



AMENDMENT NO. 5

TO

LOTS 1001 & 1002 MARMION AVENUE, ALKIMOS

AGREED STRUCTURE PLAN NO. 60

Structure Plan Ref: WANN/2015/60-05

Prepared by PTS Town Planning Pty Ltd - August 2015

This Amendment to the Agreed Structure Plan has been prepared under the provisions of the City of Wanneroo District Planning Scheme No. 2

**RECORD OF AMENDMENTS MADE TO LOTS 1001 AND 1002 MARMION AVENUE,
ALKIMOS**

AGREED STRUCTURE PLAN NO. 60

Amendment No.	Description of Amendment	Date Approved by WAPC
1	Variations to Residential Design Code Provisions for R20 and R25 front loaded lots.	19 September 2011
2	<ul style="list-style-type: none"> • Realigns the neighbourhood connector road structure in the northern and central parts; • Removes a portion of the 'Other Regional Road' reservation for Romeo Road and includes the land in the Residential zone; • Zones an area defined as 'subject to further planning' east of the Northern Suburbs Railway as Residential zone; and • Rationalises the boundary between the Centre and Residential zones east of Marmion Avenue. 	12 December 2014
3	<p><u>Map Modifications</u></p> <ul style="list-style-type: none"> • Extending a neighbourhood connector in the northern part. • Zoning the areas defined as 'subject to further planning' as described below: <ol style="list-style-type: none"> I. An area east of Marmion Avenue and south of a neighbourhood connector to 'Residential' and 'Business' zone. II. An area south of Romeo Road to 'Business' Zone, 'Residential' Zone and 'Service Industrial' Zone. III. An area west of Mitchell Freeway to Residential zone with extension of 'environment response housing' to the east. <p><u>Text Modifications</u></p> <ul style="list-style-type: none"> • Introducing new statutory provisions for the Business and Service Industrial Zone with appropriate landuse controls. 	

4	<p><u>Map Modifications</u></p> <ul style="list-style-type: none"> • Removing the Western 'Environment Response Housing' precinct and re-coding it from Residential 'R10' to Residential 'R20-60'. • Re-zoning the Western Activity Centre from 'Centre' zone to 'Commercial' Zone, 'Mixed Use' Zone and 'Residential' Zone. • Modifying the alignment of the Neighbourhood Connector west of Marmion Avenue. <p><u>Text Modifications</u></p> <ul style="list-style-type: none"> • Introducing landuse controls to the Commercial and Mixed Use zone. • Deleting provisions relating to the Western Environmental Responsive Housing and re-numbering provisions for the South Eastern Precinct – Vegetation Protection Area. 	
5	<p><u>Map Modification</u></p> <p>Modifying Note 2 in the Legend on Plan 3 – Zoning Plan from 'The maximum Retail NLA for the combined area of the Commercial and Mixed Use zone shall not exceed 2600m²' to 'The maximum Retail NLA for the combined area of the Commercial and Mixed Use zone shall not exceed 5400m²'</p> <p><u>Text Modification</u></p> <ul style="list-style-type: none"> • Increasing the retail floorspace provision of the Precinct 6 Commercial Zone and the Precinct 7 Mixed Use zone to a combined Retail NLA of 5400m². 	

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LOTS 1001 AND 1002 MARMION AVENUE, ALKIMOS
AGREED STRUCTURE PLAN NO. 60

The City of Wanneroo, pursuant to its District Planning Scheme No. 2, hereby amends the above Agreed Structure Plan by:

Map Modification

Modifying Note 2 in the Legend on Plan 3 – Zoning Plan from ‘The maximum Retail NLA for the combined area of the Commercial and Mixed Use zone shall not exceed 2600m²’ to ‘The maximum Retail NLA for the combined area of the Commercial and Mixed Use zone shall not exceed 5400m²’

Text Modification

Amending Clause ‘9.7 Precinct 6 Commercial Zone’ and Clause ‘9.8 Precinct 7 Mixed Use’ to increase the combined Retail Nett Leasable Area to 5400m².

9.7 Precinct 6 Commercial Zone

- Retail Floorspace Provision

The maximum Retail Nett Lettable Area (NLA) within the combined area of the Commercial and Mixed Use zone shall not exceed 5400m² as identified on Plan 3.

9.8 Precinct 7 Mixed Use

- Retail Floorspace Provision

The maximum Retail Nett Lettable Area (NLA) within the combined area of the Commercial and Mixed Use zone shall not exceed 5400m² as identified on Plan 3.

LEGEND

LSP BOUNDARY
 LSP BOUNDARY

4 WAY CONTROLLED INTERSECTION
 4 WAY CONTROLLED INTERSECTION

LEFT IN - LEFT OUT INTERSECTION
 LEFT IN - LEFT OUT INTERSECTION

ZONES

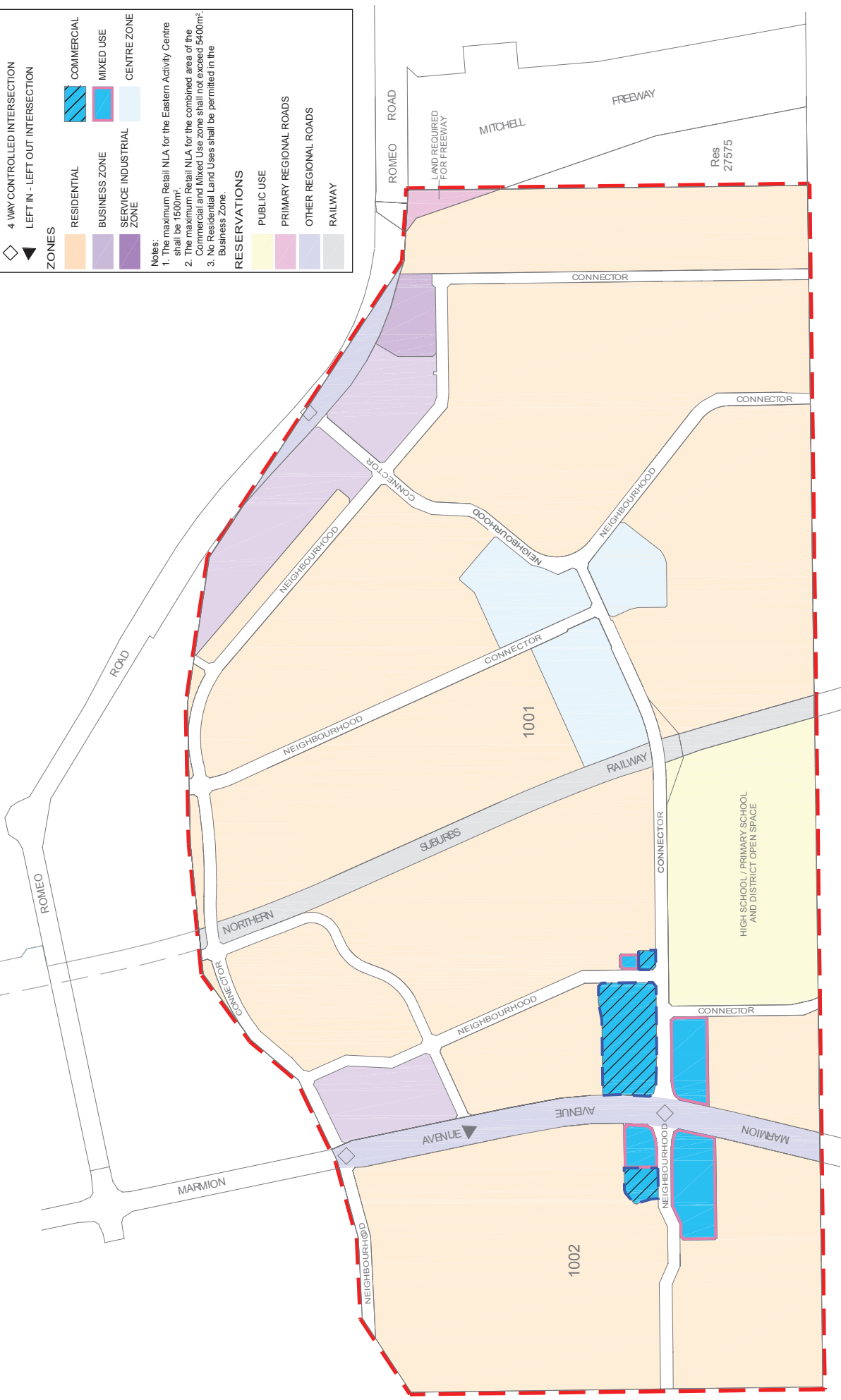
RESIDENTIAL	COMMERCIAL
BUSINESS ZONE	MIXED USE
SERVICE INDUSTRIAL ZONE	CENTRE ZONE

