11.0 APPENDIX A

Retail Sustainability Assessment

urbis

Retail Sustainability Assessment

Baldivis Activity Centre Expansion

March 2012

urbis

URBIS STAFF RESPONSIBLE FOR THIS REPORT WERE:

Director	Jeff Armstrong
Consultant	Catrin Griffiths
Job Code	MPE1-1564
Report Number	M11/98

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Australia Asia Middle East
urbis.com.au

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Introduction

REPORT OBJECTIVE

Stockland has commissioned Urbis to prepare a Retail Sustainability Assessment (RSA) as required under Section 6.5 – Retail Sustainability Assessments of the State Planning Policy 4.2 – Activity Centres for Perth and Peel. This report is designed to assess the need and demand for additional shop/retail floorspace in the Baldivis Activity Centre and its impacts, if any, on competitive centres in the broader region.

BALDIVIS DESIGNATION

Stockland Baldivis is the main retail complex within the Baldivis Activity Centre and currently provides 5,476 sq.m of shop/retail floorspace (PLUC 5). There are also freestanding retail uses in Settlers Avenue and in the South-East Precinct which are co-located with the shopping centre. In total, the Baldivis Activity Centre currently has 8,728 sq.m of built PLUC 5 shop floorspace.

In addition, already approved for the Activity Centre is 13,487 sq.m of further PLUC 5 shop floorspace, including the Stage 2A expansion of Stockland Baldivis shopping centre, as well as other floorspace within the town centre. Refer to the table below.

TABLE 1 – EXISTING AND APPROVED FLOORSPACE

EXISTING FLOORSPACE	OWNER	PLUC 5 SHOP/RETAIL NLA
Stockland Baldivis Shopping Centre – Stage 1	Stockland	5,476 sq.m
Liquor Store (including extensions)	Other	1,224 sq.m
Lot 8 (Dome Building)	Other	869 sq.m
Service Station	Other	193 sq.m
Fast Food Outlet (Hungry Jacks)	Other	213 sq.m
Liquor Store	Other	431 sq.m
Fast Food Outlet (McDonalds)	Stockland	322 sq.m
Sub-Total Existing PLUC 5 Uses 2011		**8,728 sq.m**
APPROVED FLOORSPACE	Owner	PLUC 5 SHOP/RETAIL NLA
Stockland Baldivis Shopping Centre – Stage 2A	Stockland	11,368 sq.m
Settlers Avenue East Shops (building 2)	Stockland	410 sq.m
Settlers Avenue East Shops (building 3)	Stockland	340 sq.m
Lot 17 Atwick	Other	659 sq.m
Lot 3 (Masters)	Other	500 sq.m
Fast Food Outlet (Red Rooster)	Stockland	210 sq.m
Sub-Total Approved PLUC 5 Uses		**13,487 sq.m**
Total Existing & Approved PLUC 5 Floorspace		**22,215 sq.m**

Under the SPP 4.2, District Centres are intended to *"focus on servicing the daily and weekly needs of residents."* In terms of retail, they can include discount department stores, supermarkets, and specialty shops. In this regard, District Centres are expected to have a community focus on food and convenience type product shopping needs, including local services. The main trade area population for a district centre is suggested to be usually between 20,000 – 50,000 persons.

FUTURE DEVELOPMENT

The potential for expansion of the Baldivis Activity Centre is outlined below.

As outlined in the Baldivis Activity Centre Structure Plan, the next stage of expansion proposes the addition of some 13,716 sq.m of PLUC 5 shop floorspace as shown in Table 2.

TABLE 2 – POTENTIAL EXPANSION

POTENTIAL EXPANDED FLOORSPACE	OWNER	PLUC 5 SHOP/RETAIL NLA
Stockland Baldivis Shopping Centre Stage 2B	Stockland	8,448 sq.m
Settlers Avenue East Shops (building 4)	Stockland	400 sq.m
Settlers Avenue East Shops (building 6)	Stockland	400 sq.m
Lot 6 Settlers	Other	650 sq.m
Lot 12 Atwick	Other	668 sq.m
Corner Settlers & Mennock (west side)	Other	350 sq.m
Fast Food Outlet (Pad Site 3)	Stockland	300 sq.m
Lot 9001 (Settlers Avenue)	Other	2,500 sq.m
Total Potential Additional PLUC 5 Floorspace		**13,716 sq.m**

As a result of this, in 2014, the Baldivis Activity Centre shop retail floorspace could be 35,931 sq.m at 2014, as shown in Table 4 below. The PLUC 5 floorspace refers to the shops within the shopping centre as well as tenants along Settlers Avenue, South East Precinct and pad sites.

However, not all of this additional floorspace will likely be devoted to retail uses. In reality an estimated 20% of specialty shop tenancies in a shopping centre are occupied by non-PLUC 5 shop floorspace. Therefore the floorspace addition analysed in this report's need and demand section represents the potential PLUC 5 floorspace at Baldivis Activity Centre that could be added as part of this expansion but in practice could be lower depending on the eventual tenant mix.

We have assessed impacts of the potential additional floorspace based on all of the Stockland Baldivis Stage 2B expansion being PLUC 5 retail floorspace.

TABLE 3 – BALDIVIS AT 2014

FLOORSPACE	PLUC 5 SHOP/RETAIL NLA
Existing and Approved Floorspace	22,215 sq.m
Potential Additional Floorspace	13,716 sq.m
Total Existing, Approved and Potential Floorspace	**35,931 sq.m**

RETAIL SUSTAINABILITY ASSESSMENT

The Activity Centres Policy states that a Retail Sustainability Assessment is required for a *'major development and scheme amendment or structure plan that provides for a Major Development'* which is defined as "*Development of any building or extension/s to an existing building where the building or extensions are used or proposed to be used for shop-retail purposes and where the shop-retail nla of the:*

- *proposed building is more than 10,000 sq.m; or*
- *extension/s is more than 5,000 sq.m.*"

As described in the Activity Centres Policy, "*A Retail Sustainability Assessment (RSA) assesses the potential economic and related effects of a significant retail expansion on the network of activity centres in a locality. It addresses such effects from a local community access or benefit perspective, and is limited to considering potential loss of services, and any associated detriment caused by a proposed development. Competition between existing businesses of itself is not considered a relevant planning consideration.*"

The RSA outlined in this report addresses the following:

1. The need and demand for additional PLUC 5 shop floorspace at Baldivis Activity Centre.
2. The impact of expansion of PLUC 5 shop floorspace at Stockland Baldivis on the existing and planned centres hierarchy.

REPORT OUTLINE

The report has five sections as follows:

- **Section 1** discusses the local and regional context of Baldivis Activity Centre, including the Stockland Baldivis shopping centre, the centre's current composition and the key features of the additional PLUC 5 shop floorspace.
- **Section 2** presents an analysis of the trade area market, including forecast population growth, retail spending by residents and the socio-economic profile of residents.
- **Section 3** outlines an overview of the retail supply in the region of relevance to Baldivis Activity Centre.
- **Section 4** outlines a summary of the current performance of Baldivis Activity Centre.
- **Section 5** presents the need, demand and impact assessment for increasing PLUC 5 shop floorspace at Baldivis Activity Centre.

Executive Summary

The main findings and conclusions of the Retail Sustainability Assessment outlined in this report are as follows:

- Stockland Baldivis is located within the municipality of Rockingham, approximately 40km from the Perth Central Business District (CBD). The centre forms the majority part of the Baldivis Activity Centre, which is located within the South-West sub-region of Perth as specified within Directions 2031. The Baldivis Activity Centre currently provides around 8,700 sq.m of PLUC 5 shop/retail floorspace and performs an important shopping function for residents of the developing housing estates in the area, as well as the longstanding rural residential areas in Baldivis and to the south, east and west.

- The retail facilities within the Baldivis Activity Centre have the potential to serve a main trade area comprising the suburbs of Baldivis and Karnup. It is a naturally contained trade area due to sizeable urban breaks to the east, west and south. Over time the centre can be expected to attract upwards of 30% of trade from beyond the main trade area, with the vast majority coming from Rockingham/Warnbro and Kwinana.

- The population forecasts outlined in this report are based on WAPC projections and consideration of recent growth trends, allocated residential land release and anticipated development activity. We believe the forecasts outlined in this report are conservative, particularly post 2021 and the area is likely to realise a larger resident population base than forecast by WAPC. Population projections prepared for the City of Rockingham significantly exceed that forecast by WAPC.

- The 2011 main trade area population for Baldivis is estimated at some 15,900 people, of which 14,180 live in the primary trade area. Over the next 20 years the main trade area population is forecast to increase to 44,100 people. This represents an additional influx of population into the area over the next 20 years of 28,200 people. In the broader study area, covering the municipalities of Rockingham and Kwinana, there is currently around 136,000 people. This region is forecast by WAPC to house approximately 190,000 people by 2031.

- The main trade area retail market is currently estimated at $186 million, including $165 million in the primary sector ($2011 excluding GST). Throughout the balance of the broader study area retail spending amounts to some $1.43 billion.

- Forecast growth in retail spending is estimated by combining forecast population with anticipated growth in real retail spending per capita. Over the next 20 years to 2031, retail spending is forecast to increase by $545 million in the main trade area to $731 million. In the broader study area retail spending is forecast at $2.73 billion, an increase of $1.3 billion on 2011. This growth in retail spending will provide demand and market capacity for an increased provision of retail floorspace at Baldivis Activity Centre and other centres in the region.

- Within the defined main trade area for Baldivis Activity Centre, there is currently one District Centre, which is Baldivis itself. There is also a planned District Centre at Karnup to the south of Baldivis. These two centres will serve as the key shopping destinations for residents of the main trade area, with Baldivis taking a leading role due to being the incumbent centre and proximity to a larger population base in the foreseeable future. Also in the main trade area a range of planned neighbourhood/local centres will serve localised catchments and convenience shopping needs. A number of established centres draw trade from the main trade area of the Baldivis Activity Centre including Rockingham, the highest order centre in the region, Kwinana secondary centre and several district centres (e.g. Warnbro and Secret Harbour). The extent to which these centres capture expenditure of main trade area residents will vary over time as their scale and composition changes.

- At present it is estimated that approximately 67% of main trade area retail resident expenditure is being directed to centres outside the main trade area. This is a high level of escape expenditure and indicates that the current supply of PLUC 5 shop/retail floorspace in the main trade area is insufficient to properly cater to the needs (even convenience based shopping) of main trade area residents.

- The low supply of PLUC 5 shop/retail floorspace is further evidenced by the trading performance of the Stockland Baldivis centre which is achieving a turnover productivity (i.e. per sq.m) about 2% more than a comparable supermarket centre, and 32% higher than a discount department store based centre. The centre is also achieving strong trading growth on the back of the high levels of residential development and population growth in the area.

- Currently, main trade area residents generate demand for 31,200 sq.m of PLUC 5 shop/retail floorspace. With only 8,728 sq.m provided in the main trade area, there is 22,400 sq.m of demand being directed to centres outside of the main trade area. Some of this demand will always be directed outside of the main trade area reflective of the typical diverse shopping patterns of consumers, the lack of higher order centres in the main trade area, expenditure at place of work, etc. On the reasonable basis that 58% of expenditure is retained locally (which allows for the vast majority of convenience based expenditure but less than half of discretionary spending to be undertaken locally) and allowing for a share of floorspace demand in the main trade area is supported by markets outside the main trade area, there is currently demand for an additional 13,400 sq.m of PLUC5 shop/retail floorspace in the main trade area. The extra capacity for PLUC5 shop floorspace increases to almost 30,000 sq.m by 2016 and approximately 50,000 sq.m by 2021.

- There is clearly substantial capacity in the market to support a major expansion at the Baldivis Activity Centre (i.e. proposed 27,200 sq.m by 2014) and development of other smaller centres throughout the area. Growth at Baldivis is being driven by strong market growth in the current trade area, rather than diverting sales from other centres.

- The proposed major expansion of Baldivis Activity Centre will take it above the longstanding 25,000 sq.m floorspace allocation. As demonstrated in the recent population growth since 2004, the market for Baldivis has grown dramatically. In addition, real spending growth always increases the potential scale of centres over time. Being flexible enough to support new retail formats and retailers seeking representation in an area will add to the attractiveness of Baldivis and its ability to service the shopping needs of its main trade area population, which is within the indicative service population for a district centre as defined in *Activity Centres for Perth and Peel.*

- The analysis of need and demand of PLUC 5 shop/retail floorspace in the main trade area and at the Baldivis Activity Centre indicates the following:

  - The proposed expansion of retail facilities at Baldivis Activity Centre in 2014 (i.e. 27,200 sq.m) would address unmet market demand. Beyond 2014, strong market growth would provide support for planned local centres and/or other development within the Baldivis Activity Centre.

  - A DDS is supportable at Baldivis Activity Centre in 2014, albeit at an initial modest but viable trading level. Strong market growth would result in the DDS trading at an above average turnover level well before 2020.

  - There will be demand available to support supermarkets other than those proposed at Stockland Baldivis within the next 5-7 years (e.g. Tuart Ridge and Baldivis North). Ongoing forecast strong market growth would provide support for other supermarkets in the longer term (notably other centres planned in the area).

  - The proposed development of upwards of 2,500 sq.m of PLUC 5 shop retail floorspace along Settlers Avenue (north of the Stockland centre) could be accommodated post development of the Stockland centre. Earlier development of these uses would not be supportable given the benefit the Stockland centre would provide in terms of shopper activity levels and associated spin-off benefits. Ultimately the potential for this space will be dependent on its connectivity with the Stockland asset and traffic flows along this section of Settlers Avenue (and extension of this road as a thoroughfare). Retail works best when it is contiguous and concentrated within the town centre.

  - The proposed expansion of retail uses at the Baldivis Activity Centre would not impact the potential development of retail facilities at the planned Karnup centre. Ultimately the progressive development of this centre will be reliant on the population levels in the secondary trade area (i.e. area around Karnup). Based on the population projections used in this report (and for the secondary trade area) suggest a neighbourhood centre could be developed between 2020 and

2025. As there would be around 44,000 people in the main trade area by 2031, there would not be support for a DDS at the planned Karnup centre until beyond 2031.

- The proposed development at Baldivis Activity Centre would not impact the potential for retail development elsewhere in the Rockingham/Kwinana region as it addresses local demand.

▪ The analysis of trading impacts is based on the proposed Stage 2B expansion of the Stockland Baldivis centre as well as other several Stockland owned sites (i.e. an additional 9,548 sq.m). This analysis indicates the following:

  - The assessed level of impact on any one centre is manageable and the proposed expansion would not be expected to adversely impact the role, function and viability of other activity centres.

