

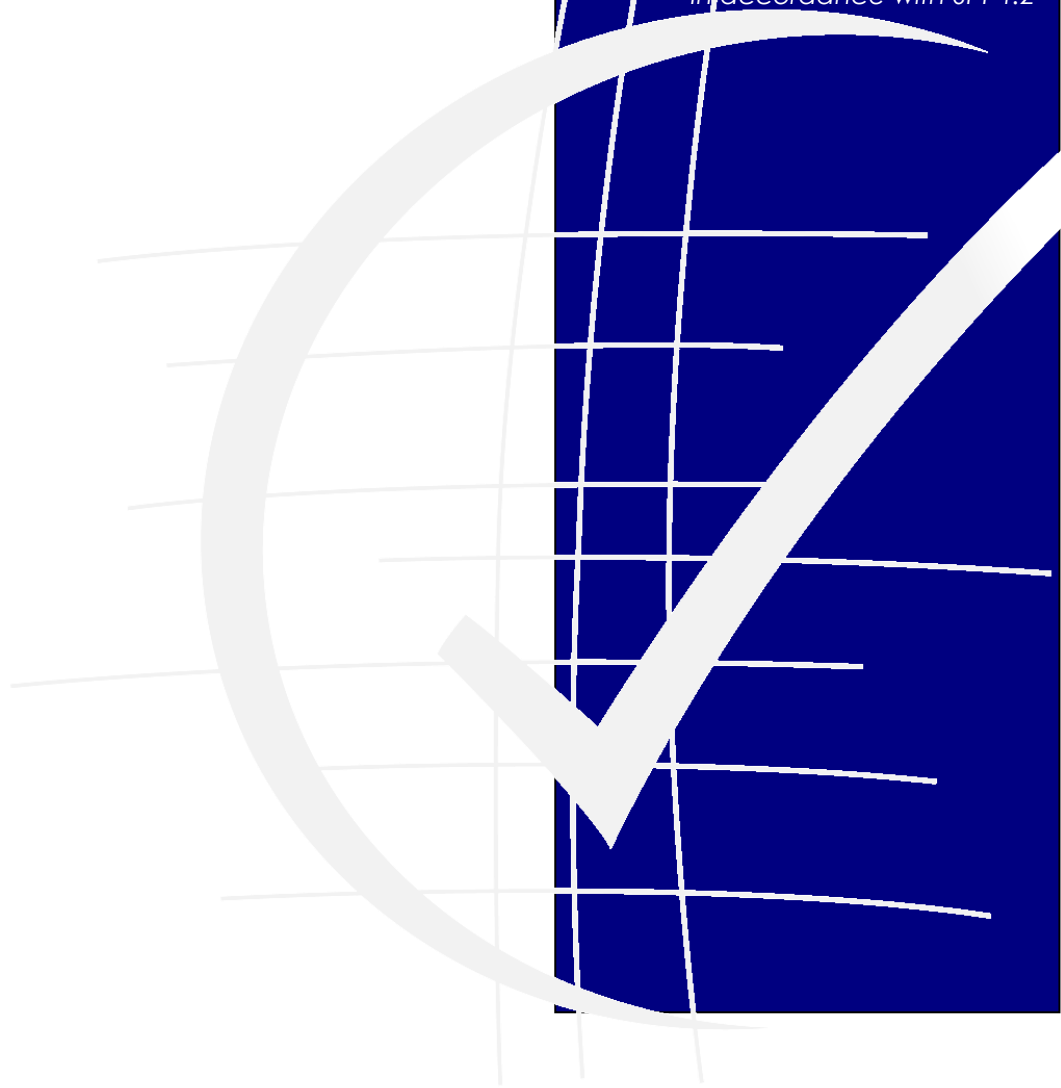
Taktics4

Precinct 3 - EWDSP

Neighbourhood Centre
East Wanneroo District Structure Plan
City of Wanneroo

Needs Assessment and Net Benefit Test

In accordance with SPP4.2



Project

Project name	Neighbourhood Centre - Precinct 3 - EWDSP
Project number	2224
Prepared for	Satterley/Burgess Design Group

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Version

Document Name	Date	Description	Prepared
2224-EWDSP-Precinct 3-NBT-Draft-01.docx	Mar 2025	Draft for Consideration	GRD
2224-EWDSP-Precinct 3-NBT-Final-01.docx	Mar 2025	Final for Lodgement	GRD

Distribution

Document Name	Date	Distribution	Format	Delivery
2224-EWDSP-Precinct 3-NBT-Draft-01.docx	Mar 2025	JB - BDG	PDF	email
2224-EWDSP-Precinct 3-NBT-Final-01.docx	Mar 2025	JB - BDG	PDF	email

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EXECUTIVE SUMMARY

This Needs Assessment and Net Benefit Test guides the assessment for a planned neighbourhood activity centre in Precinct 3 of the East Wanneroo District Structure Plan. The neighbourhood activity centre is planned to be located on the north east corner of the intersection of Lenore and Elliot Roads, in the City of Wanneroo.

Designation

The planned centre in Precinct 3 (planned centre) is designated as a:

Planned centre	A local centre is planned in Precinct 3 of the adopted EWDSP.
Major development	Any planned centre represents a major development for the purposes of triggering a Needs Assessment and Net Benefit Test

Proposed Activity

The planned centre is proposed to contain:

Retail floor space	5,000 sqm NLA
Non-Retail floorspace	2,950 sqm NLA
Total Activity Centre floor space	7,950 sqm NLA

Activity Centre Network and Trade Area Population

There are 12 existing and/or planned activity centres which are expected to influence or be influenced by the planned centre. The planned centre will:

- represent a 1.7% increase to the planned total retail floor space and 5.7% increase to the total convenience floor space available to the trade area.
- operate within a trade area (including existing and proposed resident areas) which is forecast to grow from 84,000 residents by 2031 to 148,000 by 2046.

Retail Spending

The current and forecast resident population in the trade area are estimated to generate:

- \$728M p.a. in total retail spending by 2026 including \$421M p.a. in convenience-based retail spending.
- \$1.9B p.a. in total retail spending by 2046 including \$1.1B p.a. in convenience-based retail spending.
- An additional \$676M p.a. in convenience-based retail spending generated by residents in the trade area over the next 20 years.

Needs Assessment

The Needs Assessment confirms:

- That there is demand for an additional full line supermarket in the trade area by 2026.
- There is an ultimate demand for over 12 additional full line supermarkets in the trade area by 2046.

Analysis of retail sales potential shows that the planned centre:

- Has the potential to achieve retail market shares within the immediate communities which are consistent with industry expectations.
- Does not require an unrealistic over reliance on retail sales capture from any precincts outside its immediate influence.
- Has the potential to achieve retail sales performance consistent with industry averages for a neighbourhood centre by 2031.
- Has potential for significant retail sales growth over the subsequent 15 years - despite the planned introduction of significant convenience and comparison retail activity at Gnaragar District Centre and Mariginiup NC.

Impact Assessment

Analysis of the Impact Assessment shows that the planned centre:

- Is not expected to have any economic impact on the surrounding activity centre network, nor the overall activity centre hierarchy.
- Can be developed sustainably while other existing and planned centres continue to experience significant retail sales growth.

Net Benefit Test

Analysis of the Net Benefit Test shows that the planned centre:

- Will provide the existing residents in Hocking and Pearsall and the planned residents in precinct 3, 4 and 5 with access to a wider range of daily and weekly retail goods and services, without impacting the existing choices available to the residents.
- Has the potential to create up to 259 full time equivalent (FTE) jobs including 200 in the retail sector and 59 in the non-retail sector.
- Will generate a net increase in potential retail and non-retail employment opportunities given that the planned centre is not expected to result in lost retail sales (and employment) at other centres.
- Will provide retail and non-retail employment opportunities to those otherwise underrepresented in the workforce, including:
 - Female employees.
 - Employees looking for part time work.
 - Employees aged 15-19 years.
 - Residents who travel less than 2.5 km to work.
 - Residents who travel to work without a vehicle (car as passenger, bicycle or walking).

Strategic Alignment

Based on the findings of the assessment, the planned centre is:

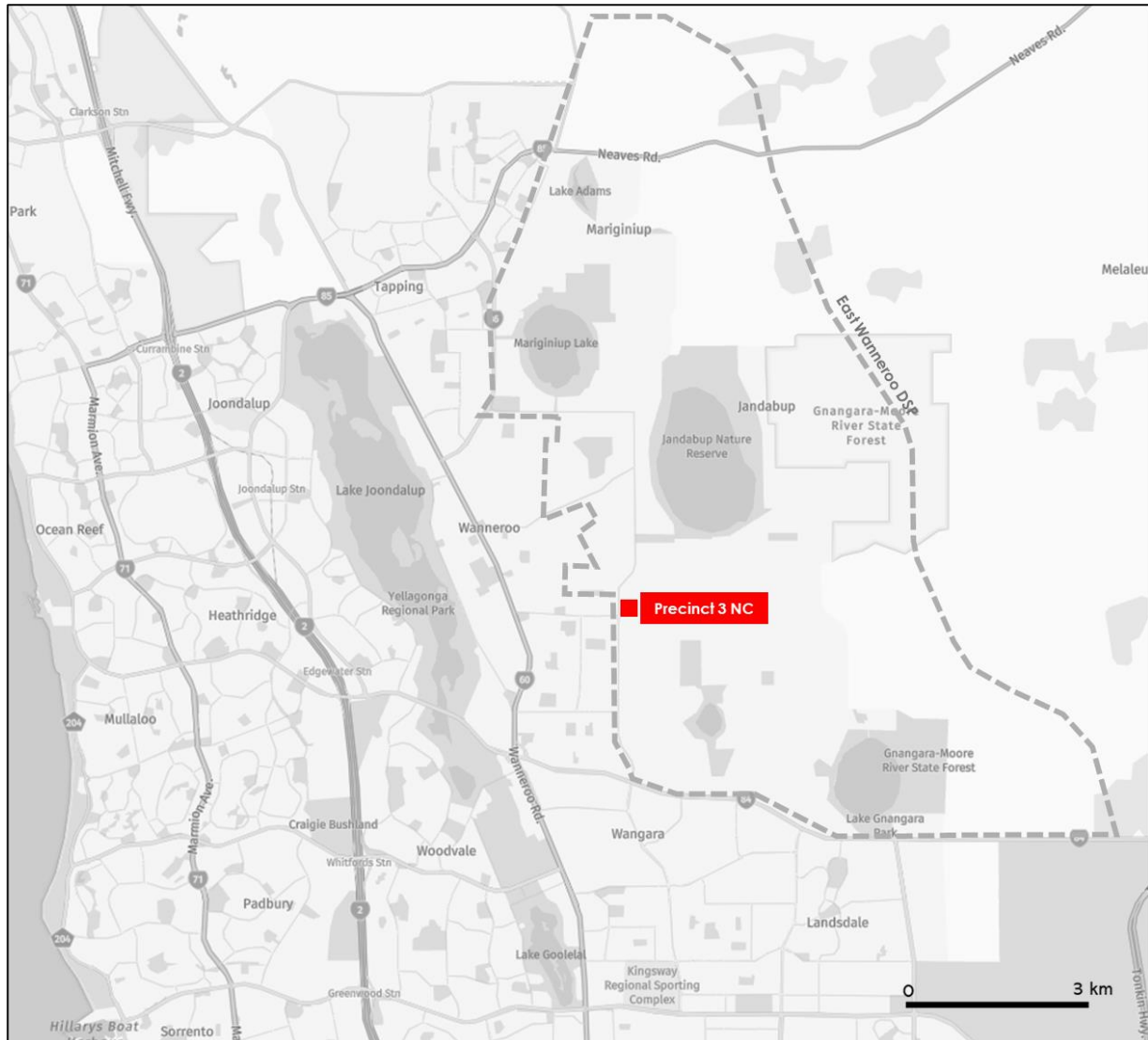
- Consistent with the strategic planning for the area.
- To be a size, scale, function, and role that is consistent with and complements the overall activity centre hierarchy as defined by SPP4.2.
- Will not have an impact on any of the activity centres in the network.
- Will not have the potential to result in the loss of or change the role and function of any activity centre in the network.
- Will not have the potential to have any impact or change to the activity centre hierarchy.
- Satisfies the criteria for assessing the benefits and impacts to the community and is therefore consistent with the objectives and outcomes of SPP4.2.



1. INTRODUCTION

This Needs Assessment and Net Benefit Test guides the assessment for a planned neighbourhood activity centre in Precinct 3 of the East Wanneroo District Structure Plan. The neighbourhood activity centre is planned to be located on the north east corner of the intersection of Lenore and Elliot Roads, in the City of Wanneroo.

LOCALITY MAP



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1.1 State Planning Policy 4.2 – Activity Centre

State Planning Policy 4.2 – Activity Centres (SPP 4.2) and its Implementation Guidelines guide the preparation and assessment of planning instruments and development applications that relate to activity centres. The objective of SPP4.2 is to ensure planning, decision making and development adequately consider the distribution, function, land use, access and urban form considerations for activity centres. All existing, planned or proposed activity centres should be consistent with the objectives and outcomes of SPP 4.2. and:

- not undermine the established and planned activity centre hierarchy.
- not result in a deterioration in the level of service to the local community.
- not undermine public investment in infrastructure and services.
- not unreasonably affect the amenity of the locality through traffic or other impacts.

Needs Assessment

A Needs Assessment is required to guide a Local Planning Strategy. Where a Needs Assessment has not been prepared for a Local Planning Strategy, or the Needs Assessment is more than 5 years old. A new Needs Assessment may be prepared for a District, Local and Precinct Structure Plan or Local Planning Scheme / Scheme Amendment. A Needs Assessment must show:

- Centre location, status and role in the hierarchy.
- An indicative range of activity centre uses and floorspace per activity centre.
- Land requirements.

Net Benefit Test

A Net Benefit Test is to ensure that planning instruments and development applications align with the objectives of SPP 4.2. A Net Benefit Test is required for development applications for major development, development applications for out-of-centre development, planning instruments that identify new land or rezone land to facilitate major development or out-of-centre development. The Net Benefit Test is to demonstrate that the proposal will:

- Not have an unreasonable and detrimental impact on the activity centre hierarchy or the existing or planned functions of activity centres.
- Not have an unreasonable and detrimental impact upon existing, committed and planned public and private investment in activity centres.
- Deliver a net benefit to the community and not reduce the level of access to services by the community.

Major Development

A development application is considered a major development if the net additional floorspace for Category A activity centre use is greater than the thresholds shown in SPP4.2.

Established Centres	Major Development Threshold
District Centre	Net increase of 5,000 sqm NLA
Neighbourhood Centre	Net increase of 3000 sqm NLA
Local Centre	Net increase of 1500 sqm NLA
All Proposed/Planned Centres	Net increase of 0 sqm NLA - any development in a planned centre is major development

1.2 East Wanneroo DSP - Activity Centres

The planned centre is located within Precinct 3 of the East Wanneroo District Structure Plan (EWDSP). The EWDSP was adopted in August 2021 to guide the urbanisation of East Wanneroo. The EWDSP covers 8,300 hectares of land and will ultimately provide up to 50,000 dwellings, 150,000 residents, and 20,000 new jobs. Precinct 3 in the EWDSP is recognised as a suburban neighbourhood with a need for a local centre. The allocation of a planned centre in Precinct 3 is therefore consistent with the activity centre principles of the EWDSP.

1.3 Proposed Centre

Based on the relevant planning policy, the proposed centre may be designated as a:

Planned centre	A local centre is planned in Precinct 3 in the adopted EWDSP.
Major development	Any planned centre represents a major development for the purposes of triggering a Needs Assessment and Net Benefit Test

The planned centre is proposed as part of a Local Structure Plan for Precinct 3 in an area which has been informed by a Needs Analysis within the past five years. However, the EWDSP does not specifically allocate floor space provision to a centre in Precinct 3. Assessment of the planned centre is therefore required to be informed by a Needs Assessment and a Net Benefit Test.

The planned centre is intended to reflect the characteristics of a neighbourhood centre as defined by SPP 4.2. According to SPP4.2, a neighbourhood centre is intended to provide a local focal point for the daily and weekly retail needs of a trade area between 2,000 and 15,000 persons. A neighbourhood centre is intended to include activities such as convenience store, shop—small & large, liquor store—small and large, fast-food outlet / lunch bar, restaurant/café, small bar, restricted premises, amusement parlour, educational establishment, recreation—private, small bar, tavern, office—small, medical centre, art gallery.

A typical modern urban neighbourhood centre typically contains:

A full line supermarket	3,500 sqm NLA.
A range of 10-15 small convenience-based shops	1,500 sqm NLA
Total Retail Floor space	5,000 sqm NLA
Several fast food and service station sites	750 sqm NLA
Childcare centre	600 sqm NLA
Medical centre	600 sqm NLA
Small Bar Tavern	1,000 sqm NLA
Total Non-Retail Floorspace	2,950 sqm NLA
Total Activity centre Floor space	7,950 sqm NLA

Neighbourhood centres are typically developed as a single stage and require a land area of between 1.5 Ha and 2 Ha.

2. ACTIVITY CENTRES

This section considers the influence of commercial principles and consumer shopping behaviour, and the subsequent implications for delineating the trade area for the planned centre.

2.1 Consumer Principles

Consumer and commercial dynamics vary significantly between retail tenant categories and are influenced by the frequency in which consumers require access to certain retail goods and services. Retailers, shopping centre developers, and urban planners acknowledge this variation in dynamics through the establishment of a clearly defined hierarchy of activity centres which reflect different shopping trips and expectations for consumers/residents.