RESERVATIONS

PUBLIC USE
PRIMARY REGIONAL ROADS
OTHER REGIONAL ROADS
RAILWAY

Notes:

- The maximum Retail NLA for the Eastern Activity Centre shall be 1500m².
- The maximum Retail NLA for the combined area of the Commercial and Mixed Use zone shall not exceed 5400m².
- No Residential Land Uses shall be permitted in the Business Zone.



AMENDMENT 5 LOCAL STRUCTURE PLAN - PROPOSED ZONING PLAN

WANN/2015/60-05



**Proposed Amendment No. 5 to Agreed Local Structure Plan 60
 Plan 3 – Zoning Plan**

October 2015

This Structure Plan Amendment is prepared under the provisions of the City of Wanneroo
District Planning Scheme No. 2

IT IS CERTIFIED THAT THIS STRUCTURE PLAN AMENDMENT NO. 5 TO LOTS 1001 AND
1002 MARMION AVENUE, ALKIMOS, AGREED STRUCTURE PLAN NO. 60

WAS APPROVED BY

RESOLUTION OF THE WESTERN AUSTRALIAN PLANNING COMMISSION ON

.....

Signed for and on behalf of the Western Australian Planning Commission

.....

an officer of the Commission duly authorised by the Commission pursuant to section 24 of the
Planning and Development Act 2005 for that purpose, in the presence of:

.....Witness

..... Date

..... Date of Expiry

Part 2 - Explanatory Report
WANN/2015/60-05

AMENDMENT NO. 5

TO

LOTS 1001 & 1002 MARMION AVENUE, ALKIMOS

AGREED STRUCTURE PLAN NO. 60

Prepared for:	Trinity Success Developments Pty Ltd
Prepared by:	PTS Town Planning Pty Ltd – August 2015
Consultant Team:	CBRE –Project Manager
	Taylor Robinson - Architects
	MacroPlan Dimasi - Economic Consultant
	Transcore – Traffic

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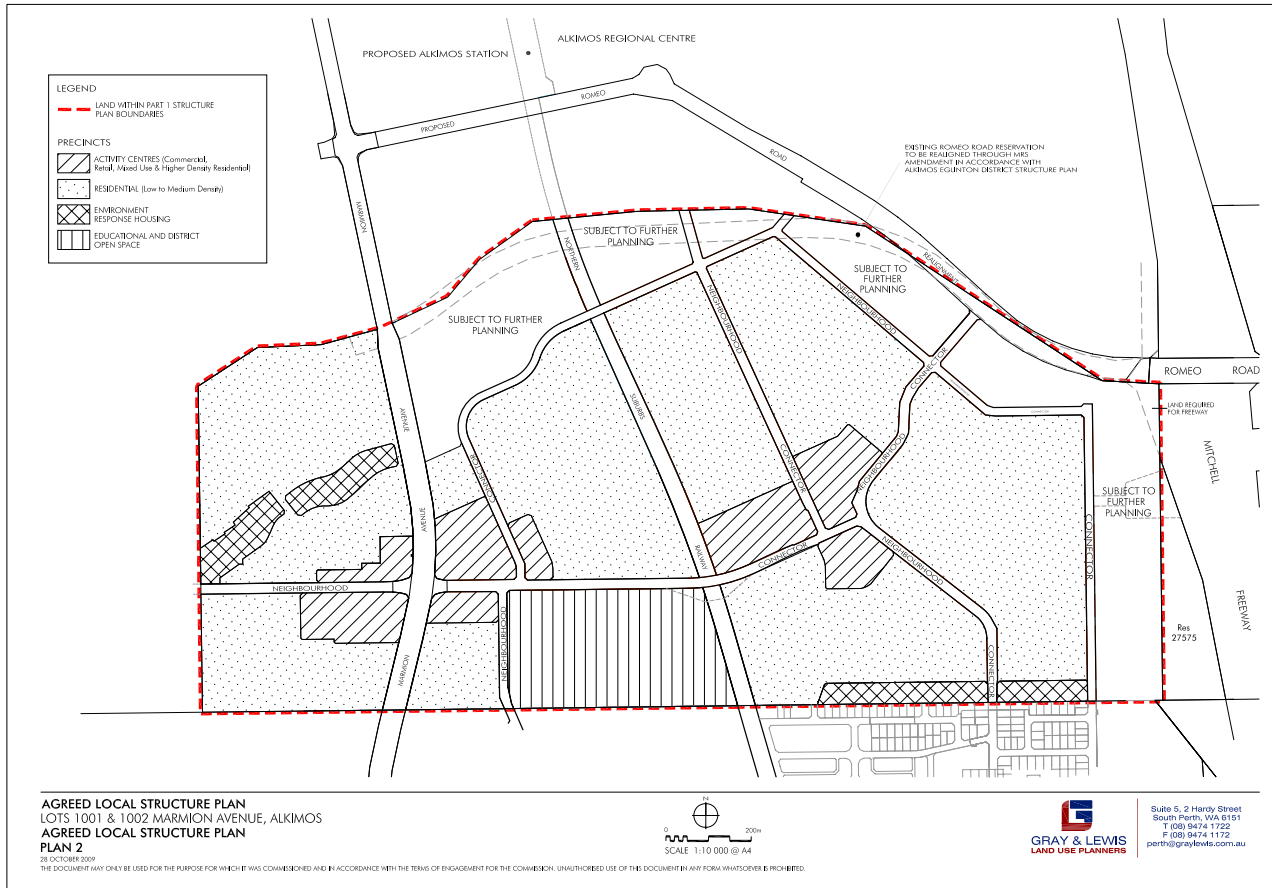
APPENDICES

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1. INTRODUCTION

Agreed Structure Plan No. 60 ('ASP 60') for Lots 1001 and 1002 was prepared by Gray & Lewis Land Use Planners on behalf of LWP Property Group. ASP 60 was adopted for final approval by the Western Australian Planning Commission (WAPC) on 13 November 2009, and endorsed by the City of Wanneroo on 27 January 2010.