    ▪ Post expansion of the Baldivis Activity Centre, almost all affected centres are expected to achieve a higher turnover in 2014 than their current turnover in 2011, as market growth offsets the assessed one-off impacts. Those that do not are also affected by other expansions in the market including the effects of Kwinana, Warnbro and Secret Harbour centre expansions. The expansion of retail facilities at Baldivis Activity Centre is therefore supported by market growth and excess capacity in the market for new PLUC 5 shop/retail floorspace.

    ▪ The resulting trading levels of affected centres would remain at viable levels.

  - The proposed expansion addresses the need for additional shop/retail floorspace in the region, particularly the main trade area, and will be integral in reducing the amount of expenditure escaping to centres outside the Baldivis main trade area and the broader study area. Greater support would therefore be provided to the local centres hierarchy and residents of the main trade area and broader study area will have improved access to retail goods and services and opportunity to undertake more linked shopping/services trips.

  - Any increase in shopping activity undertaken locally will generate spin-off benefits for other businesses and facilities in the Baldivis Activity Centre. The proposed development therefore would be expected to support further provision of non-retail related uses such as office space and community facilities and enhance the multi-functional role of the town centre.

▪ In summary, the proposed expansion of the Baldivis property is an appropriate development that can be supported by the market without adversely impacting existing and planned centres in the region. The development of the centre for the purpose of supermarkets, discount department store, and associated specialty shops appropriate for a District Centre will not result in the centre performing the functions of a higher order centre or impact on the on-going viability or development potential of higher order centres.

1 Centre Description

The purpose of this section is to put the Stockland Baldivis and wider Baldivis Activity Centre into a regional and local context.

1.1 REGIONAL CONTEXT

As shown in Map 1.1, Stockland Baldivis is located within the municipality of Rockingham, approximately 40km from the Perth Central Business District (CBD). The centre forms the majority part of the Baldivis Activity Centre, which is located within the South-West sub-region of Perth as specified within Directions 2031. Baldivis is classified as a District Centre under the policy, and is one of seven of this type of centre (both existing and proposed) in the sub-region. Higher order centres under the policy include Secondary Centres at Cockburn and Kwinana, and Rockingham Strategic Metropolitan Centre.

Stage 1 of Baldivis Activity Centre, Stockland Baldivis shopping centre, opened in mid-2007. It performs an important shopping function for residents of the developing housing estates in the area, as well as the longstanding rural residential areas in Baldivis and to the south and east.

1.2 LOCAL CONTEXT

The boundary of the Baldivis Activity Centre is shown in Map 1.2. Stockland Baldivis shopping centre is located at the intersection of Safety Bay Road and Settlers Avenue in Baldivis, within the Core Precinct of the Activity Centre Structure Plan.

The centre has good exposure to passing traffic along busy Safety Bay Road which is one of the main access routes from the coast to the Kwinana Freeway. Nairn Drive, which runs along the western boundary of the shopping centre, will be one of the main north-south collector roads through the housing estates in the area once completed. In terms of public transport access the centre is served by bus routes and Warnbro Station on the Mandurah railway line is a 5km drive away.

Also within the Baldivis Activity Centre is a developing bulky goods precinct at the corner of Safety Bay Road and Baldivis Road which will be anchored by a Masters hardware store (currently under construction). Within the Core Precinct there are medical and dentist suites and commercial office space, located along Settlers Avenue. The City of Rockingham have a site set aside for the development of community facilities such as a library and community centre complex, which will complement and build upon the centre's role as the District Centre for the region.

The area surrounding the Baldivis Activity Centre is currently a mix of newly developed residential estates. The area is characterised by low to medium density residential housing with potential for higher density dwellings in proximity to the town centre. There is also a large retirement village under construction on the southern side of Safety Bay Road.

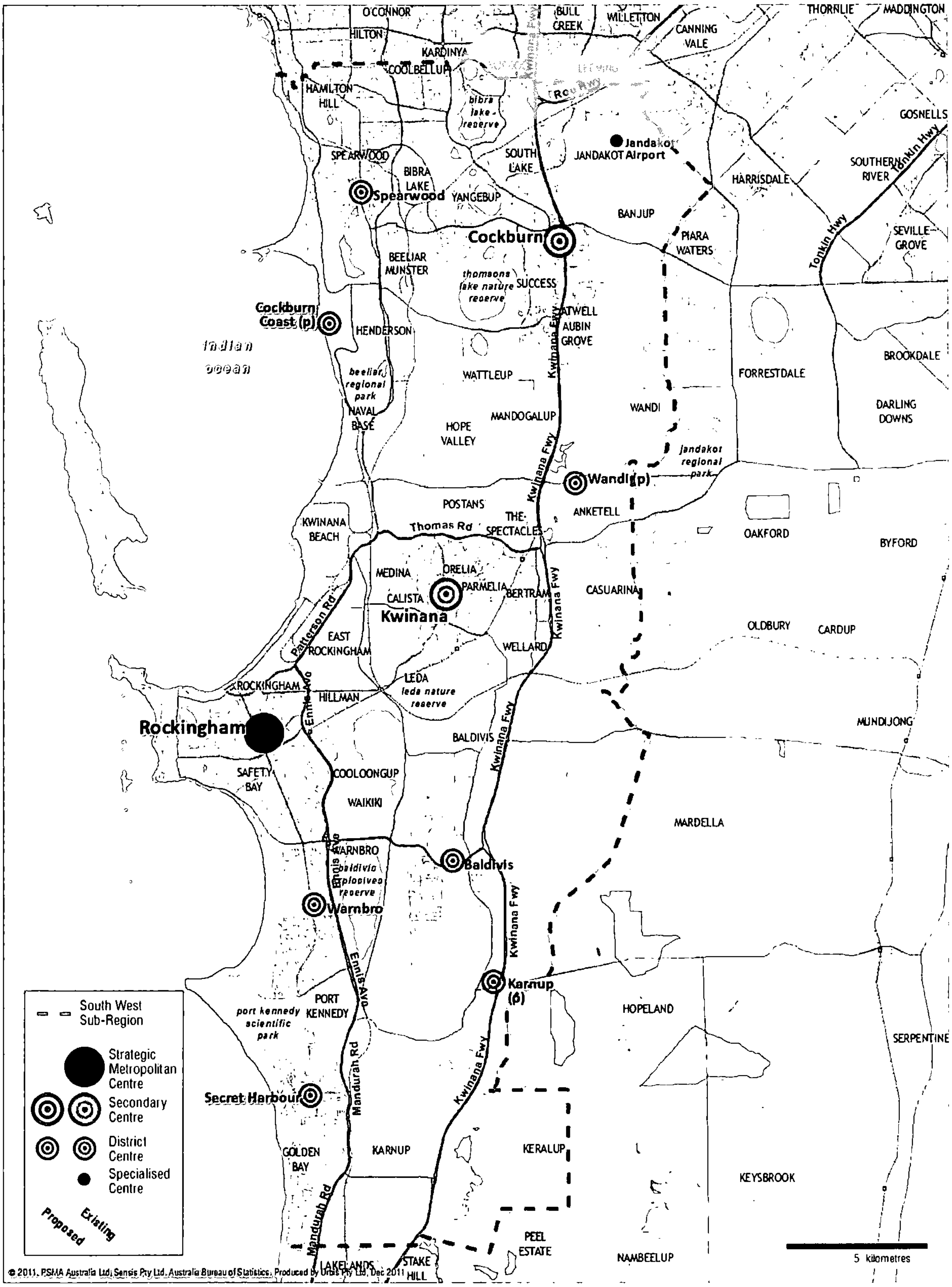
1.3 ACTIVITY CENTRE COMPOSITION AND LAYOUT

Baldivis currently provides 8,728 sq.m of PLUC 5 shop/retail floorspace, located in Stockland Baldivis Shopping Centre, Settlers Avenue main street shops, and a small group of shops in the South East Precinct of the Activity Centre on Baldivis Road.

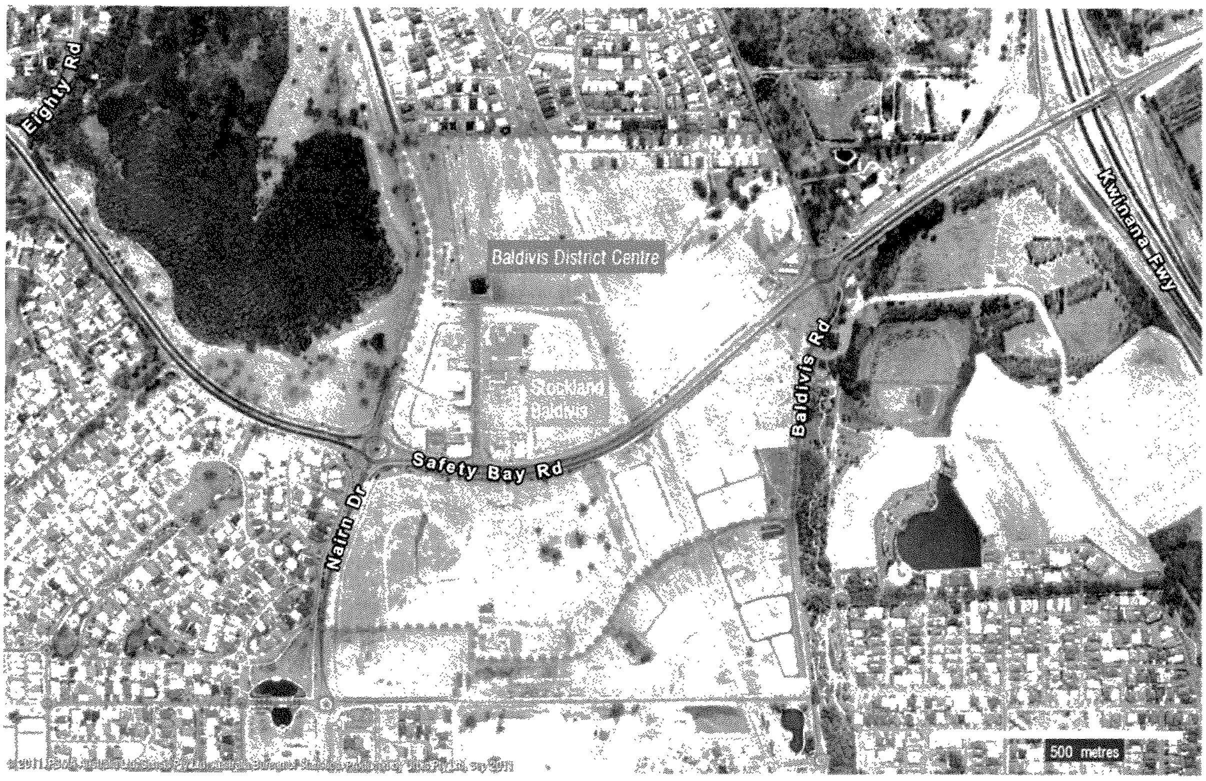
The shopping centre is anchored by a Coles supermarket and includes two mini-majors, Red Dot and a large pharmacy (Nightingales). The centre is served by at-grade carparking to the south of the centre and on-street carparking along Settlers Avenue. The retail shops are all on ground level with assorted external tenancies facing the main street environment on Settlers Avenue and main carpark and the rest in an internal mall along with Coles.

The centre serves the community's convenience and weekly grocery shopping needs. It is light and bright and modern, and had no vacancies at the time of visit.

Map 1.1 – Regional Context



Map 1.2 – Local Context



2 Market Analysis

This section of the report analyses the market served by the Baldivis Activity Centre.

2.1 TRADE AREA DEFINITION

The trade area for the Baldivis Activity Centre has been defined based on the current and future role of the centre, taking into account the pattern of urban development, location of other existing and proposed activity centres, road and public transport infrastructure and the existence of urban breaks such as Lake Cooloongup and Lake Walyungup.

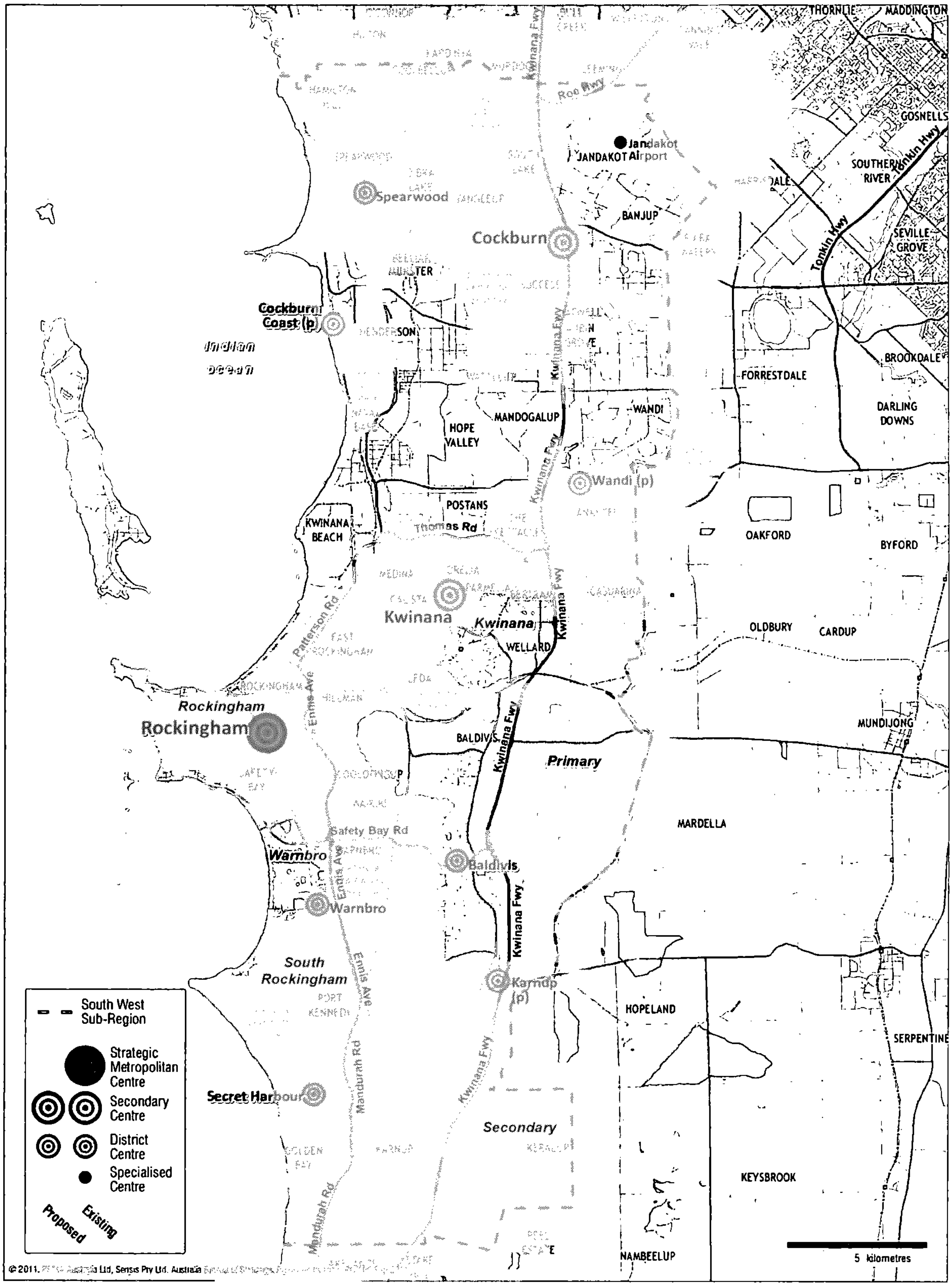
As shown in Map 2.1, the primary trade area served by Baldivis covers an area extending approximately 5km from the centre. In the north this is defined by the extent of the suburb of Baldivis, and in the south we have drawn the boundary at Sixty Eight Road in order to take account of the proposed district centre at Karnup which would serve areas south of this boundary.

