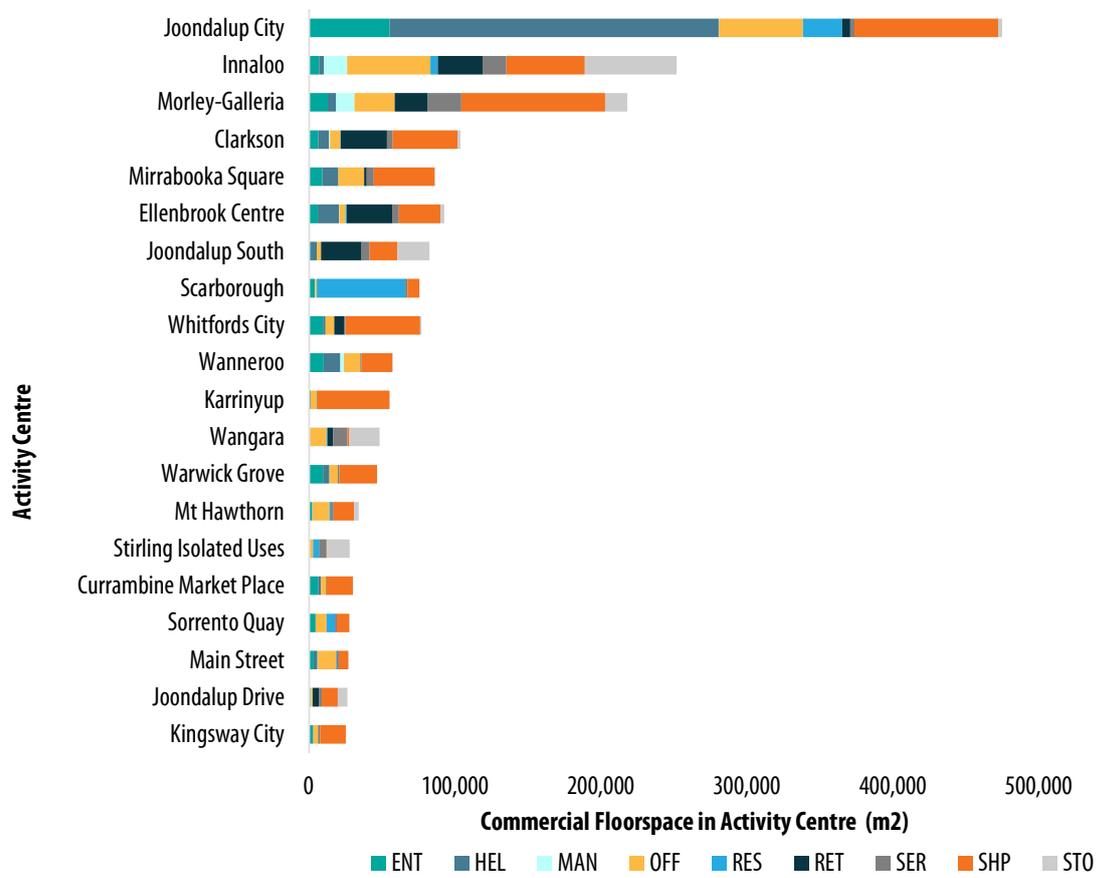


Note: Only top floorspaces are illustrated.

Source: DPLH 2016, Pracsys 2021



Figure 116. Commercial Floorspace in Joondalup Catchment Activity Centres by PLUC

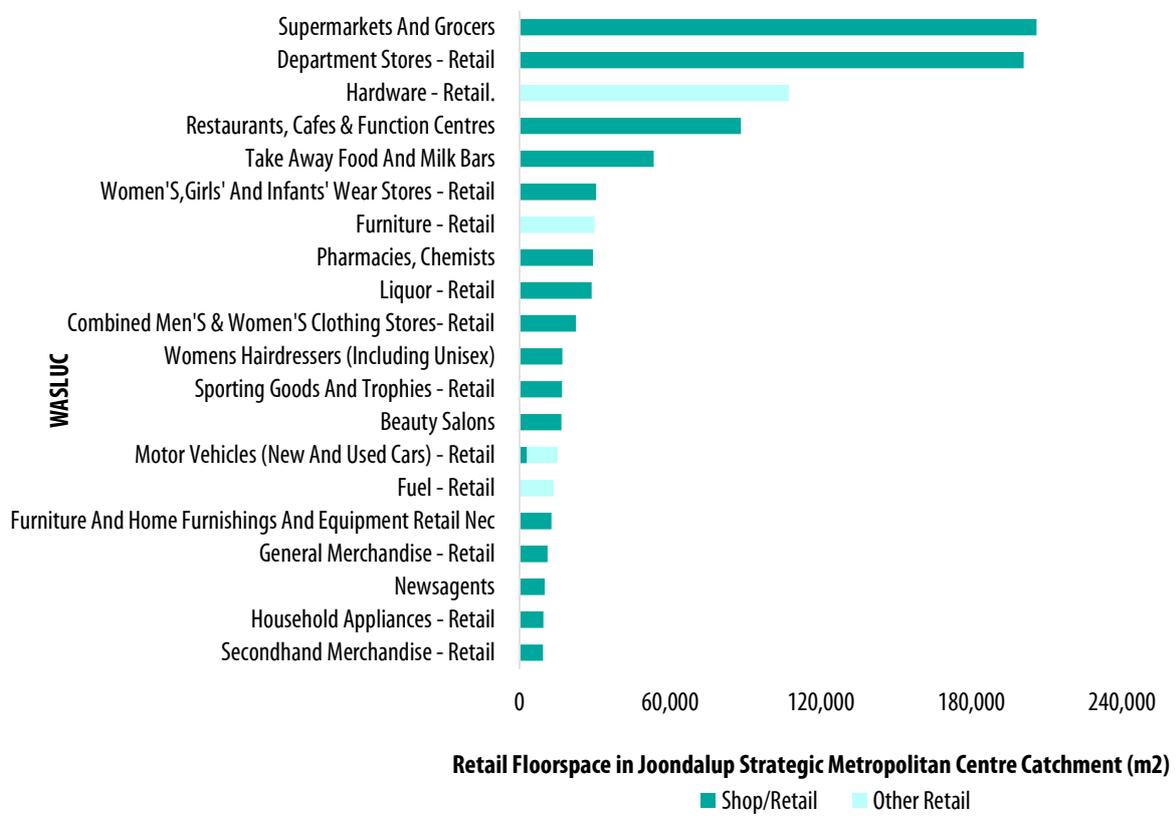


Note: Only top floorspaces and centres are illustrated.

Source: DPLH 2016, Pracsys 2021



Figure 117. Retail Floorspace in Joondalup Strategic Metropolitan Centre Catchment by WASLUC



Note: Only top floorspaces are illustrated.

Source: DPLH 2016, Pracsys 2021

12.6 Benchmark Gap Analysis

The following analysis used population to floorspace ratios to compare the Analysis Catchment to the benchmark catchments and identify gaps in floorspace. The total gaps by PLUC category were constrained based on the benchmark level of population to floorspace to identify gaps that represent a supportable floorspace increase.

Figure 118. Commercial Floorspace in RSMC and Benchmarks by PLUC

PLUC	RSMC 25km Catchment	Mandurah Catchment	Armadale/Cannington Catchment	Joondalup Catchment
Other Retail	44,506	50,779	134,240	207,473
Shop/Retail	286,649	191,666	658,375	914,423
Total Retail	331,155	242,445	792,615	1,121,896
Entertainment/Recreation/Culture	71,483	51,533	155,414	222,647
Health/Welfare/Community Services	99,499	27,996	113,110	354,537
Manufacturing/Processing/Fabrication	4,073	14,044	40,663	38,708
Office/Business	102,223	76,451	245,090	359,160
Primary/Rural	9,200	0	9,200	2,600
Residential	88,292	111,095	100,262	130,214
Service Industry	15,401	16,793	80,817	105,684
Storage/Distribution	41,160	35,500	114,356	202,099
Utilities/Communications	8,697	19,870	22,005	72,978
Vacant Floor Area	35,412	41,743	111,311	132,675
Total Non-Retail	440,028	353,282	880,917	1,488,627
Total Commercial	771,183	595,727	1,673,532	2,610,523

Source: DPLH 2016, Pracsys 2021

Figure 119. Commercial Floorspace Provision Ratios in RSMC and Benchmarks by PLUC

PLUC	RSMC 25km Catchment	Mandurah Catchment	Armadale/Cannington Catchment	Joondalup Catchment
Other Retail	0.19	0.22	0.27	0.33
Shop/Retail	1.21	0.84	1.31	1.46
Total Retail	1.39	1.07	1.58	1.79
Entertainment/Recreation/Culture	0.30	0.23	0.31	0.35
Health/Welfare/Community Services	0.42	0.12	0.23	0.57
Manufacturing/Processing/Fabrication	0.02	0.06	0.08	0.06
Office/Business	0.43	0.34	0.49	0.57
Primary/Rural	0.04	0.00	0.02	0.00
Residential	0.37	0.49	0.20	0.21
Service Industry	0.06	0.07	0.16	0.17
Storage/Distribution	0.17	0.16	0.23	0.32
Utilities/Communications	0.04	0.09	0.04	0.12
Vacant Floor Area	0.15	0.18	0.22	0.21
Total Non-Retail	1.85	1.56	1.76	2.37
Total Commercial	3.24	2.63	3.34	4.16

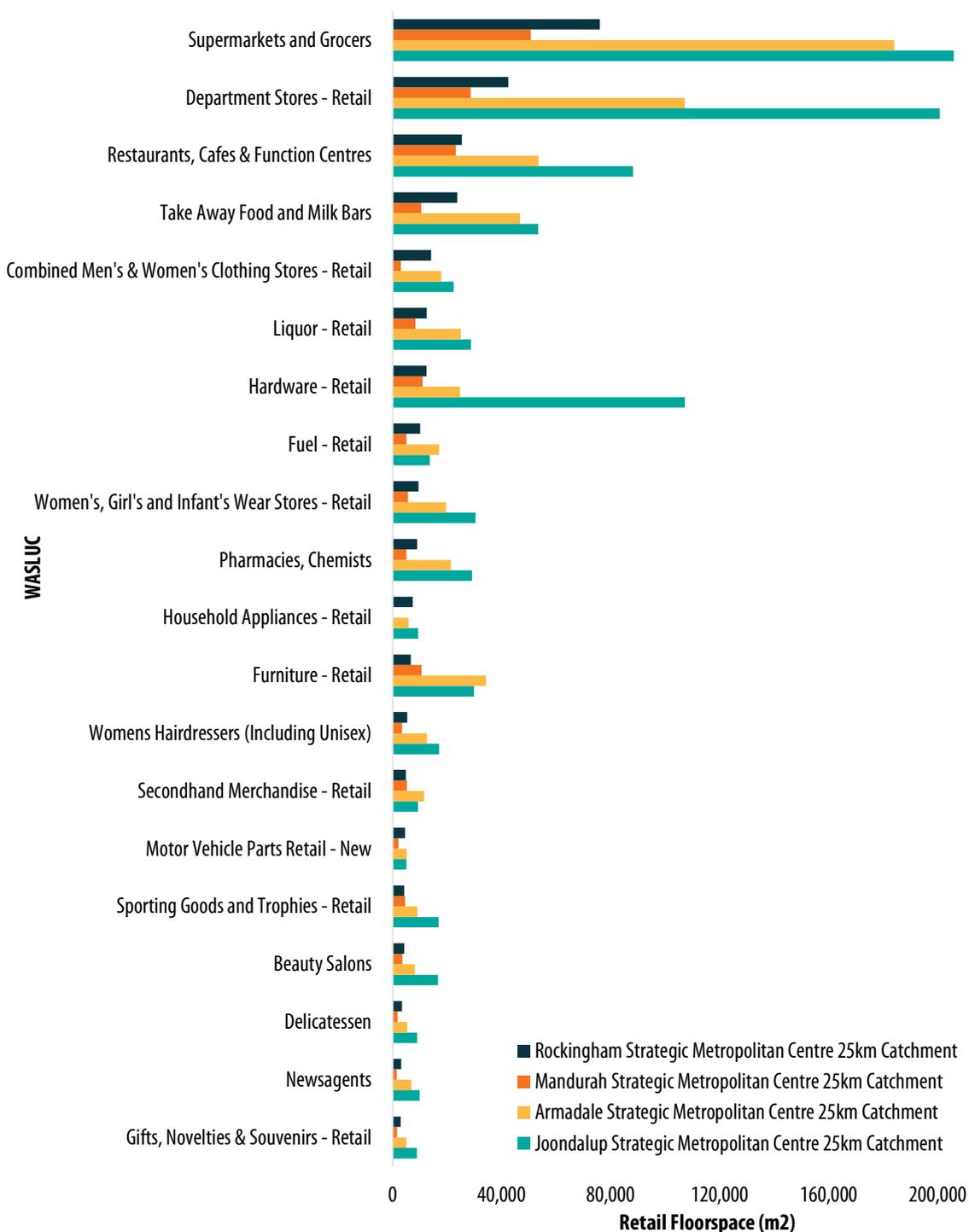
Source: DPLH 2016, Pracsys 2021



The following tables provide the total gap amount per WASLUC where a gap was identified. The total floorspace gap for the City's centres has been developed using a mix of the identified benchmarks and a maximum level of floorspace provision based on benchmarks (i.e. the total amount of additional floorspace was not allowed to exceed the floorspace to population ratio of the benchmarks). Gaps identified at the specific WASLUC level should not be interpreted as target amounts of floorspace for that use as the gaps are unconstrained. The identified WASLUC gaps should be interpreted as potential opportunity uses and their uptake should be considered based on private sector interest (i.e. if a development proposes to include a use that is identified as a WASLUC gap it may indicate potential community benefit/viability).



Figure 120. Retail Floorspace in RSMC Catchment and Benchmarks by WASLUC

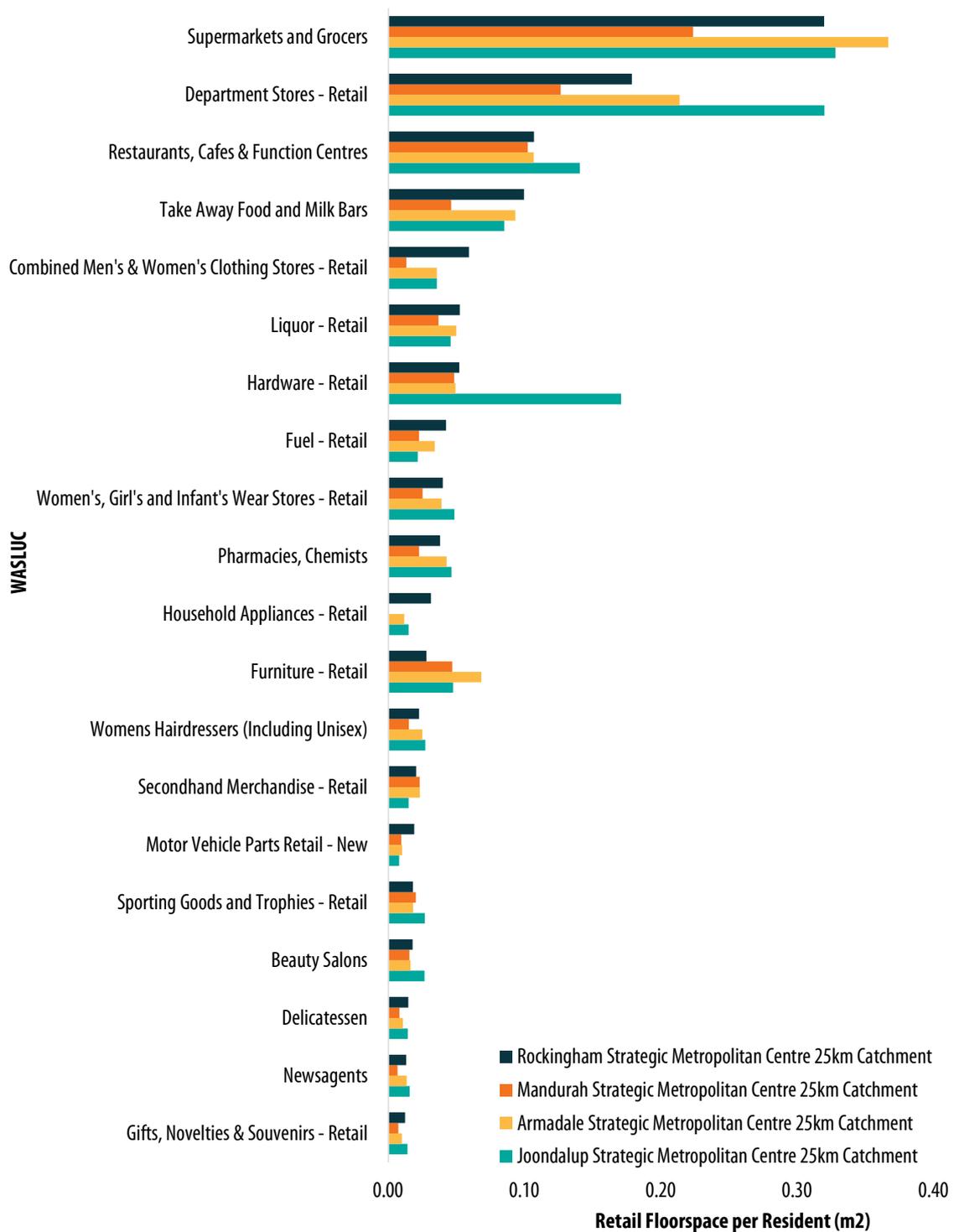


Note: Only top floorspaces are illustrated.