Convenience

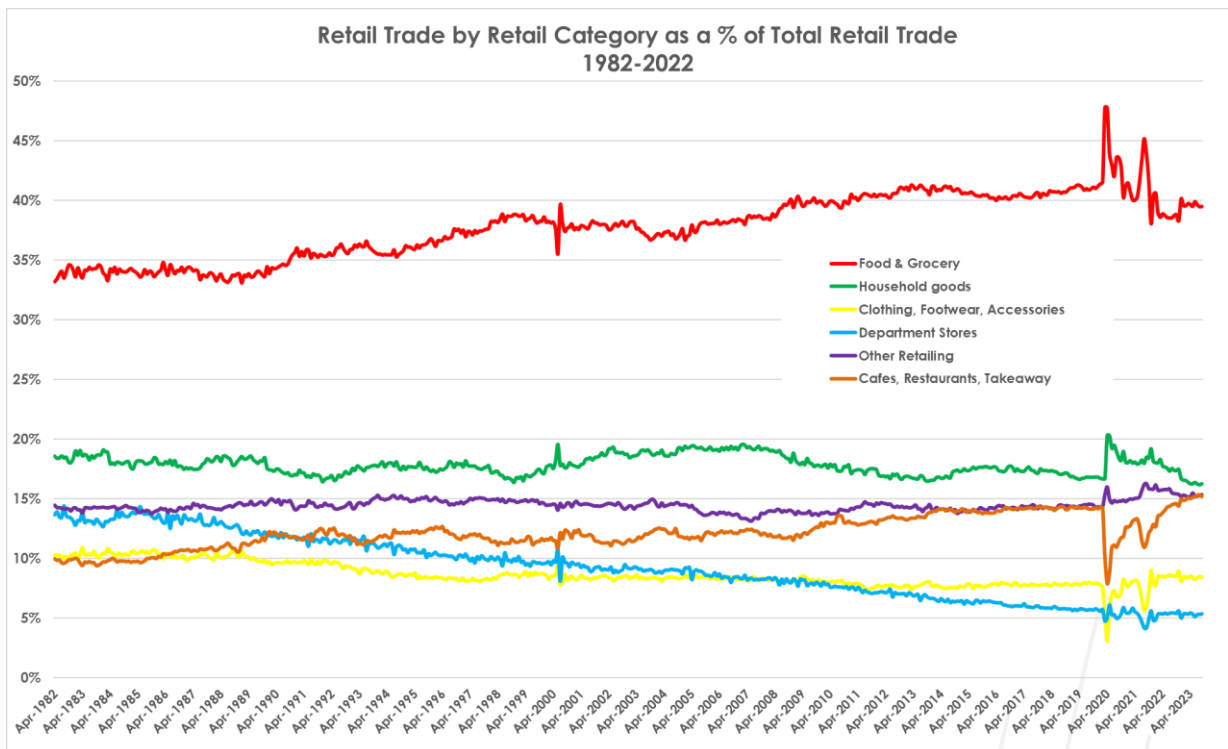
Convenience retail trips include visits to supermarkets, other food and grocery stores, newsagencies, and cafes/takeaway stores. These trips are typically daily or weekly trips and are generally made to activity centres closest to the resident/consumer. Activity centres serving this category are typically anchored by a supermarket, or small grocery store and classified as a neighbourhood and/or local centre.

Food and grocery retail spending represents nearly 40% of all retail spending by Australian residents. Supermarkets play a fundamental role in centre sustainability and subsequently have a significant influence on retail planning in the Australian urban retail environment. Supermarkets capture an average of 83% of all food & grocery retail spending from residents. Non-supermarket-based convenience retailers, such as butchers, bakers etc., can only expect to capture up to 17% of this retail spending category. Most of this 17% of convenience-based retail spending available to specialty food & grocery retailers is captured by retailers adjacent to supermarkets. Non supermarket based local centres will not have access to the same amount of retail spending that centres with supermarkets will have access to. This commercial dynamic highlights the importance of supermarkets to the retail network, and subsequently to the retail planning sector, especially at the neighbourhood and local centre level of the hierarchy.

Comparative

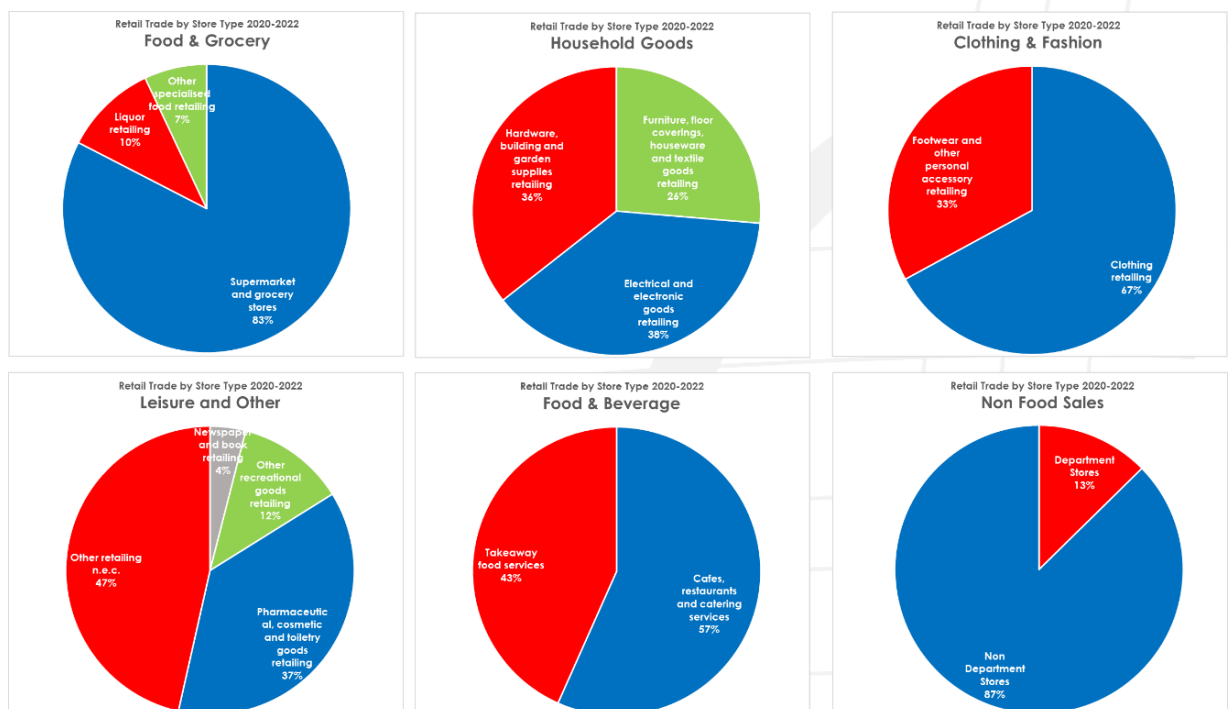
Comparative retail trips include visits to department stores, discount department stores, fashion, and household goods stores. These are typically less frequent trips than convenience-based trips and consumers are more likely to target specific items, brands, products, and prices on these trips. They are therefore more likely to travel further to access these goods and services. Centres serving this category are typically anchored by a Department Store or DDS and classified as Strategic, Secondary, or District Centres. These centres invariably also serve a convenience-based role. Discount Department Stores are what separate supermarket-based Neighbourhood Centres and District Centres. The influence of the DDS in centres has reduced over the past 20 years. DDSs once accounted for 15% of the total retail spending in Australia. Consumers who purchased anything from luggage, clothes, furniture, sports and recreation equipment predominantly did so at a DDS. The introduction of Category Killers (Showrooms) such as Golf Box and Harvey Norman added a range of stock and choice in a single retail category that DDS could not compete with in a relatively small proportion of floor area in a store.

RETAIL SALES DISTRIBUTION BY RETAIL CATEGORY



Retail Trade (ABS 2024)

RETAIL SALES DISTRIBUTION BY RETAIL TENANT TYPE



Retail Trade (ABS 2024)

As such the DDS has been increasingly squeezed in the retail market, losing sales ground to showrooms and mini majors, making them less dominant and less intricate to the retail hierarchy than they once were. They now represent only 5% of total retail sales. As a result, the three DDS operators have repositioned themselves over time. Notably Target has positioned itself closer to the Myer and David Jones end of the market – more by range than by price. Whilst Big W and Kmart battle it out at the traditional DDS level. This shift in market position is further borne out in later analysis on District Centre composition.

To further complicate the industry, Coles, Kmart and Target brands until recently were all owned under the same company. And whilst they remained separate trading and location deciding entities, there were clear synergies in store selection processes and protocols. Kmart and Target are still owned under the same company – which is another reason for the shift in market position between the two retailers. Similarly, Woolworths and Big W share the same company ownership.

It is increasingly difficult for centres to attract a DDS, either because of their demand for a larger trade area to compensate for less sales over time, or because of the reduced choice of operators available from three down to two – Kmart and Big W.

Mini Majors

There appear to be two types of mini majors emerging in the Australian retail sector. The convenience / discount based mini major and the high-end mini major. High end mini majors are emerging from overseas and/or local markets, such as H&M, Uniglo, Zara, Mecca, Kookai, Cotton on etc. These stores tend to gravitate to higher end Department Store Centres. Whilst the convenience, discount end of the market includes, Rebel, JB HiFi, Priceline, Red dot, Reject, Best & Less in Discount Department Store Centres.

Large Format/Bulky Goods

Homewares, furnishing, and recreation goods are more likely to represent less frequent trips for targeted goods/purchases. Consumers are therefore prepared to travel further for these goods and services. These centres are less likely to include a convenience-based role beyond access to cafes/takeaway facilities as part of the shopping experience. But they are increasingly likely to be co-located with higher order centres such as Secondary and District Centres.

Consumer Driver Principles

The fundamental retail consumer behaviour principles for shopping centres are that:

- Consumers are generally less likely to travel beyond the nearest Strategic Centre and or Secondary Centre to visit another centre with the same role/function/offer. For example, to drive past their nearest Myer to shop at another Myer – but they will drive past a Myer to shop at a David Jones and vice versa.
- Residents are generally less likely to travel beyond the nearest District Centre to visit another District Centre with the same role/function/offer. For example, to drive past their nearest Kmart to shop at another Kmart – but they will drive past a Kmart to shop at a Big W and vice versa.
- Residents are generally less likely to travel beyond one supermarket-based neighbourhood centre to visit another supermarket-based centre. For example, to drive past their nearest Coles to shop at another Coles – but they will drive past a Coles to shop at a Woolworths and vice versa.

- Residents are generally less likely to travel beyond the nearest local centre to visit another local centre with the same role/function/offer. For example, to drive past one IGA to shop at another IGA.

That is not to say that residents will not visit other centres from time to time, just that they will not visit these different centres frequently enough or in sufficient numbers to establish a pattern of behaviour.

Commercial Driver Principles

Overall, the changing nature of the role of DDS's and the emergence of high-end mini majors has resulted in:

1. Larger, Department Store Centres (Strategic and Secondary Centres) increasing in size and dominance) – as evidenced by Karrinyup.
2. The single large supermarket-based centres (Neighbourhood Centres) with 10-15 specialty shops positioning itself to cater for the essential day to day shops to dominate the convenience sector.
3. Leaving the DDS Centre not big enough to compete with the dominance of the larger Departments Store Centres and too big to compete with the convenience of the smaller Neighbourhood Centres.