The secondary trade area comprises the area south of Sixty Eight Road to Keralup which presently is undeveloped for urban housing and has a small rural population. The secondary trade area has easy access to Baldivis via the Kwinana Freeway or Baldivis Road. It too is somewhat separated from the rest of Rockingham's suburbs by the existence of urban breaks such as the Rockingham Lakes regional park.

Shoppers use centres for a variety of reasons and will not always use the centre that is closest to them, particularly if they have brand preferences, work nearby, chasing sales, shopping while visiting friends or relatives or on holidays, etc. As a result of this diverse shopping behaviour, the trade area for any one centre therefore does not represent the entire market that supports the centre's scale. In addition, trade areas are not mutually exclusive and commonly overlap. In the case of Baldivis which serves a relatively contained catchment, it can be expected that the centre attracts upwards of 30% (but possibly more) of turnover from outside the main trade area. The proportion of turnover sourced from outside the main trade area will vary over time, influenced by competitive developments and the size of the market locally.

The main trade area defined for Baldivis is therefore the most important market for the centre but not the only market that supports its role, scale and performance. This is a relevant consideration in the assessment of market support for additional PLUC 5 shop floorspace. For the purposes of the analysis in this report, the area of the South West sub-region not covered by the main trade area for Baldivis Activity Centre has been further divided into sectors for analysis, covering the South Rockingham area around Secret Harbour; the Warnbro area; the Rockingham area; and the Town of Kwinana (refer Map 2.1). These form a broader study area for the market demand and impact analysis. We have excluded the Cockburn municipality from our analysis as it is too far distant from the centre.

Map 2.1 – Baldivis Activity Centre Trade Area



2.2 POPULATION TRENDS

2.2.1 SOUTH-WEST REGION

The WAPC Directions 2031 document forecasts a capacity population in 2031 for the South-West sub-region of 278,000 people. This has been further revised and updated by WAPC in *WA Tomorrow Population Report No. 6, to* encompass a capacity population for the region of 313,100.

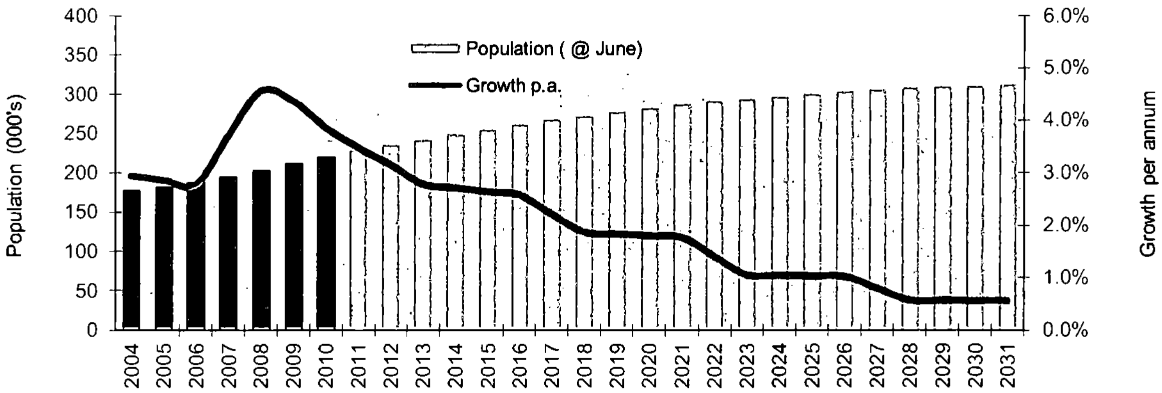
We note that since the report was prepared by WAPC there has been stronger growth in the South-West sub-region than anticipated. We have prepared a forecast for the South-West sub-region that uses the capacity populations as specified by the Department of Planning, but takes into account the Estimated Resident Population (ERP) data released by the ABS to 2010. The result is shown in Chart 2.1. Key points to note are:

- The current (2011) population of the South-West sub-region is estimated at some 228,000 people. In 2010, it was 220,500.
- The South-West sub-region has experienced high levels of population growth over the period to 2011, reaching 4.6% per annum in 2008.
- In order for the population to meet the conservative WAPC projections identified above, we have forecast a gradual tapering off of growth in the region as new release areas are taken up for housing settlement over the period to 2031.
- Growth during the period 2026-31 is forecast at only (and unlikely) 0.5% per annum.

Our forecast is conservative, being designed to match the official capacity population numbers prepared by WAPC.

South-West Sub-Region Population

HISTORIC AND FORECAST POPULATION, 2004 - 2031 CHART 2.1



Source : Urbis; ABS (2008); Western Australian Department of Planning, Directions 2031 (2010); WA Tomorrow Population Report No. 6

2.2.2 MUNICIPALITY FORECASTS

As discussed above, in order to match official WAPC local government area forecasts while marrying the data we already have regarding population growth in the region in the historic and short term, we have reviewed a number of sources including but not limited to: the latest ABS ERP data; ABS projections; small area forecasts prepared by id.forecast on behalf of local government; and ABS new dwelling approvals and land release information.

Historic and future populations for the three municipalities comprising the South-West sub-region are shown in Table 2.1. Key points to note are:

- All three municipalities have exhibited historically strong growth in the period 1996-2011, albeit off a lower population base in Kwinana compared with the other two muncipalities.
- In 2011 Rockingham City (107,500 people) accounts for a 46% share of the total population in the South-West subregion, with 41% in Cockburn (96,000 residents) and 12% share living in Kwinana (28,700 residents).
- Rockingham is also expected to account for the largest share of growth in the South-West sub-region, adding 38,050 residents by 2031. This accounts for 47% of the forecast growth in the sub-region. 27,450 additional residents are forecast to live in Cockburn by 2031; and Kwinana is expected to add 15,540 residents, accounting for 20% of population growth.

In summary the forecasts reflect the growth profile of the areas in the short and medium term, while aligning with official population forecasts for 2031. This results in a diminishing population growth rate particularly over the years 2026-31 when the region is forecast to add on average 1,600 residents per annum.

Population by Municipality, 1996-2031

PERTH SOUTH-WEST SUB-REGION

TABLE 2 1

					Forecast Population			
Population (No.)	**1996**	**2001**	**2006**	**2011**	**2016**	**2021**	**2026**	**2031**
City of Rockingham	58,750	73,860	87,610	107,470	122,700	136,100	143,950	145,520
Town of Kwinana	18,540	20,010	22,770	28,660	33,660	37,660	41,160	44,200
City of Cockburn	61,290	70,920	79,740	95,950	108,450	115,950	119,950	123,400
South West Sub-Region	**138,580**	**164,790**	**190,120**	**232,080**	**264,810**	**289,710**	**305,060**	**313,120**
Average Annual Change (No.)								
		1996-01	**2001-06**	**2006-11**	**2011-16**	**2016-21**	**2021-26**	**2026-31**
City of Rockingham		3,022	2,750	3,972	3,046	2,680	1,570	314
Town of Kwinana		294	552	1,178	1,000	800	700	608
City of Cockburn		1,926	1,764	3,242	2,500	1,500	800	690
South West Sub-Region		**5,242**	**5,066**	**8,392**	**6,546**	**4,980**	**3,070**	**1,612**
Average Annual Change (%)								
		1996-01	**2001-06**	**2006-11**	**2011-16**	**2016-21**	**2021-26**	**2026-31**
City of Rockingham		4.7%	3.5%	4.2%	2.7%	2.1%	1.1%	0.2%
Town of Kwinana		1.5%	2.6%	4.7%	3.3%	2.3%	1.8%	1.4%
City of Cockburn		3.0%	2.4%	3.8%	2.5%	1.3%	0.7%	0.6%
South West Sub-Region		**3.5%**	**2.9%**	**4.1%**	**2.7%**	**1.8%**	**1.0%**	**0.5%**

1. as at June

Source : AABS, Regional Population Growth, Australia, Electronic Delivery (3218 0 55 001).
WA Planning Commission, Western Australia Tomorrow, Population Report No 6; Urbis

A comparison of official forecasts for Rockingham (as an example) is provided in Table 2.2 which shows Urbis' forecast reflecting current estimated residential population and projected new developments in the region, bringing the growth in Rockingham forward when compared with the WAPC forecast.

The conservative nature of our forecast compared with the id. forecast is most evident in the year 2031 where their forecast predicts an additional 19,300 people over and above the Urbis/WAPC forecast. In summary the id forecast predicts Rockingham City to grow by 59,700 people in the 20 years to 2031. The ABS projections are even more bullish on population growth in Rockingham.

As indicated, we believe the WAPC forecasts under-estimate the likely rate of population growth throughout the South-West Sub Region over the period to 2031. Stronger than forecast population growth will generate greater demand and support for PLUC 5 floorspace in the region.

Comparison of Forecasts

CITY OF ROCKINGHAM — TABLE 2.2

Population (No.)	**2011**	**2016**	**2021**	**2026**	**2031**
Urbis	107,470	122,700	136,100	143,950	145,516
WAPC	103,900	116,500	130,100	137,800	145,500
Council (forecast.id)	105,095	120,985	136,251	150,412	164,822
ABS	108,761	130,727	153,459	176,677	n.a.
Average Annual Change (No.)					
		2011-16	**2016-21**	**2021-26**	**2026-31**
Urbis		3,046	2,680	1,570	313
WAPC		2,520	2,720	1,540	1,540
Council (forecast.id)		3,178	3,053	2,832	2,882
ABS		4,393	4,546	4,644	n.a.
Average Annual Change (%)					
		2011-16	**2016-21**	**2021-26**	**2026-31**
Urbis		2.7%	2.1%	1.1%	0.2%
WAPC		2.3%	2.2%	1.2%	1.1%
Council (forecast.id)		2.9%	2.4%	2.0%	1.8%
ABS		3.7%	3.3%	2.9%	n.a.

1. as at June

Source : ABS Cdata 1991, 1996, 2001 and 2006; ABS, Regional Population Growth, Australia, Electronic Delivery (3218.0.55.001); WA Planning Commission, Western Australia Tomorrow, Population Report No. 6; Urbis

2.2.3 MAIN TRADE AREA

We have prepared population forecasts for the main trade area of Baldivis Activity Centre and the broader study area defined in section 2.1 and shown in Map 2.1, which is essentially the South-West sub-region minus the municipality of Cockburn. For the purposes of our analysis we have discounted the Cockburn area as being too far distant from Baldivis (competitive centres are upwards of 20km to the north) to be of relevance to the economic need and impact analysis.

The 2011 main trade area population for Baldivis is estimated at some 15,900 people, of which 14,180 live in the primary trade area. Key points to note from Table 2.2 below are:

- As the area around Baldivis has been progressively developed for broadhectare housing developments, growth in the main trade area has been historically high – particularly in the last five years when the main trade area added on average 1,800 residents per annum.
- The main trade area for Baldivis is forecast to reach 44,100 people by 2031. This represents an additional influx of population into the area over the next 20 years of 28,200 people. The majority of

this growth is expected to be in the primary trade area as developments continue to occur in Baldivis over the short and medium term. We expect a gradual ramping up of growth in the secondary trade area sector (Karnup area) to begin towards the latter part of the period as the urban investigation land and urban growth moves further south.

Once again as we have prepared our projections to match with the official forecasts, growth is shown to taper off significantly from 2021. This will likely prove unrealistic given the high levels of growth in the trade area and the expected release of further land for development around Baldivis and in Karnup and Keralup later on in the period.

Study Area Population, 1996-2031

BALDIVIS ACTIVITY CENTRE — TABLE 2.3

Resident Population

	1996	2001	2006	2011	2016	2021	2026	2031
Primary Trade Area	910	2,140	5,490	14,180	23,180	31,930	35,430	35,875
Secondary Trade Area	1,150	1,240	1,510	1,740	2,270	4,770	7,770	8,216
Main Trade Area	**2,060**	**3,380**	**7,000**	**15,920**	**25,450**	**36,700**	**43,200**	**44,091**
Other Study Areas								
• Sth Rockingham	7,510	15,820	26,030	34,230	37,730	38,980	39,480	39,706
• Warnbro	11,340	13,490	13,960	14,920	15,620	16,020	16,370	16,596
• Rockingham	37,840	41,170	40,620	42,400	43,900	44,400	44,900	45,123
• Kwinana	18,540	20,010	22,770	28,660	33,660	37,660	41,160	44,200
Study Area Total	**77,290**	**93,870**	**110,380**	**136,130**	**156,360**	**173,760**	**185,110**	**189,716**

Average Annual Change (No.)