Source: DPLH 2016, Pracsys 2021



Figure 121. Retail Floorspace Provision Ratios in RSMC and Benchmarks by WASLUC



Note: Only top floorspaces are illustrated.

Source: DPLH 2016, Pracsys 2021

**Figure 122. Retail Floorspace Gaps in RMSC 25km Catchment to Mandurah Benchmark by WASLUC**

WASLUC	Gap to Mandurah Provision Rate
Furniture - Retail	4,516
Furniture and Home Furnishings and Equipment Retail NEC	1,414
Marine Craft and Accessories - Retail	1,414
Stationers	1,142
Manchester Goods and Soft Furnishings - Retail	688
Second-hand Merchandise - Retail	602
Sporting Goods and Trophies - Retail	551
Kitchenware - Retail	469
Paint and Wallpaper - Retail	439
Men's Hairdressers	385
Bicycles - Retail	301
Nurseries - Retail	269
Electronic Equipment and Parts Retail	265
Business and Computing Equipment	192
Tyres, Batteries & Accessories-Retail	158
Craft and Art Supplies - Retail	129
Other Retail Trade NEC	120
Music And Musical Instruments - Retail	111
Other Farm and Garden Supplies Retail NEC	110
Plumbing, Heating & Refrigeration Equipment - Retail	46
Floor Coverings - Retail	38
Florists - Retail	5

Source: DPLH 2016, Pracsys 2021

Figure 123. Retail Floorspace Gaps in RMSC 25km Catchment to Armadale Benchmark by WASLUC

WASLUC	Gap to Armadale Provision Rate
Supermarkets and Grocers	11,193
Furniture - Retail	9,628
Department Stores - Retail	8,338
Pets and Pet Supplies - Retail	3,643
Furniture and Home Furnishings and Equipment Retail NEC	3,403
Fruits and Vegetables - Retail	3,051
Tyres, Batteries & Accessories-Retail	2,554
Other Retail Trade NEC	2,317
Electronic Equipment and Parts Retail	2,265
Nurseries - Retail	1,983
General Merchandise - Retail	1,891
Pharmacies, Chemists	1,108
Manchester Goods and Soft Furnishings - Retail	1,006
Meats - Retail	839
Paint and Wallpaper - Retail	693
Second-hand Merchandise - Retail	645
Craft and Art Supplies - Retail	635
Toys and Hobbies - Retail	573
Women's Hairdressers (Including Unisex)	558
Floor Coverings - Retail	487
Sports Store - Clothing/Equipment Etc	415
Plumbing, Heating & Refrigeration Equipment - Retail	399
Florists - Retail	368
Stationers	133
Adult Products - Retail	124
Health Foods	124
Other Retail Food Trade NEC	118
Newsagents	101
Bread and Cake Stores	82
Men's Hairdressers	69
Sporting Goods and Trophies - Retail	41
Footwear Repair Services	32
Fabric Shop and Dressmaking Accessories Retail	24

Source: DPLH 2016, Pracsys 2021

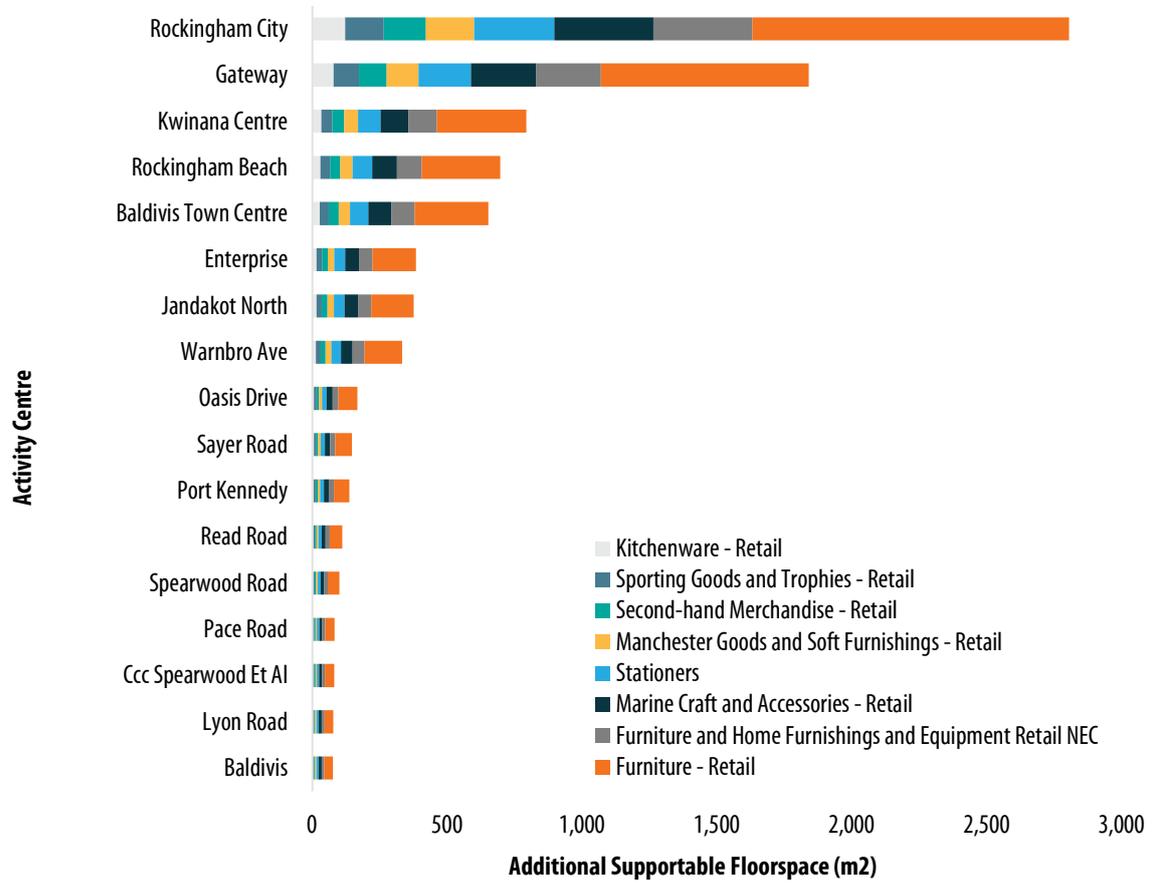
Figure 124. Retail Floorspace Gaps in RMSC 25km Catchment to Joondalup Benchmark by WASLUC

WASLUC	Gap to Joondalup Provision Rate
Department Stores - Retail	33,574
Hardware - Retail	28,223
Restaurants, Cafes & Function Centres	8,007
Furniture - Retail	4,688
Furniture And Home Furnishings And Equipment Retail NEC	3,050
Sporting Goods and Trophies - Retail	2,089
Beauty Salons	2,078
Women's, Girl's and Infant's Wear Stores - Retail	2,038
Nurseries - Retail	2,007
Fabric Shop And Dressmaking Accessories Retail	1,991
Pharmacies, Chemists	1,988
Supermarkets and Grocers	1,986
Pets And Pet Supplies - Retail	1,982
Fruits And Vegetables - Retail	1,976
General Merchandise - Retail	1,330
Other Retail Trade NEC	1,251
Bread And Cake Stores	1,163
Sports Store - Clothing/Equipment Etc	1,109
Business And Computing Equipment	1,056
Women's Hairdressers (Including Unisex)	1,052
Marine Craft And Accessories - Retail	942
Electronic Equipment And Parts Retail	925
Tyres, Batteries & Accessories-Retail	877
Plumbing, Heating & Refrigeration Equipment - Retail	779
Men's And Boys' Clothing - Retail	743
Meats - Retail.	669
Watchmakers And Jewellers - Retail	640
Newsagents	610
Booksellers	550
Manchester Goods And Soft Furnishings - Retail	522
Stationers	496
Fish And Seafoods - Retail	471
Footwear - Retail	468
Motion Picture Distribution And Services	452
Gifts, Novelties & Souvenirs - Retail	408
Accessories Retail NEC	406
Paint And Wallpaper - Retail	351
Kitchenware - Retail	327
Florists - Retail	291
Craft And Art Supplies - Retail	281
Men's Hairdressers	223
Weight Reducing Salons	189
Other Retail Food Trade NEC	132
Toys And Hobbies - Retail	97
Boat, Caravan & Trailer Hire	82
Footwear Repair Services	6

Source: DPLH 2016, Pracsys 2021



Figure 125. Retail Gaps to Mandurah Benchmark Supportable by RSMC 25km Catchment Activity Centres

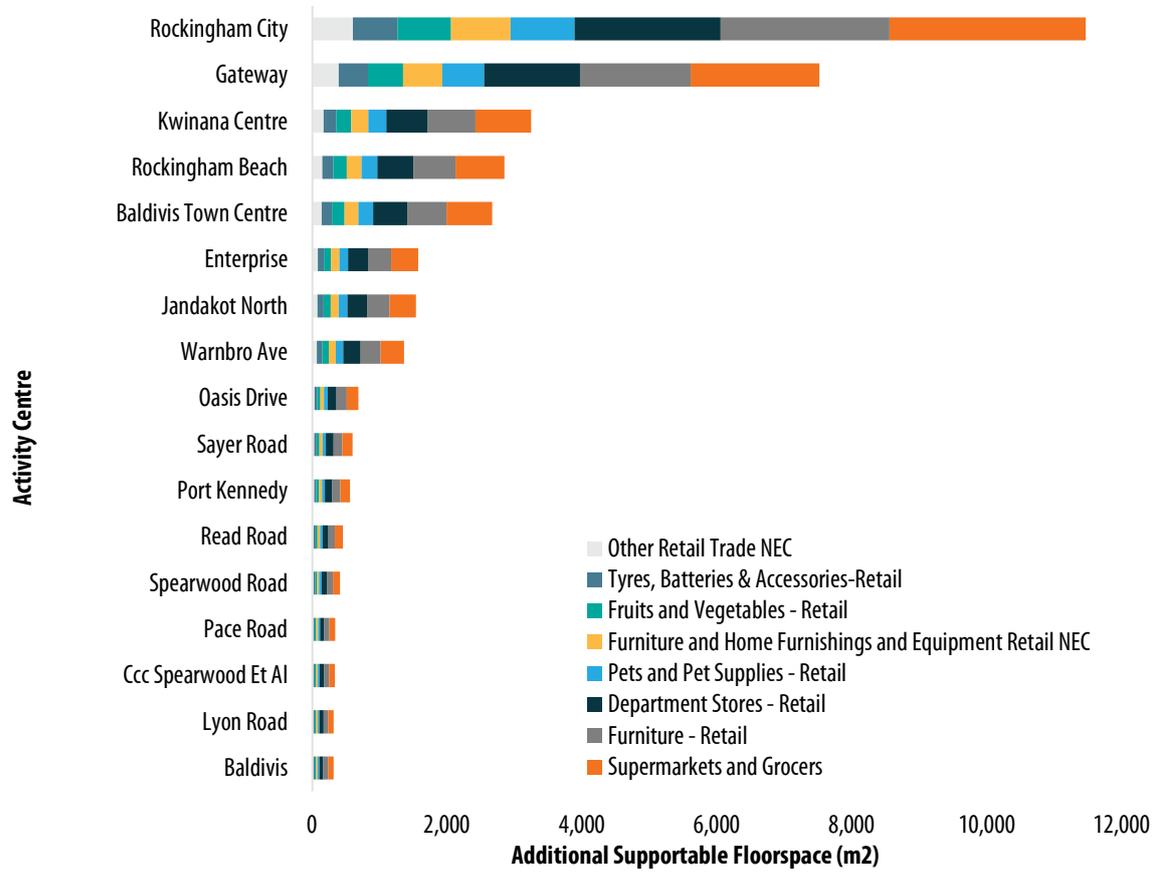


Note: Only top floorspaces and centres are illustrated.

Source: DPLH 2016, Pracsys 2021



Figure 126. Retail Gaps to Armadale Benchmark Supportable by RSMC 25km Catchment Activity Centres

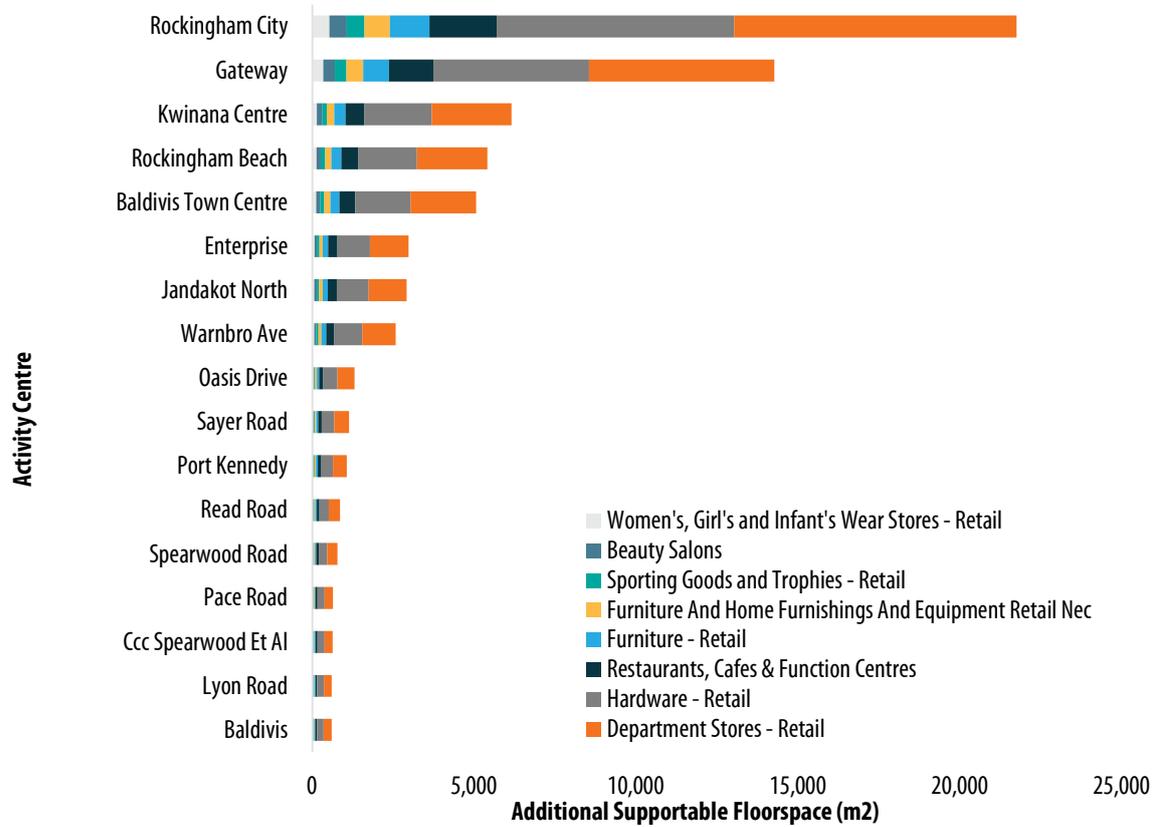


Note: Only top floorspaces and centres are illustrated.

Source: DPLH 2016, Pracsys 2021



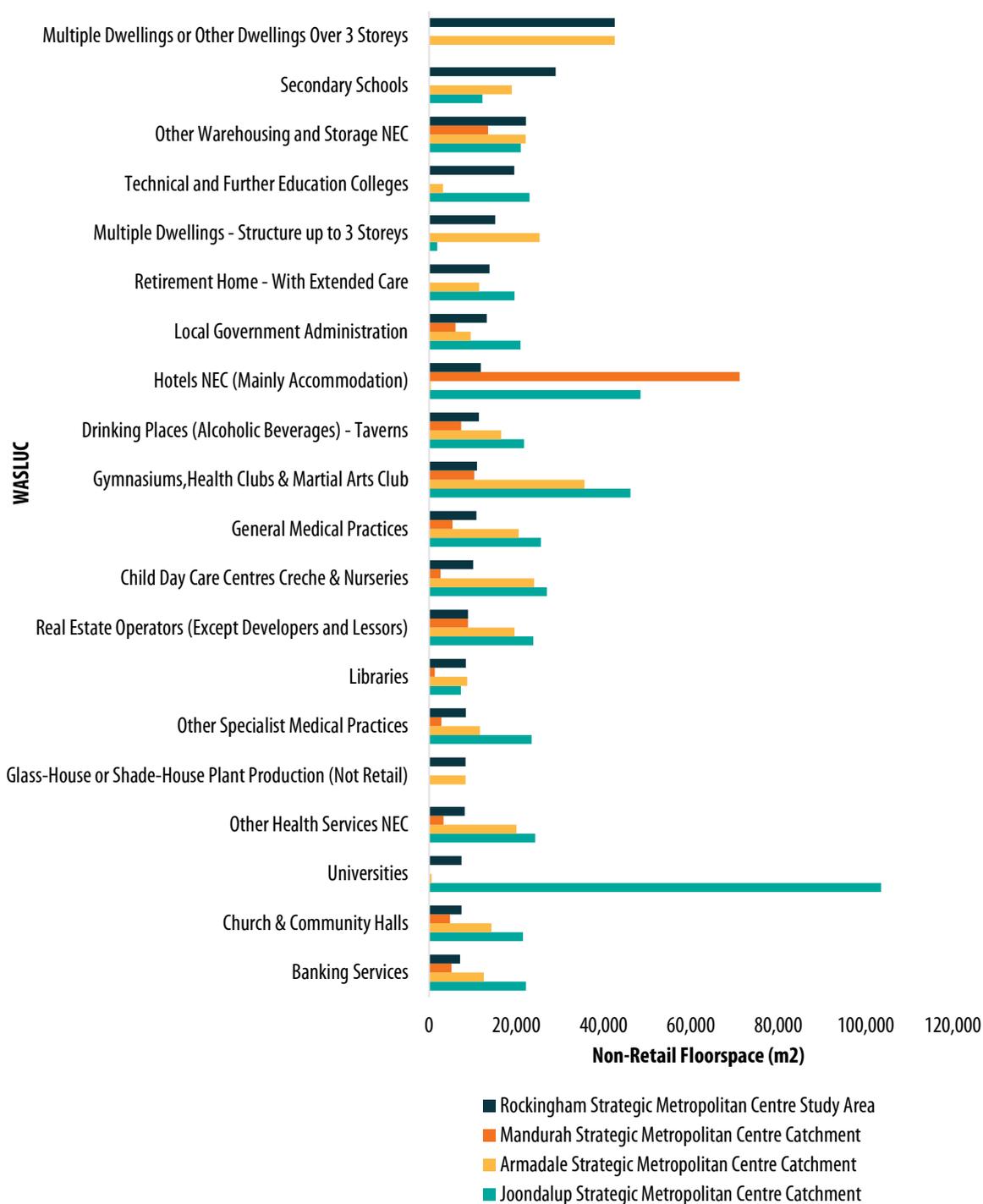
Figure 127. Retail Gaps to Joondalup Benchmark Supportable by RSMC 25km Catchment Activity Centres



Note: Only top floorspaces and centres are illustrated.