2.2 Existing Activity Centres

The following centres are considered relevant to the assessment for the planned centre due to their characteristics and subsequent influence on the consumer shopping behaviour.

Joondalup City Centre

An existing designated Strategic Metropolitan Centre in SPP4.2, located 12 km (travel distance) from Precinct 3. Joondalup incorporates most of the major supermarket, department store and mini major anchor tenants and is performing its role as a Strategic Metropolitan Centre. Joondalup is currently estimated to be attracting both convenience and comparison sales from residents in the trade area due to the size and range of its convenience and comparison retail offer. This centre will continue to influence consumer retail shopping behaviour and is therefore included in the assessment.

Wanneroo Town Centre

An existing Secondary Centre in SPP4.2, located 3.5 km (travel distance) from Precinct 3. Wanneroo includes Coles, Woolworths, Aldi and a Kmart. Wanneroo is currently estimated to be the main centre attracting both convenience and comparison sales from residents in the trade area due to the size and range of its convenience and comparison retail offer compared to other centres in the trade area. This centre will continue to influence consumer retail shopping behaviour and is therefore included in the assessment.

Madeley (Kingsway) District Centre

An existing designated District Centre in SPP4.2, located 9 km (travel distance) from Precinct 3. Madeley incorporates a Big W, Woolworths and Aldi as anchor tenants. Madeley is currently estimated to be attracting both convenience and comparison sales from residents in the trade area since it has the only Big W store in the trade area to the south. This centre will continue to influence consumer retail shopping behaviour and is therefore included in the assessment.

Neerabup (Banksia Grove) District Centre

An existing designated District Centre in SPP4.2, located 9 km (travel distance) from Precinct 3. Neerabup incorporates a Coles, Woolworths and Aldi as anchor tenants. Neerabup may also incorporate a DDS in the future. Neerabup is currently estimated to be attracting convenience sales from residents in the north of the trade area. This centre will continue to influence consumer retail shopping behaviour and is therefore included in the assessment.

Carramar Neighbourhood Centre

An existing Neighbourhood Centre as defined by SPP4.2, located 11 km (travel distance) from Precinct 3. Carramar incorporates a Woolworths as an anchor tenant. Carramar is currently estimated to be attracting convenience sales from residents in the north of the trade area. This centre will continue to influence consumer retail shopping behaviour and is therefore included in the assessment.

Hocking Neighbourhood Centre

An existing Local Centre as defined by SPP4.2, located 1.8 km (travel distance) from Precinct 3. Hocking incorporates a small Woolworths as an anchor tenant. Hocking is currently estimated to be attracting convenience sales from residents in the trade area. This centre will continue to influence consumer retail shopping behaviour and is therefore included in the assessment.

Ashby Local Centre

An existing Local Centre as defined by SPP4.2, located 6.4 km (travel distance) from Precinct 3. Ashby incorporates a small Farmer Jacks as an anchor tenant. Ashby is currently estimated to be attracting convenience sales from residents in the trade area. This centre will continue to influence consumer retail shopping behaviour and is therefore included in the assessment.

Pearsall Local Centre

An existing Local Centre as defined by SPP4.2, located 3.2 km (travel distance) from Precinct 3. Pearsall incorporates an IGA as an anchor tenant. Pearsall is currently estimated to be attracting convenience sales from residents in the trade area. This centre will continue to influence consumer retail shopping behaviour and is therefore included in the assessment.

2.3 Proposed Centres

The EWDSP forecasts a demand for 64,600 sqm NLA in activity centre floorspace, comprised mainly in the Gngangara District Centre (58,600 sqm NLA), and the Mariginiup Neighbourhood Centre (6,000 sqm NLA). The EWDSP also promotes opportunities for an additional ten 'Local Centres' in precincts 3, 5, 6, 8, 10, 11, 12, 13, 15, and 16.

Planned Gngangara District Centre

A planned District Centre as defined by SPP4.2, located 4 km (travel distance) from Precinct 3. The allocation of 58,000 sqm NLA of activity centre floor space is not expected to be all retail floor space. Gngangara may expect to incorporate one DDS, 2 full line supermarkets and a limited line supermarket as anchor tenants and ultimately include up to 30,000 sqm NLA of retail floor space. Gngangara is expected to attract convenience and comparison sales from residents in the trade area. This centre will influence consumer retail shopping behaviour and is therefore included in the assessment. Given the timing of residential development planned around this centre, the Gngangara District Centre may expect to commence the first stage of development by 2036.

Planned Mariginiup Neighbourhood Centre

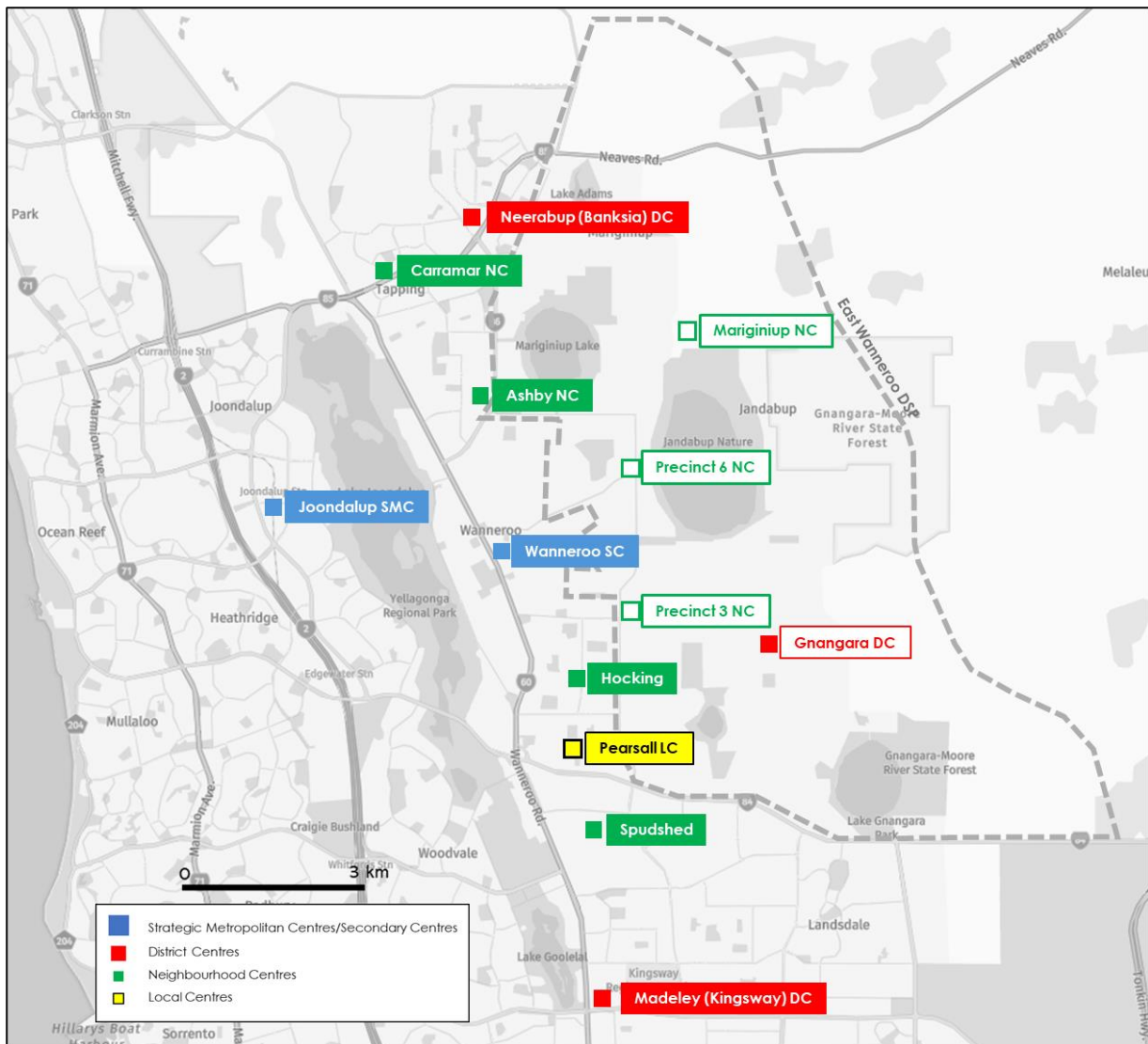
A planned Neighbourhood Centre as defined by SPP4.2, located 6 km (travel distance) from Precinct 3. Mariginiup may expect to incorporate 2 full line supermarkets as anchor tenants. Mariginiup is expected to attract convenience and some comparison sales from residents in the trade area. This centre will influence consumer retail shopping behaviour and is therefore included in the assessment. Given the timing of residential development planned around this centre, the Mariginiup Neighbourhood Centre may expect to commence the first stage of development by 2036.

Precinct 6 Neighbourhood Centre

The ten 'Local Centres' planned throughout EWDSP have not been formally documented or assessed and therefore have not been included in this assessment. The exception is Precinct 6. A Needs Assessment and Net Benefit Test has also been completed for a planned neighbourhood centre in Precinct 6. This centre is intended to be developed as a neighbourhood centre as defined by SPP 4.2. It is proposed to be located 3 km (travel distance) north of the planned centre in Precinct 3. This centre will influence consumer retail shopping behaviour and is therefore included in the assessment.

Overall, there are twelve existing or planned centres which will influence, and be influenced by, the planned centre. These centres are ultimately estimated to contain 225,000 sqm NLA in total retail floor space including 75,000 sqm NLA of convenience (daily and weekly) retail floor space. The addition of the planned centre in Precinct 3 represents a 1.7% increase to the total retail floor space and 5.7% increase to the total convenience floor space.