	1996-01	2001-06	2006-11	2011-16	2016-21	2021-26	2026-31
Primary Trade Area	246	670	1,738	1,800	1,750	700	89
Secondary Trade Area	18	54	46	106	500	600	89
Main Trade Area	**264**	**724**	**1,784**	**1,906**	**2,250**	**1,300**	**178**
Other Study Areas							
• Sth Rockingham	1,662	2,042	1,640	700	250	100	45
• Warnbro	430	94	192	140	80	70	45
• Rockingham	666	-110	356	300	100	100	45
• Kwinana	294	552	1,178	1,000	800	700	608
Study Area Total	**3,316**	**3,302**	**27,226**	**4,046**	**3,480**	**2,270**	**921**

Average Annual Change (%)

	1996-01	2001-06	2006-11	2011-16	2016-21	2021-26	2026-31
Primary Trade Area	18.7%	20.7%	20.9%	10.3%	6.6%	2.1%	0.2%
Secondary Trade Area	1.5%	4.0%	2.9%	5.5%	16.0%	10.3%	1.1%
Main Trade Area	**10.4%**	**15.7%**	**17.9%**	**9.8%**	**7.6%**	**3.3%**	**0.4%**
Other Study Areas							
• Sth Rockingham	16.1%	10.5%	5.6%	2.0%	0.7%	0.3%	0.1%
• Warnbro	3.5%	0.7%	1.3%	0.9%	0.5%	0.4%	0.3%
• Rockingham	1.7%	-0.3%	0.9%	0.7%	0.2%	0.2%	0.1%
• Kwinana	1.5%	2.6%	4.7%	3.3%	2.3%	1.8%	1.4%
Study Area Total	**4.0%**	**3.3%**	**4.3%**	**2.8%**	**2.1%**	**1.3%**	**0.5%**

1. as at June

Source : ABS Cdata 1991, 1996, 2001 and 2006; ABS, Regional Population Growth, Australia, Electronic Delivery (3218.0.55.001); WA Planning Commission, Western Australia Tomorrow, Population Report No. 6; Urbis

In preparing this forecast, while our ultimate population numbers are lower than the forecast.id 2031 population, we share a number of assumptions with their forecast regarding projected dwelling numbers and land release areas throughout the Baldivis main trade area. We have matched the share of population the Baldivis main trade area is forecast to have in the Rockingham municipality with the forecast.id MTA shares, as shown in Table 2.4 below. This is consistent up until the year 2021 and begins to diverge after that, due to our need to match the WAPC forecast capacity population.

Baldivis Trade Area Share of Growth

CITY OF ROCKINGHAM — TABLE 2.4

	Resident Population				
	2011	**2016**	**2021**	**2026**	**2031**
Urbis Forecast					
Baldivis Main Trade Area	15,920	25,450	36,700	43,200	44,091
Rockingham	107,470	122,700	136,100	143,950	145,516
MTA as % of Rockingham	15%	21%	27%	30%	30%
Council Forecast (forecast.id)					
Baldivis Main Trade Area[1]	14,207	24,557	37,308	50,106	63,346
Rockingham	105,095	120,985	136,251	150,412	164,822
MTA as % of Rockingham	14%	20%	27%	33%	38%

1 Equivalent to forecasts for Baldivis North, Baldivis South Karnup and Keralup small areas

Source : ABS Cdata 1991, 1996, 2001 and 2006, ABS. Regional Population Growth Australia, Electronic Delivery (3218 0.55 001), forecast id City of Rockingham 2011; WA Planning Commission, Western Australia Tomorrow. Population Report No. 6: Urbis

In addition, our forecast main trade area population broadly aligns with the expected population predicted by the WA Urban Growth Monitor to occur in the main trade area over the next 10 years. We have compiled a list of the expected housing estates and greenfield development in the Baldivis main trade area, shown in Table 2.5. Key points to note are:

- Using the household size assumptions from Directions 2031 of 1.7 people per new dwelling in the South-West sub-region, the forecast number of dwellings predicts an expected increase from 2009-31 in the Baldivis main trade area population of some 31,300 people.

- If we use a higher household size, such as 2.5 which is more reflective of a growth area with a large proportion of family households, the expected increase in the Baldivis main trade area is larger, at 46,000 people.

This analysis provides further evidence in support of the strong population growth in the main trade area of Baldivis Activity Centre.

Housing Estates & Greenfield Development

BALDIVIS DISTRICT CENTRE TRADE AREA

TABLE 2.5

Estate Name	Time Period	Dwellings	Potential Population	
			HH size = 2.5	HH Size = 1.7
The Chase	2009-14	145	363	247
Baldivis Town Centre	2009-15	170	425	289
Baldivis Central	2009-16	434	1,085	738
Rockingham Lifestyle Village	2009-20	443	1,108	753
Baldivis North	2013-23	339	848	576
Fifty Road	2015-22	246	615	418
Baldivis North Precinct 3	2018-28	470	1,175	799
Baldivis North Precinct 1	2019-31	690	1,725	1,173
Baldivis North Precinct 2	2019-31	590	1,475	1,003
The Ridge	2009-13	163	408	277
The Rivergums	2009-16	280	700	476
Settlers Hills	2009-17	479	1,198	814
Heritage Park	2009-18	360	900	612
Evermore Heights	2009-20	374	935	636
Highbury Park	2009-20	558	1,395	949
Tuart Ridge	2009-21	600	1,500	1,020
Baldivis South Precinct 5	2010-17	210	525	357
Settlers Hill Precinct J	2010-18	331	828	563
Lifestyle Village Sixty Eight Road	2010-24	673	1,683	1,144
Baldivis South Precinct 6	2013-20	200	500	340
11 & 26 Baldivis Road	2014-20	262	655	445
Smirk Road	2015-29	987	2,468	1,678
Eighty Road	2017-30	1,180	2,950	2,006
Baldivis South Precincts 3 & 4	2020-31	765	1,913	1,301
Total Primary		**10,949**	**27,373**	**18,613**
Mandurah Road	2014-31	1,380	3,450	2,346
Peel Pine Plantation	2016-31	2,230	5,575	3,791
Department of Housing Keralup	2013-31	3,875	9,688	6,588
Total Secondary		**7,485**	**18,713**	**12,725**
Main Trade Area		**18,434**	**46,085**	**31,338**

Source : WAPC, Urban Growth Monitor, August 2010; Urbis

2.3 SOCIO-ECONOMIC CHARACTERISTICS

The main trade area is a more affluent area compared with the rest of the study area as a whole, as shown in Table 2.6. Average household incomes in the main trade area are 20% and 27% above the Perth average for the primary and secondary trade area sectors respectively.

It is clear that the areas of newer housing development, including to a lesser degree the area around Secret Harbour (South Rockingham, household incomes +7% v. Perth), are attracting a different kind of resident in contrast to the more established suburbs in the study area. These exhibit significantly lower household incomes, particularly around Rockingham (-21% v. Perth) and Kwinana (-22% v. Perth).

The Baldivis main trade area shows a much higher proportion of family households, particularly those with children under 15 years old, compared with the rest of the study area and Perth on average. This is borne out by the greater household sizes and lower average age in the area compared with the Perth average.

The higher incomes in the main trade area are supported by a lower level of unemployment (just 2%) and higher labour force participation than that found in the rest of the study area sectors, or Perth as a whole. Reflecting the relative affluence of the area, a higher proportion of residents have two cars and significantly less people are renting in the main trade area.

In summary the Baldivis main trade area is typical of a growth area profile in that it is characterised by young families paying off a mortgage. The levels of income and employment are higher than those typically found in developing outer suburban areas. These characteristics are positively correlated to retail spending and the residents of the Baldivis trade area will have one of the higher rates of spending on a per capita basis in the South West sub-region.

Key Socio-Economic Characteristics of the Study Area, 2006

BALDIVIS DISTRICT CENTRE TABLE 2.6

Characteristics	**Primary TA**	Secondary TA	**Main TA**	Other Study Areas Sth Rock.	Warnbro	Rocking-ham	Kwinana	**Study Area**	**Perth Average**
Household Income									
$Nil	**1%**	0%	**1%**	1%	1%	1%	1%	**1%**	1%
$1-$26,000	**9%**	14%	**10%**	11%	16%	28%	24%	**20%**	18%
$26,000-$52,000	**14%**	20%	**16%**	23%	26%	30%	32%	**26%**	26%
$52,000-$88,400	**32%**	30%	**32%**	34%	32%	24%	28%	**29%**	27%
$88,400 - $104,000	**13%**	7%	**12%**	11%	9%	6%	6%	**8%**	8%
$104,000 - $130,000	**13%**	9%	**12%**	9%	8%	5%	5%	**7%**	7%
$130,000+	**17%**	20%	**18%**	12%	9%	7%	5%	**9%**	13%
Average Household Income	**$86,833**	$91,752	**$87,912**	$77,778	$71,425	$57,263	$56,586	**$67,130**	$72,280
Var'n from Perth Avg.	***20.1%***	*26.9%*	***21.6%***	*7.6%*	*-1.2%*	*-20.8%*	*-21.7%*	***-7.1%***	*n.a.*
Var'n from Australian Avg.	***28.6%***	*35.9%*	***30.2%***	*15.2%*	*5.8%*	*-15.2%*	*-16.2%*	***-0.6%***	*7.0%*
Average Household Size	**3.1**	3.2	**3.1**	3.1	2.8	2.3	2.6	**2.7**	2.5
Personal Income									
$Nil	**8%**	11%	**9%**	9%	8%	7%	7%	**8%**	8%
$1 - $20,800	**29%**	31%	**29%**	33%	35%	43%	41%	**37%**	34%
$20,800 - $41,600	**22%**	25%	**22%**	24%	26%	25%	28%	**26%**	26%
$41,600 - $83,200	**30%**	23%	**29%**	27%	24%	20%	21%	**24%**	24%
$83,200 +	**10%**	11%	**11%**	8%	6%	5%	3%	**6%**	8%
Avg. Per Capita Income	**$27,808**	$28,978	**$28,072**	$25,189	$25,128	$24,612	$22,118	**$25,250**	$28,371
Per Capita Income Var'n	***-2.0%***	*+2.1%*	***-1.1%***	*-11.2%*	*-11.4%*	*-13.2%*	*-22.0%*	***-11.0%***	*+0.0%*
Age Distribution									
Aged 0-13	**28%**	22%	**26%**	28%	23%	16%	22%	**21%**	18%
Aged 14-24	**13%**	15%	**13%**	16%	18%	15%	15%	**15%**	16%
Aged 25-39	**25%**	15%	**23%**	25%	20%	17%	24%	**22%**	21%
Aged 40-59	**26%**	36%	**28%**	23%	27%	27%	24%	**26%**	28%
Aged 60+	**8%**	13%	**9%**	9%	13%	25%	15%	**15%**	17%
Average Age	**30**	36	**32**	30	33	41	34	**35**	37
Household Composition (%)									
Couples with no children	**32%**	37%	**33%**	26%	28%	31%	27%	**28%**	26%
Family with children <15	**49%**	38%	**46%**	48%	38%	24%	32%	**33%**	28%
Family with children 15+	**10%**	17%	**12%**	12%	15%	13%	12%	**14%**	15%
Total Family (with children)	***59%***	*55%*	***58%***	*60%*	*53%*	*37%*	*45%*	***48%***	*43%*
Group Household	**1%**	0%	**1%**	2%	2%	3%	3%	**3%**	4%
Lone Person	**8%**	7%	**8%**	12%	16%	29%	25%	**21%**	25%
Other	**1%**	1%	**1%**	1%	1%	1%	1%	**1%**	1%
Housing Status									
Own Outright[1]	**21%**	43%	**26%**	16%	25%	36%	23%	**29%**	32%
Have Mortgage[1]	**64%**	47%	**60%**	58%	48%	33%	50%	**46%**	41%
Renter[1]	**14%**	10%	**13%**	26%	27%	30%	26%	**25%**	26%
Car Ownership									
% 0 Cars	**1%**	0%	**0%**	2%	4%	9%	8%	**6%**	7%
% 1 Car	**20%**	15%	**19%**	30%	34%	43%	38%	**35%**	36%
% 2 Cars +	**79%**	85%	**80%**	68%	62%	48%	54%	**59%**	57%
Labour Force									
Labour Force Participation	**75%**	71%	**74%**	71%	67%	57%	60%	**65%**	67%
% Unemployed	**2%**	2%	**2%**	4%	4%	6%	7%	**4%**	4%
Birthplace									
Australian Born	**70%**	72%	**70%**	72%	71%	67%	71%	**70%**	66%
Overseas Born	**30%**	28%	**30%**	28%	29%	33%	29%	**30%**	34%
• Asia	**1%**	0%	**1%**	1%	2%	2%	2%	**3%**	7%
• Europe	**23%**	23%	**23%**	21%	21%	24%	19%	**20%**	17%
• Other	**6%**	5%	**6%**	6%	7%	7%	8%	**8%**	10%

1. 'Other' Tenure Types have not been included.

Source : ABS Census of Population and Housing 2006, Cdata 2006; Urbis

2.4 RETAIL SPENDING

2.4.1 METHODOLOGY AND DEFINITIONS

The retail spending market has been estimated using *MarketInfo*, a micro-simulation model developed by MDS Market Data Systems Pty Ltd. This model is based on information from the ABS Household Expenditure Survey (HES), the Census of Population and Housing (2006) and other information sources that provide that provide up-to-date information on changes in spending behaviour and/or income levels (eg. Australian National Accounts, Australian Taxation Statistics, etc.). *MarketInfo* is used widely by stakeholders in the retail industry.

The model uses micro-simulation techniques to combine propensity to spend on particular commodities with the socio-economic characteristics of individuals to derive spending per capita estimates on a small area basis (ie. the Census Collector District level).

The retail expenditure estimates throughout the report exclude the component of turnover attributable to GST, and all values are expressed in constant $2011 terms (ie. inflation is not included).

Further, the retail spending estimates outlined in this report represent the categories of retail goods and services which are served by retailers under the PLUC 5 definition. A summary of the types of retail expenditure within the PLUC 5 retail definition is provided in Table A1 in Appendix A. Throughout this report PLUC 5 retail expenditure is referred to as retail expenditure or spending.

2.4.2 PER CAPITA RATES

Table 2.7 outlines estimates of retail spending per capita for residents of the Baldivis main trade area and broader study area. Consistent with above average income levels in the main trade area, retail spend per capita in the main trade area for Baldivis is 6.1% higher than the Perth average. The strongest spending levels are in the primary trade area (+6.5%). The below average household income levels in the broader study area have likewise translated into lower levels of retail expenditure per capita, which is particularly pronounced in the Kwinana region (-16.7% v. Perth average).

Study Area Retail Spending Per Capita

BALDIVIS DISTRICT CENTRE, $2011 EXCL GST — TABLE 2.7

	Retail Spending Per Capita	**Var'n from Benchmarks**	
		Aust.	Perth
	$	%	%
Primary Trade Area	12,416	+9.8%	+6.5%
Secondary Trade Area	12,050	+6.6%	+3.3%
Main Trade Area	**12,374**	**+9.4%**	**+6.1%**
Other Study Areas			
• Sth Rockingham	10,769	-4.8%	-7.7%
• Warnbro	10,726	-5.2%	-8.0%
• Rockingham	10,584	-6.4%	-9.2%
• Kwinana	9,710	-14.1%	-16.7%
Total Study Area	**10,663**	**-5.7%**	**-8.6%**
Benchmarks			
Australia	11,309	n.a.	-3.0%
Capital Cities	11,621	n.a.	-0.4%
Perth	11,662	+3.1%	n.a.