Source: DPLH 2016, Pracsys 2021

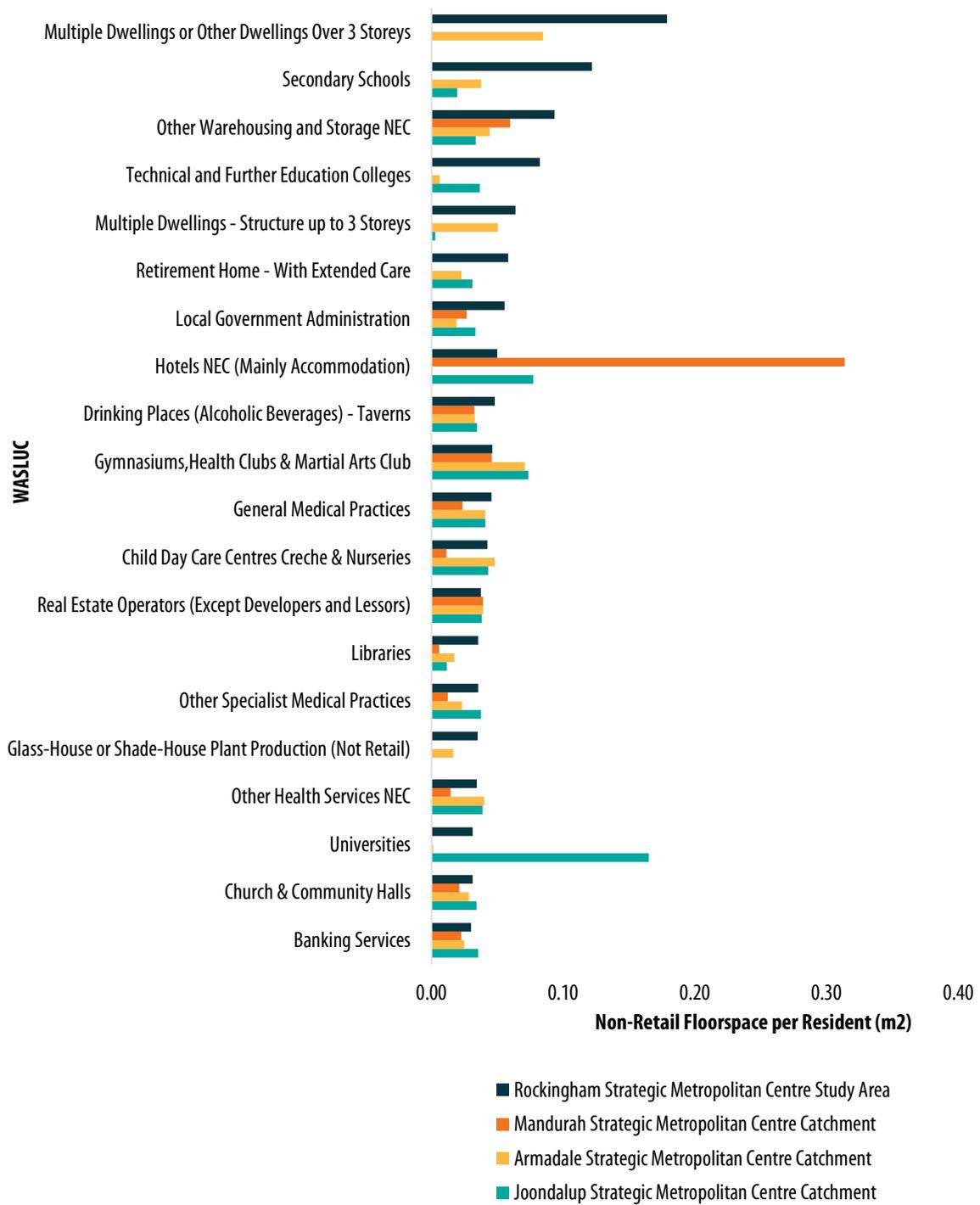
Figure 128. Non-Retail Floorspace in RSMC and Benchmarks by WASLUC



Note: Only top floorspaces are illustrated.

Source: DPLH 2016, Pracsys 2021

Figure 129. Non-Retail Floorspace Provision Ratios in RSMC and Benchmarks by WASLUC



Note: Only top floorspaces are illustrated.

Source: DPLH 2016, Pracsys 2021

Figure 130. Non-Retail Floorspace Gaps in RMSC 25km Catchment to Mandurah Benchmark by WASLUC

WASLUC	Gap to Mandurah Provision Rate
Hotels NEC (Mainly Accommodation)	62,686
Under Cover Parking	14,126
Live Entertainment Theatres	6,385
Private Hotels	5,792
Police	3,574
Other Transient Lodgings NEC	2,586
State Government Administration	2,407
Other Professional Services NEC	2,084
Welfare and Charitable Services NEC	2,054
Plumbing, Heating & Air Conditioning Services	1,965
Art Galleries	1,957
Motor Vehicle Repairs NEC	1,866
Hardware - Retail	1,702
Services to Finance and Investment NEC	1,457
Community Organisations NEC	1,119
Furniture - Retail	1,077
Travel Arranging Services	874
Yachting Clubs	850
Electrical Services	816
Advertising Services	707
Pet Services	660
Building Materials - Retail	574
Tyres, Batteries & Accessories- Retail	556
Function and Reception Centres	535
Art and/or Craft Centres	514
Accounting, Auditing & Book-Keeping Services	470
Insurance Agents, Brokers & Services	440
Other Repair Services NEC	416
Real Estate Operators (Except Developers and Lessors)	396
Other Retail Food Trade NEC	364
Other Cultural, Entertainment & Recreational Activities NEC	348
Publishing	339
Printing	299
Other Special Training and Schooling NEC	293
Business and Management Consulting Services	281
Legal Services	229
Wood Products Manufacturing NEC	178
Sand, Gravel & Soil Quarrying	170
Primary Schools	163
Churches, Synagogues & Temples	155
Precision Engineered Products Manufacturing	135
Retirement Home - No Extended Care	132

Source: DPLH 2016, Pracsys 2021

Figure 131. Non-Retail Floorspace Gaps in RMSC 25km Catchment to Armadale Benchmark by WASLUC

WASLUC	Gap to Armadale Provision Rate
State Government Administration	10,377
Gymnasiums, Health Clubs & Martial Arts Club	5,862
Other Special Training And Schooling NEC	3,936
Motor Vehicle Mechanical Repair Services NEC	3,381
Motor Vehicle Repairs NEC	2,952
Accounting, Auditing & Book-Keeping Services	2,526
Police	2,355
Hardware - Retail	2,118
Electrical Services	1,869
Primary Schools	1,852
Motor Vehicle Detailing	1,517
Telecommunication Facilities Operation	1,468
Other Professional Services NEC	1,435
Community Organisations NEC	1,395
Child Day Care Centres Creche & Nurseries	1,308
Other Health Services NEC	1,304
Community Health Centres (Medical)	1,253
Motels/Motor Inns	1,101
Business And Management Consulting Services	1,082
Welfare And Charitable Services NEC	1,075
Engineering Services	1,038
Furniture - Retail	1,014
Basketball And/or Netball Courts	995
Clothing - Wholesale/Warehousing	833
Printing	725
Building Materials -Retail	706
Water Well Drilling, Irrigation & Reticulation Services	631
Other Laboratory Services	600
Travel Arranging Services	552
Family Welfare Services NEC	550
Cheese Manufacturing	543
Services To Finance And Investment NEC	505
Postal Service Operation NEC	488
Computer Support Services	482
Funeral And Crematory Services	464
Optometry And Optical Dispensing	460
Motion Picture Theatres (Excluding Drive-In)	449
Single House	440
Gambling Services (Except Lotteries)	422
Wine And Brandy Manufacturing	395
Psychology Practices	389
Real Estate Operators (Except Developers and Lessors)	363

Source: DPLH 2016, Pracsys 2021

Figure 132. Non-Retail Floorspace Gaps in RMSC 25km Catchment to Joondalup Benchmark by WASLUC

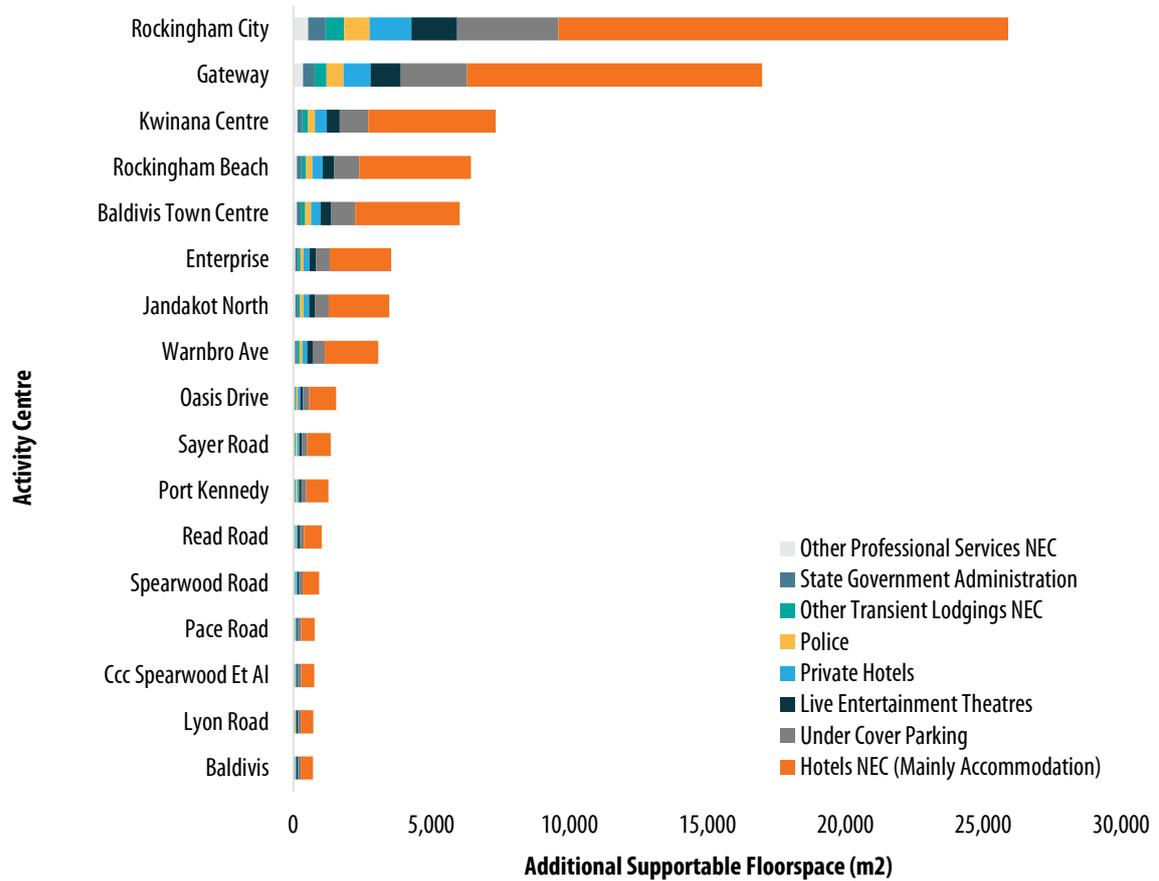
WASLUC	Gap to Joondalup Provision Rate
Universities	31,803
Under Cover Parking	12,726
Other Special Training And Schooling NEC	9,609
State Government Administration	7,270
Hotels NEC (Mainly Accommodation)	6,479
Gymnasiums, Health Clubs & Martial Arts Club	6,471
Primary Schools	6,467
Building Materials -Retail	6,154
Motor Vehicle Mechanical Repair Services NEC	5,089
Basketball And/or Netball Courts	3,940
Furniture - Retail	3,814
Community Health Centres (Medical)	3,502
Accounting, Auditing & Book-Keeping Services	3,213
Other Business Services NEC	3,064
Engineering Services	2,911
Other Entertainment Assembly NEC	2,598
Other Professional Services NEC	2,571
Motels/Motor Inns	2,500
Holiday And Club Resorts	2,199
Grouped Housing Units - Town Houses	2,138
Outdoor Storage NEC	2,080
Dental Practices	1,911
Police	1,794
Plumbing, Heating & Air Conditioning Services	1,794
Welfare And Charitable Services NEC	1,784
Nurseries - Retail	1,710
Hardware - Retail.	1,611
Churches, Synagogues & Temples	1,500
Motor Vehicle Detailing	1,358
Banking Services	1,261
Other Retail Trade NEC	1,122
Business And Management Consulting Services	1,013
Other Health Services NEC	1,009
Insurance Agents, Brokers & Services	972
Other Sports Assembly NEC	971
Physically And Mentally Handicapped Welfare Services NEC	930
Postal Service Operation NEC	928
Optometry And Optical Dispensing	912
Motor Vehicle Repairs NEC	896
Tennis Courts (Outdoor)	879
Retirement Home - No Extended Care	859
Advertising Services	828

WASLUC	Gap to Joondalup Provision Rate
Grouped Housing Units - Villa Units	824
Laundering, Dry-Cleaning & Dyeing Services	816
Electrical Services	728
Church & Community Halls	727
Travel Arranging Services	645
Psychology Practices	608
Funeral And Crematory Services	603
Services To Finance And Investment NEC	592
Communication NEC	557
Other Specialist Medical Practices	510
Community Organisations NEC	506
Detective And Protective Services	471
Cleaning Services NEC	465
Other Personal Services NEC	451
Supermarkets And Grocers	445
Colleges Of Advanced Education	444
Lawn Mower Repair Service	428
Computer Support Services	418
Bread Manufacturing	415
Architectural Services	393
Settlement Agents	390
Gardening Services	389
Parliamentary Office	387
Other Wholesale Trade With Associated Warehousing NEC	341
Gambling Services (Except Lotteries)	336
Art And Music Schools	331
Meats - Retail.	330
Motion Picture Theatres (Excluding Drive-In)	320
Legal Services	318
Iron And Steel Basic Products Mfg	280
Other Cultural, Entertainment & Recreational Activities NEC	268
Printing Trade Service NEC	251
Other Laboratory Services	210
Federal Government Administration	180
Publishing	151
Marketing Services	144
Precision Engineered Products Mfg	140
Tyres, Batteries & Accessories-Retail	131
Real Estate Operators (Except Developers and Lessors)	117
Child Day Care Centres Creche & Nurseries	111
Printing	109

Source: DPLH 2016, Pracsys 2021



Figure 133. Non-Retail Gaps to Mandurah Benchmark Supportable by RSMC 25km Catchment Activity Centres

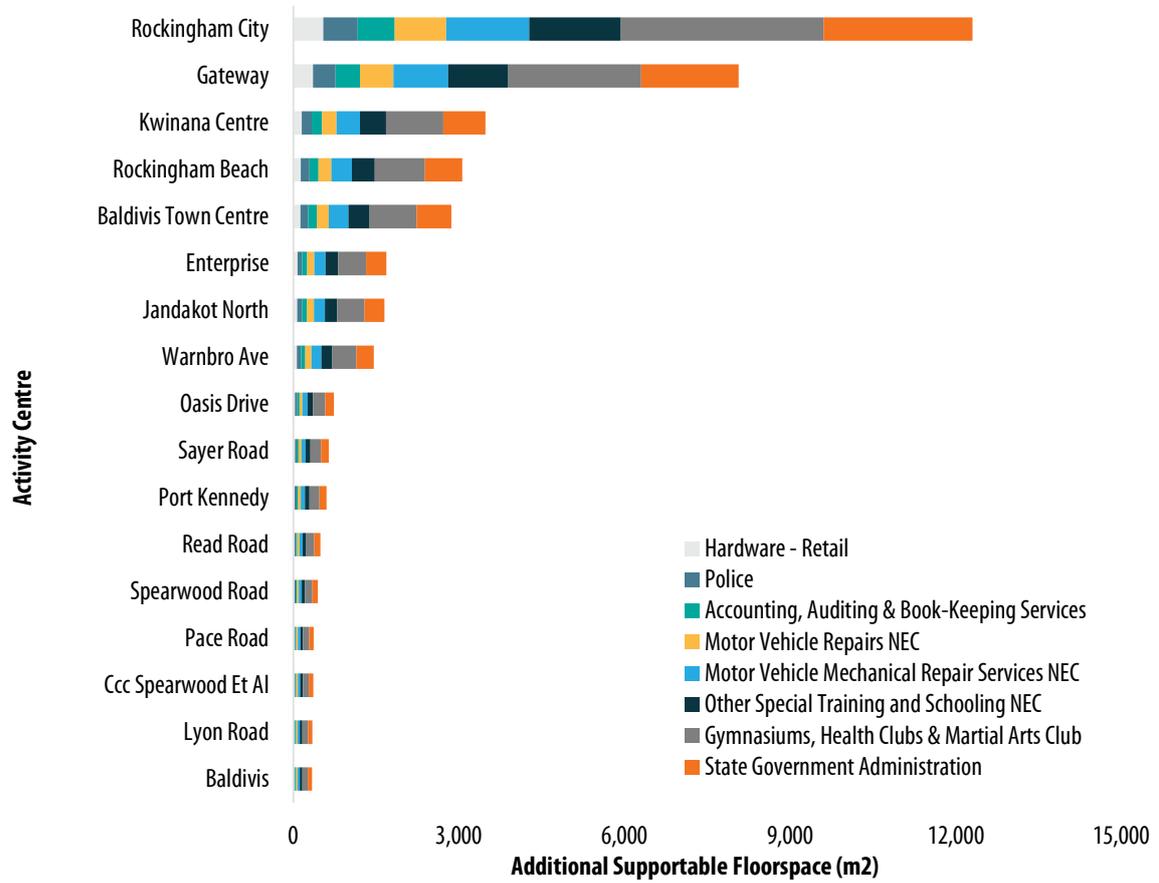


Note: Only top floorspaces and centres are illustrated.