Figure 1 – Agreed Local Structure Plan



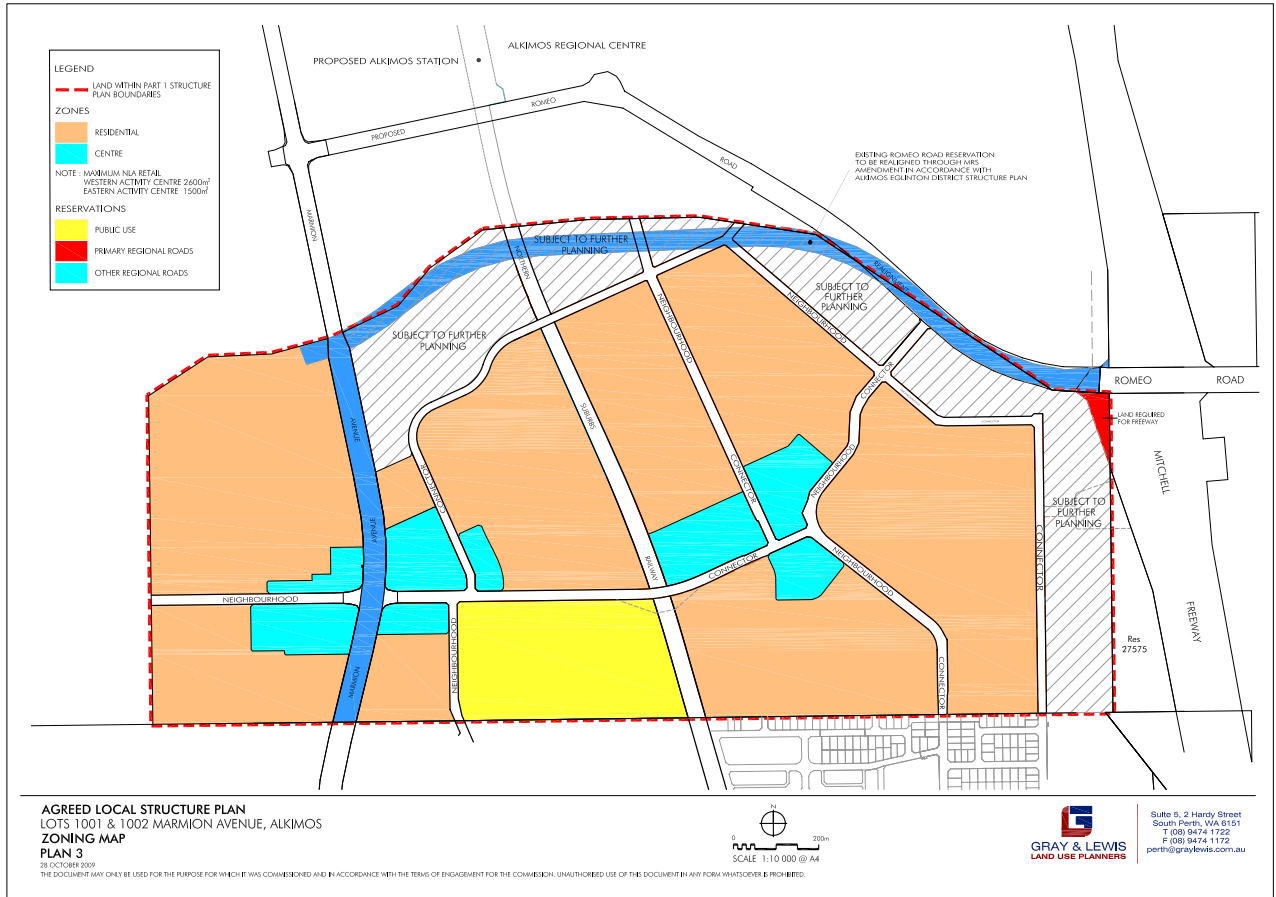
The Agreed Structure Plan Zoning Plan 3 (Figure 2) identifies:

- The Western Centre, located at the intersection of Marion Avenue and Santorini Promenade, as a Centre Zone with a maximum Retail Nett Leasable Area of 2600m².
- The Eastern Centre as a Centre Zone with a maximum Retail Nett Leasable Area of 1500m².

Amendment No. 4 to ASP 60, prepared by Gray and Lewis on behalf of LWP, introduces Commercial and Mixed Use zones in place of the Western Centre - Centre zone. The amendment has been advertised and is currently being considered by the Western Australian Planning Commission.

Trinity Success Developments Pty Ltd has entered into a contract of sale with LWP to purchase the land within the western centre located on the north-east corner of Marmion Avenue and Santorini Promenade. Trinity Success Development Pty Ltd proposes to create a neighbourhood centre with a supermarket. The current limitation of the Retail NLA would prevent a suitable sized supermarket being located on site and therefore this amendment (No. 5) proposes to increase the maximum Retail Nett Lettable Area to 5400m².

Figure 2 – Agreed Structure Plan Zoning Plan



2. AGEED STRUCTURE PLAN NO. 60 – AMENDMENTS

There have been a number of amendments to ASP 60. In particular Amendment No. 2 and Amendment No. 4 are relevant to the Western Centre.

2.1 Amendment No 1

Amendment 1 was endorsed by the Western Australian Planning Commission on 19 September 2011 and introduced variations to the Residential Design Code provisions for R20 and R25 front loaded lots.

2.2 Amendment No 2

Amendment No. 2 rationalised the shape of the western activity centre east of Marmion Avenue. The amendment also extended the Residential zone to the north and re-aligned the northern and western neighbourhood connector roads. Amendment No. 2 was finally endorsed by the City of Wanneroo on 18 September 2014 and endorsed by the Western Australian Planning Commission on 12 December 2014.

2.3 Amendment No. 3

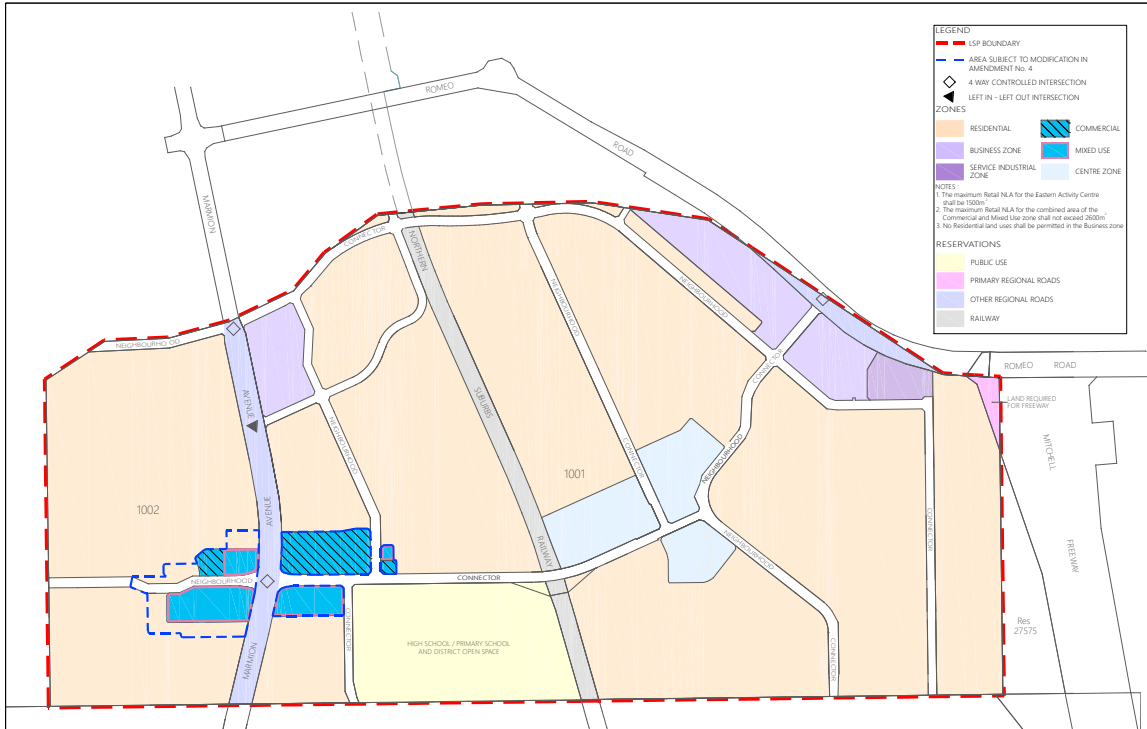
Amendment No 3 is currently being considered by the City of Wanneroo. Amendment No 3 to ASP 60 will bring the ASP into conformity with the proposed Amendment to the BJDSP, which replaces a portion of the 'Service Industrial' zone with Residential west of the Freeway and Business zone south of Romeo Road; and introduces a new 'Residential' and 'Business zone' east of Marmion Avenue within areas previously identified as 'subject to further planning'.