Source: MDS, MarketInfo 2009, ABS, Australian National Accounts: National Income, Expenditure and Product Accounts (5206.0), Urbis

2.4.3 RETAIL SPEND

Applying the retail spending per capita rates to the populations of the main trade area and the broader study area, we arrive at an estimate of the total retail spending market as shown in Table 2.8. Spending estimates are expressed in constant $2011 excluding GST. Key points to note are:

- The main trade area retail market is currently estimated at $186 million, including $165 million in the primary sector. Throughout the balance of the broader study area retail spending amounts to some $1.43 billion.

- Forecast growth in retail spending is estimated by combining forecast population with anticipated growth in real retail spending per capita. Over the next 20 years to 2031, retail spending is forecast to increase by $545 million in the main trade area to $731 million.

- In the broader study area retail spending is forecast at $2.73 billion, an increase of $1.3 billion on 2011.

We have assumed modest growth in retail spending per capita over the next two decades. Growth in the retail spending market, particularly in the Baldivis main trade area, is primarily being driven by population growth.

Retail Spending Market by Sector, 2011-2031

BALDIVIS DISTRICT CENTRE, $2011 EXCL GST — TABLE 2.8

Year	Primary TA	Sec. TA	**Main TA**	S. Rock'ham	Warnbro	Rock'ham	Kwinana	**Study Area**
				Other Study Areas				
2011	164.7	20.8	**185.5**	362.8	159.3	446.8	272.7	**1427.0**
2014	245.0	25.5	**270.5**	408.6	172.6	480.7	318.3	**1650.6**
2016	300.3	28.9	**329.2**	435.8	180.4	500.0	347.4	**1792.8**
2021	448.8	63.0	**511.8**	484.6	198.1	540.9	416.4	**2151.9**
2026	544.4	111.6	**656.0**	527.0	216.9	584.9	487.4	**2472.1**
2031	599.0	131.9	**730.9**	569.9	236.4	630.4	560.8	**2728.3**
Average Annual Growth[1]								
2011-14	14.1%	7.0%	**13.4%**	4.0%	2.7%	2.5%	5.3%	**5.0%**
2011-21	10.5%	11.7%	**10.7%**	2.9%	2.2%	1.9%	4.3%	**4.2%**
2021-31	2.9%	7.7%	**3.6%**	1.6%	1.8%	1.5%	3.0%	**2.4%**
2011-31	6.7%	9.7%	**7.1%**	2.3%	2.0%	1.7%	3.7%	**3.3%**
Share of Total Study Area								
2011	11.5%	1.5%	**13.0%**	25.4%	11.2%	31.3%	19.1%	**100.0%**
2014	14.8%	1.5%	**16.4%**	24.8%	10.5%	29.1%	19.3%	**100.0%**
2021	20.9%	2.9%	**23.8%**	22.5%	9.2%	25.1%	19.4%	**100.0%**
2031	22.0%	4.8%	**26.8%**	20.9%	8.7%	23.1%	20.6%	**100.0%**

1. Assumes average annual per capita growth of 1.7% in 2010-2015 and 1.4% thereafter, with different growth rates for each product group.
Source: MDS, MarketInfo 2009; ABS, Australian National Accounts: National Income, Expenditure and Product Accounts (5206.0); Urbis

3 Retail Supply

This section reviews the existing and future supply of retail centres in the region of relevance to Baldivis Activity Centre.

3.1 CENTRES POLICY

On the 31st of August 2010, the Western Australian State Government released State Planning Policy 4.2, *Activity Centres for Perth and Peel.* This document outlines the centres hierarchy across metropolitan Perth and covers seven types of activity centres as follows:

- Perth Capital City
- Primary Centres
- Strategic Metropolitan Centres
- Secondary Centres
- Specialised Centres
- District Centres
- Neighbourhood Centres

The Activity Centres Policy outlines the requirements for the planning and development of new activity centres and the redevelopment and renewal of existing centres.

In terms of the activity centres hierarchy, a number of provisions are specified to meet the Policy's objectives:

- *"The responsible authority should not support activity centre structure plans or development proposals that are likely to undermine the established and planned activity centre hierarchy.*
- *Activity centre structure plans and developments should be consistent with the centre's classification in the hierarchy.*
- *The responsible authority should consider the main role/function and typical characteristics for each centre type",* as outlined above.

The main role and function and indicative service (trade area) population for each group of activity centres is outlined in the State Policy as follows:

TABLE 3.1 – CENTRES HIERARCHY

CENTRE TYPE	MAIN ROLE/FUNCTION	FUTURE INDICATIVE SERVICE POPULATION (TRADE AREA)
Perth Capital City	Perth Capital City is the largest of the activity centres, providing the most intensely concentrated development in the region. It has the greatest range of high order services and jobs, and the largest commercial component of any activity centre.	Greater Metropolitan Region
Primary Centres	Identified in *Directions 2031* but not specifically discussed in the final *Activity Centres for Perth and Peel* policy as no centre in Perth currently has been classified as a primary centre, although Rockingham and Joondalup have been mooted. Primary centres should house major institutions and become the preferred location for investment in high order public and employment generating infrastructure outside the CBD. The concept of primary centres is somewhat similar to a 'second CBD' for Perth.	Not given; assumed to be 300,000 +
Strategic Metropolitan Centres	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 catchment.	150,000 -300,000
Secondary Centres	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.	Up to 150,000
District Centres	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.	20,000-50,000
Neighbourhood Centres	Neighbourhood centres provide for daily and weekly household shopping needs, community facilities and a small range of other convenience services.	2,000-15,000

Source: SPP 4.2, Activity Centres for Perth and Peel, WA Government; Directions 2031, WA Government

As shown in Table 3.1, in the South-West Sub-Region of Perth, there are (existing and planned):

- One Strategic Metropolitan Centre (Rockingham)
- Two Secondary Centres (Cockburn and Kwinana)
- Seven District Centres (Baldivis, Secret Harbour, Spearwood, Warnbro and planned centres at Cockburn Coast, Karnup and Wandi).

Within the defined main trade area (service population trade area) for Baldivis Activity Centre, there is currently one District Centre, which is Baldivis itself. There is also a planned District Centre at Karnup in the secondary trade area sector. Other district and neighbourhood centres which would be expected to capture an amount of trade from the Baldivis main trade area include several planned local centres within and in proximity of Baldivis (eg. Baldivis North, Tuart Ridge Village Centre), Warnbro District Centre and smaller neighbourhood centres such as Waikiki Village.

Other centres of competitive relevance, due to their relative proximity and role as Secondary Centres or Strategic Regional Centres include Rockingham to the west and Kwinana to the north.

These are the range of centres most relevant in assessing market capacity for future development of PLUC 5 shop floorspace at Baldivis Activity Centre.

Estimates of shop/retail floorspace and performance of other activity centres are based on a number of data sources including:

- Perth Land Use Survey 2008 conducted by the Department of Planning, WAPC.
- Australian Shopping Centre Database 2011, Property Council of Australia.
- Big Guns 2010 and Little Guns 2009, Shopping Centre News
- Field work undertaken by Urbis

We have also made reference to the existing City of Rockingham Local Commercial Strategy (2004) for information regarding the scale and likelihood of future developments.

Activity Centre Hierarchy

PERTH SOUTH-WEST SUB-REGION

TABLE 3.2

Centre Type	Name	Status	Anchor Tenants	Dist from Baldivis[1]
Strategic Metropolitan Centre	Rockingham	Existing	Target, Kmart, Woolworths, Coles	8.6
Secondary Centres	Cockburn	Existing	Big W, Woolworths, IGA	22.5
	Kwinana	Existing	Woolworths, Coles	9.4
District Centres	Baldivis	Existing	Coles	n.a.
	Secret Harbour	Existing	Woolworths	10.3
	Spearwood	Existing	Big W, Woolworths, Coles, IGA	26
	Warnbro	Existing	Woolworths, Coles	5.8
	Cockburn Coast	Proposed	n.a.	26.2
	Karnup	Proposed	n.a.	11.5
	Wandi	Proposed	n.a.	15.9

Source: Activity Centres for Perth and Peel, August 2010, Urbis

1. Distance measured in a straight line

3.2 STRATEGIC METROPOLITAN CENTRE

The Strategic Metropolitan Centre of competitive relevance to Baldivis is Rockingham.

Rockingham is located approximately 8.6km east of Baldivis. The main shopping centre, Rockingham City, is located on the corner of Read Street and Council Avenue. The centre includes Target and Kmart discount department stores (the only instances of these particular major brands in the study area), and Woolworths and Coles supermarkets as well as a cinema complex which likewise is the only cinema in the study area. Having recently completed a major expansion in 2009, the centre is modern, well presented and busy. The majority of shop/retail floorspace is focussed in Rockingham City shopping centre however ancillary retail is dispersed throughout the town centre. Total PLUC 5 shop floorspace currently amounts to around 75,200 sq.m.

As a higher order centre the main trade area for Rockingham would cover a broad area, including the Baldivis area. This is particularly the case if in future Rockingham is re-classified to a primary centre befitting its key role serving a wide area in the south-west of Perth and Peel. However, in terms of impact on Baldivis's place in the centres hierarchy Rockingham moving to a primary centre would have little effect. Baldivis serves a more localised retail role as a district centre consistent with the needs of its main trade area.

3.3 SECONDARY CENTRE

The secondary centre of competitive relevance to Baldivis is Kwinana.

Kwinana is the closest secondary centre to Baldivis at 9.4km to the north. Kwinana Hub is the shopping centre, anchored by Woolworths and Coles supermarkets. In the early 2000s Kwinana had a Kmart discount department store which we understand traded poorly and has since been replaced by Coles. There is no current discount department store located in Kwinana. The centre is currently poorly presented and has a high level of vacancies. However, the shopping centre's quality will improve post redevelopment (see Section 3.5). Currently we estimate that total PLUC 5 shop floorspace in the Kwinana Town Centre amounts to some 20,500 sq.m.

3.4 DISTRICT CENTRES

District centres of competitive relevance to Baldivis are as follows:

- **Warnbro** district centre is anchored by two supermarkets, Woolworths and Coles. The centre provides around 13,400 sq.m of PLUC 5 shop floorspace. The centre is relatively modern and busy. Warnbro is the closest competing centre to Baldivis at 5.8km to the west.

- **Secret Harbour** is anchored by a Woolworths supermarket. The centre is fairly new, built as part of the Secret Harbour housing estate. Due to its distance from Baldivis (10.3km to the south west) its trade area would only have minimal, if any, overlap with that of Baldivis. We estimate approximately 5,800 sq.m of PLUC 5 shop floorspace in the centre.

3.5 NEIGHBOURHOOD CENTRES

Existing neighbourhood centres of competitive relevance to Baldivis and considered in the impact analysis are as follows:

- <u>Waikiki</u>

  - **Waikiki Village** is a shopping centre located 6.4km west of Baldivis. It is anchored by Woolworths and includes a Rebel Sport outlet store. In early 2011 it underwent a small expansion, adding five external carpark-facing tenancies. Taking this into account, we estimate the total provision of PLUC 5 shop floorspace in the centre to be some 8,800 sq.m.

  - **Charthouse Waikiki** shopping centre (estimated PLUC 5 floorspace of 2,200 sq.m), some 7.3km from Baldivis, is a small and somewhat dated centre anchored by an IGA. As it has no main road exposure, it would serve a localised catchment.

- Port Kennedy
  - **Port Kennedy Central** is a recently opened centre on Warnbro Sound Avenue, some 6.4km south-west of Baldivis. It is anchored by an IGA supermarket and provides around 5,200 sq.m of PLUC 5 shop floorspace. The centre is located in a wider bulky goods retail precinct on Warnbro Sound Avenue of which we estimate some 3,000 sq.m relate to the PLUC 5 categories of furniture and large electricals.
  - **Stargate Port Kennedy** shopping centre is 6.2km south west of Baldivis. It is anchored by a Supa IGA supermarket and includes a range of complementary specialty shops. The centre comprises approximately 5,200 sq.m of PLUC 5 shop floorspace.
- Cooloongup
  - **Supa IGA Cooloongup**, some 6.6km from Baldivis, consists of the supermarket and approximately 15 specialty shops. Total size of the shopping centre is estimated at 3,200 sq.m of PLUC 5 shop floorspace.
- Leda
  - **Stargate Leda** shopping centre is located 8.1km north of Baldivis. It is anchored by a Farmer Jacks (Foodworks) supermarket. It serves a small localised catchment and at time of visit had several vacant shops. We estimate total PLUC 5 shop floorspace in the order of 3,100 sq.m.

3.6 PROPOSED DEVELOPMENTS

For the purposes of the retail sustainability assessment, future competitive developments taken into account are those developments which have been approved or are currently being pursued through the planning process. They are summarised below:

- **Kwinana Town Centre** is undergoing a revitalisation project, with improved landscaping and access projects expected to be completed in early 2012. A new community centre and library is currently under construction as is a youth centre. Kwinana Hub shopping centre was sold to Woolworths last year and discussions have been held with Kwinana council regarding redevelopment. The council announced on 9 June 2011 approval for an expansion of floorspace at Kwinana Hub from 16,738 sq.m to 30,794 sq.m, encompassing addition of a Big W discount department store, mini-majors and additional specialty shops. Construction is expected to commence in late 2011. We have estimated a total addition of PLUC 5 shop floorspace in the order of 13,100 sq.m will be added to the centre's previous total of 20,500 sq.m.

- **Secret Harbour** shopping centre has announced a planned addition of a discount department store, in total some 17,000 sq.m additional floorspace. As the operator is not yet known, we have assumed an average floorspace of 7,000 sq.m for the DDS and an increase of 8,400 sq.m of PLUC 5 floorspace for mini majors and specialty shops (with an additional 1,600 sq.m of non-shop/retail floorspace).

- **Centro Warnbro** has development approval for an expansion of the shopping centre to include a 5,130 sq.m discount department store (mooted to be Target) and a further 1,966 sq.m of specialty shop floorspace. We have assumed all but 100 sq.m of this will be PLUC 5 floorspace.