Source: DPLH 2016, Pracsys 2021



Figure 134. Non-Retail Gaps to Armadale Benchmark Supportable by RSMC 25km Catchment Activity Centres

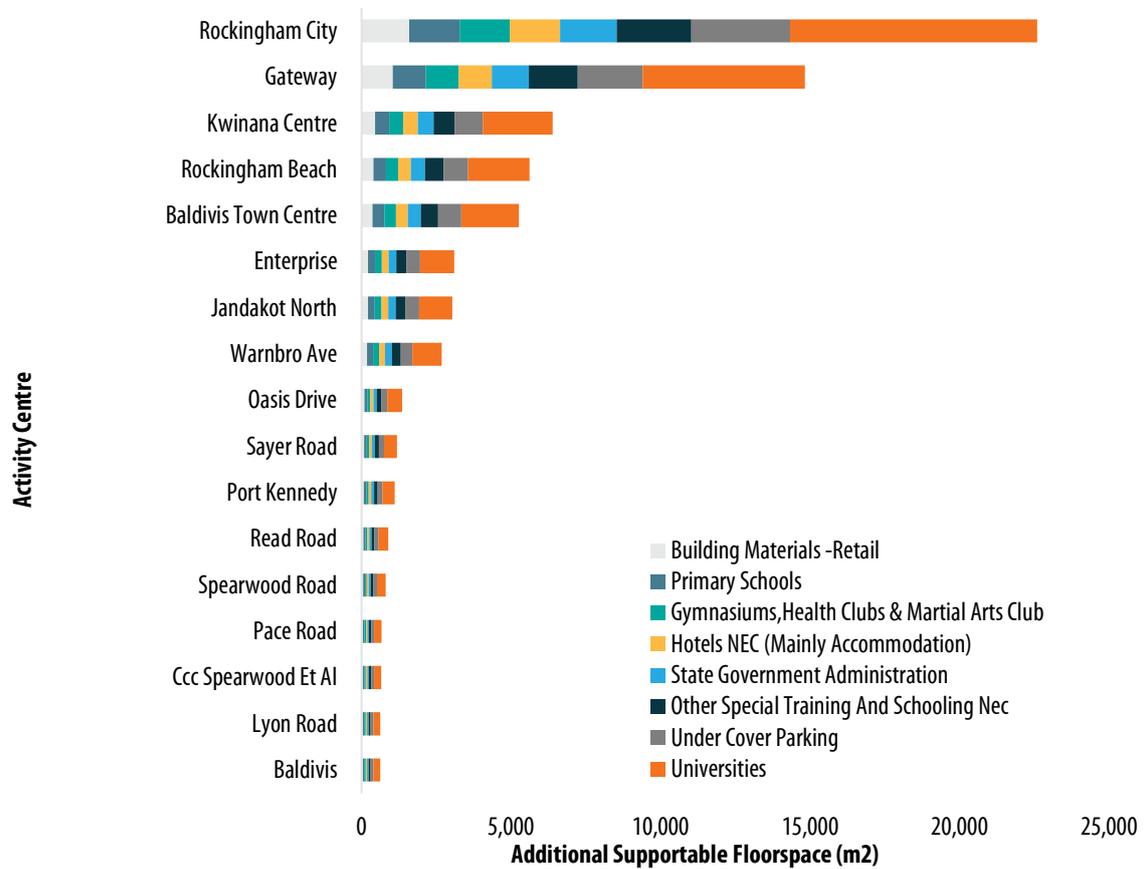


Note: Only top floorspaces and centres are illustrated.

Source: DPLH 2016, Pracsys 2021



Figure 135. Non-Retail Gaps to Joondalup Benchmark Supportable by RSMC 25km Catchment Activity Centres

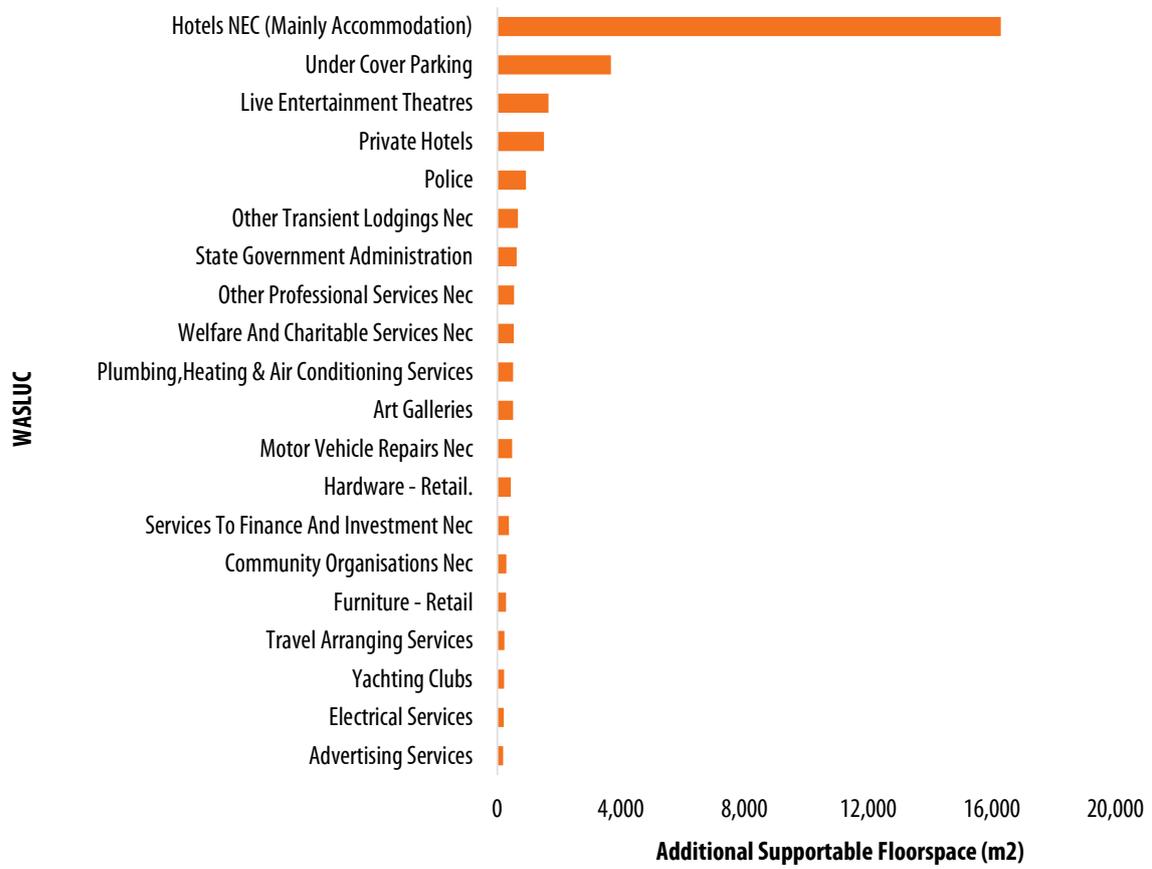


Note: Only top floorspaces and centres are illustrated.

Source: DPLH 2016, Pracsys 2021



Figure 136. Non-Retail Floorspace Gaps to Mandurah Benchmark Supportable at RSMC by WASLUC

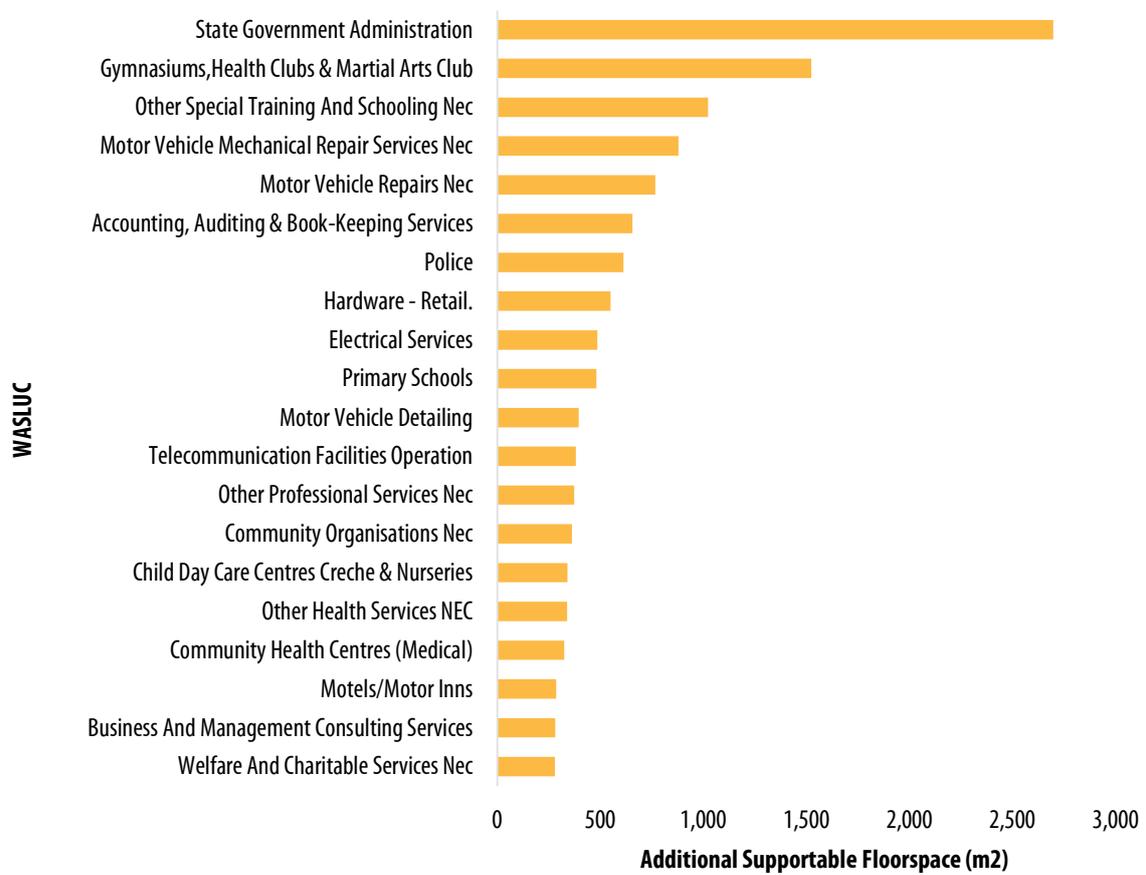


Note: Only top floorspaces are illustrated.

Source: DPLH 2016, Pracsys 2021



Figure 137. Non-Retail Floorspace Gaps to Armadale Benchmark Supportable at RSMC by WASLUC

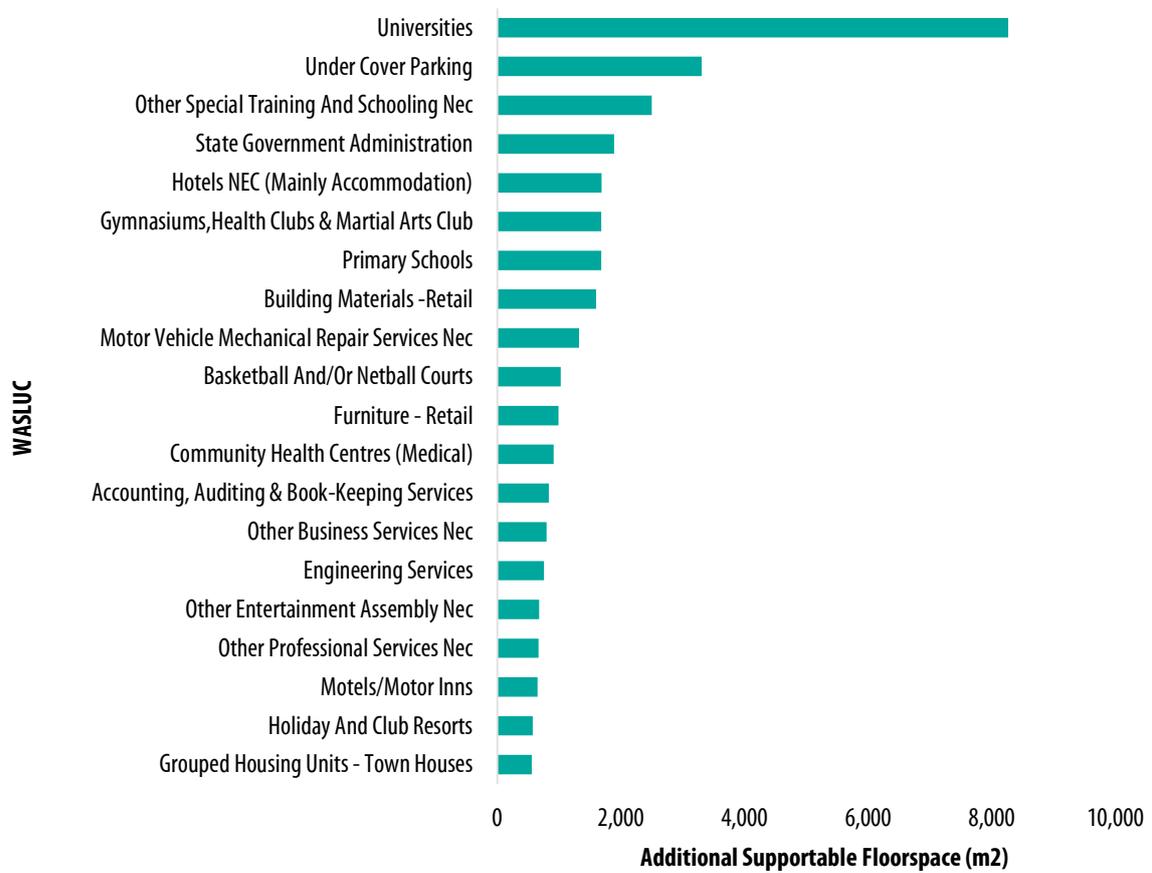


Note: Only top floorspaces are illustrated.

Source: DPLH 2016, Pracsys 2021



Figure 138. Non-Retail Floorspace Gaps to Joondalup Benchmark Supportable at RSMC by WASLUC



Note: Only top floorspaces are illustrated.

Source: DPLH 2016, Pracsys 2021

Accommodation Floorspace

Figure 139. Per Resident Provision of Accommodation Floorspace by Benchmark

WASLUC	RSMC 25km Catchment	Mandurah Catchment	Armadale Catchment	Joondalup Catchment
Motels/Motor Inns	0.022	0.014	0.027	0.033
Hotels NEC (Mainly Accommodation)	0.050	0.314	0.001	0.077
Private Hotels	0.003	0.027	0.000	0.000
Holiday and Club Resorts	0.002	0.000	0.000	0.011

Source: DPLH 2016, Pracsys 2021

Figure 140. Accommodation Floorspace Gaps by Benchmark

WASLUC	RSMC 25km Catchment	Mandurah Catchment	Armadale Catchment	Joondalup Catchment
Motels/Motor Inns	n/a	-1,987	1,101	2,500
Hotels NEC (Mainly Accommodation)	n/a	62,686	-11,705	6,479
Private Hotels	n/a	5,792	-486	-600
Holiday and Club Resorts	n/a	-430	-430	2,199

Source: DPLH 2016, Pracsys 2021

Figure 141. Visitor Nights and Accommodation Floorspace, City of Rockingham versus Benchmarks

Local Government Area	Domestic Visitor Nights per Annum	International Visitor Nights per Annum	Total Visitor Nights per Annum	Short-Stay Accommodation Floorspace	Total Visitor Nights per Accommodation Floorspace (m2)
City of Rockingham	686,163	579,301	1,265,464	17,833	71
City of Mandurah	1,123,294	395,549	1,518,843	77,162	20
City of Armadale	298,695	572,828	871,523	6,410	136
City of Joondalup	333,028	786,625	1,119,653	4,941	227

Note: As floorspace information is based on data collected by the Department of Planning, Lands and Heritage in 2016, 2016/17 visitor nights data has been utilised to ensure comparison between visitation demand and accommodation supply is accurate.