2.4 Amendment No. 4

Amendment No 4 (Figure 3) is currently being considered by the City of Wanneroo. Amendment No. 4 proposes three modifications to ASP 60, being:

- Removal of the Environment Responsive Housing precinct and increasing the residential density from 'R10' to 'R20/60'.
- Rezoning the Western Activity Centre from 'Centre' Zone to 'Commercial' Zone, 'Mixed Use' Zone and 'Residential' zone. Landuse and development will be controlled through the existing provisions of the City of Wanneroo District Planning Scheme No 2, as applicable to each zone. The boundaries of the activity centre west of Marmion Avenue have also been amended.
- Modifying the alignment of the Neighbourhood Connector west of Marmion Avenue..

Figure 3 – Amendment No. 4 to ASP 60



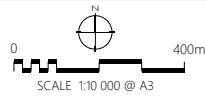
AMENDMENT 4 LOCAL STRUCTURE PLAN - PROPOSED ZONING PLAN

PROPOSED AMENDMENT 4 TO
AGREED LOCAL STRUCTURE PLAN 60

PLAN 3 - ZONING PLAN

17th FEBRUARY 2015

THE DOCUMENT MAY ONLY BE USED FOR THE PURPOSE FOR WHICH IT WAS COMMISSIONED AND IN ACCORDANCE WITH THE TERMS OF ENGAGEMENT FOR THE COMMISSION. UNAUTHORISED USE OF THIS DOCUMENT IN ANY FORM WHATSOEVER IS PROHIBITED.



* AMENDMENT 3 HAS BEEN LODGED SEPARATELY TO THE CITY OF WANNEROO AND IS SUBJECT TO SEPARATE APPROVAL. AMENDMENT 3 MAPPING HAS BEEN INCLUDED FOR INFORMATION PURPOSES ONLY.

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3. PROPOSED AMENDMENT NO. 5

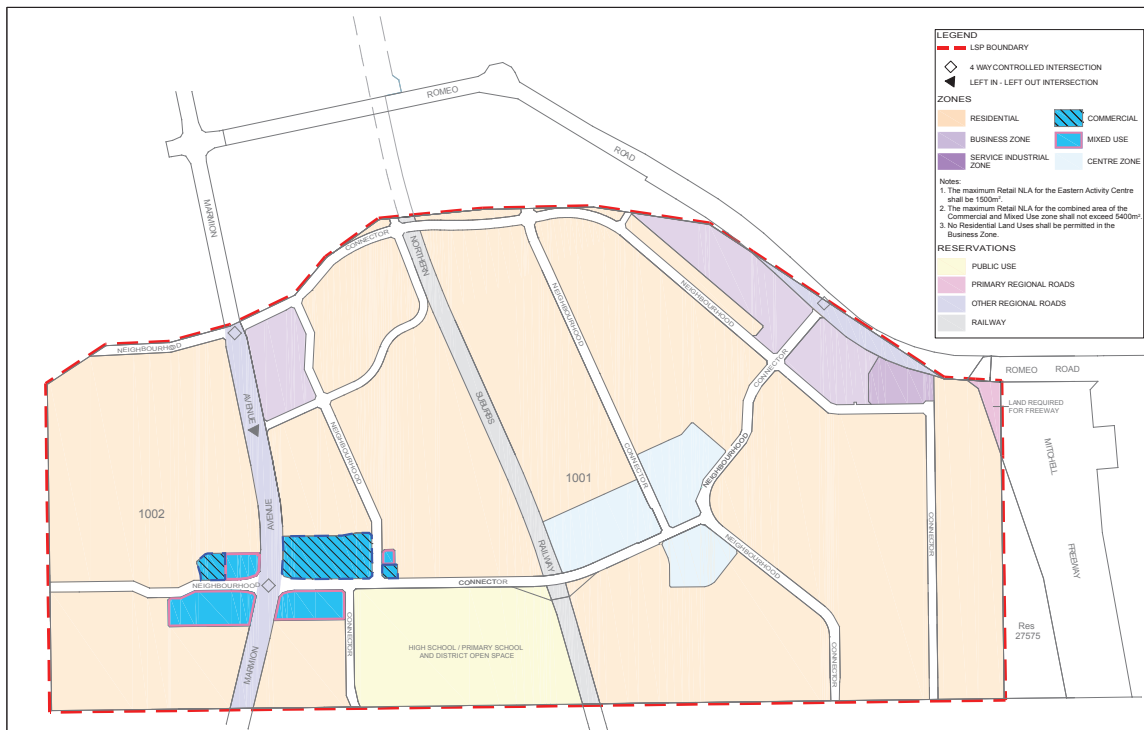
Amendment No. 5 (this amendment) proposes to increase the Retail Nett Lettable Area (NLA) within the Western Centre (lots zoned Commercial and Mixed Use) from 2600m² to 5400m². Amendment 5 is an amendment to the provisions to be established by Amendment No. 4.

There are no other changes proposed by Amendment No. 5.

The 5400m² Retail NLA is proposed to be distributed with 4950m² allocated to the main commercial lot on the north-east corner of Marmion Avenue and Santorini Promenade and 450m² (in total) allocated to the remaining sites in the Commercial and Mixed Use zones.

The proposed neighbourhood centre on the north-east corner of Marmion Avenue and Santorini Promenade is proposed to include a supermarket and specialty retail. In addition, the centre will include other non retail land uses such as a child care centre, medical centre, gymnasium etc.

Figure 4 – Amendment 5 to ASP 60



AMENDMENT 5 LOCAL STRUCTURE PLAN - PROPOSED ZONING PLAN

4. PLANNING FRAMEWORK

The following provides the planning framework relevant to Amendment No. 5.

4.1 Metropolitan Region Scheme

The land the subject of ASP60 and the Western Centre is zoned 'Urban' Under the Metropolitan Region Scheme. Marmion Avenue is reserved as an 'Other Regional Road'.

4.2 City of Wanneroo District Planning Scheme No. 2

Under Amendment No. 4 to ASP60, the land the subject of this amendment is proposed to be zoned Commercial and Mixed Use.