Three further district centres are proposed to be developed in the south-west sub-region of Perth as per *Directions 2031*. While we consider the centres at Wandi and Cockburn Coast to be irrelevant as they are too far distant from Baldivis, we have considered Karnup as follows:

- **Karnup** would be the closest proposed district centre to Baldivis, located some 11.5 km to the south. As yet structure planning for this area is ongoing and timing of this area for land release is not expected in the medium term. Development of this centre will be in the long term.

Neighbourhood centres proposed for the immediate Baldivis area and included in our analysis of impacts include:

- **Baldivis North** – this centre is currently undergoing the structure planning process. We have assumed a supermarket of 1,500 sq.m, mini majors of 400 sq.m (eg. a pharmacy) and PLUC 5 specialty shops of 600 sq.m, taking the future PLUC 5 shop floorspace for the centre to 2,500 sq.m. The centre will be located some 3.9km north of Baldivis Activity Centre and serve a localised catchment.

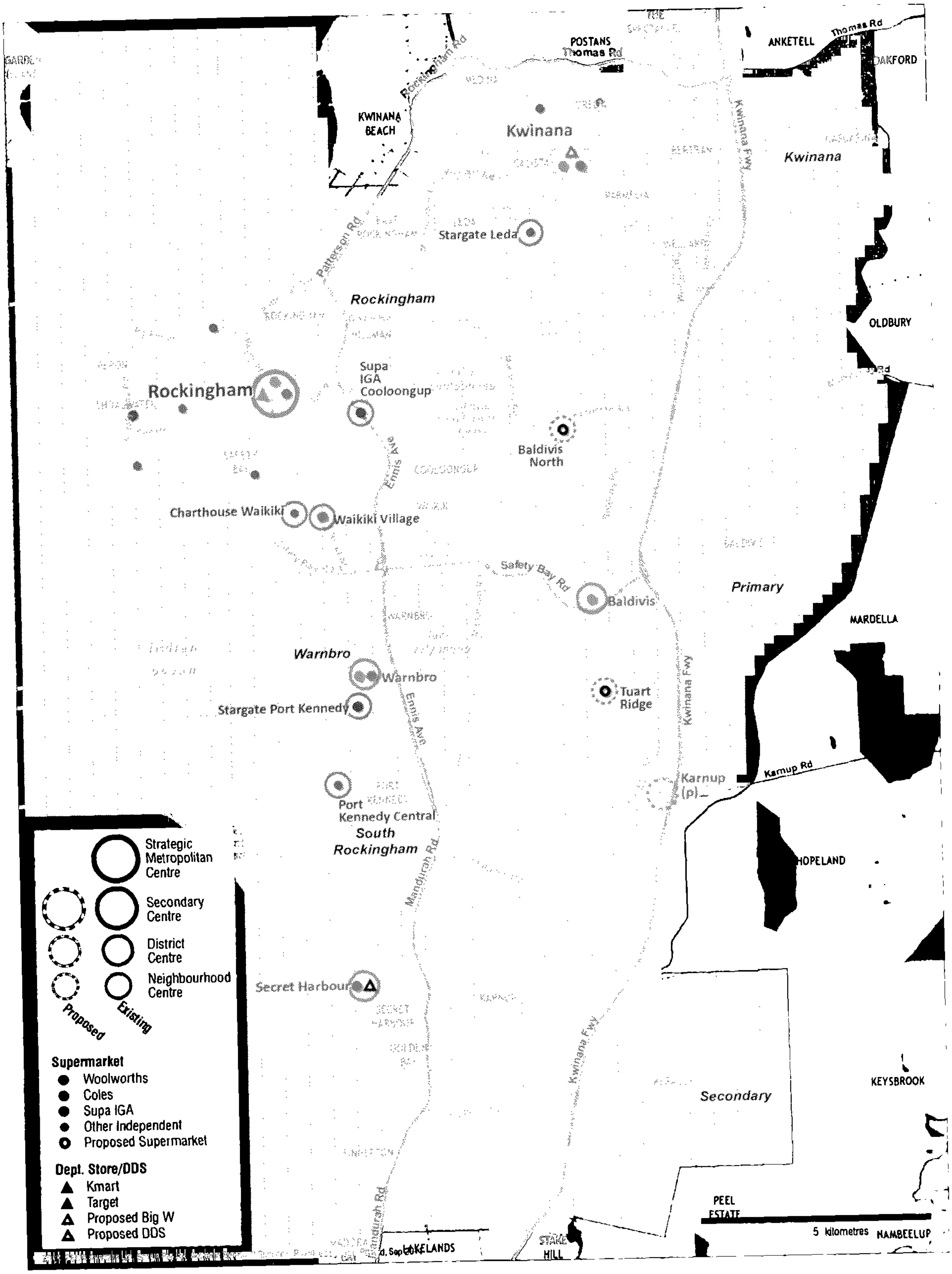
- **Tuart Ridge Village Centre** – we have allowed for development of a supermarket of 2,000 sq.m with 1,200 sq.m of specialty shop floorspace. Total PLUC 5 for the shopping centre is estimated to be 3,200 sq.m when constructed. The centre will be located 1.5km south of Baldivis.

- In addition there is a proposal to continue the **Baldivis Main Street Retail** north from the Stockland land. We have assumed an additional 2,500 sq.m of leasable floorspace including 2,000 sq.m of PLUC 5 shop floorspace will be provided along the extension of the main street retail.

We have also considered the neighbourhood centre proposed for Baldivis Road South, some 2.2km south of Baldivis Activity Centre. As it is in such close proximity to the Tuart Ridge centre (within 700m) we have considered that a market for the centre to serve will not eventuate by our forecast year of 2014.

We have also considered the proposed Keralup centre further to the south and other centres identified in the City of Rockingham Local Commercial Strategy which as yet have not been formalised in the planning process. We have not specifically included these centres in our assessment of need and demand due to their uncertain status at this time, but do recognise their future potential role in the centres hierarchy.

Map 3.1 – Competitive Centres



4 Existing Centre Performance

This section outlines the current performance of the Baldivis Activity Centre. Data sources we have used to arrive at an assessment of the overall trading performance of retail facilities within the Baldivis Activity Centre include information provided by Stockland Baldivis; and knowledge and experience we have regarding the average trading levels of outer suburban Perth shops and similar tenants in Perth and across Australia. We have utilised publicly available sources of information such as the Property Council of Australia's Shopping Centres Directory, and Shopping Centre News publications such as Big Guns/Little Guns/Mini Guns rankings.

4.1 TURNOVER PERFORMANCE

As of June 2011, Stockland Baldivis centre provided some 5,873 sq.m of PLUC 5 shop floorspace, which is about two-thirds of all PLUC5 floorspace in the Baldivis Activity Centre. These retailers generated approximately $59 million in moving annual turnover, at an average trading level of $9,987 per square metre (refer Table 4.1 below).

Table 4.1 also shows the turnover performance of Baldivis Activity Centre compared with the average turnover and productivity of single DDS and single supermarket-based centres, as sourced from the *2010 Urbis Retail Averages.* While the Activity Centre as a whole incorporates a broader range of uses than shopping centres, this comparison shows that Baldivis is achieving higher than average turnover productivity of about 19% more than a comparable supermarket centre, and 54% higher than a discount department store based centre. This performance indicates that market demand could support a larger provision of PLUC 5 shop floorspace in Baldivis.

Turnover & Floorspace Compared With Australian Averages

BALDIVIS ACTIVITY CENTRE — TABLE 4.1

	Unit	Baldivis Activity Centre	Centre Average		Variation from Average	
		(Jun 2011)	Single Smkt	Single DDS	Smkt	Single DDS
Floorspace	sq.m	5,873	7,043	22,123	-17%	-73%
Turnover	$M	59	59	143	-1%	-59%
Productivity	$psm	9,987	8,384	6,476	+19%	+54%

Note: Turnover and floorspace refer to PLUC 5 categories, total floorspace in Activity Centre
Source : Urbis; Urbis Retail Averages 2009/10

4.2 MARKET SHARE PERFORMANCE

Based on an estimated geographic distribution of trade we have derived the current market shares achieved by PLUC 5 shop floorspace at the centre. This analysis is summarised in Table 4.2. Key points to note regarding the centre's market share:

- Stockland Baldivis is estimated to capture a 25% share of all expenditure by main trade area residents on retail goods and services.
- This is built up from a 44% market share of food spending reflecting the centre's role as the primary food and convenience centre with the only supermarket in the MTA; and a lower non-food market share of 15%. Residents are travelling beyond the centre's trade area in order to fulfil most of their discretionary shopping needs at higher order centres.
- We have estimated that approximately 20% of business at Stockland Baldivis comes from outside the main trade area. The majority of this 'beyond' business is sourced from residents living elsewhere in the broader study area (17%), with just 3% of turnover derived from beyond this region.

Total Centre Market Share, 2011

BALDIVIS ACTIVITY CENTRE, $2011 EXCL GST

TABLE 4 2

	Resident Spending ($M)			Market Share (%)			Retail Turnover ($M)		
	Food	NF	Total	Food	NF	Total	Food	NF	Total
Primary Trade Area	88.8	76.0	164.7	34.4%	15.0%	25.5%	30.5	11.4	41.9
Secondary Trade Area	12.1	8.7	20.8	30.0%	15.6%	24.0%	3.6	1.4	5.0
Main Trade Area	**100.9**	**84.6**	**185.5**	33.9%	15.1%	25.3%	34.2	12.7	46.9
Turnover From Beyond MTA				20.0%	20.0%	20.0%	8.5	3.2	11.7
Centre Retail Turnover ($M)							**42.7**	**15.9**	**58.7**

Note: PLUC 5 Retailers
Source: Urbis

5 Retail Need and Impact Assessments

This section outlines the assessment of need, demand and impacts for development of additional PLUC 5 shop floorspace at Baldivis Activity Centre.

5.1 FUTURE RETAIL DEVELOPMENT

As shown in Table 5.1, the proposed retail expansion of Baldivis Activity Centre involves an addition of 13,716 sq.m of leasable floorspace on top of the additional 13,487 sq.m of PLUC5 retail/shop floorspace already approved in the Baldivis Activity Centre.

The further expansion of Stockland Baldivis with Stage 2B (i.e. +8,448 sq.m) is to include a second supermarket, additional mini-major tenancies and supporting specialty shop floorspace. The mix of mini-majors and specialty shop floorspace may vary when developed depending on tenant interest.

The retail need and demand assessment considers the potential quantum of PLUC5 shop/retail floorspace that could be developed based on the proposed masterplan for the activity centre. The masterplan indicates some 35,931sq.m of PLUC5 shop/retail floorspace. As this figure does not fully allow for the potential of non-PLUC5 uses occupying tenancies in the Stockland centre and that a greater proportion of the floorspace in the broader Baldivis Activity Centre could be occupied by non-PLUC5 uses, in all likelihood the amount of PLUC5 uses in the Baldivis Activity Centre will be less than 35,931 sq.m. The need and demand analysis of PLUC5 floorspace therefore should be considered in this context.

Existing and Proposed Floorspace

BALDIVIS ACTIVITY CENTRE — TABLE 5.1

Tenant Type	**Net Lettable Area**			
	Existing	**Approved & U/C[2]**	**After Proposed Expansion**	**Change[1]**
Stockland Baldivis Shopping Centre (inc McDonalds Pad site)	5,798	11,368	25,614	+ 8,448
Liquor Store	1,224	-	1,224	-
Lot 8 (Dome Building)	869	-	869	-
South East Precinct: Service Station, HJs, Liquor Store, Masters (U/C)	837	500	1,337	-
Settlers Avenue East	-	750	1,550	+800
Lot 6 Settlers	-	-	650	+650
Atwick	-	659	1,327	+668
Red Rooster	-	210	210	-
Corner Settlers & Mennock	-	-	350	+350
Fast Food Outlet (Pad site 3)	-	-	300	+300
Lot 9001 (Settlers Avenue)	-	-	2,500	+ 2,500
Baldivis Activity Centre - PLUC 5	**8,728**	**13,487**	**35,931**	**+ 13,716**

1. Change refers to net additional floorspace from existing & approved to expansion

2. This floorspace is already approved and under construction - see Introduction. Occurring between 2011 and 2014.

Source : Stockland; Urbis

5.2 ASSUMPTIONS

Assumptions factored into the assessment of need, demand and impacts are as follows:

- The expansion of Baldivis Activity Centre to 35,931 sq.m of PLUC 5 shop floorspace (13,716 sq.m plus 13,487 sq.m of already approved floorspace) is assumed to open within the year ending June 2014. In all likelihood not all of the additional floorspace will be provided by 2014 and progressively developed over a number of years.

- Our impact assessment is based the Stage 2B expansion of the Stockland Baldivis centre and development on other Stockland owned sites in the town centre. Our analysis treats the already approved floorspace in the Baldivis Activity Centre as a competitive development within the timeframe to 2014, impacting centres between 2011 and 2014. We then calculate the impacts of the further 9,548 sq.m of floorspace on Stockland owned sites on competitive centres in financial year 2014.

- Population growth in the main trade area and broader study area is forecast as per that outlined in Section 2 of this report.

- The existing and future centres hierarchy is outlined in Section 3. The need and impact assessments also make allowances for the proposed developments as discussed in that section.

5.3 PLUC 5 SHOP FLOORSPACE NEED AND DEMAND

As outlined in State Planning Policy 4.2, a retail needs assessment is intended to guide structure plans for district and neighbourhood centres. The policy indicates that a retail needs assessment "*generally includes*

- *The projected population and its socio-economic characteristics;*

- *Household expenditure and required retail floorspace;*

- *Changing shopping patterns and trends; and*

- *The needs of different retail sectors."*

This section of the report assesses the demand and need for shop/retail floorspace by residents of the main trade area and broader study area. The extent to which the proposed expansion of PLUC 5 shop retail floorspace at Baldivis Activity Centre satisfies market need and demand and is appropriate in context of overall demand and intended role of the activity centre within the existing and planned centres hierarchy is assessed.

5.3.1 STUDY AREA DEMAND

We commence with assessment of the demand for PLUC 5 shop retail floorspace across the study area to 2031, which is summarised in Table 5.1. The demand for PLUC 5 shop retail floorspace is estimated using the following inputs:

- Amount of expenditure by study area residents on PLUC 5 shop retail uses. This is estimated by applying forecast population to spend per capita estimates sourced from *MarketInfo*. As of June 2011, there were approximately 136,100 people living in the study area. These residents are estimated to have spent $1.4 billion on PLUC 5 shop retail goods and services.

- An appropriate trading density (i.e. turnover per square metre) is then applied to the estimated size of the spending market. The trading density estimates are derived from industry performance benchmarks relevant to the category of uses within the PLUC 5 definition. The average trading density applied in 2011 is at $5,950 per sq.m. Over time, on the back of growing incomes and wealth, and therefore an improving performance of the retail sector, the trading density is assumed to increase, in real terms, by 0.5% per annum.