Source: DPLH 2016, Tourism Research Australia 2021, Pracsys 2021

The analysis has identified a gap in the provision of accommodation floorspace by compared the City of Rockingham to the City of Mandurah. Rockingham attracts approximately 83% of the visitation that Mandurah attracts, however Rockingham only provides 23% of Mandurah’s total accommodation floorspace. Further analysis will quantify a relevant accommodation floorspace target for Rockingham and distribute it to appropriate centres (Figure 142).

Figure 142. Visitor Nights and Accommodation Floorspace, City of Rockingham and City of Mandurah



Note: As floorspace information is based on data collected by the Department of Planning, Lands and Heritage in 2016, 2016/17 visitor nights data has been utilised to ensure comparison between visitation demand and accommodation supply is accurate.

Source: DPLH 2016, Tourism Research Australia 2021, Pracsys 2021

12.7 Future Gap Analysis

Figure 143. Projected Future Residential Population in Strategic Activity Centre Catchments

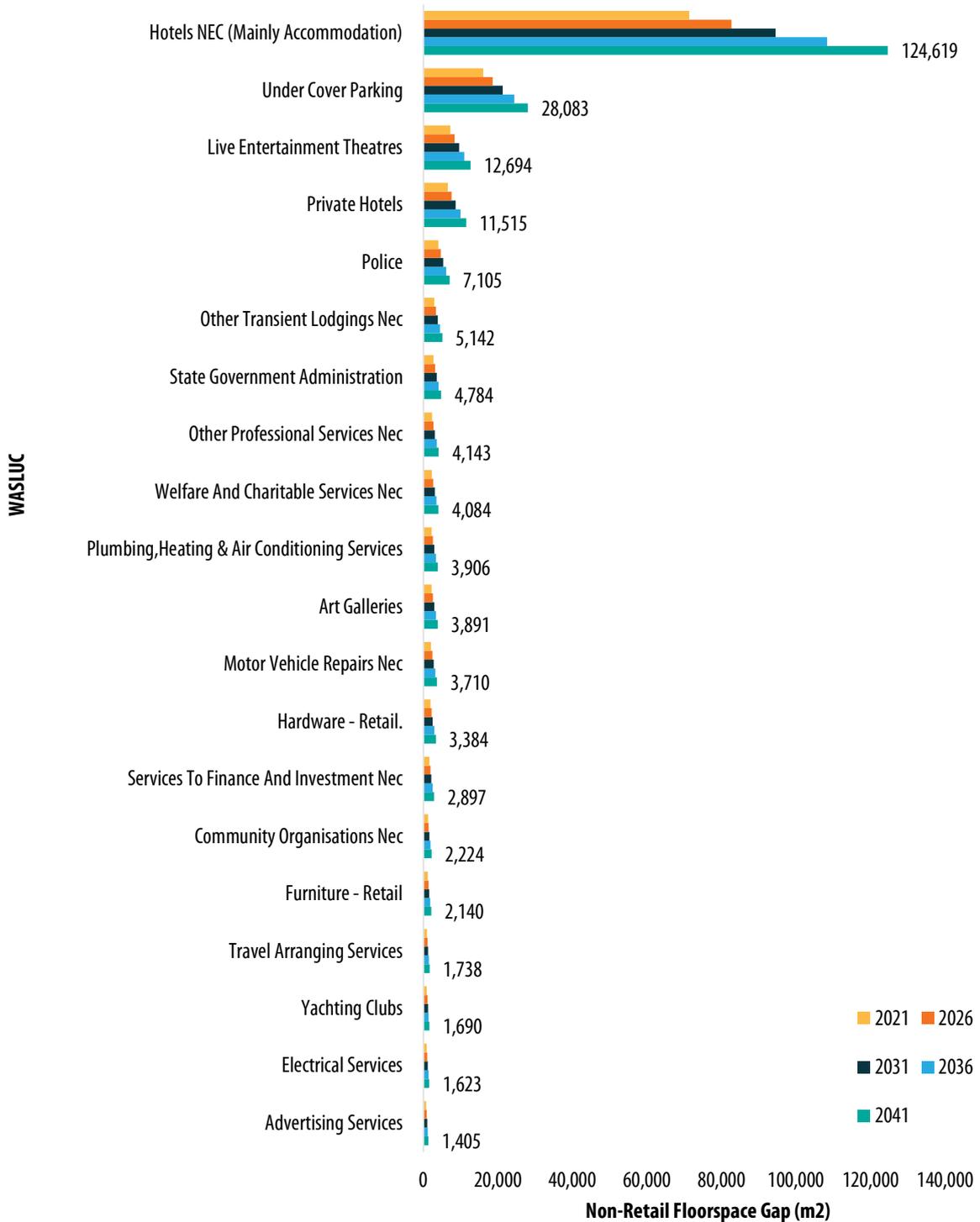
Spatial Area	2016	2021	2026	2031	2036	2041
Rockingham Strategic Metropolitan Centre 25km Catchment	237,721	277,300	336,708	396,362	469,836	561,069
Mandurah Strategic Metropolitan Centre Catchment	226,853	258,384	299,130	342,037	392,209	450,978
Armadale Strategic Metropolitan Centre Catchment	501,544	544,363	605,376	663,864	731,985	811,480
Joondalup Strategic Metropolitan Centre Catchment	627,426	662,202	722,025	786,794	869,496	976,538

Source: WA Tomorrow 2015, Pracsys 2021

The following graphs summarise the gaps in non-retail floorspace by benchmark comparison. The total non-retail floorspace gap for the City’s centres has been developed using a mix of the identified benchmarks (see Draft Activity Centre Hierarchy (Floorspace only) 2.0 2021.10.19) and a maximum level of floorspace provision (i.e. the total amount of additional floorspace was not allowed to exceed the floorspace to population ratio of the benchmarks).



Figure 144. Future Non-Retail Floorspace Gaps to Mandurah Benchmark in RSMC 25km Catchment by WASLUC

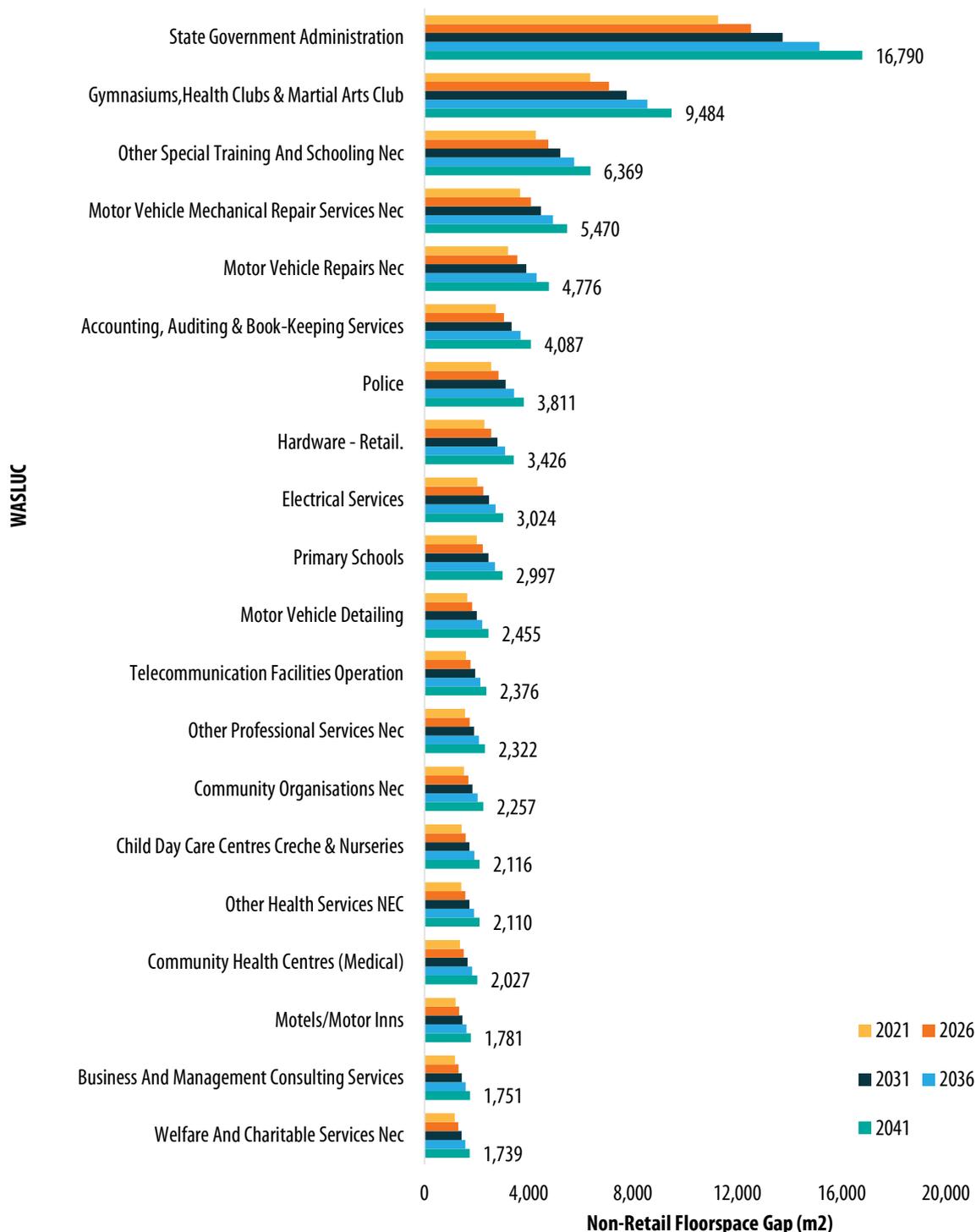


Note: Only top floorspaces are illustrated. 2041 gap value shown as data label.

Source: WA Tomorrow 2016, DPLH 2016, City of Rockingham 2021, Pracsys 2021



Figure 145. Future Non-Retail Floorspace Gaps to Cannington/Armadale Benchmark in RSMC 25km Catchment by WASLUC

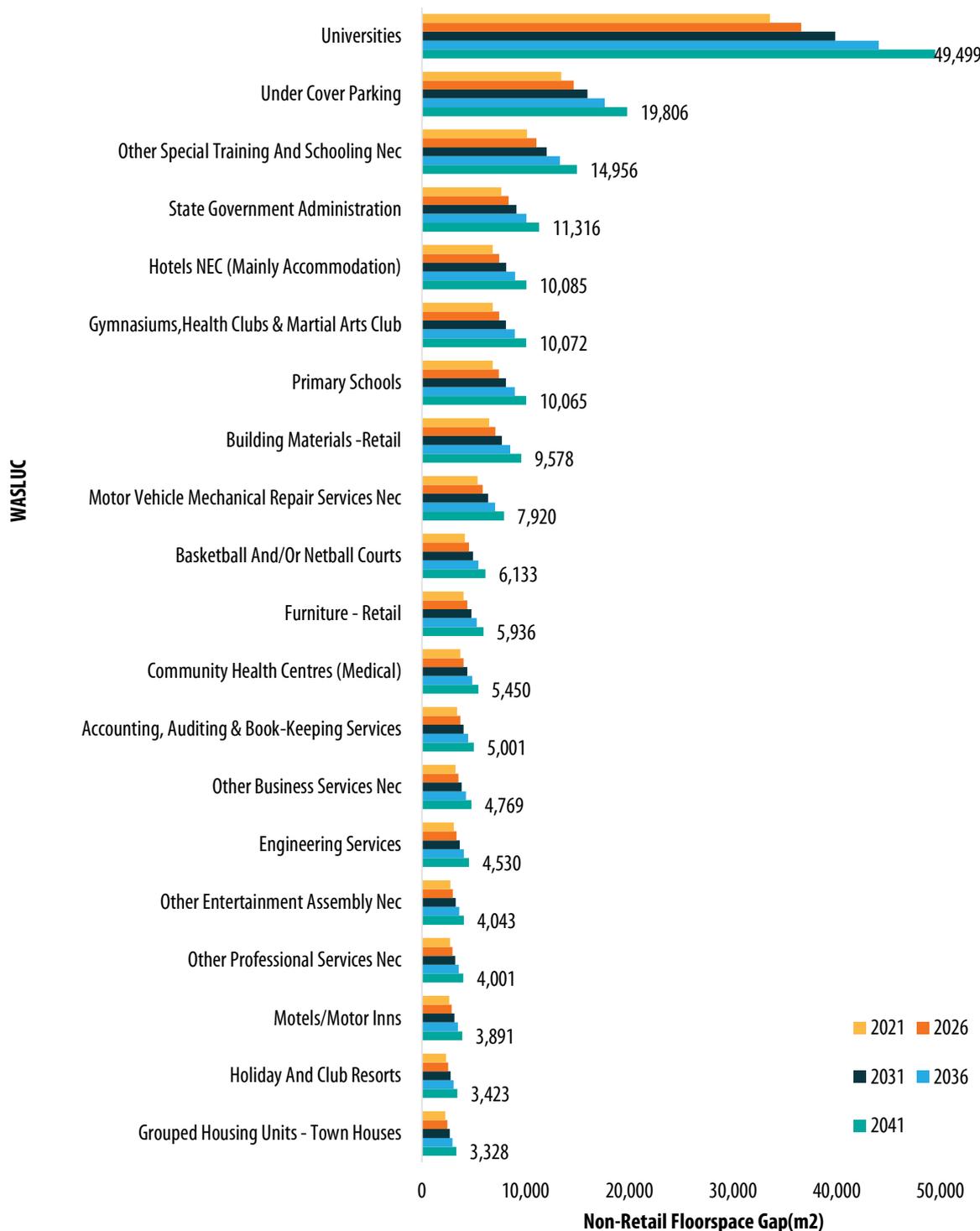


Note: Only top floorspaces are illustrated. 2041 gap value shown as data label.

Source: WA Tomorrow 2016, DPLH 2016, City of Rockingham 2021, Pracsys 2021



Figure 146. Future Non-Retail Floorspace Gaps to Joondalup Benchmark in RSMC 25km Catchment by WASLUC



Note: Only top floorspaces are illustrated. 2041 gap value shown as data label.

Source: WA Tomorrow 2016, DPLH 2016, City of Rockingham 2021, Pracsys 2021

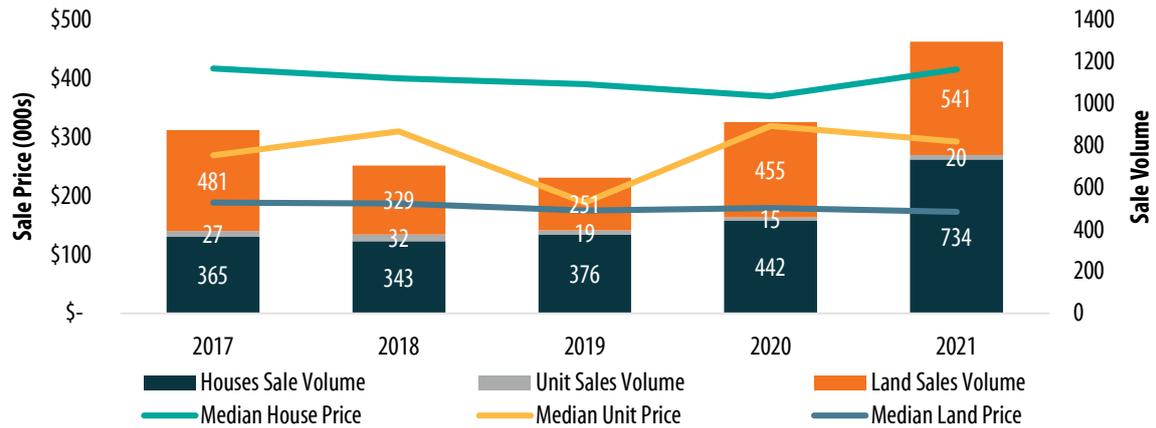


13 APPENDIX 4: PROPERTY MARKET PROFILE

Suburb of Baldivis

Sales Analysis

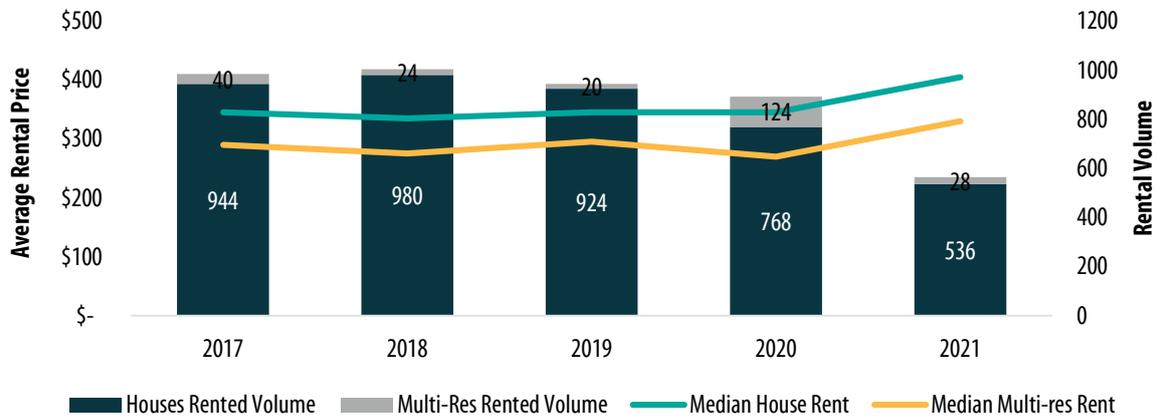
Figure 147. Suburb of Baldivis Residential Sales Prices and Volumes