Under District Planning Scheme No. 2, the commercial is zone is intended to accommodate existing or proposed shopping and business centres where the planning of the locality is well advanced. The objectives of the commercial zone include:

- Make provision for existing or proposed retail and commercial areas that are not covered currently by an Agreed Structure Plan;
- Provide for a wide range of uses within existing commercial areas, including retailing, entertainment, professional offices, business services and residential.

The Mixed Use Zone is intended to accommodate a mixture of residential development with small scale businesses in a primarily residential scale environment. The predominant uses will be residential, office, consulting, dining and limited retail uses occupying the street frontage of lots. The objectives of the Mixed Use Zone are to:

- Provide a diversity of land use and housing types;
- Allow appropriate businesses to locate and develop in close proximity to residential areas;
- Allow for services to be provided locally; and
- Provide a high level of amenity.

4.3 Butler-Jindalee Agreed District Structure Plan No.39

ASP 60 was prepared in accordance with the Butler-Jindalee Agreed District Structure Plan No. 39 (BJDSP), which was prepared by Chappell & Lambert Town Planners in April 2003 and was adopted by WAPC for final approval in October 2006.

4.4 Lots 1001 and 1002 Marmion Avenue, Alkimos Agreed Structure Plan No. 60

The Agreed Structure Plan No 60 (ASP 60) ASP 60 was adopted for final approval by the Western Australian Planning Commission (WAPC) on 13 November 2009, and endorsed by the City of Wanneroo on 27 January 2010. The ASP 60 states that the primary objectives of Activity Centres and Employment are:

“To establish accessible and amenable main street based village centres in accordance with Liveable Neighbourhoods principles to best service the commercial, social and employment needs of the community and act as a focus for community activity and interaction;

“To create a robust urban framework within and around centres which enhances the opportunity for mixed use local based employment and active focal points.”

Two activity centres are identified in ASP 60 being the Western Activity Centre and the Eastern Activity Centre. As stated in the ASP 60, the main objective of the activity centres is to:

“facilitate the creation of vibrant centres with a diverse mix of uses including commercial and retail activities as well as leisure, health and community services...”

The maximum Retail Net Leasable Area (NLA) for the two activity centres are set out in the ASP 60 as follows:

- Western Activity Centre : 2,600m²; and
- Eastern Activity Centre: 1,500m².

4.5 City of Wanneroo Local Planning Policy 3.2: Activity Centres

The purpose of the policy is to provide guidance on the planning and development of activity centres in the City of Wanneroo, and provide a framework for implementing the principles and objectives of SPP 4.2 and the Department of Planning’s Structure Plan Preparation Guidelines.

4.6 Activity Centres Policy for Perth and Peel (SPP4.2)

The Activity Centres Policy sets out the policy direction for the planning and development of activity centres throughout Perth and Peel.

The objectives of the policy include:

- The distribution of activity centres to meet different levels of need, employment and access;
- Creation of an activity centre hierarchy;
- The planning and development of new activity centres;
- Creation of employment;
- Support high frequency public transport; and
- Maximise access to activity centre with a legible street network

The Policy provides a hierarchy of activity centres, which differentiates such centres and their planning principles in terms of their roles and functions within the overall network; retail catchments; and housing density and mix of land uses.

The activity centre policy identifies that neighbourhood centres are an important local community focal point to service the day-to-day needs of the immediately surrounding residents. The Policy does not provide the locations for neighbourhood centres, but emphasises the important role of these centres in providing walkable access to services and facilities, which should be recognised in local planning strategies and structure plans.

The Policy identifies that the typical neighbourhood centre retail types include supermarkets, personal services and convenience shops with other local professional services. Neighbourhood centres have an indicative future service population of between 2000-15000 persons located generally within a one kilometre radius of the activity centre. The policy identifies that structure plans are not required for neighbourhood centres.

The policy identifies that where any proposal that would result in the total shop-retail floorspace of a neighbourhood centre exceeding 6000m² nla, or expanding by more than 3000m² shop-retail nla a retail sustainability assessment is required. In addition where an endorsed local structure plan includes an indicative amount of shop-retail floorspace derived from a retail needs assessment, a retail sustainability assessment is required where a significant increase to this shop-retail floorspace is proposed.

A Retail Sustainability Assessment (RSA) assesses potential effects of the sustainable future provision of shopping by existing and planned activity centres in the locality, taking into account the supportable shop-retail floorspace for an appropriate service population, based on the normative primary service (trade) area.

A Retail Sustainability Assessment (RSA) 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 businesses of itself is not considered a relevant planning consideration.

5. PLANNING ANALYSIS

5.1 Commercial and Mixed Use Zoning Under ASP60

Amendment 4 to ASP60 proposes to change the zoning of the western centre to commercial and mixed use with the land uses to be determined by reference to the relevant zones in District Planning Scheme No. 2.

There are three sites to be zoned commercial, with the main site being on the corner of Marmion Avenue and Santorini Promenade.

The development of a neighbourhood shopping centre is consistent with the intent and objectives of the proposed commercial zoning as the Commercial zone is intended to accommodate proposed shopping and business centres that provide for a wide range of uses including retailing, entertainment, professional offices, business services and residential.

5.2 ASP 60 Objectives

The ASP 60 objectives include to:

- Establish accessible and amenable centres to best service the commercial, social and employment needs of the community and act as a focus for community activity and interaction.
- Create a robust urban framework within and around centres, which enhances the opportunity for mixed use local based employment and active focal points.
- Facilitate the creation of vibrant centres with a diverse mix of uses including commercial and retail activities as well as leisure, health and community services.
- The land included within the Local Structure Plan boundary is located between the proposed District Centre at Jindalee and the proposed Regional (City) Centre at Alkimos. As such, the two activity centres within the Structure Plan area will be relatively small and intimate.

The proposed increase in the retail floorspace meets these objectives, as it will provide an accessible centre that services the convenience needs of the community while also providing employment and a focus for the community. The proposed centre may include a diverse mix of uses including a medical centre, health centre, café etc. The retail sustainability assessment (Appendix A) indicates that the proposed centre will not impact the viability of other centres in the area.

5.3 Land Use

The main commercial site on the corner of Marmion Avenue and Santorini Promenade is to be developed with a supermarket and specialty retail tenancies. The specialty retail tenancies could include a pharmacy, café, shop etc. In addition it is proposed to develop non-retail uses such as a child care centre, tavern, medical centre and fitness centre. The proposed uses are all either permitted or discretionary land uses within the Commercial Zone.

The Mixed Use zone provides for limited retail floorspace uses, such as convenience stores, corner store etc.

5.4 Retail Floor Area

The existing retail NLA maximum within ASP 60 date back to 2003 prior to the adoption by the Western Australian Planning Commission of State Planning Policy 4.2 Activity Centres for Perth and Peel.

The adoption of the Activity Centres Policy resulted in a change with respect to activity centres and the retail floor area caps previously identified under the Metropolitan Centres Policy.

The Activity Centres Policy identifies that neighbourhood centres are an important local community focal point to service the day-to-day needs of the immediately surrounding residents. The Policy further identifies that the typical neighbourhood centre retail types include supermarkets, personal services and convenience shops with other local professional services.

The proposed western activity centre is consistent with the policy in that the centre is provided for the catchment surrounding the centre and will include a supermarket and other services.