EXISTING AND PLANNED ACTIVITY CENTRES



Tactics4/EWDSP

ACTIVITY CENTRES CHARACTERISTICS

Centre Name	Status	Hierarchy	Supermarkets	DDS	Floor space (sqm) NLA		
					Total Convenience	Total Comparison	Total 'Shop' Retail
Joondalup	Existing	Strategic	C W A Sp	K, T, BW	13,650	86,350	100,000
Wanneroo	Existing	Secondary	C W A	K	7,150	20,850	28,000
Madeley (Kingsway)	Existing	District	W A	BW	9,100	15,900	25,000
Gungahlin	Planned	District			11,700	18,300	30,000
Neerabup (Banksia)	Existing	District	W A		9,100	5,900	15,000
Mariginiup	Planned	Neighbourhood			6,000	-	6,000
Carramar	Existing	Neighbourhood	W		4,550	450	5,000
Ashby	Existing	Local	FJ		2,600	400	3,000
Hocking	Existing	Neighbourhood	W		2,600	400	3,000
Spudshed Gungahlin	Existing	Local	Sp		3,250	-	3,250
Precinct 6	Planned	Neighbourhood			4,550	450	5,000
Pearsall	Existing	Local	IGA		1,300	200	1,500
ALL EXISTING & PLANNED CENTRES					75,550	149,200	224,750
Precinct 3		Neighbourhood			4,550	450	5,000
ALL EXISTING & PLANNED CENTRES (Including subject Centre)					80,100	149,650	229,750

3. TRADE AREA

3.1 Existing Resident Population

There is an existing resident population base adjacent to the EWDSP. This existing resident population base will have a direct influence on the demand for future activity centres and has been included in the assessment. This existing resident population is established to the immediate west of the EWDSP area and comprises the suburbs of Hocking, Pearsall, Wanneroo, Ashby, Sinagra, Tapping, Carramar and Neerabup.

3.2 East Wanneroo DSP

The EWDSP is delineated into 28 precincts. Only 17 of these precincts are forecast to include residential development. These 17 precincts are ultimately forecast to provide approximately 50,000 homes, and a resident population of around 150,000 residents over the next 30 plus years. The EWDSP provides an indicative development staging plan which promotes development of precincts in to three stages:

Short term	between 2021 and 2036,
Medium term	between 2036 and 2051,
Longer term	from 2051 on

Precincts 1 – 16 are estimated to be predominantly developed between 2026 and 2046 and estimated to include a resident population base of 26,800 by 2031, 53,000 by 2036, 73,000 by 2041 and 88,000 by 2046. The remaining residential development is expected to be developed beyond 2046.

3.3 Trade Area

Both existing populations and forecast populations will be modelled to estimate the demand for a planned activity centre in the location and the net benefits of the planned centre on the existing and forecast activity centre framework. The entire trade area (including existing and proposed resident areas) is forecast to accommodate 84,000 residents by 2031, 111,000 by 2036, 133,000 by 2041, and 148,000 by 2046.

EXISTING RESIDENTIAL POPULATION BY AREA BY YEAR

Catchment	2026	2031	2036	2041	2046
Hocking/ Pearsal	12,000	12,300	12,000	11,900	11,800
Wanneroo	14,400	14,300	14,200	14,100	14,000
Ashby/ Sinagra	7,600	8,900	9,800	10,600	10,500
Tapping	9,700	9,400	9,100	8,900	8,800
Carramar/ Neerabup	11,850	12,400	13,400	14,200	15,000
Existing Resident Precincts	57,576	57,300	58,500	59,700	60,100

EWDSP (2021), extrapolation by Tactics4

EAST WANNEROO DISTRICT STRUCTURE PLAN AREA

By Precinct By Development by Stage

Precinct	Name	Dwellings	Population	2026	2031	2036	2041	2046	2051	2056	Total
1	Mary St	1,500	4,500	10%	45%	45%					100%
2	Bebich Dr	500	1,500							100%	100%
3	Elliot Rd	2,000	6,000	10%	45%	45%					100%
4	High Rd	300	900	10%	45%	45%					100%
5	Begrade Rd	1,900	5,700		10%	40%	50%				100%
6	Edgar Griffiths Park	3,100	9,300	10%	50%	40%					100%
7	Lake Mariginiup	4,000	12,000		20%	40%	40%				100%
8	Ranch Rd	2,300	6,900	10%	45%	45%					100%
10	South Pinjar	3,500	10,500		35%	35%	30%				100%
11	Lakelands	3,000	9,000	10%	40%	40%	10%				100%
12	Gnangara	7,500	22,500					20%	40%	40%	100%
13	Trichet Rd	4,500	13,500					20%	40%	40%	100%
15	Central Mariginiup	3,800	11,400				35%	35%	30%		100%
16	North Mariginiup	4,000	12,000				35%	35%	30%		100%
20	Lorian	2,500	7,500							100%	100%
25	East Gnangara	6,000	18,000							100%	100%
		50,400	151,200	2%	15%	17%	13%	10%	14%	27%	100%

East Wanneroo District Structure Plan (WAPC 2021)

EAST WANNEROO DISTRICT STRUCTURE PLAN AREA

Cumulative Population by Precinct by Period

Precinct	Name	2026	2031	2036	2041	2046	2051	2056
1	Mary St	450	2,475	4,500	4,500	4,500	4,500	4,500
2	Bebich Dr	-	-	-	-	-	-	1,500
3	Elliot Rd	600	3,300	6,000	6,000	6,000	6,000	6,000
4	High Rd	90	495	900	900	900	900	900
5	Begrade Rd	-	570	2,850	5,700	5,700	5,700	5,700
6	Edgar Griffiths Park	930	5,580	9,300	9,300	9,300	9,300	9,300
7	Lake Mariginiup	-	2,400	7,200	12,000	12,000	12,000	12,000
8	Ranch Rd	690	3,795	6,900	6,900	6,900	6,900	6,900
10	South Pinjar	-	3,675	7,350	10,500	10,500	10,500	10,500
11	Lakelands	900	4,500	8,100	9,000	9,000	9,000	9,000
12	Gnangara	-	-	-	-	4,500	13,500	22,500
13	Trichet Rd	-	-	-	-	2,700	8,100	13,500
15	Central Mariginiup	-	-	-	3,990	7,980	11,400	11,400
16	North Mariginiup	-	-	-	4,200	8,400	12,000	12,000
20	Lorian	-	-	-	-	-	-	7,500
25	East Gnangara	-	-	-	-	-	-	18,000
		3,660	26,790	53,100	72,990	88,380	109,800	151,200

East Wanneroo District Structure Plan (WAPC 2021)

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EXISTING AND FORECAST TRADE AREA POPULATION BY PRECINCTS BY YEAR

Catchment	2026	2031	2036	2041	2046
Hocking/ Pearsal	12,000	12,300	12,000	11,900	11,800
Wanneroo	14,400	14,300	14,200	14,100	14,000
Ashby/ Sinagra	7,600	8,900	9,800	10,600	10,500
Tapping	9,700	9,400	9,100	8,900	8,800
Carramar/ Neerabup	11,850	12,400	13,400	14,200	15,000
Existing Resident Precincts	57,576	57,300	58,500	59,700	60,100
Precinct 1 & 2	450	2,475	4,500	4,500	4,500
Precinct 3	600	3,300	6,000	6,000	6,000
Precinct 4 & 5	90	1,065	3,750	6,600	6,600
Precinct 6	930	5,580	9,300	9,300	9,300
Precinct 7	-	2,400	7,200	12,000	12,000
Precinct 8 & 15	690	3,795	6,900	10,890	14,880
Precinct 10 & 16	-	3,675	7,350	14,700	18,900
Precinct 11	900	4,500	8,100	9,000	9,000
Precinct 12	-	-	-	-	4,500
Precinct 13	-	-	-	-	2,700
EWDSP Precincts	3,660	26,790	53,100	72,990	88,380
Total Trade Area	61,236	84,090	111,600	132,690	148,480

EWDSP (2021) / ABS (2021)

3.4 Spending Profiles

Resident retail spending profiles for the trade area are derived by extrapolating data from a range of sources including:

- Household Expenditure Survey by socio economic characteristics (ABS 2019)
- Population and Household Census by socio economic characteristics (ABS 2021)
- Retail Sales by store categories (ABS 2024)

Correlation of data from these sources relative to the demographic profiles of an area produces an estimate of the average retail spending potential of residents within that area.

New, developing or transitioning trade areas may not currently have sufficient population bases to extract valid demographic and retail spending profiles. Where trade areas do not have sufficient population base the retail spending profiles have been adopted from neighbouring/adjoining trade areas. The forecast average retail spending profiles for the future EWDSP resident population has been adopted from the Tapping resident spending profiles.

Correlation of demographic profiles to retail spending profiles for residents in the trade area reveal that the average retail spending profile for residents across the total trade area is estimated to be nearly \$13,000 which is 14% below the average profile of residents for the Perth Metropolitan Area \$15,000.