Source: REIWA 2021, Pracsys 2021

Rental Analysis

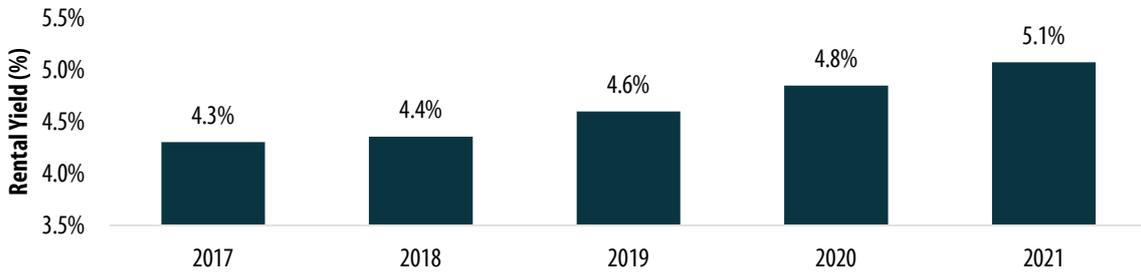
Figure 148. Suburb of Baldivis Residential Rental Prices and Volumes



Source: REIWA 2021, Pracsys 2021



Figure 149. Suburb of Baldivis Rental Yield for Houses

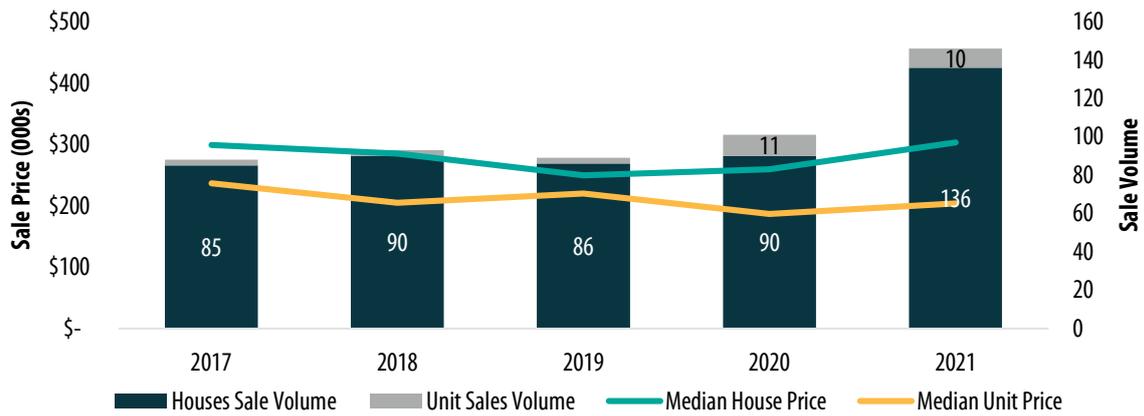


Source: REIWA 2021, Pracsys 2021

Suburb of Coo loongup

Sales Analysis

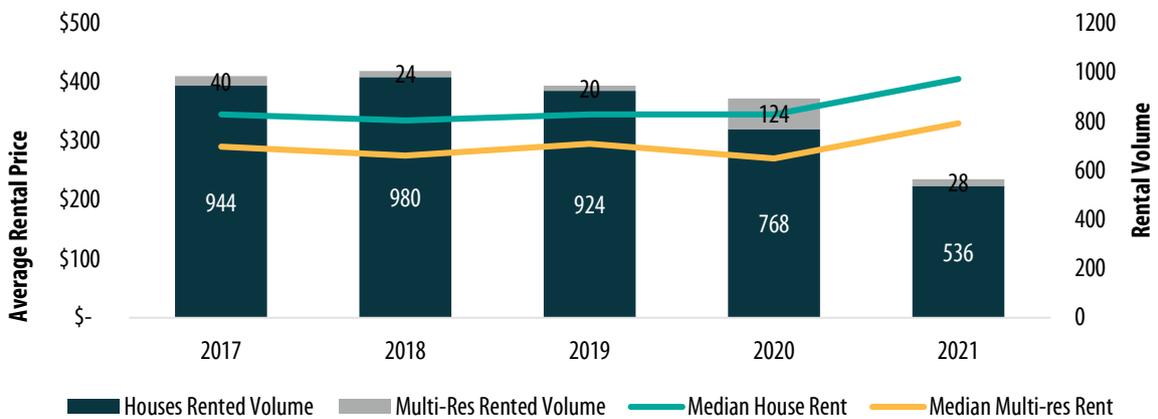
Figure 150. Suburb of Coo loongup Residential Sales Prices and Volumes



Source: REIWA 2021, Pracsys 2021

Rental Analysis

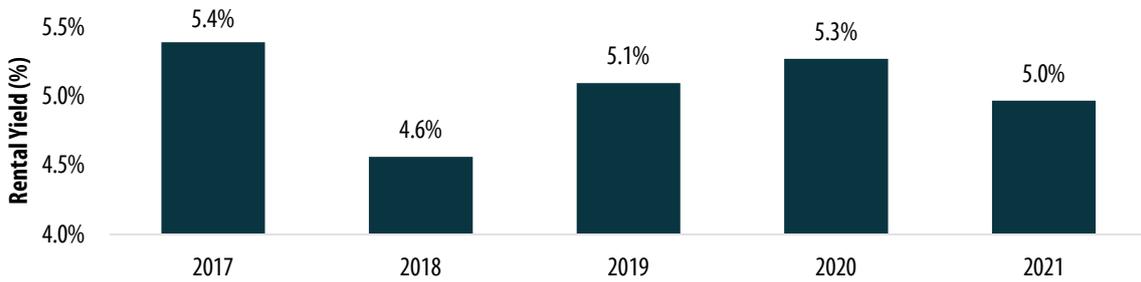
Figure 151. Suburb of Coo loongup Residential Rental Prices and Volumes



Source: REIWA 2021, Pracsys 2021



Figure 152. Suburb of Cooloongup Rental Yield for Houses

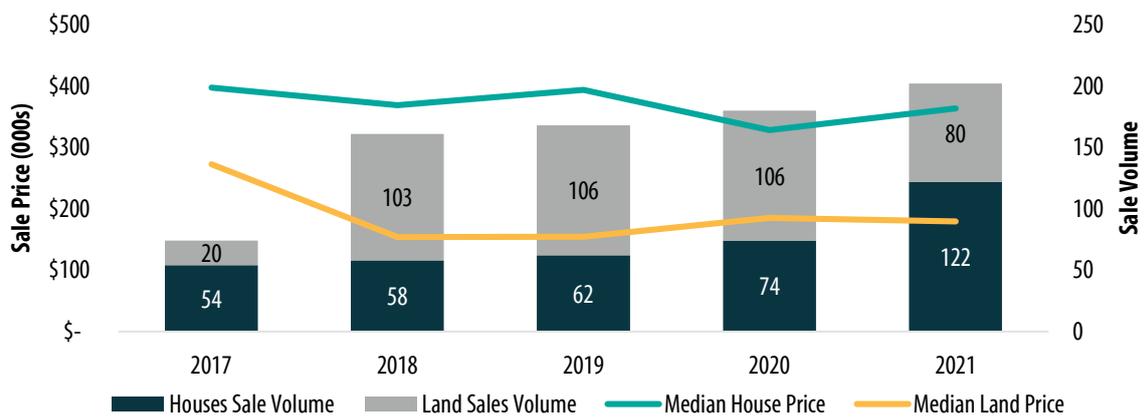


Source: REIWA 2021, Pracsys 2021

Suburb of Golden Bay

Sales Analysis

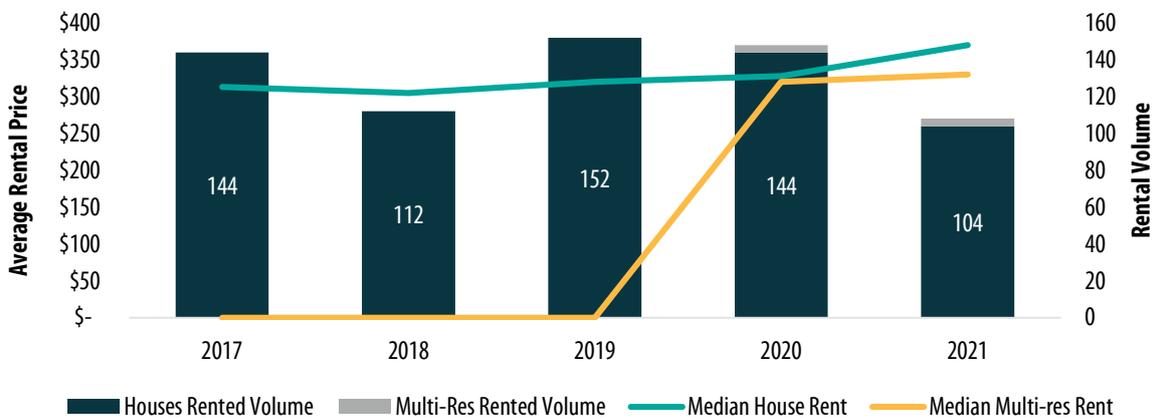
Figure 153. Suburb of Golden Bay Residential Sales Prices and Volumes



Source: REIWA 2021, Pracsys 2021

Rental Analysis

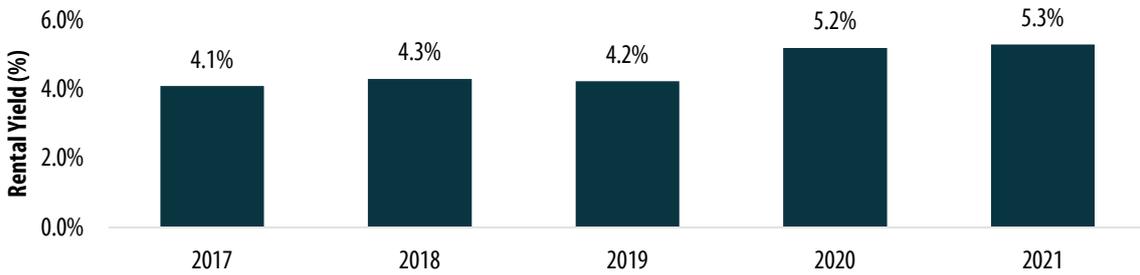
Figure 154. Suburb of Golden Bay Residential Rental Prices and Volumes



Source: REIWA 2021, Pracsys 2021



Figure 155. Suburb of Golden Bay Rental Yield for Houses

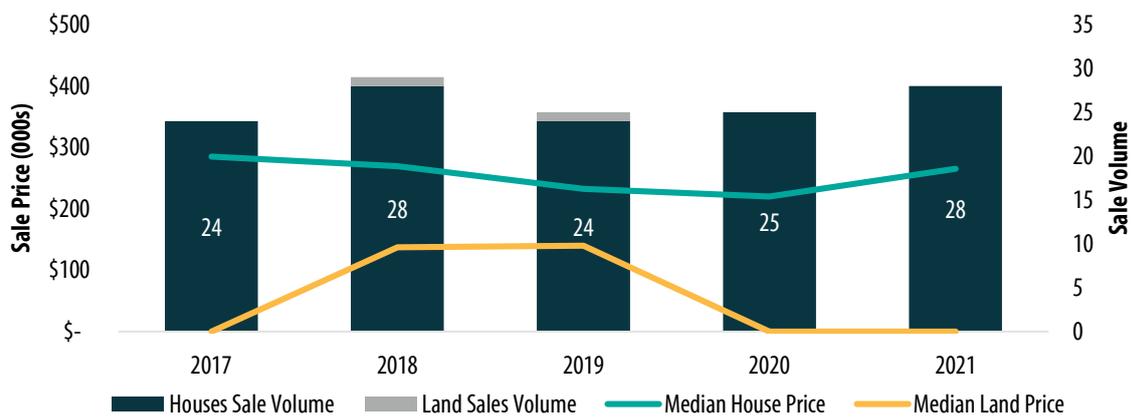


Source: REIWA 2021, Pracsys 2021

Suburb of Hillman

Sales Analysis

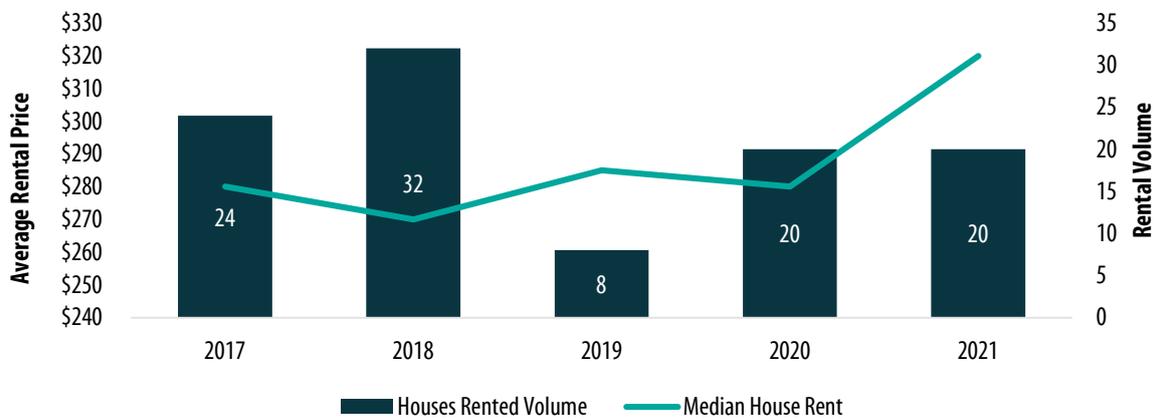
Figure 156. Suburb of Hillman Residential Sales Prices and Volumes



Source: REIWA 2021, Pracsys 2021

Rental Analysis

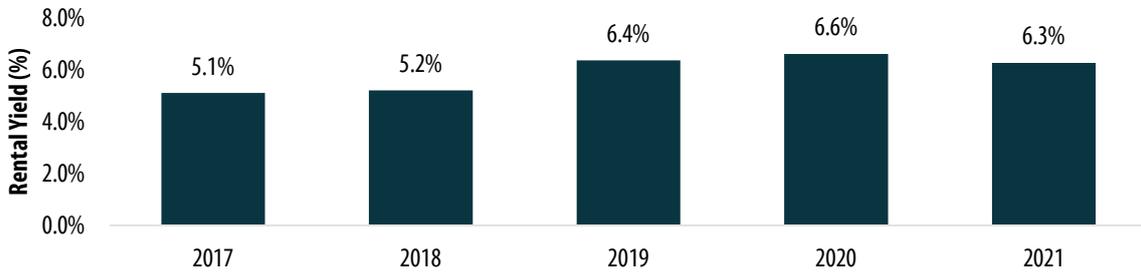
Figure 157. Suburb of Hillman Residential Rental Prices and Volumes



Source: REIWA 2021, Pracsys 2021



Figure 158. Suburb of Hillman Rental Yield for Houses

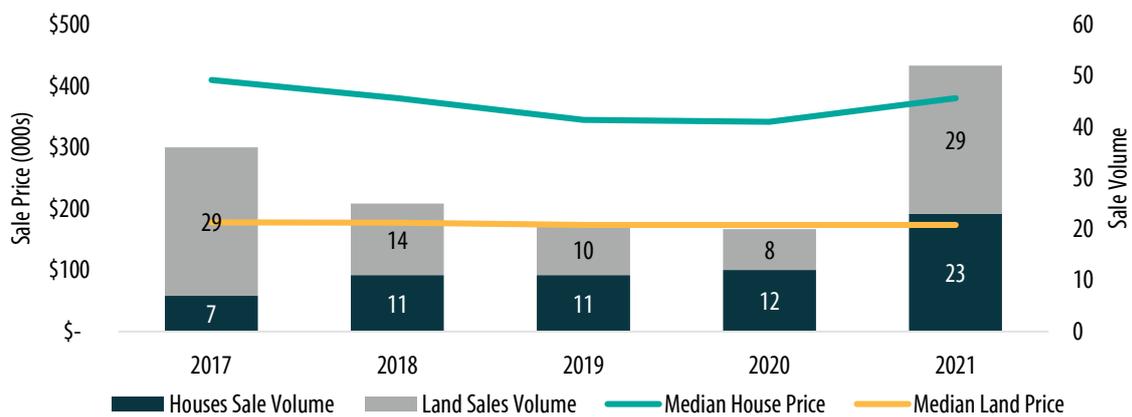


Source: REIWA 2021, Pracsys 2021

Suburb of Karnup

Sales Analysis

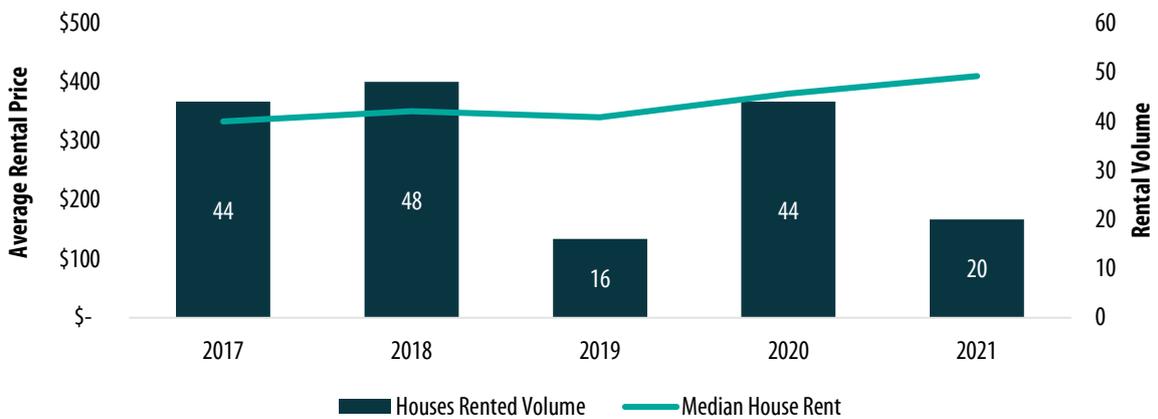
Figure 159. Suburb of Karnup Residential Sales Prices and Volumes