- It is assumed that study area inflows and outflows of expenditure are in balance.

Key points to note are:

- Demand exists for 23,000 sq.m more shop/retail floorspace than currently provided in 2011.
- Without new retail developments, this shortfall in PLUC 5 shop retail floorspace increases to 59,400 sq.m by 2014 and 138,000 sq.m by 2021.
- The proposed addition of 27,203 sq.m (total) at Stockland Baldivis would account for only 46% of excess shop retail floorspace demand by 2014, leaving 54% for expansion of other existing centres or development of new centres in the region. This remaining excess demand would more than cover current proposals, including expansions at Kwinana, Warnbro and Secret Harbour.

PLUC 5 Capacity Assessment Summary

STUDY AREA TABLE 5.2

	Unit	2011	2014	2016	2021	2026	2031
PLUC 5 Spending Market	**$M**	**1,427.0**	**1,650.6**	**1,792.8**	**2,151.9**	**2,472.1**	**2,728.3**
Total PLUC 5 Floorspace Demand							
Average Trading Density	$psm	5,950	5,980	6,000	6,060	6,130	6,200
Floorspace Demand	sq.m	239,800	276,200	298,800	355,000	403,200	439,700
Estimated PLUC 5 Floorspace[1]	sq.m	216,800	216,800	216,800	216,800	216,800	216,800
Excess Capacity	sq.m	23,000	59,400	82,000	138,200	186,400	222,900
Baldivis Expansion	sq.m		27,203	27,203	27,203	27,203	27,203
Other Expansions	sq.m		32,197	54,797	110,997	159,197	195,697
Baldivis as % of Excess Capacity	sq.m		46%	33%	20%	15%	12%

1. Total additional floorspace in the catchment area since PLUS conducted is estimated at 31,100 sq.m

Source : PCA Shopping Centre Directory April 2011; Urbis

5.3.2 MAIN TRADE AREA DEMAND

In order to assess the capacity of the market to support PLUC5 shop floorspace at the Baldivis Activity Centre it is relevant to consider demand generated for floorspace in the main trade area. It is important to note that the higher than average income and retail spending levels in the Baldivis main trade area, as identified earlier in section 2 of this report, may lead to a higher level of need for more PLUC 5 floorspace than other sectors of the study area. PLUC5 shop floorspace demand analysis for the main trade area is shown in Table 5.3.

This analysis provides an indication of the potential for shop retail floorspace in the Baldivis main trade area and therefore market support for the expansion of the Stockland centre and other retail developments within the Baldivis Activity Centre (e.g. main street) and surrounding local centres. The key findings from this analysis are as follows:

- In the main trade area, there is currently 8,728 sq.m of PLUC 5 shop retail floorspace (Baldivis Activity Centre).
- In 2011, main trade area residents generated demand for 31,200 sq.m of PLUC5 shop floorspace. Not all of this demand will be provided for by centres within the main trade area as a significant share of resident expenditure will continue to be directed to larger centres outside the main trade area which served broader discretionary shopping needs than would be provided for in a District Centre such as Baldivis (e.g. Rockingham, Perth CBD, etc.).
- Allowing for turnover sourced from beyond the main trade area, and a net 58% of demand to be retained, which recognises most convenience based shopping will be undertaken locally but the majority of discretionary spending undertaken elsewhere, there exists excess demand for

approximately 23,700 sq.m of PLUC 5 shop retail floorspace in the main trade area by 2014, rising to 30,500 sq.m by 2016 and 51,000 sq.m by 2021.

- The proposed addition of approximately 27,200 sq.m of PLUC 5 shop retail floorspace at Stockland Baldivis Activity Centre would exceed demand by around 4,000 sq.m in 2014 but fall short of demand by almost 3,000 sq.m by 2016. It is important to recognise that a proportion of the additional 27,200 sq.m of PLUC5 shop floorspace will likely be developed over a number of years and that a significant proportion of this space will be occupied by non-PLUC5 uses (e.g. banks, travel agents, commercial/office uses, etc.). The addition of PLUC5 shop floorspace in the order of 27,000 sq.m is sustainable within the assessed timeframe and appropriate given the highest order role of the centre in the main trade area and limited range of other development opportunities elsewhere in the main trade area at this time. It is preferable to build early in developing areas such as these in order to provide residents with amenity at an earlier stage and build sustainable shopping habits closer to home. It is important to note that more floorspace could be accommodated in the main trade area but at overall lower but still sustainable average trading densities.

- Market growth would provide sufficient demand to support several planned local centres by 2016, e.g. Baldivis North and Tuart Ridge. One of these centres could be developed earlier likely at soft but still sustainable trading levels. This is a common occurrence in developing areas where retail facilities are brought to the market at the earliest possible timeframe to ensure residents have access to retail facilities.

- Longer term there would be increasing demand for PLUC 5 retail floorspace across the main trade area.

Main Trade Area PLUC 5 Capacity Assessment Summary

BALDIVIS ACTIVITY CENTRE — TABLE 5.3

	Unit	2011	2014	2016	2021	2026	2031
MTA PLUC 5 Spending Market	**$M**	**185.5**	**270.5**	**329.2**	**511.8**	**656.0**	**730.9**
MTA PLUC 5 Floorspace Demand							
Average Trading Density	$psm	5,950	5,980	6,000	6,060	6,130	6,200
Floorspace Demand	sq.m	31,200	45,200	54,900	84,500	107,000	117,900
Estimated PLUC 5 Floorspace[1]	sq.m	8,728	8,728	8,728	8,728	8,728	8,728
Floorspace Demand Retained in MTA[2]	sq.m	18,010	26,092	31,691	48,778	61,766	68,058
Floorspace Demand to MTA Retailers[3]	sq.m	22,153	31,897	38,584	58,778	73,656	80,309
Excess Capacity	sq.m	13,425	23,169	29,856	50,050	64,928	71,581
Baldivis Expansion[4]	sq.m		27,203	27,203	27,203	27,203	27,203
Baldivis as % of Excess Capacity	sq.m		117%	91%	54%	42%	38%

1 We have taken the total PLUS for Baldivis, Karnup and Keralup suburbs and assumed no changes since 2008. By 2014 the following developments are assumed to have taken place Baldivis North NC and Tuart Ridge Village Centre

2 Approximately 58% of floorspace demand is retained by retailers located in the main trade area

3 Includes allowance for turnover (floorspace demand) sourced from markets outside of the main trade area

4. Analysis assumes all of the additional floorspace is developed by 2014 In reality a proportion of the additional floorspace will likely be added beyond 2014.

Source : PLUS; Urbis

5.3.3 MARKET CAPACITY FOR A DISCOUNT DEPARTMENT STORE

A key feature of the expansion of Baldivis Activity Centre is the addition of a discount department store in order to respond to the everyday non-food shopping needs of main trade area residents and general under supply of DDS floorspace in the broader study area region.

The Activity Centres hierarchy indicates that DDSs can be provided in centres classified as District Centres and above. In the broader study area, therefore, applicable centres are Baldivis, Secret Harbour, Warnbro, Kwinana, Rockingham and the centre proposed at Karnup. Of these centres Rockingham is currently the only centre with DDSs, although four are proposed (Baldivis, Warnbro, Secret Harbour and Kwinana).

We have used the market capacity assessment to test the market potential for DDSs in the main trade area. This assessment considers the extent to which residents shop at DDSs, the amount of expenditure at DDSs retained in the main trade area and resulting supportable number of DDSs.

This method applies a target productivity level (turnover per square metre) for DDSs, having regard to Perth metro and outer metro benchmarks, and capital cities across Australia. This target is grown to take into account growing real spending in the market. The potential DDS turnover has been derived taking into account the amount of spending typically directed to DDSs and the share of DDS turnover that would be retained by DDSs in the main trade area. Allowance is also made as to the amount of turnover sourced from outside the main trade area.

Table 5.4 shows the results of our analysis on DDS capacity within the Baldivis main trade area.

- As shown, the turnover potential of a DDS in the main trade area is assessed at $15.0 million in 2014 and a higher $27.1 million by 2021 ($2011 excluding GST).
- Applying a target trading level of $2,800 per square metre, grown over time to 2031, indicates that there would be sufficient demand to support a DDS by 2014, albeit at a modest but still viable turnover level. Strong market growth would result in the DDS achieving an above average turnover well before 2020.
- The analysis shows that a DDS could be supported at Baldivis Activity Centre by 2014. The DDS would be an important addition to the retail mix of the centre and enhance shopping options of main trade area residents particularly the option to undertake more non-food shopping locally rather than travelling to further afield centres.

Main Trade Area DDS Capacity Assessment

BALDIVIS ACTIVITY CENTRE — TABLE 5.4

	Unit	2011	2014	2016	2021	2026	2031
Population	**No.**	**14,992**	**20,679**	**24,489**	**35,566**	**42,541**	**44,091**
Potential DDS Turnover ($2011M)	**$M**	**10.5**	**15.0**	**18.1**	**27.1**	**33.3**	**35.9**
Supportable Number of DDSs							
Indicative Average Trading Level	$psm	2,800	2,870	2,910	3,030	3,160	3,280
Indicative Supportable DDS Floorspace	sq.m	3,740	5,240	6,210	8,930	10,550	10,930
Typical DDS Store Size	sq.m	7,000					
Supportable No. of DDSs (5,500 sq.m)	No.	0.7	1.0	1.1	1.6	1.9	2.0
Supportable No. of DDSs (8,000 sq.m)	No.	0.5	0.7	0.8	1.1	1.3	1.4
Existing and Planned DDSs							
DDS Baldivis (p)	*No.*		*1.0*				
Total	**No.**		**1.0**				
Excess Capacity for DDSs	**No.**		**-0.0 to -0.3**	**+0.1 to -0.2**	**+0.6 to +0.1**	**+0.9 to +0.3**	**+1.0 to +0.4**

Source : Urbis

5.3.4 MARKET CAPACITY FOR SUPERMARKETS

As the Baldivis proposal also comprises an expansion to supermarket floorspace, we have assessed the market capacity for supermarket floorspace in the main trade area, as shown in Table 5.7. Key points to note from Table 5.7 are:

- We have estimated the potential turnover of supermarkets in the main trade area currently at $54 million. A good proportion of this potential turnover is being directed to other centres beyond the main trade area given the modest provision of supermarkets locally (i.e. only a Coles store at Stockland Baldivis serving a main trade area population of 15,000).
- The target trading level for supermarkets has been chosen with reference to Perth and other capital city benchmarks, which indicates unmet demand for supermarket floorspace of 3,170 sq.m in the main trade area as at 2011. We note supermarkets can be supported at a lower average trading level than used in Table 5.5.
- Without the addition of new supermarket floorspace, market growth will increase the level of unmet supermarket floorspace demand to 5,600 sq.m by 2014 and 11,700 sq.m by 2021.
- The proposed addition of an additional 4,545 sq.m of supermarket floorspace at Stockland Baldivis in 2014 would address unmet demand in the main trade area. By 2016, there would be capacity for at least another 2,600 sq.m of supermarket floorspace which could be accommodated by several planned local centres (e.g. Tuart Ridge and Baldivis North). These centres could be developed earlier with the likely result being a lower but overall sustainable average trading level for supermarkets in the main trade area. The potential of each local centre development would need to be assessed on the specific merits of each centre's market and location attributes.
- We note that additional supermarkets could be introduced earlier than suggested in Table 5.5 but at lower but still sustainable trading levels. This is a common outcome in developing areas where retail facilities are introduced early to ensure local residents have access to retailing at the earliest possible timeframe.

The supermarket capacity analysis demonstrates that the market is able to support both an expansion at Baldivis and the development of ancillary neighbourhood/local centres within the next 5-7 years. There would unlikely be market potential for other supermarkets within this timeframe.

Main Trade Area Supermarket Capacity Assessment

BALDIVIS ACTIVITY CENTRE — TABLE 5.5

	Unit	2011	2014	2016	2021	2026	2031
Population	**No.**	**14,992**	**20,679**	**24,489**	**35,566**	**42,541**	**44,091**
Turnover Available to TA Smkts	**$M**	**54.2**	**75.7**	**90.2**	**133.1**	**161.6**	**170.3**
<u>Supermarket Floorspace Demand</u>							
Indicative Average Trading Level	$psm	8,500	8,628	8,715	8,935	9,160	9,392
Indicative Supportable S'market Floorspace	sq.m	6,374	8,772	10,353	14,893	17,643	18,132
<u>MTA Existing and Planned Smkts</u>							
Coles Baldivis	sq.m	3,205	3,205	3,205	3,205	3,205	3,205
Supermarket(s) Baldivis (p)	*sq.m*		*4,545*	*4,545*	*4,545*	*4,545*	*4,545*
Total Baldivis	**sq.m**	**3,205**	**7,750**	**7,750**	**7,750**	**7,750**	**7,750**
Excess Capacity for Other Smkts	**sq. m**	**3,169**	**1,022**	**2,603**	**7,143**	**9,893**	**10,382**

Source : PLUS; Urbis

5.3.5 ESCAPE EXPENDITURE ANALYSIS

Supporting evidence for demand in the main trade area for a broader and larger range of shop retail floorspace is shown in Table 5.6 which outlines analysis of the amount of expenditure currently (2011) being directed to centres outside of the main trade area.

This analysis shows that approximately $124 million of main trade area retail expenditure is escaping the main trade area, or around 67% of the available spending market. The level of escape expenditure is high in both the food (55%) and non-food (82%) segments of the market. A better planning outcome would be for more expenditure retained locally, especially convenience based expenditure.

Baldivis's place in the centres hierarchy means that some level of escape expenditure will always be directed to higher order centres such as Rockingham and the Perth CBD, particularly for non-food discretionary type items. However such a large level of escape expenditure existing currently in the trade area means that residents have sub-optimal access to retail shops and are having to drive long distances to centres outside the main trade area in order to meet their shopping needs. This obviously has negative consequences for the environment, traffic congestion, maintenance of road infrastructure, and social costs such as time spent on the road and building a thriving multi-purpose district centre that can cater to the community's needs.

The proposed addition of PLUC 5 shop retail floorspace at Baldivis Activity Centre would be integral in retaining expenditure currently being directed elsewhere which has positive spin-off benefits to other commercial businesses and community facilities.