The policy identifies that where any proposal that would result in the total shop-retail floorspace of a neighbourhood centre exceeding 6000m² nla a retail sustainability assessment is required. The western centre is not proposed to exceed 5,400m² retail NLA.

The policy does, however, identify that where an endorsed local structure plan includes an indicative amount of shop-retail floorspace derived from a retail needs assessment, a retail sustainability assessment is required where a significant increase to this shop-retail floorspace is proposed. It is questionable as to whether the proposed increase to 5,400m² is significant given that it is still below 6000m², however, a retail sustainability has been prepared (Appendix A).

The following section provides an overview of the retail sustainability assessment, which identifies that a net community benefit will result from the proposed increase in the maximum floorspace area of the centre.

It is important to note that the Activity Centres policy specifically identifies that competition between businesses of itself is not considered a relevant planning consideration.

5.5 Conclusion

The proposed amendment to ASP 60 to increase the retail NLA to 5,400m² is considered appropriate as the land uses proposed are consistent with the permitted and discretionary land uses and as identified in the following section the retail sustainability assessment concludes that the increase will not threaten the ongoing viability of any existing or future centres located in the area and will result in a net community benefit.

6. RETAIL SUSTAINABILITY ASSESSMENT

A retail sustainability assessment has been undertaken by MacroPlan Dimasi in accordance with Section 6.5 of State Planning Policy 4.2 Activity Centres Policy for Perth and Peel (SPP 4.2). The full report is contained in Appendix A.

The report specifically examines:

- The trade area which is likely to be served by the future western activity centre, including current and projected population and retail spending levels within the trade area;
- The competitive environment within which the proposed western activity centre will operate.
- The demand for retail floorspace at the western activity centre as well as providing estimates of sales potential for the centre.
- The likely trading impacts on the future retail facilities located throughout the surrounding region, as well as the employment and other economic effects of the proposed western activity centre.

The following is a summary of MacroPlan Dimasi's conclusions.

6.1 Trade Area

MacroPlan Dimasi analysed the catchment of the trade area based on a number of factors including the nature of the proposed centre, the road network and public transport options, competitive retail facilities and physical barriers and determined that the trade area is the extent of the ASP60 area.

6.2 Trade Area Population and Profile

At 2015, the main trade area population is estimated at 2,440. The population of the main trade area is projected to reach 8,280 people by 2023, when the Trinity residential estate is expected to reach its population capacity. The population profile is expected to be reflective of a growing outer suburban area.

Table 1 – Trade Area Population

	Estimated Population	Forecast Population		
		2015-2018	2018-2021	2021- 2026
	2015			
Main Trade Area	2440	5140	7240	8280
Annual Average Growth (No.)		900	700	208
Annual Average Growth (%)		28.2	12.1	2.7

6.3 Trade Area Spending

Per capita retail expenditure levels of the main trade area residents are slightly below the respective Perth metropolitan area averages, reflecting the lower per capita income levels. Total per capita retail expenditure for main trade area residents is estimated at \$13,375 for 2014/15, which is 10.2% below the Perth average.

Total expenditure on retail items by the main trade area population is estimated at \$25.9 million at 2015, and is projected to increase to \$123.5 million by 2026 (in constant 2014/15 dollars), reflecting an average real growth rate of 15.3% per annum.

Total expenditure on take-home food, groceries, and packaged liquor (FLG) by the main trade area population, which is the main category for supermarkets, is estimated at \$11.9 million at 2015, and is projected to increase in real terms to \$57.5 million by 2026 (in constant 2014/15 dollars), reflecting an average rate of 15.4% per annum.

Table 2- Western Centre Retail Expenditure (\$m)

Year Ending	FLG	Food Catering	Apparel	Household Goods	Leisure	General Retail	Retail Services	Total Retail
2015	11.9	2.7	2.5	4.8	1.2	2.1	0.7	25.9
2018	29.7	6.9	6.0	11.8	2.9	5.2	1.7	64.3
2021	45.1	10.6	9.0	17.8	4.3	7.8	2.6	97.3
2026	57.5	13.9	11.2	22.4	5.3	9.7	3.4	123.5

6.4 Competitive Context

Existing and proposed retail facilities in the region form a retail hierarchy as designated under State Planning Policy 4.2, including Alkimos (secondary centre), Butler and Eglinton (District Centres) and several neighbourhood and local centres which serve the day-to-day convenience and shopping needs of immediately surrounding residents.

Alkimos is a designated Secondary Centre under State Planning Policy 4.2 and is planned to be a future regional employment and community hub for the rapidly growing north-west corridor of the Perth metropolitan area. Recently updated retail modeling indicates an estimated 75,000m² of supportable shop/retail floorspace.

The Butler District Centre is a planned activity centre to comprise of retail, business, mixed- use, residential, entertainment, community and recreational uses. The Butler District Centre Activity Centre (BDCAC) Structure Plan No. 87 estimates a total of traditional shop/retail floorspace of 22,500m².

The future Eglinton District Centre is planned to provide district level facilities for residents of Eglinton and the broader catchment. The Eglinton LSP allows for an indicative traditional shop/retail floorspace provision of 15,591m² in the Eglinton District Centre.

There are a number of existing and planned neighbourhood/local centres located throughout the region. Most of the centres range in size between 1,000 – 5,000m² in terms of traditional shop/retail floorspace provision.

6.5 Retail Floorspace Analysis and Retail Sales Potential

The population of the main trade area is expected to reach capacity by 2023 (8,280 residents). By 2023, assuming 50% of food, packaged liquor and grocery (FLG) expenditure is retained by the western centre, an estimated 3,400m² retail (NLA) of FLG floorspace would be supportable at the subject site. A total of 5,400m² of retail NLA is estimated to be supportable at the western centre by 2023.

Table 3 – Western Centre Estimated Supportable Retail NLA (m2)

	Population	FLG	Food Catering	Non-Food	Retail Services	Total Retail
2015	2440	800	100	200	100	1200
2018	5140	1900	300	600	200	3000
2021	7240	2900	500	900	300	4600
2023	8280	3400	600	1000	400	5400

An activity centre of 5,400m² retail NLA could reasonably be anchored by a supermarket of 3,000m² and include 2,400m² of retail specialty floorspace. Supermarkets generate almost all of sales from the take-home food, grocery and packaged liquor (FLG) expenditure market. The main trade area population will provide the majority of the sales for the proposed supermarket at the subject site, with some sales coming from beyond the trade area. The available FLG spending generated by the main trade area population is estimated at \$12 million at 2014/15, and is expected to increase to nearly \$54 million by 2023.

The retail floorspace analysis shows that around 2,400m² of retail specialty floorspace is supportable at the western centre, assuming a 3,000m² supermarket anchors the proposed centre.

In addition to the proposed retail specialty mix, the western activity centre could provide a range of non-retail services such as a gymnasium, a medical centre, banking facilities, a travel agent and a real estate agent, which would add to the overall convenience offer of the future centre.

If the size of the centre is increased from 2,600m² to 5,400m² retail NLA, total retail sales is estimated to increase by \$13.4 million (constant 2014/15 dollars).

6.6 Economic and Social Benefits

The proposed increase in the size of the western activity centre will result in a range of economic benefits, particularly for residents of the main trade area. The key positive impacts will include the following:

- Strengthening the centre as a food and convenience shopping destination.
- Substantially improving shopping choice and convenience for local residents.
- Addressing the supermarket shopping needs of local residents.
- Creating a focal point for local residents.
- Creation of additional employment.