Source: REIWA 2021, Pracsys 2021

Rental Analysis

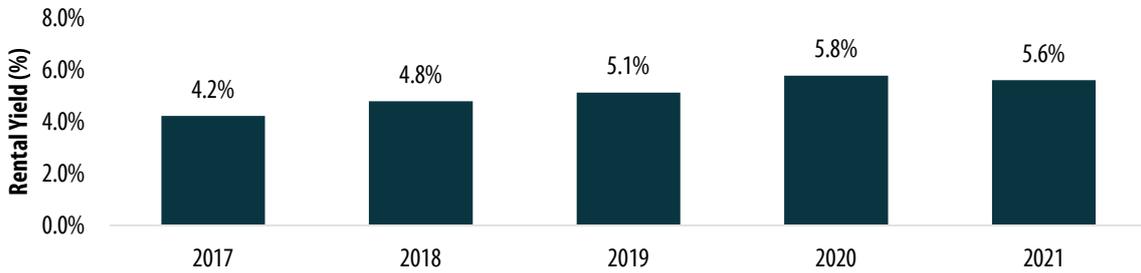
Figure 160. Suburb of Karnup Residential Rental Prices and Volumes



Source: REIWA 2021, Pracsys 2021



Figure 161. Suburb of Karnup Rental Yield for Houses

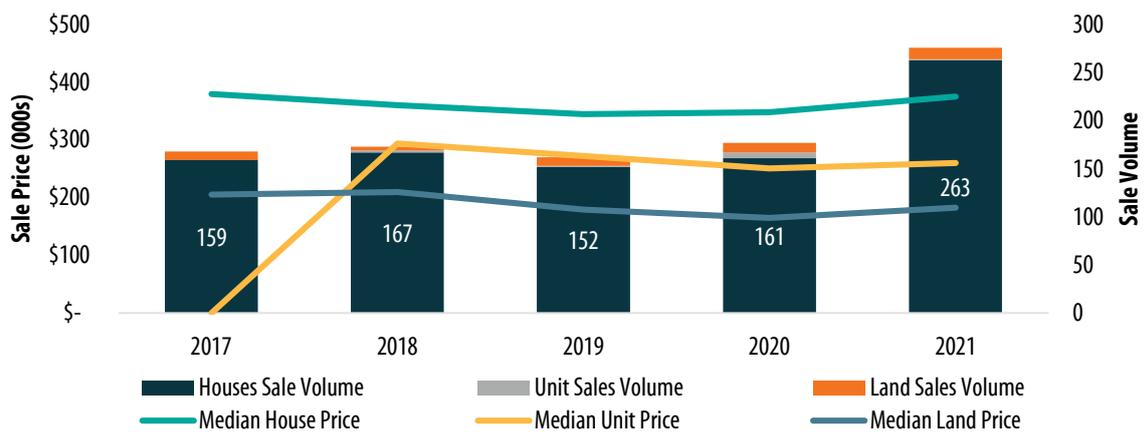


Source: REIWA 2021, Pracsys 2021

Suburb of Port Kennedy

Sales Analysis

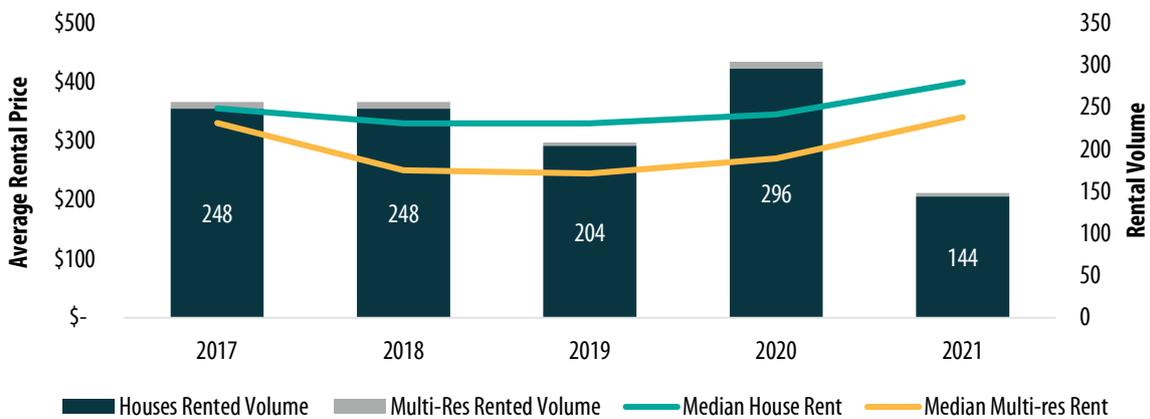
Figure 162. Suburb of Port Kennedy Residential Sales Prices and Volumes



Source: REIWA 2021, Pracsys 2021

Rental Analysis

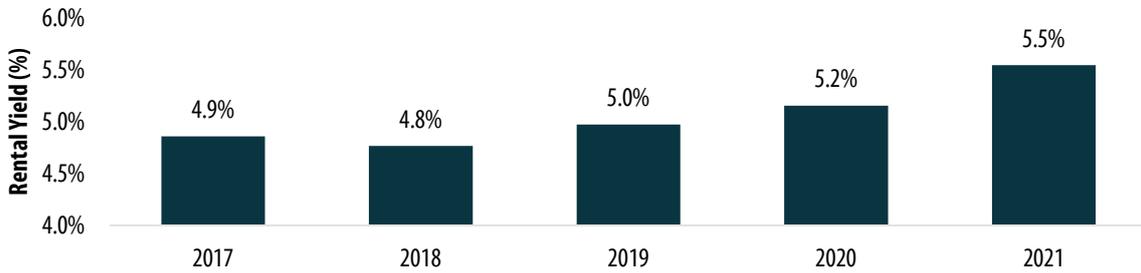
Figure 163. Suburb of Port Kennedy Residential Rental Prices and Volumes



Source: REIWA 2021, Pracsys 2021



Figure 164. Suburb of Port Kennedy Rental Yield for Houses

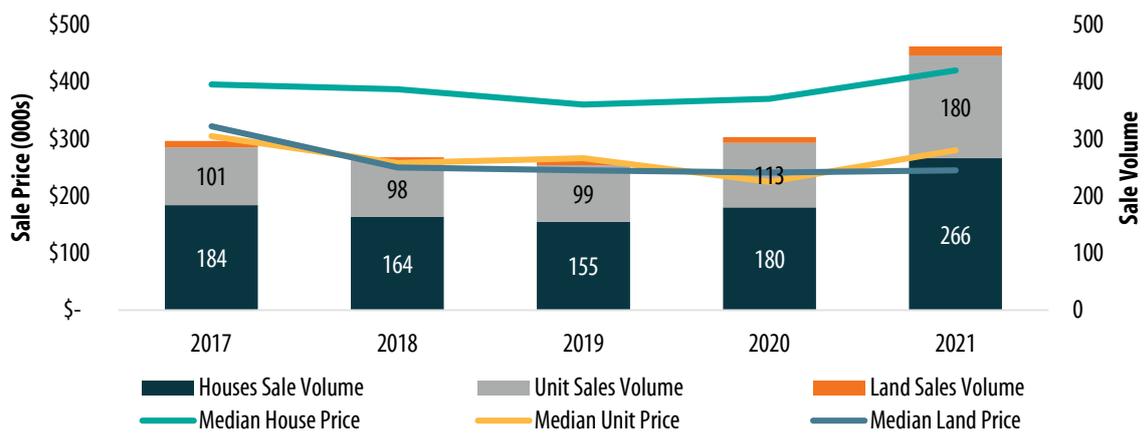


Source: REIWA 2021, Pracsys 2021

Suburb of Rockingham

Sales Analysis

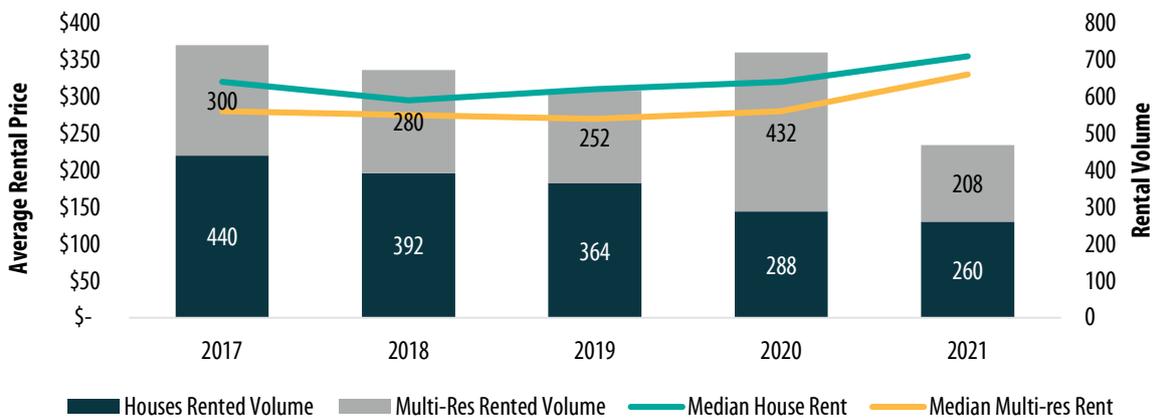
Figure 165. Suburb of Rockingham Residential Sales Prices and Volumes



Source: REIWA 2021, Pracsys 2021

Rental Analysis

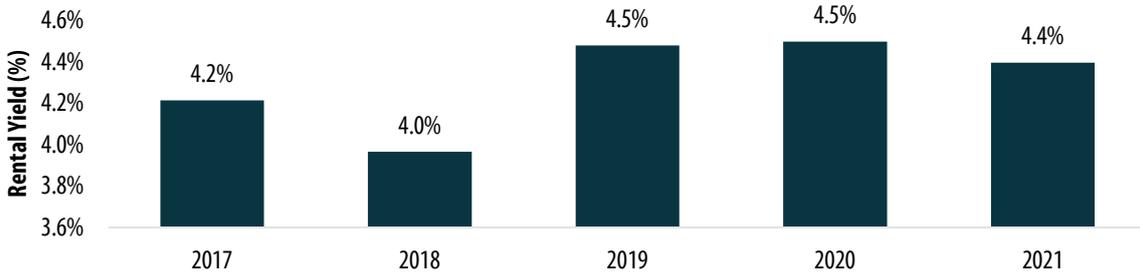
Figure 166. Suburb of Rockingham Residential Rental Prices and Volumes



Source: REIWA 2021, Pracsys 2021



Figure 167. Suburb of Rockingham Rental Yield for Houses

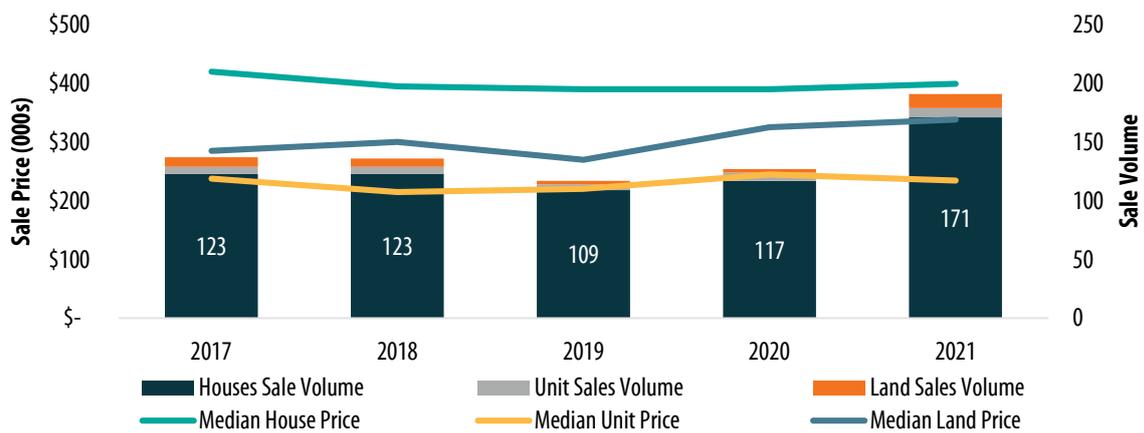


Source: REIWA 2021, Pracsys 2021

Suburb of Safety Bay

Sales Analysis

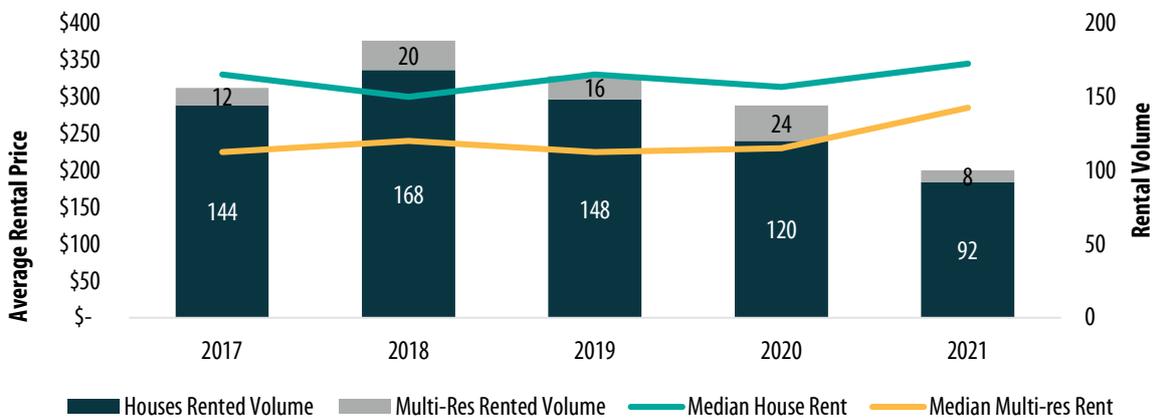
Figure 168. Suburb of Safety Bay Residential Sales Prices and Volumes



Source: REIWA 2021, Pracsys 2021

Rental Analysis

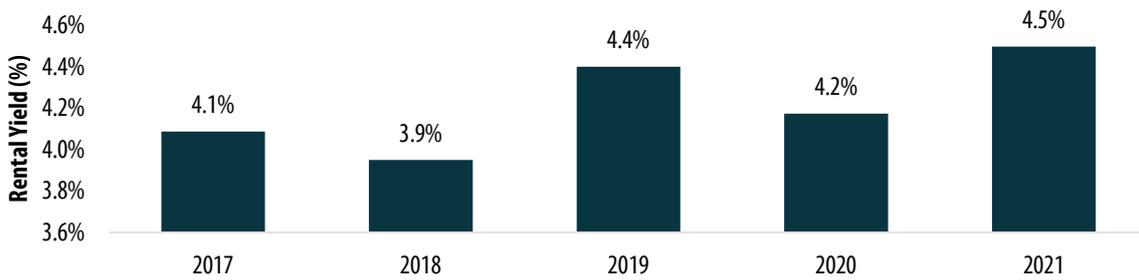
Figure 169. Suburb of Safety Bay Residential Rental Prices and Volumes