ESTIMATED RETAIL SPENDING PROFILES BY TRADE AREA BY RETAIL CATEGORY

Retail Store Category	Hocking/ Pearsal	Wanneroo	Ashby/ Sinagra	Tapping	Carramar/ Neerabup	EWDSP Precincts	Perth Average	Total Trade Area
Total Convenience Retail	\$7,270	\$6,223	\$6,562	\$7,590	\$7,805	\$7,590	\$8,663	\$7,516
Total Comparison Retail	\$5,228	\$4,332	\$4,614	\$5,679	\$5,983	\$5,679	\$6,366	\$5,410
Total Shop	\$12,498	\$10,555	\$11,176	\$13,269	\$13,788	\$13,269	\$15,029	\$12,926

Retail Trade (ABS 2025) / HHES (ABS 2019)

3.5 Spending Capacity

The average potential resident retail spending profile for each area is subsequently multiplied by the forecast resident population in each trade area for each year to determine the forecast resident retail spending capacity of each trade area over time. Based on the average potential resident retail spending profiles, residents in the trade area are:

- estimated to generate \$728M p.a. in total retail spending by 2026 including \$421M p.a. in convenience-based retail spending.
- estimated to generate \$1.9B p.a. in total retail spending by 2046 including \$1.1B p.a. in convenience-based retail spending.

This represents an additional \$676M p.a. in convenience-based retail spending generated by residents in the trade area over the next 20 years. It would be expected that most of this additional convenience-based retail spending will be captured by centres serving the immediate needs of the resident population.

ESTIMATED ANNUAL RESIDENT RETAIL SPENDING CAPACITY in TRADE AREA (\$M p.a.)

By Retail Category by Year

Retail Category	2026	2031	2036	2041	2046
Total Convenience Retail	\$421	\$608	\$817	\$976	\$1,096
Total Comparison Retail	\$307	\$447	\$603	\$722	\$812
Total Shop	\$728	\$1,055	\$1,419	\$1,698	\$1,909

8501 Retail Trade (ABS 2025) / HHES (ABS 2019)

4. NEEDS ASSESSMENT

The need or demand for an activity centre in a trade area may be assessed in one of two ways.

- Supermarket Demand Assessment
- Retail Modelling Assessment

4.1 Supermarket Demand Assessment

A specialty convenience-based retailer relies almost solely on the foot traffic generated by a supermarket in its centre to generate sufficient sales to be sustainable. Logic therefore suggests that any assessment of neighbourhood retail network should focus on the extent to which supermarket demand may be met, and the impacts of a supermarket in the network influencing sales at another supermarket, to determine the sustainability of the network. This assessment focuses on the future supermarket-based demand in the trade area to determine the sustainability of the centres network in the trade area.

Activity centres in or directly adjacent to the total trade area currently provide the equivalent of 7.25 full line supermarkets.

FIGURE

Catchment	Operators	Current Supply
Hocking/ Pearsal	small WW, small IGA	0.75
Wanneroo	Coles, WW, Aldi	3.00
Ashby/ Sinagra	FJ	0.50
Tapping	-	
Carramar/ Neerabup	2x WW, Coles	3.00
Existing Resident Precincts		7.25

The distribution of supermarkets across urban Australia represents a ratio of one full line supermarket for every 7,500 residents. Application of this population per supermarket ratio to the current trade area population – i.e. the 2026 trade area population produces a demand for eight supermarkets. This result confirms:

- That the average supermarket demand ratio is consistent and valid.
- That there is already demand for a full line supermarket in the trade area by 2026.

Application of this supermarket demand ratio to the forecast 2046 trade area population confirms a demand for 20 supermarkets in the trade area. This result confirms that:

- There is an expected demand for an additional 12 full line supermarkets in the trade area by 2046.
- That almost all the demand for additional supermarkets is generated by demand from the forecast resident population in the EWDSP area.

CURRENT SUPERMARKET PROVISION

Catchment	Supermarkets		
	Current Supply	2046 Demand	Gap in Provision
Existing Resident Precincts	7.3	8.0	-0.8
EWDSP Precincts	0.0	11.8	-11.8
Total Trade Area	7.3	19.8	-12.5

Tactics4

This analysis confirms demand for the number of centres proposed in the EWDSP, confirming that a supermarket-based centre in Precinct 3 is justified in principle.

4.2 Retail Modelling Assessment

Retail modelling techniques are used to assess the likely propensity for a resident in a particular area to visit/spend at each centre in the network. Based on:

- The proximity of the resident to each centre.
- The role and function of each centre.
- The size of the retail offer at each centre, relative to other centres.

The sales potential for the proposed centre will be based on the extent to which it may capture retail sales from each trade area. The results of the retail modelling shows:

- The expected market share that each centre may expect to capture from each trade area.
- The retail sales that may therefore be expected to be captured by each centre in the network from the designated trade areas.
- The relative contribution of each trade area to the overall sales at each centre.

Planned Centre Sustainability

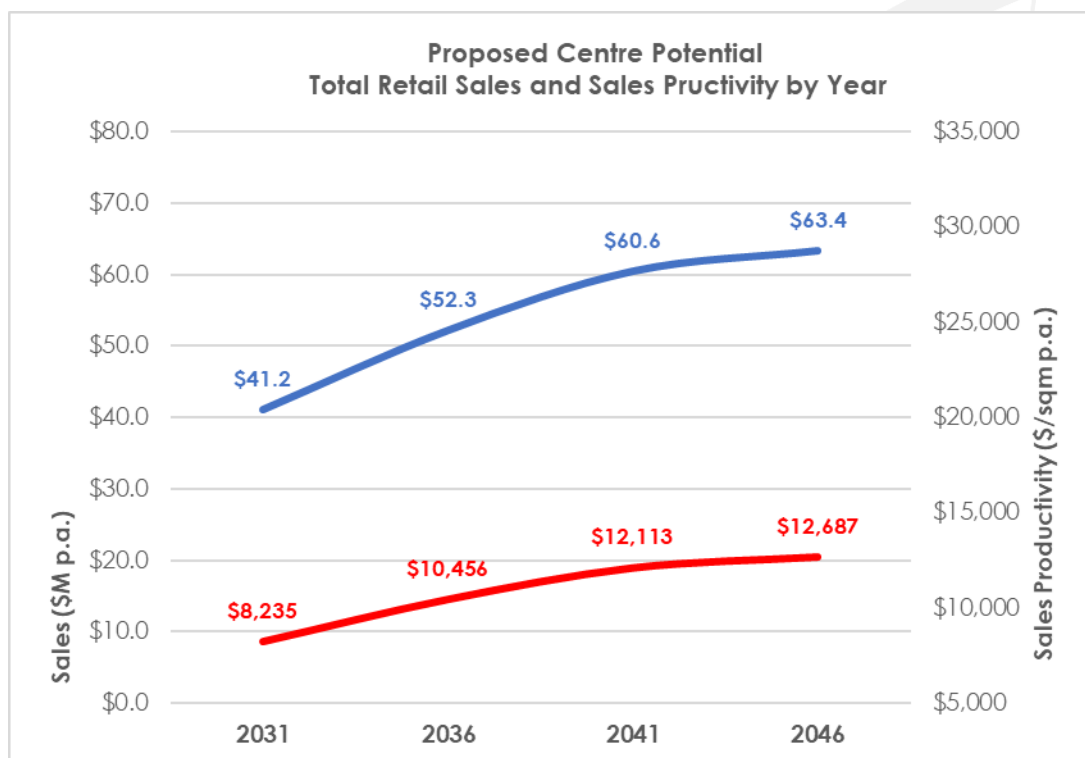
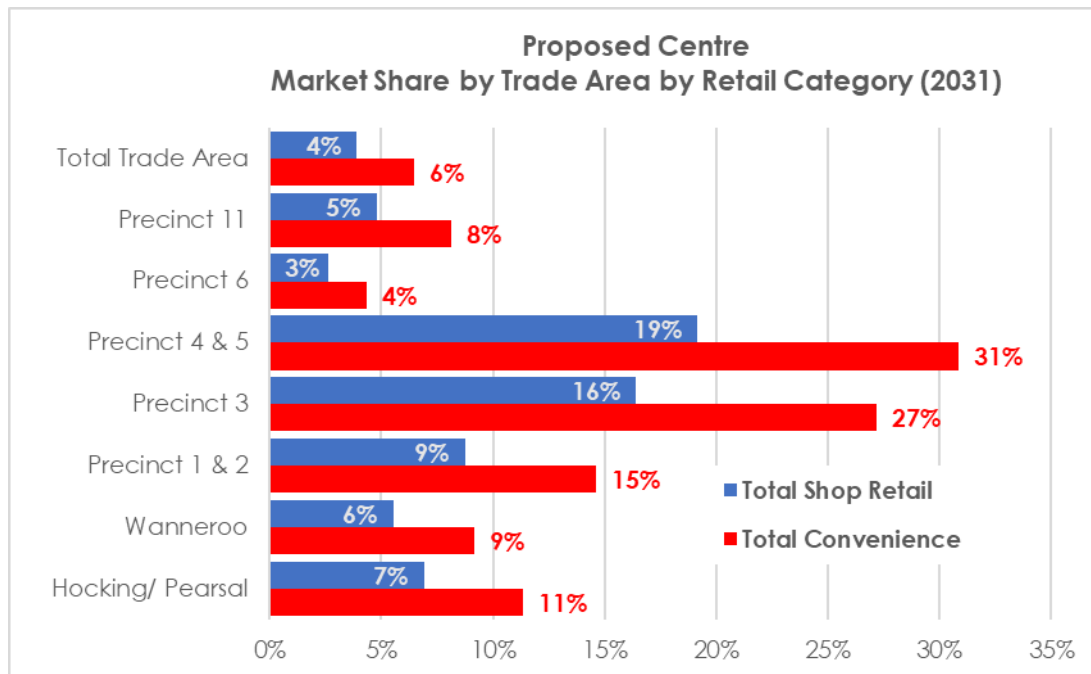
The retail modelling indicates that the planned centre is estimated to:

- Capture less than 4% market share of the total retail spending and 6% of the convenience retail spending across the entire trade area.
- Capture 31% market share of convenience retail spending from residents in Precinct 4 & 5.
- Capture 27% market share of convenience-based retail spending from residents in Precinct 3.
- Generate total retail sales of \$41.2M p.a. by 2031 at an average sales productivity of \$8,300/sqm NLA p.a.