Main Trade Area Escape Expenditure

BALDIVIS ACTIVITY CENTRE TABLE 5.6

	Food	Non-Food	Total
Estimated Turnover ($M)[1]	57.2	19.3	76.6
Estimated % from Beyond Main Trade Area	20%	20%	20%
Turnover from Main Trade Area ($M)	45.8	15.5	61.2
Estimated MTA Spending ($M)	100.9	84.6	185.5
Estimated Escape Spending:			
$M	55.1	69.2	124.3
% of Trade Area Spending	55%	82%	67%

1. Total current Activity Centre (8,728 sq.m)
Source : Urbis

5.3.6 SUMMARY OF NEED AND DEMAND ASSESSMENT

The key findings from the need and demand assessment are as follows:

- The proposed expansion of retail facilities at Baldivis Activity Centre in 2014 (i.e. 27,200 sq.m) would address unmet market demand. Beyond 2014, strong market growth would provide support for planned local centres and/or other development within the Baldivis Activity Centre.
- A DDS is supportable at Baldivis Activity Centre in 2014, albeit at an initial modest but viable trading level. Strong market growth would result in the DDS trading at an above average turnover level well before 2020.
- There will be demand available to support supermarkets other than those proposed at Stockland Baldivis within the next 5-7 years (e.g. Tuart Ridge and Baldivis North). Ongoing forecast strong market growth would provide support for other supermarkets in the longer term (notably other centres planned in the area).
- The need and demand analysis looks at the impact of all floorspace within the Baldivis Activity Centre. Some of the proposed land uses, particularly those not contiguous to the current retail core,

have been included as potential retail areas but could be more suited to non-retail uses. Alternatively they could be accommodated post expansion of the Stockland centre.

- Earlier development of these areas (such as the 2,500 sq.m of retail in the north of the Main Street) would not be supportable given the benefit the Stockland centre would provide in terms of shopper activity levels and associated spin-off benefits. Ultimately the potential for this space will be dependent on its connectivity with the Stockland asset and traffic flows along this section of Settlers Avenue (and extension of this road as a thoroughfare). Urban design principles suggest that a compact retail centre reflecting critical mass of activity generators will promote a more active streetscape. Ideally any outwards growth would occur from the current activity centre organically over time to avoid the chance of any 'gaps' in the main Activity Centre itself.
- The proposed expansion of retail uses at the Baldivis Activity Centre would not impact the potential development of retail facilities at the planned Karnup centre. Ultimately the progressive development of this centre will be reliant on the population levels in the secondary trade area (i.e. area around Karnup). Based on the population projections used in this report (and for the secondary trade area) a neighbourhood centre could be developed between 2020 and 2025. As there would be around 44,000 people in the main trade area by 2031, there would likely not be support for a DDS at the planned Karnup centre until beyond 2031. We again note that the population forecasts are aligned to official state government projections/targets and considered conservative by Urbis. If the population projections were exceeded then the timing of development of the Karnup centre could be earlier than stated in this report.
- The proposed development at the Baldivis Activity Centre, including expansion of Stockland Baldivis, would not impact the potential for retail development elsewhere in the Rockingham/Kwinana region as it addresses local demand.

5.4 BALDIVIS ACTIVITY CENTRE TURNOVER POTENTIAL

We have assessed the effect of the proposed new Stockland floorspace of 9,548 sq.m in the Baldivis Activity Centre (ie. the Stage 2B shopping centre expansion, buildings 4 and 6 and the fast food outlet pad site 3). In reality not all of this additional floorspace will be PLUC 5 floorspace however we are estimating impacts on the total quantum.

The net additional turnover at Stockland Baldivis following the proposed Stockland expansion by 2014 is $41.1 million. Of the $41.1 million, $34.4 million is estimated to be drawn from the main trade area. The net additional turnover is detailed in Table 5.7.

The net additional turnover represents the amount of spending that will be directed from other centres or in other words the combined trading impact on other centres.

Stockland Baldivis Net Additional Retail Turnover, 2014

STOCKLAND STAGE 2B EXPANSION SCENARIO, $2011 EXCL GST — TABLE 5.7

	Resident Spending ($M)			Market Share Potential			Forecast Turnover		
	Food	NF	Total	Food	NF	Total	Food	NF	Total
Primary Trade Area	129.4	115.6	245.0	13.5%	11.6%	12.6%	17.5	13.4	30.9
Secondary Trade Area	14.6	10.9	25.5	15.0%	11.8%	13.6%	2.2	1.3	3.5
Main Trade Area	**144.0**	**126.5**	**270.5**	**13.7%**	**11.6%**	**12.7%**	**19.7**	**14.7**	**34.4**
Plus Turnover From Beyond MTA							2.8	3.8	6.7
Centre Retail Turnover ($M)							**22.6**	**18.5**	**41.1**

Source: Urbis

5.5 IMPACT ASSESSMENT

An impact assessment is expected to provide an indication of the trading environment and average trading conditions within which retailers operate, and implications for likely turnover declines or gains on average for the retailers involved. Because an impact assessment forecasts how groups of people are likely to alter their shopping behaviour in response to a given change in the competitive environment, it is not possible to estimate individual retailer impacts or each group of retailers in each location.

Therefore in any impact assessment of this type it is not possible to estimate impacts on any specific individual retailer. The impact on any one individual retailer or any small group of retailers in a given location would depend on many factors (e.g. retailer profitability), some of which are within their control. The actions which each of these retailers take will determine the eventual impact on each, and furthermore the actions which they each take will also determine the eventual impact on the other retailers involved.

All of these factors need to be kept in mind when considering the likely impact of any relocation and expansion of a retailer within the existing retail network. Existing retailers are not passive participants but rather will play a major role in the eventual impact which they will experience.

In addition while undertaking our assessment we have considered the effect of changing the retail trading hours but have not included any specific impacts in our analysis regarding this. Changing retail trading hours will not impact the development potential for the Baldivis Activity Centre or other neighbourhood centres to a material extent.

5.5.1 GENERAL IMPACT

Table 5.8 outlines an analysis of the average impact of the expansion of the Baldivis centre by 9,548 sq.m of PLUC 5 shop/retail floorspace in terms of the proportion of PLUC 5 retail turnover that will be diverted from other centres and stores that serve the study area population. This analysis is presented for the year 2014.

The key points to note from this analysis are as follows:

- Retail spending by main trade area residents is forecast to grow by $85 million between 2011 and 2014.
- The expansion of Stockland Baldivis is estimated to capture $34 million in retail turnover from main trade area retail spending.
- Other retailers serving the main trade area therefore would still have access to $51 million of the forecast growth in the market between 2011 and 2014. As a consequence the turnover derived by retailers from the main trade area would be some 27% higher than the current 2011 level.

The one-off impact of 12.7% on main trade area retail spending at other centres would be more than offset by market growth to 2014 and that market growth would support the quantum of floorspace proposed to be added at Baldivis. The proposed expansion of Stockland Baldivis is therefore catering to the growing demand for floorspace.

General Impact on Retail Spending

STOCKLAND BALDIVIS EXPANSION, $2011 EXCL GST TABLE 5.8

(9,548 sq.m of net additional PLUC 5 Floorspace)	Row Reference	Unit	**Analysis Year** 2014
Main Trade Area Retail Spending 2011	(1)	$M	185.5
Main Trade Area Retail Spending (Analysis Year)	(2)	$M	270.5
Main Trade Area Retail Spending Growth (Analysis Years)	(3)=(2)-(1)	$M	85.0
Net Additional MTA Resident Retail Spending to Baldivis	(4)	$M	34.4
Average Turnover Impact (Analysis Year)	(7)=-(4)/(2)	%	-12.7%
Retail Spending Growth less Baldivis Net Additional Turnover	(5)=(3)-(4)	$M	50.6
Average T/O Change Other Retailers (2011 to 2014)	**(6)=(5)/(1)**	**%**	**+27.3%**

Source: Urbis

5.5.2 SPECIFIC CENTRE IMPACTS

Shopper behaviour is related to the satisfaction of particular requirements. Decisions made regarding where to shop are based on a number of judgements, including relative accessibility, availability of particular retailers, convenience, variety, carparking and others. As a result, residents like to spread their purchases across a wide variety of shopping centres and areas, and use the full range of facilities available to satisfy particular needs.

The method of analysis used to assess the impacts on individual centres from a retail development is based on a 'competitive usage' model. This model is based on the principle that if shoppers choose to direct some of their retail expenditure to the subject development proposal, then they will reduce their expenditure at other centres in direct proportion to their usage of each centre or location (reflected by each centre's market share from the various trade area sectors). In assessing the potential impacts on other centres in the hierarchy we have adopted a 'turnover allocation approach'.

The assessment of impacts on specific retail centres relies upon an understanding of the existing turnover and level of usage of centres in the study area and beyond. The model attempts to estimate the degree to which various shopping locations within and beyond the study area are used for retail shopping, by allocating a proportion of turnover to each study area sector (i.e source of sales). These estimates result in market share calculations for each competitive centre, and thereby form the basis of which the impact of the proposed retail development is distributed to all other centres used by residents of the study area for retail shopping.

It is also relevant to consider the dollar impacts in relation to the turnover that would potentially be generated by these and other shopping centres over the intervening period. The impact analysis therefore details the turnover loss, or net impact, which is expected for each centre/location, expressed as a reduction in turnover and as a percentage of the turnover level for each centre in 2014.

The centre specific analysis is presented in Table 5.9 and the main findings are as follows:

- The highest impacts on higher order existing centres or comparable district centres are at Warnbro, Kwinana, and Rockingham (-3.3%, -2.8% and -1.9% respectively). This is expected as they are the closest in proximity to Baldivis. Again market growth and expansions to some of these centres would be expected to offset these impacts as evidenced by these centres estimated to still achieve a higher turnover in 2014 relative to their 2011 level. Note that we have included the proposed expansions of Kwinana and Warnbro in our impact analysis which affects the change in turnover between 2011 and 2014.

- Minor impacts are expected on other centres below Baldivis in the centres hierarchy.
- Some centres will have a turnover level in 2014 that is lower than the level in 2011. This result is due the analysis allowing for developments at other centres such as the expansion of Centro Warnbro, Secret Harbour and Kwinana.

Distribution of Impact on Key Centres, 2014

STOCKLAND BALDIVIS EXPANSION, $2011 EXCL GST — TABLE 5.9

Expansion of 8,448 sq.m, includes 13,748 sq.m already approved	**Est. Retail Turnover ($M)[1]**			**Turnover Incr./Decr. ($M) Relative to:**		**IMPACT**	
Shopping	Existing	Pre-Exp[1]	Post Exp.	Existing	Pre-Exp	Relative to:	
Area	2011 (1)	2014 (2)	2014 (3)	2011 (4)=(3)-(1)	2014 (5)=(3)-(2)	2011 (6)=(4)/(1)	2014 (7)=(5)/(2)
Strategic Metropolitan Centres							
Rockingham	387.3	404.4	396.7	9.4	-7.7	+2.4%	-1.9%
Secondary Centres							
Kwinana	106.9	172.1	167.3	60.5	-4.7	+56.6%	-2.8%
District Centres							
Warnbro	108.4	139.9	135.3	26.9	-4.6	+24.8%	-3.3%
Secret Harbour	53.6	118.9	117.0	63.4	-1.9	+118.1%	-1.6%
Other Centres							
Waikiki Village	82.2	82.5	80.3	-1.9	-2.2	-2.3%	-2.6%
Stargate Port Kennedy	35.0	34.1	34.0	-1.0	-0.1	-2.9%	-0.3%
Port Kennedy Central	49.7	45.7	45.5	-4.2	-0.2	-8.5%	-0.4%
Charthouse Waikiki IGA	16.9	17.2	17.1	+0.3	-0.1	+1.6%	-0.3%
Cooloongup	27.1	27.9	27.8	+0.8	-0.0	+2.9%	-0.2%
Leda	24.7	23.1	22.6	-2.1	-0.5	-8.6%	-2.2%
Total Above Centres	**891.7**	**1,065.7**	**1,043.7**	**152.0**	**-22.0**	**+17.0%**	**-2.1%**
Other centres[3]					-19.1		
Total Competing Centres					**-41.1**		

1. Year ending June

2. Turnover CHANGE is a comparison to current 2011 turnover

Turnover IMPACT is a comparison to expected turnover would otherwise be in the forecast year if the subject development did not occur.

3. Includes impact on existing/approved floorspace in the Baldivis Activity Centre

Source: Urbis

In summary, the impact analysis demonstrates the following:

- The development of Baldivis Activity Centre by 2014 is appropriate in scale and can be supported by the market.
- The assessed level of impact on any one centre is manageable and the proposed expansion would not be expected to adversely impact the role, function and viability of other activity centres.
- The proposed expansion addresses the need for additional shop/retail floorspace in the region, particularly the main trade area, and will be integral in reducing the amount of expenditure escaping to centres outside the Baldivis main trade area and the broader study area. Greater support would therefore be provided to the local centres hierarchy and residents of the main trade area and broader study area will have improved access to retail goods and services.
- Any increase in shopping activity undertaken locally will generate spin-off benefits for other businesses and facilities in the Baldivis centre. The proposed development therefore would be expected to support further provision of non-retail related uses such as office space and community facilities.

In conclusion the incremental development of additional PLUC 5 shop floorspace at Baldivis is sustainable and the community will benefit from enhanced access to retail goods and services over time.

Appendix A PLUC 5 Shop/Retail Expenditure

PLUC 5 Shop/Retail Definition

RETAIL EXPENDITURE INCLUDED, BY PRODUCT GROUP

TABLE A1

Product Group	**Commodity Items**	**Food/Non-Food**
Food Retail	Food, Groceries, Tobacco, Liquor	Food
Food Catering	Take-Away, Meals	Food
Apparel	Clothing, Footwear, Jewellery, Accessories	Non-Food
Homewares	Household, TV/Sound, Small Electricals, Manchester	Non-Food
Bulky Goods	Furniture, Large Electricals	Non-Food
General/Leisure	Books, Music, Sports, Toys, Chemist, News	Non-Food
Services	Hair, Optician, Film Processing, Dry Cleaning, Video Hire, Repairs	Non-Food

Source : WAPC: Urbis

Sydney
Level 21, 321 Kent Street
Sydney, NSW 2000
t +02 8233 9900
f +02 8233 9966

Brisbane
Level 12, 120 Edward Street
Brisbane, QLD 4000
t +07 3007 3800
f +07 3007 3811

Melbourne
Level 12, 120 Collins Street
Melbourne, VIC 3000
t +03 8663 4888
f +03 8663 4999

Perth
Level 1, 55 St Georges Terrace
Perth, WA 6000
t +08 9346 0500
f +08 9321 7790

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w urbis.com.au **e** info@urbis.com.au