It is estimated that around 264 ongoing jobs will be created at the centre. This is a net additional employment increase of 129 jobs compared with a smaller 2,600m² centre, and would improve the employment self-sufficiency of the area.

Based on the estimated construction cost of around \$15 million for a 5,400m² centre, it is considered that during the construction period of the project some 64 direct construction jobs will be created, with a further 103 jobs resulting from supplier induced multiplier effects during this period. The construction costs for a 2,600m² centre are estimated at around \$8.5 million, which is likely to create 36 direct construction jobs, with a further 58 jobs resulting from supplier induced multiplier effects.

Therefore, an increase in the maximum floorspace area of the centre will result in an estimated 28 additional direct construction jobs created during the construction period of the project, with a further 45 jobs from supplier induced multiplier effects.

Table 4 - Western Centre Estimated Additional Future Employment Levels

		Direct Employment (long term)	Direct Employment (Construction)	Supplier Employment Multiplier	Total
Total Centre 5400m ²	Centre Employment	251		100	351
	Construction		64	103	167
	Total	251	64	203	518
Total Centre 2600m ²	Centre Employment	122		49	171
	Construction		36	58	94
	Total	122	36	107	265
Difference	Centre Employment	129		51	180
	Construction		28	45	73
	Total	129	28	96	253

6.7 Consideration of trading impacts

The proposed increase in the maximum floorspace area of the centre is expected to result in modest impacts on other existing and planned centres in the region, ranging from 2.8% on the existing Brighton Village Shopping Centre (anchored by a Coles supermarket) up to 4.1% on the Alkimos City Centre.

Table 5 – Trading Impact Assessment

	Estimated Sales (\$m)		Estimated Impact	
	2600m ² Western Centre	5400m ² Western centre	\$M	%
Alkimos City Centre	115.0	110.3	-4.7	-4.1
Brighton Marketplace	127.0	122.3	-4.7	-3.7
Brighton Village	47.8	46.5	-1.3	-2.8
Alkimos Gateway	25.0	24.1	-0.9	-3.5
Agora Village	10.0	9.6	-0.3	-3.4
Other			-1.5	
Total			-13.4	

Overall the impacts on existing and future centres in the region are considered to be well within the reasonable bounds of normal competition, and are not considered to threaten the viability of any centre.

6.8 Conclusion

A range of economic and social benefits are likely to arise from the proposed increased floorspace at the centre, these benefits can be summarised as follows:

- Strengthening TWAC as a food and convenience shopping destination;
- Significantly improving shopping choice and convenience for local residents in undertaking their regular food and grocery shopping;
- Addressing the supermarket shopping needs of local residents;
- Creating a focal point for local residents; and
- Providing additional employment opportunities for residents and improving the employment self-sufficiency of the area.

Against these benefits, a minor level of impact is projected on centres within the surrounding region. These impacts will not threaten the ongoing viability of any existing or future centre.

A net community benefit will therefore result from the proposed increase in the maximum floorspace area of the centre.

7. TRAFFIC ANALYSIS

A traffic analysis has been undertaken by Transcore, who have been the traffic consultants for ASP 60. The finding of the analysis is provided below.

ASP 60 made provision for a neighbourhood activity centre around the Marmion Avenue and Santorini Promenade intersection including a total of 2600m² of retail floor space. The proposed shopping centre site at the northeast corner of this intersection was allocated 2400m² of this retail floor space.

Amendment No 5 will increase the total retail floor space in this activity centre to 5400m² with 4950m² of this retail floor space within the proposed shopping centre site at the northeast corner of this intersection.

The traffic generation of the proposed increase in retail floor space has been assessed using trip rates provided in the *NSW Guide to Traffic Generating Developments*, which takes into consideration the different trip rates of the various components of a shopping centre, such as supermarket and specialty stores. For this analysis it is assumed the original 2600m² retail floor space would have included 1800m² of supermarket floor space. Preliminary planning for the proposed shopping centre indicates this would now increase to approximately 3000m² of supermarket floor space.

Based on those trip rates the original 2600m² retail floor space would have generated traffic flows of 3,100 vehicles per day (vpd) and the proposed increase to this retail floor space will increase the traffic generation to 6,240vpd. However, this does not result in an increase equal to simply adding all of that extra traffic generation on top of the previously forecast traffic flows on the adjacent roads.

The larger proposed shopping centre will cater more fully for the shopping trips generated by the residential development within the LSP area, which means that some shopping trips that would previously have travelled past this site on their way to larger centres along Marmion Avenue will now stop at this neighbourhood activity centre instead. Therefore the net increase in traffic on the adjacent road network will not be excessive.

For Amendment 4 to ASP 60, Transcore prepared a *Trinity West LSP, Alkimos Transport Addendum Report* (Dec 2014), which included traffic modelling of the Trinity LSP area. That report indicated future traffic flows of 6300vpd on Santorini Promenade east of Marmion Avenue when the LSP area is fully developed.

The traffic modelling has subsequently been revised to include the proposed increase in retail floor space. The resulting future weekday traffic flows on the road network around the shopping centre site are as indicated in Table 6.

Table 6 – Future Weekday Traffic Flows

	Vehicles Per Day
Marmion Ave north of Santorini Prom	27,700vpd
Santorini Prom east of Marmion Ave	7,200vpd
Santorini Prom west of Hollington Gdns	6,600vpd
Santorini Prom east of Hollington Gdns	5,600vpd
Trethowan Prom north of Santorini Prom	1,800vpd
Trethowan Prom north of the shopping centre	2,900vpd

The forecast traffic flows are generally within the capacity range indicated by the WAPC *Liveable Neighbourhoods* policy for these categories of roads (i.e. 35,000vpd on Marmion Avenue as a 4-lane Primary Distributor road; 7,000vpd on Santorini Promenade as a Neighbourhood Connector A and 3,000vpd on Trethowan Promenade as a Neighbourhood Connector B).

The short section of Santorini Promenade between Marmion Avenue and the shopping centre access would only be marginally above but not significantly higher than its nominal 7,000vpd capacity and would operate satisfactorily at this traffic volume.

Transcore has also analysed weekday AM and PM peak hour traffic flows at the adjacent intersections around the proposed shopping centre site. The proposed upgrade of the existing single-lane Marmion Ave / Santorini Prom roundabout to a dual-lane roundabout would operate at approximately 79% and 76% of capacity during weekday AM and PM peak hours, respectively, for the forecast future traffic flows.

The existing T-intersections along Santorini Promenade at Trethowan Promenade and Hollington Gardens and a proposed T-intersection for the shopping centre driveway would all operate at less than 30% of capacity during weekday AM and PM peak hours, with minimal queues and delays.

Therefore the proposed increase in retail floor space at the planned neighbourhood activity centre can be accommodated by the existing and planned road network without any significant traffic impact.

8. CONCLUSION

Amendment No. 4 to ASP 60, which is with the WAPC for consideration, redefines and rezones the Western Activity Centre. The amendment introduces Commercial and Mixed Use zones in place of the Centre zone with land use and development to be controlled through the existing provisions of the City of Wanneroo District Planning Scheme No 2.

Amendment No. 5 proposes to increase the retail floorspace provision within the Western Centre (lots zoned Commercial and Mixed Use) from 2600m² to 5400m² Retail Nett Leasable Area (NLA).