These results show that the planned centre:

- Is estimated to achieve market shares that are consistent with the industry expectations.
- Will not require unrealistic over reliance on any precincts outside its immediate influence.
- Will achieve retail sales that are consistent with industry averages for a neighbourhood centre.

- Has the potential for significant growth over the subsequent 15 years - despite the planned introduction of significant convenience and comparison retail activity at Gnaragana District Centre and Mariginiup NC.



5. IMPACT ASSESSMENT

The potential sales generated by the development of the planned centre will be drawn from centres in the network that would have reasonably expected to capture those sales had the planned centre not been developed. The impact of the proposal on existing and planned activity centres is defined as an estimate of the retail turnover for each relevant activity centre identified for the following scenarios:

- Without the proposed activity centre.
- With the new activity centre assumed to be developed.

The differences between the 'without' and 'with' scenario is the potential turnover impact for each activity centre.

SPP4.2 states that competition between businesses in and of itself is not considered a relevant planning consideration. The impact of a proposal on an activity centre is defined as the potential loss of services and any associated detriment to the community caused by the proposed development. The following impact percentage and risk level for retail turnover is provided as a general guide and should not be used as the only indicator of acceptability of a proposal.

SPP4.2 IMPACT and RISK GUIDE

Impact Percentage	Risk Level	Description
0-5%	Low	Any impacts are likely to be temporary and have no long-term effects on the viability of individual activity centres.
5-10%	Medium	Impacts are likely to be more significant for individual centres, but overall network sustainability is unlikely to be undermined in the long-term.
10% +	High	Impacts are likely to be very significant for individual centres and will undermine the long-term network sustainability.

Where the short-term impact is initially high before falling to a medium or low level in the long term, consideration should be given to how the development can be staged or if there needs to be any additional short-term benefits to ensure that level of service is always maintained. However, the overall impact of the proposal may be lessened or offset by the potential growth in sales each activity centre may generate from the introduction of additional residents and retail spending in the trade area over time.

The retail model results are focused primarily on the centres which can be expected to generate most of their sales from within the modelled trade areas. Centres located on the fringe of, or outside the trade areas will only show that proportion of sales captured from the trade areas. Subsequently, centres on the fringe of, or outside of the trade area will not show a true sales figure, but rather that part of the sales captured solely from within the trade area modelled. The impact assessment typically focuses primarily on the existing and planned centres closest to the proposed centre.

Any loss of sales from more distant centres such as Joondalup and Madeley generated from the trade area are to be expected and even encouraged as the retail activity centre network expands in the trade area. These distant centres will continue to influence consumer shopping over time – but not to the same extent that they do now.

The focus for this section is therefore on the centres closest to the planned centre, including:

Higher Order Centres	Wanneroo Town Centre Neerabup (Banksia Grove) Town Centre Proposed Gnangara District centre Proposed Mariginiup Neighbourhood Centre
Lower Order Centres	Existing Ashby Neighbourhood Centre Existing Hocking Neighbourhood Centre Existing Pearsall Local Centre

The modelling shows the forecast retail sales potential of each centre from 2026 to 2031 without the planned centre developed, and the forecast retail sales potential of each centre from 2031 to 2046 with the planned centre developed.

5.1 Higher Order Centres

The results of the retail modelling indicate that:

Wanneroo Town Centre

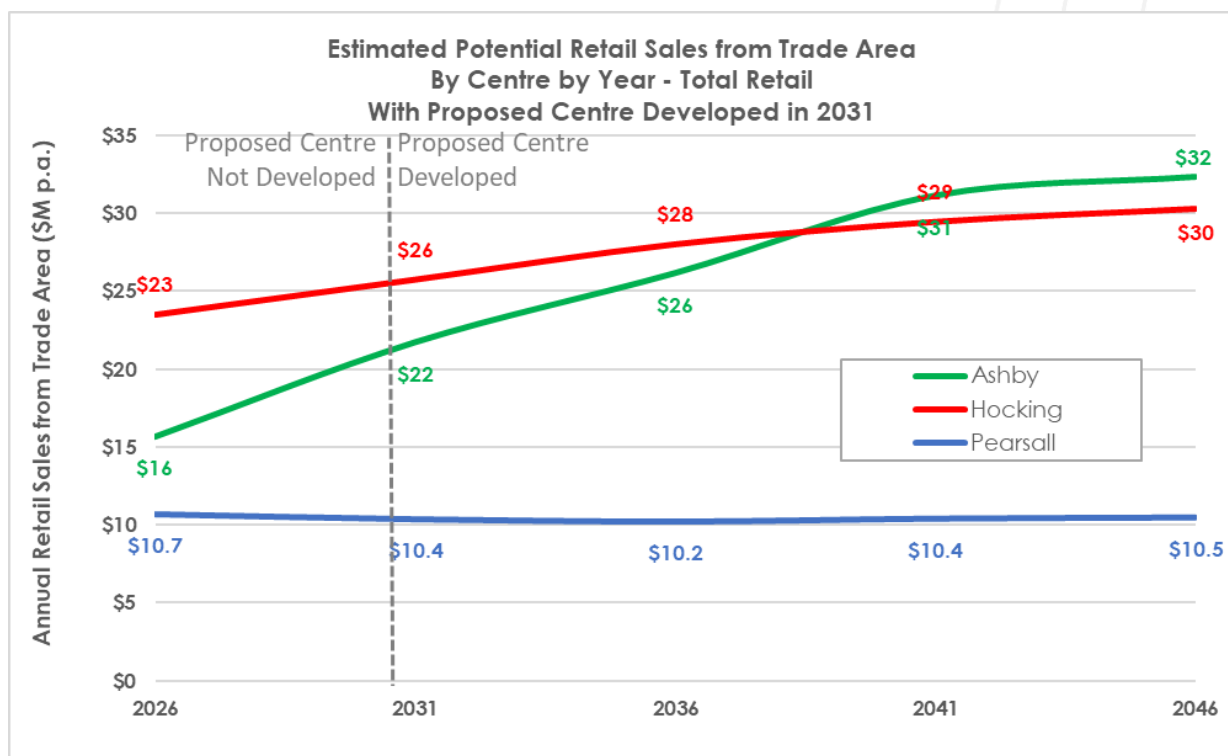
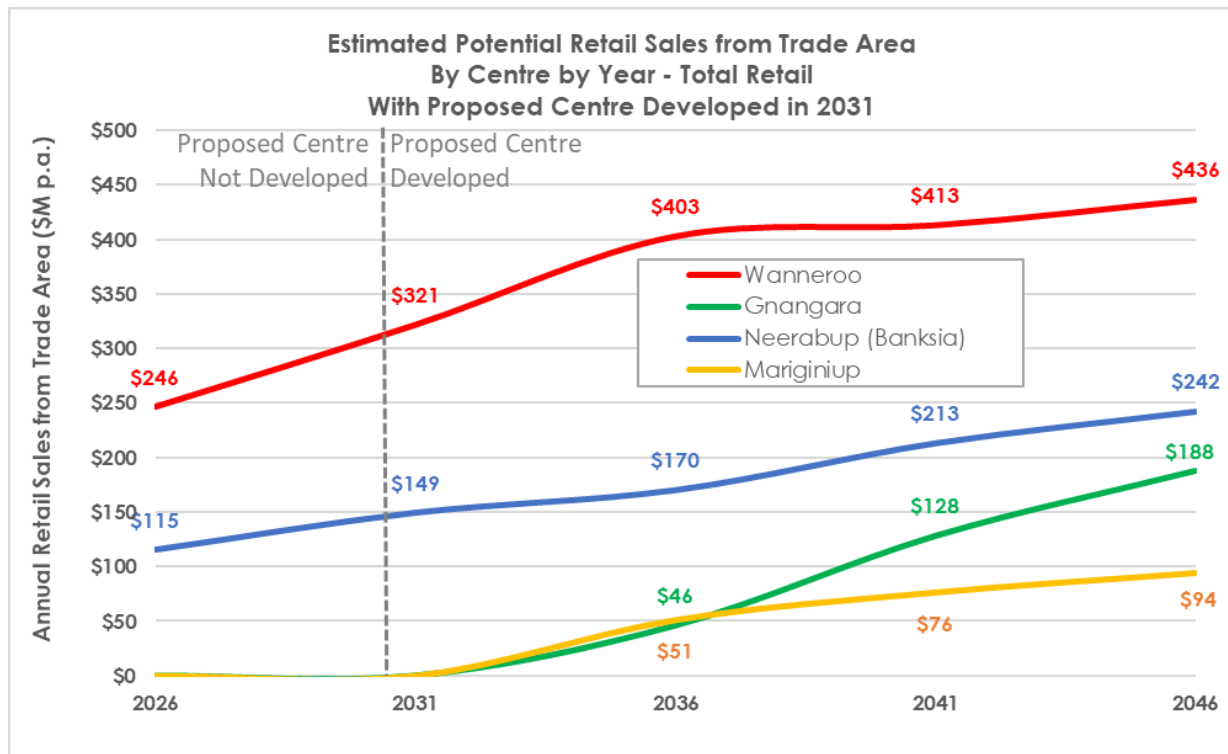
Wanneroo has the potential to generate \$246M p.a. in total retail sales by 2026 without the planned centre in Precinct 3 developed. Once the planned Precinct 3 centre is developed, Wanneroo has the potential to generate \$321 M p.a. in total retail sales by 2031. This is an increase of nearly \$65M p.a. in additional retail sales available to its retailers. This is due to the increase in available retail spending in the trade area available to the centre being greater than any potential loss of market share experienced by the development of the Precinct 3 centre. Wanneroo has the potential to increase total retail sales to \$436M p.a. by 2046, confirming that the retailers in Wanneroo will continue to have the potential to benefit from the significant forecast increase in retail spending generated in the trade area.