Source: REIWA 2021, Pracsys 2021



Figure 170. Suburb of Safety Bay Rental Yield for Houses

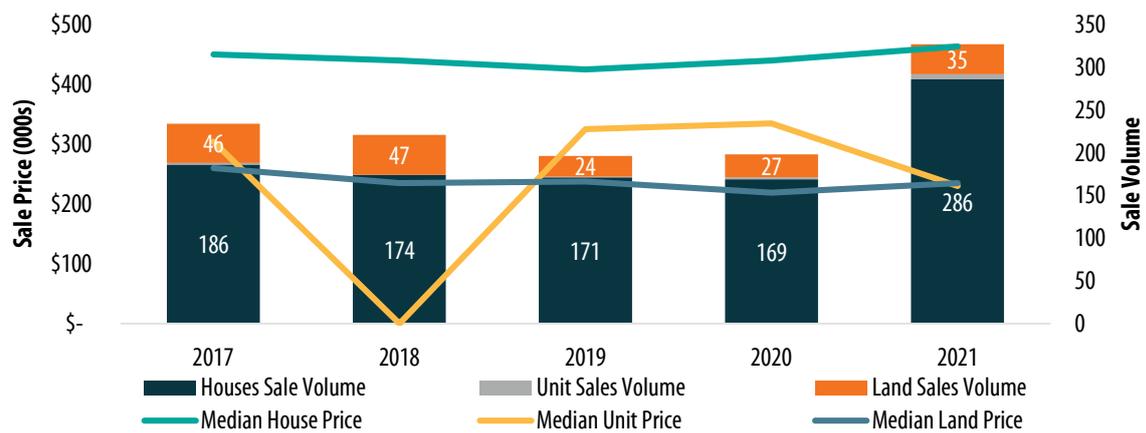


Source: REIWA 2021, Pracsys 2021

Suburb of Secret Harbour

Sales Analysis

Figure 171. Suburb of Secret Harbour Residential Sales Prices and Volumes



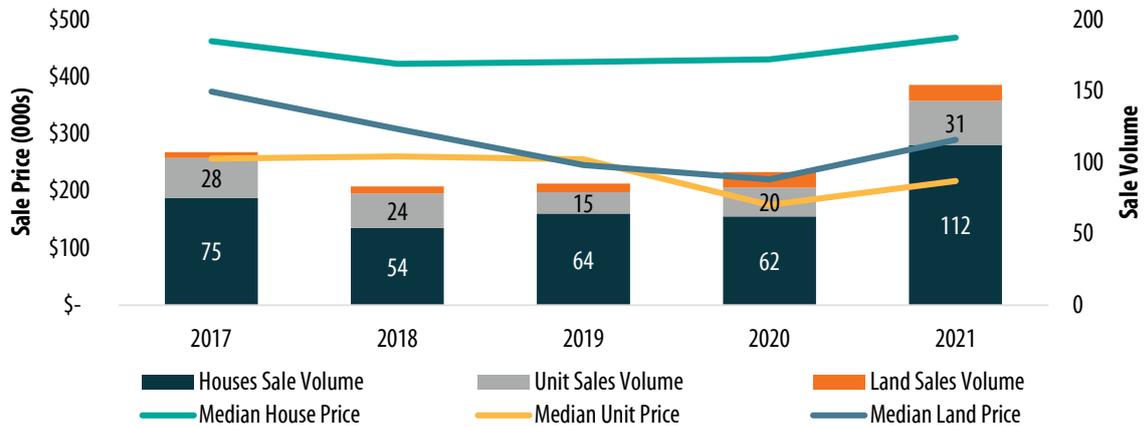
Source: REIWA 2021, Pracsys 2021



Suburb of Shoalwater

Sales Analysis

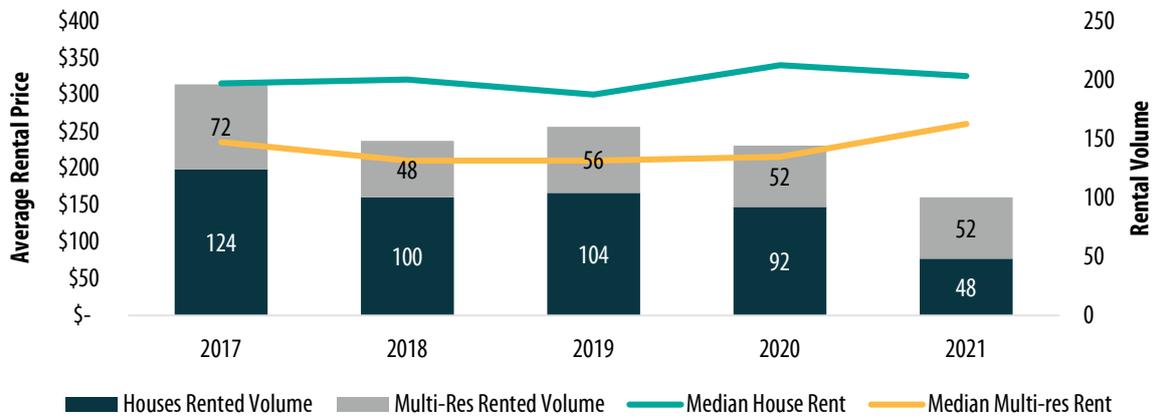
Figure 172. Suburb of Shoalwater Residential Sales Prices and Volumes



Source: REIWA 2021, Pracsys 2021

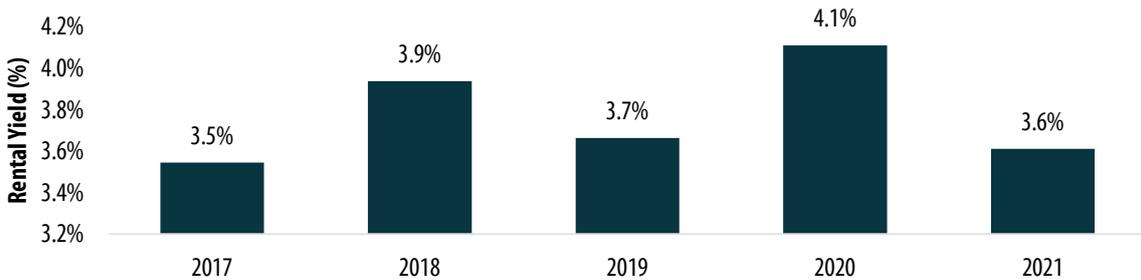
Rental Analysis

Figure 173. Suburb of Shoalwater Residential Rental Prices and Volumes



Source: REIWA 2021, Pracsys 2021

Figure 174. Suburb of Shoalwater Rental Yield for Houses



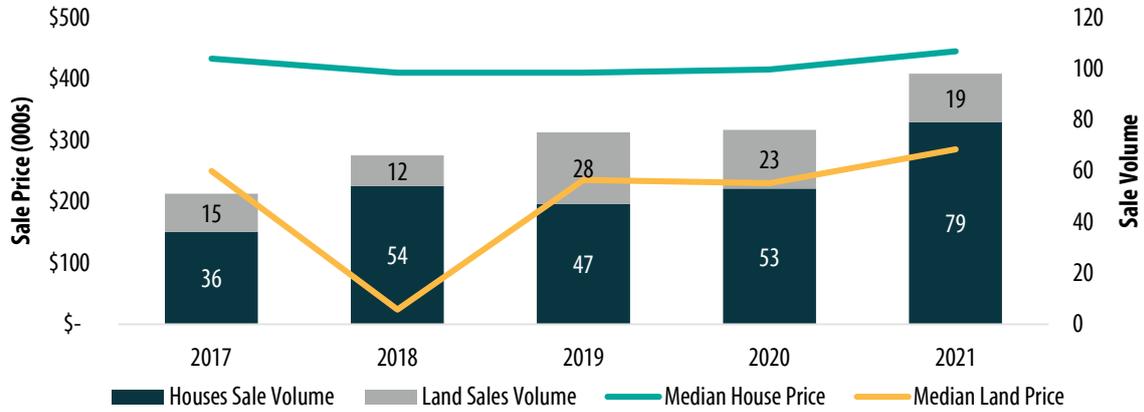
Source: REIWA 2021, Pracsys 2021



Suburb of Singleton

Sales Analysis

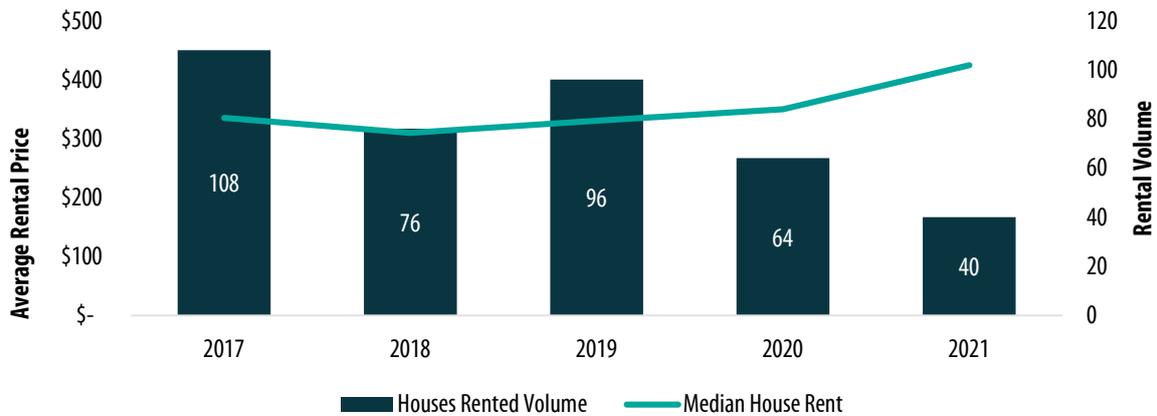
Figure 175. Suburb of Singleton Residential Sales Prices and Volumes



Source: REIWA 2021, Pracsys 2021

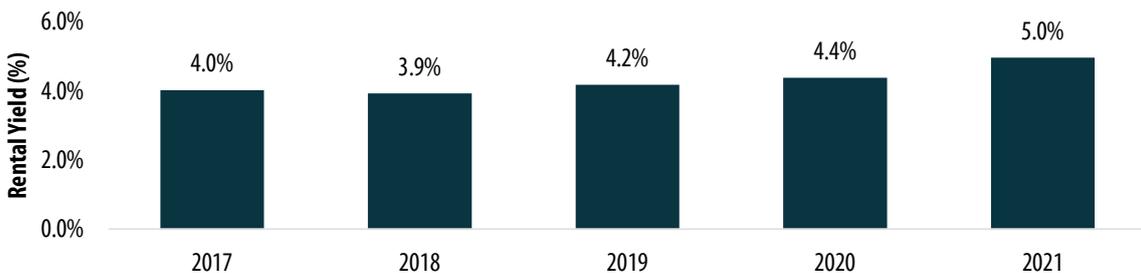
Rental Analysis

Figure 176. Suburb of Singleton Residential Rental Prices and Volumes



Source: REIWA 2021, Pracsys 2021

Figure 177. Suburb of Singleton Rental Yield for Houses



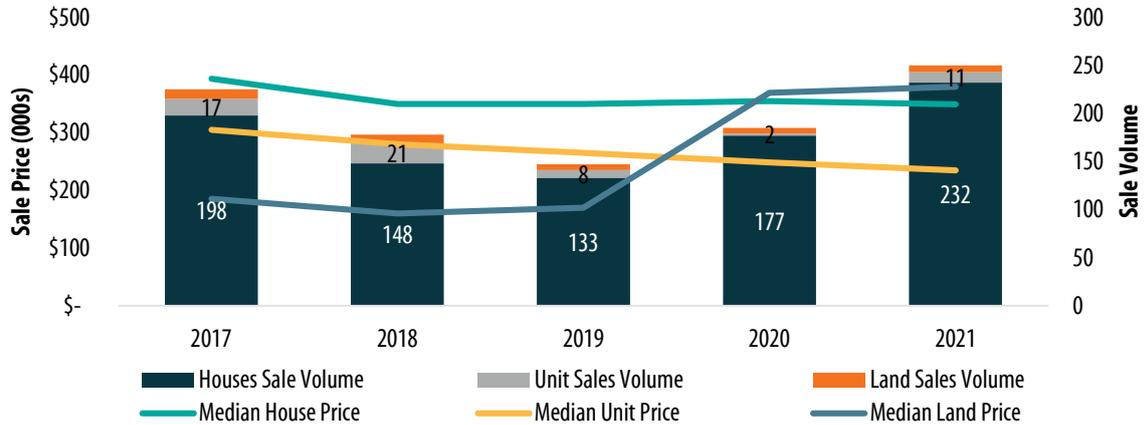
Source: REIWA 2021, Pracsys 2021



Suburb of Waikiki

Sales Analysis

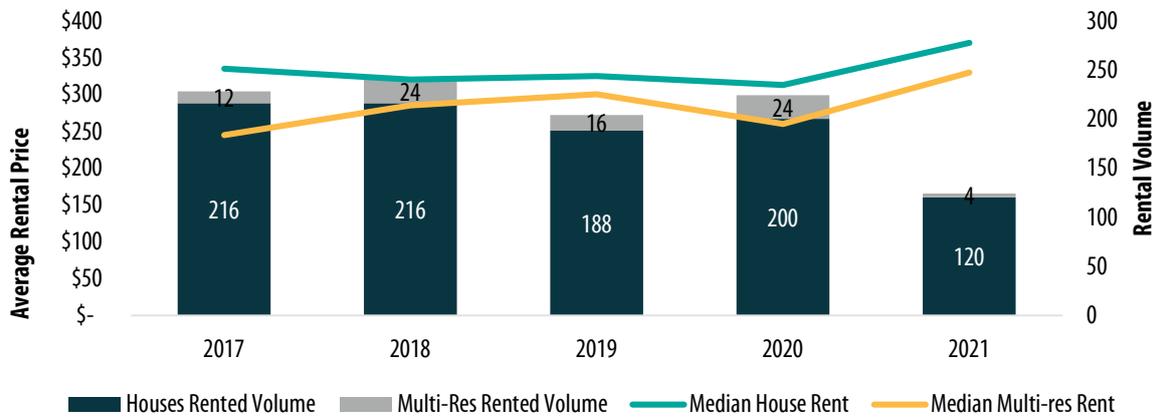
Figure 178. Suburb of Waikiki Residential Sales Prices and Volumes



Source: REIWA 2021, Pracsys 2021

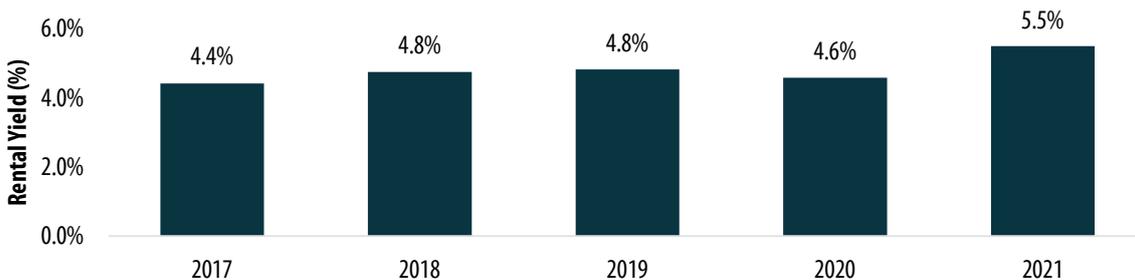
Rental Analysis

Figure 179. Suburb of Waikiki Residential Rental Prices and Volumes



Source: REIWA 2021, Pracsys 2021

Figure 180. Suburb of Waikiki Rental Yield for Houses



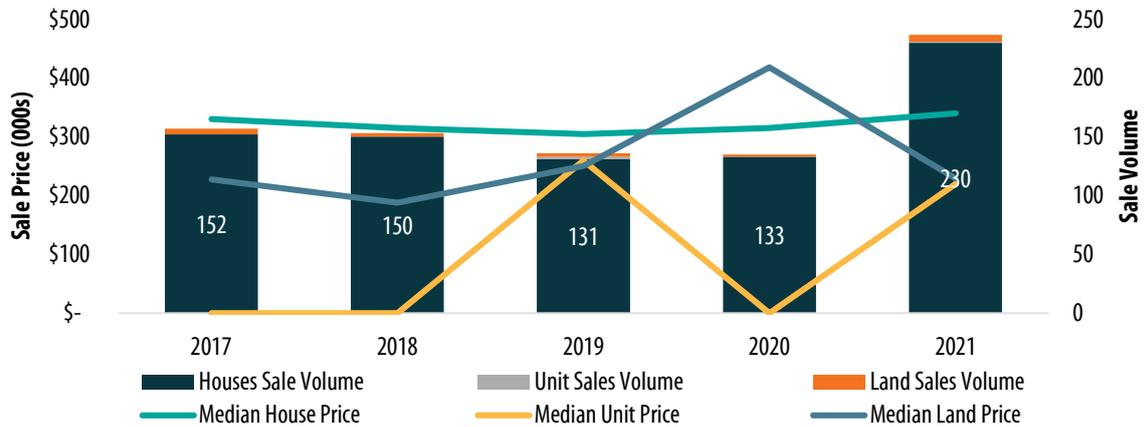
Source: REIWA 2021, Pracsys 2021



Suburb of Warnbro

Sales Analysis

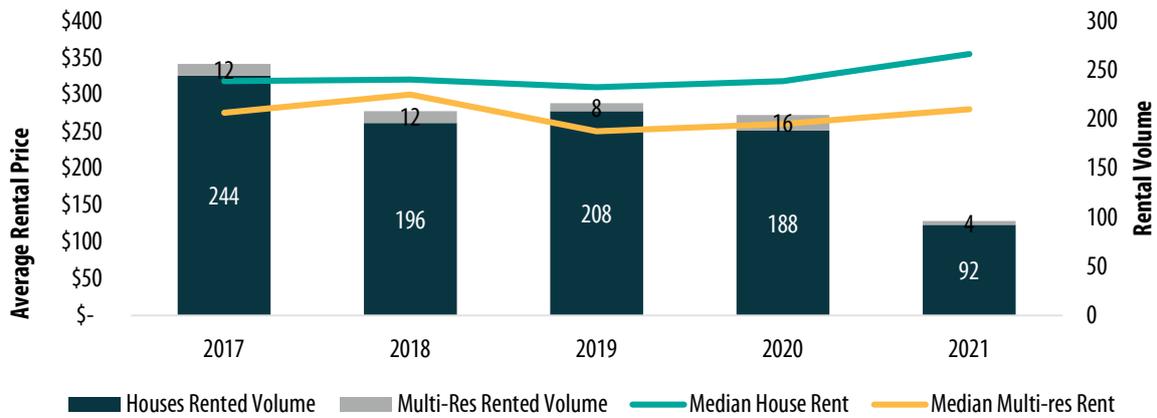
Figure 181. Suburb of Warnbro Residential Sales Prices and Volumes



Source: REIWA 2021, Pracsys 2021

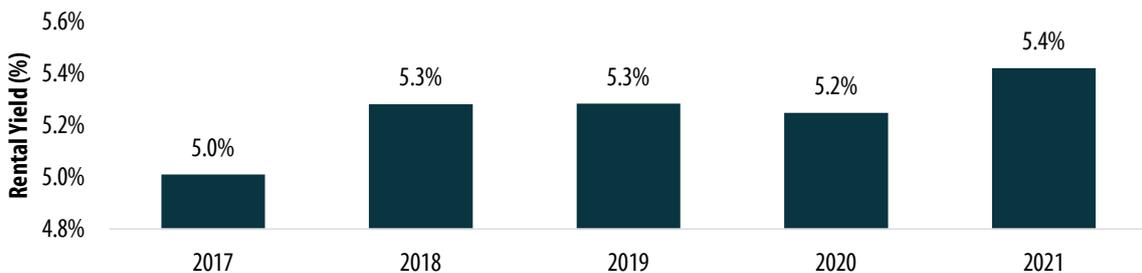
Rental Analysis

Figure 182. Suburb of Warnbro Residential Rental Prices and Volumes



Source: REIWA 2021, Pracsys 2021

Figure 183. Suburb of Warnbro Rental Yield for Houses



Source: REIWA 2021, Pracsys 2021