Neerabup/Banksia Grove

Neerabup has the potential to generate \$115M p.a. in total retail sales by 2026 without the planned centre in Precinct 3 developed. Once the planned Precinct 3 centre is developed, Neerabup has the potential to generate \$149M p.a. in total retail sales by 2031. This is an increase of nearly \$34M p.a. in additional retail sales available to its retailers. This is due to the increase in available retail spending in the trade area available to the centre being greater than any potential loss of market share experienced by the development of the Precinct 3 centre. Neerabup has the potential to increase total retail sales to \$242M p.a. by 2046, confirming that the retailers in Neerabup will continue to have the potential to benefit from the significant forecast increase in retail spending generated in the trade area.

Gnangara and Mariginiup Centres

Neither of these centres are expected to be developed prior to 2036. However, once developed both centres have the potential to generate \$46M - \$51M p.a. by 2036, before increasing to \$94M - \$188M p.a. by 2046, confirming that the planned centre in Precinct 3 will not impact the development and growth of these centres.



5.2 Lower Order Centres

The results of the retail modelling indicate that:

Hocking Neighbourhood Centre

Hocking has the potential to generate \$23M p.a. in total retail sales by 2026 without the planned centre in Precinct 3 developed. Once the planned Precinct 3 centre is developed, Hocking has the potential to generate \$26M p.a. in total retail sales by 2031. This is an increase of nearly \$3M p.a. in additional retail sales available to its retailers. This is due to the increase in available retail spending in the trade area available to the centre being greater than any potential loss of market share experienced by the development of the Precinct 3 centre. Hocking has the potential to increase total retail sales to \$30M p.a. by 2046, confirming that the retailers in Hocking will continue to have the potential to benefit from the significant forecast increase in retail spending generated in the trade area.

Ashby Neighbourhood Centre

Ashby has the potential to generate \$16M p.a. in total retail sales by 2026 without the planned centre in Precinct 3 developed. Once the planned Precinct 3 centre is developed, Ashby has the potential to generate \$22M p.a. in total retail sales by 2031. This is an increase of nearly \$5M p.a. in additional retail sales available to its retailers. This is due to the increase in available retail spending in the trade area available to the centre being greater than any potential loss of market share experienced by the development of the Precinct 3 centre. Ashby has the potential to increase total retail sales to \$32M p.a. by 2046, confirming that the retailers in Ashby will continue to have the potential to benefit from the significant forecast increase in retail spending generated in the trade area.

Pearsall Local Centre

Pearsall has the potential to generate \$10.7M p.a. in total retail sales by 2026 without the planned centre in Precinct 3 developed. Once the planned centre in Precinct 3 is developed, Pearsall has the potential to generate \$10.4 M p.a. in total retail sales by 2031. This is a slight decrease of nearly \$300,000 p.a. in additional retail sales available to its retailers. This is due to the increase in available retail spending in the trade area available to the centre being slightly less than any potential loss of market share experienced by the development of the Precinct 3 centre. Pearsall has the potential to maintain total retail sales to \$10.5M p.a. by 2046, confirming that its retailers in Pearsall will continue to have the potential to benefit from the increase in retail spending generated in the trade area.

6. NET BENEFIT TEST

When estimating benefits to the community, SPP4.2 states that the Net Benefit Test should:

- Detail what benefit will occur due to the proposed development.
- Use existing data and standards to measure the size of the benefit and how important it will be to the community.
- Identify those in the community who will be likely to experience the benefit.
- Estimate how many individuals are expected to experience the benefit.
- Describe the degree of change expected due to the benefit.
- Determine the expected duration for which stakeholders are expected to experience the benefit.

SPP4.2 provides a guide to the measures used to assess any net benefit to the community.

6.1 Employment

Will the proposal provide new jobs in addition to any that may be lost elsewhere – net additional jobs?

The planned centre has the potential to create up to 259 full time equivalent (FTE) jobs including 200 in the retail sector and 59 in the non-retail sector. This may be considered a net increase in potential employment opportunities given that the planned centre is not expected to result in lost retail sales (and employment) at other activity centres.

ESTIMATED EMPLOYMENT

	Floorspace (sqm NLA)	Floorspace/ FTE Employee Ratio	Employment (FTE's)
Retail Activity	5,000	25	200
Non retail Activity	2,950	50	59
Total Activity Centre	7,950	31	259

Will the planned centre contribute to diversifying local jobs – creating more strategic employment versus population-driven employment? Will the planned centre create the potential to improve access to economic opportunity for minority and vulnerable groups?

The role of the planned centre will ensure that it generates population driven employment opportunities. Employment in the retail sector typically attracts the following underrepresented employment positions in the workforce.

- Female labour force
- Part time labour force
- Young adult labour force
- Local labour force
- Labour force without access to a motor vehicle

RETAIL SECTOR EMPLOYMENT PROFILES

Employee characteristic	Retail Employment Sector	All Employment Sectors	Difference in representation
Female employment	66%	57%	1.2
Part time employment	62%	46%	1.3
employees aged 15-19 years	19%	9%	2.1
employees who travel less than 2.5 km to work	15%	10%	1.5
Employees who travel to work by Car as a passenger	9%	6%	1.5

Pop & Hhld Census (ABS 2021)

The planned centre will therefore provide employment opportunities to those otherwise underrepresented in the workforce, including:

- Female employees who are 1.2 times more likely to work in the retail sector than other employment sectors.
- Employees looking for part time work who are 1.3 times more likely to work in the retail sector than other employment sectors.
- Employees aged 15-19 years, who are 2.1 times more likely to work in the retail sector than other employment sectors.
- Residents who travel less than 2.5 km to work – who are 1.5 times more likely to work in the retail sector than other employment sectors.
- Residents who travel to work without a vehicle (car as passenger, bicycle or walking) – who are 1.5 times more likely to work in the retail sector than other employment sectors.

6.2 Impact

How is the planned centre expected to impact upon the current and expected turnover and role of relevant activity centres? Will the planned centre increase the choice and availability of goods and services in the area?

The planned centre is not expected to have any economic impact on the surrounding centres nor the overall activity centre hierarchy. The significant forecast growth in residential development and retail spending capacity in the trade area means that the planned centre can be developed sustainably while other existing planned centres continue to experience sales growth. Retail modelling confirms that the planned centre will predominantly serve the immediate neighbourhood trade area. The planned centre will provide the existing residents in Hocking and Pearsall and the forecast residents in Precincts 3, 4 and 5 with access to a wider range of daily and weekly retail goods and services, without impacting the existing choices available to the residents.

6.3 Compatibility

Is the planned centre compatible with surrounding land uses?

The planned centre will introduce a neighbourhood centre in the middle of a trade area which will ultimately contain 12,600 residents (in Precincts 3,4,5) within a 1.5 km radius of the proposed activity. This resident population is a significant base for a supermarket-based centre. The planned location on the intersection of both north south and east west connector roads provides ease of access to residents in all directions from the immediate trade area.

6.4 Environment

Will there be an improvement in the level of amenity and vibrancy that benefits the wider community? Will the planned centre include land uses such as healthcare, education, and community facilities? Will the planned centre have an impact on overall vehicle trips? Will car-based net trips (by distance) increase or reduce because of the planned centre?

The planned centre has the potential to create a community hub for the resident communities in Precincts 3, 4, and 5, increasing a sense of place for residents. The planned centre is expected to attract a range of non-retail activity including community facilities such as medical and childcare services.

The planned centre has the potential to reduce the amount of trip kilometres that residents would otherwise have to travel each year to satisfy their daily/weekly shopping needs. The immediate trade area will ultimately contain 12,600 residents who will benefit directly from more convenient access to the planned centre. Trips to the planned centre will result in less trips to centres at Wanneroo (4 km away) and Hocking (2 km) away. The planned centre has the potential to significantly reduce the number of trips/trip km by residents. Residents in these areas will be far more likely to walk to the planned centre than their current trip patterns to supermarket-based centres over 2km away.

6.5 Infrastructure

Is there significant government investment in services, infrastructure or development in the area or nearby centres that may be affected by the planned centre? Will the planned centre impact patronage/viability of the investment and what is the expected impact? Will the planned centre include new, or improvements to existing transport infrastructure, particularly walking, cycling and public transport, that increases access and helps manage congestion? Will the planned centre include enhancements to utilities that benefit the local area?

The planned centre location is designed to maximise its exposure and accessibility to the dedicated bus route planned to service the EWDSP area.

6.6 Strategic Alignment

Is the planned centre consistent with the strategic planning for the area? Is it aligned with the relevant regional strategy and approved local planning strategy? Is the size and scale of the planned centre consistent with the level of the hierarchy? What are the potential impacts on the activity centre hierarchy? Is the planned centre consistent with the objectives and outcomes of SPP 4.2?

The EWDSP allocates a centre in Precinct 3. The planned centre is therefore consistent with the strategic planning for the area. The planned centre is proposed to be a size, scale, function, and role that is consistent with and complements the overall activity centre hierarchy as defined by SPP4.2.

The planned centre will not have an impact on any of the activity centres in the network. The planned centre does not have the potential to result in the loss of, nor change the role and function of any activity centre in the network. As such the planned centre does not have the potential to have any impact or change to the activity centre hierarchy within EWDSP area.

This assessment confirms that the planned centre satisfies the criteria for assessing the benefits and impacts to the community and is therefore consistent with the objectives and outcomes of SPP4.2.