The 5400m² Retail NLA for the western centre is proposed to be distributed with 4950m² allocated to the main commercial lot on the north-east corner of Marmion Avenue and Santorini Promenade and 450m² (in total) allocated to the remaining Commercial and Mixed Use zoned lots.

The land uses proposed for the centre are consistent with the permitted and discretionary land uses.

The proposed increased floorspace at the centre will strength the centre as a convenience destination, improve shopping choice and convenience for the local residents, create a neighbourhood focal point and provide additional employment opportunities.

A minor level of impact is projected on centres within the surrounding region, however, these impacts will not threaten the ongoing viability of any existing or future centres.

The proposed increase in retail floor space can be accommodated by the existing and planned road network without any significant traffic impact.

Therefore proposed amendment 5 is appropriate based on the planning, economic and traffic analysis.

Appendix A

Retail Sustainability Assessment

Trinity Western Activity Centre, Alkimos

Retail Sustainability Assessment

July 2015



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Executive summary

The Trinity Western Activity Centre is covered by the *Lots 1001 and 1002 Marmion Avenue, Alkimos Agreed Structure Plan No. 60* – which states that the maximum Retail Nett Leasable Area (Retail NLA) for the Western Activity Centre is 2,600 sq.m. The purpose of this Retail Sustainability Assessment is to investigate the potential impacts (both positive and negative) which may arise from increasing the maximum retail floorspace of the Trinity Western Activity Centre (TWAC).

Local and regional context

- The proposed TWAC is situated in Alkimos, approximately 40 km north-west of the Perth CBD. Alkimos is located within the City of Wanneroo, which is one of the fastest growing municipalities in Western Australia. The TWAC is located at the intersection of Marmion Avenue and Santorini Promenade. Marmion Avenue is a major north-south thoroughfare in this part of Perth, extending north to Yanchep and south to Perth's inner north-western suburbs.

Planning framework

- The *Activity Centres Policy for Perth and Peel* is a state planning policy released in August 2010. It sets a hierarchy of activity centres for Perth and Peel - Perth Capital City, Strategic Metropolitan Centres, Secondary Centres, District Centres and Neighbourhood Centres. This report has been prepared as part of the requirements as set out in Section 6.5 of the policy.
- The *Agreed Structure Plan No 60 (Consolidated to include Amendment 1 and 2) Lots 1001 and 1002 Marmion Avenue, Alkimos (ASP 60)*, was endorsed by the City of Wanneroo in September 2014 and by the Western Australian Planning Commission (WAPC) in December 2014. Amendment No 3 and Amendment No 4 to ASP 60 have been prepared and were lodged in October 2014 and December 2014 respectively.

- The Butler-Jindalee Agreed District Structure Plan No. 39 (BJDSP) also covers Alkimos, as well as Butler, Ridgewood and Jindalee. Amendment 1 to the BJDSP is being processed concurrently with the related Amendment No 3 to the ASP 60, and will bring conformity to the two structure plans.

Trade area analysis

- The trade area defined for the TWAC is the extent of the Trinity Estate and reflects the location of the site at the intersection of Marmion Avenue and Santorini Promenade, as well as the surrounding competitive context including both existing and planned activity centres.
- The main trade area population is estimated at 2,440 in 2015, and is projected to increase strongly over the forecast period and reach a capacity population of 8,280 by 2023.
- Total expenditure on retail items by the main trade area population is estimated at \$25.9 million at 2015, and is projected to increase to \$123.5 million by 2026 (constant 2014/15 dollars, including GST), reflecting an average annual growth rate of 15.3% per annum.

Competitive context

- Alkimos City Centre is designated as a Secondary Centre and is planned to be a future regional employment and community hub for the rapidly growing north-west corridor. The latest retail modelling indicates that an estimated 75,000 sq.m of shop/retail floorspace is supportable at Alkimos City Centre.
- Butler is designated as a District Centre and is planned to comprise of retail, business, mixed-use, residential, entertainment, community and recreational uses. Brighton Marketplace (which will be the main retail centre in Butler) was approved in July 2014, and is planned to include a Big W discount department store, a Woolworths supermarket and around 70 specialty shops.

- Alkimos Gateway is a proposed mixed use development that has development approval for approximately 3,500 sq.m of traditional shop/retail floorspace, including for a 1,300 sq.m supermarket. The site is located 1 km north of the proposed TWAC.
- Existing centres in the region include Brighton Village SC (anchored by a Coles supermarket) and an IGA supermarket in Butler, which are both located to the south of Alkimos.

Retail floorspace analysis and retail sales potential

- The retail floorspace assessment undertaken as part of this report reveals that 5,400 sq.m of Retail Nett Lettable Area (Retail NLA) floorspace is supportable at the future TWAC. The analysis assumed that 50% of food, packaged liquor and grocery (FLG) and retail services expenditure, 25% of food catering spending and 10% of spending on non-food items is retained by the TWAC, with the remaining expenditure being directed to other activity centres in the surrounding region.
- The sales potential for TWAC, assuming it includes 5,400 sq.m of Retail NLA, is estimated at \$35.2 million in 2022/23 (constant 2014/15 dollars), and \$21.8 million if the maximum retail floorspace remained at 2,600 sq.m. Therefore, if the maximum retail floorspace of the centre is increased from 2,600 sq.m to 5,400 sq.m, total retail sales is estimated to increase by \$13.4 million.

Economic impact considerations

A range of economic and social benefits are likely to arise from increasing the maximum retail floorspace area of the TWAC, with the key benefits as follows:

- Strengthening TWAC as a food and convenience shopping destination;
- Significantly improving shopping choice and convenience for local residents in undertaking their regular food and grocery shopping;
- Addressing the supermarket shopping needs of local residents;
- Creating a focal point for local residents; and

- Providing additional employment opportunities for residents and improving the employment self-sufficiency of the area.

Against these benefits, a minor level of impact is projected on centres within the surrounding region. These impacts will not threaten the ongoing viability of any existing or future centre, and therefore it can be concluded that a net community benefit will result from the proposed increase in the maximum floorspace area of the TWAC.

Introduction

This report presents a Retail Sustainability Assessment (RSA) for a proposed increase in retail floorspace for the designated Trinity Western Activity Centre (TWAC) located in the emerging suburb of Alkimos, approximately 40 km north-west of the Perth CBD. The report has been prepared as part of the requirements of the *State Planning Policy 4.2 Activity Centres Policy for Perth and Peel* (SPP 4.2), as outlined in Section 6.5 of the Policy.

Specifically, Section 6.5 outlines the following in regards to Retail Sustainability Assessments:

“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 businesses of itself is not considered a relevant planning consideration.”

The report therefore considers the potential economic and related impacts of the proposed increase in the retail floorspace of the TWAC on the surrounding network of centres, addressing the overall costs and benefits of the proposal from a community viewpoint. The report is presented in five sections as follows:

- **Section 1** examines the locational context of the proposed TWAC, and summarises the overall planning framework for the broader region.
- **Section 2** examines the trade area which is likely to be served by the future TWAC, including current and projected population and retail spending levels within the trade area.
- **Section 3** describes the competitive environment within which the proposed TWAC will operate.

- **Section 4** assesses the demand for retail floorspace at the TWAC as well as providing estimates of sales potential for the centre.
- **Section 5** considers the likely trading impacts on the future retail facilities located throughout the surrounding region, as well as the employment and other economic effects of the proposed TWAC.

Section 1: Site location and planning framework

This section considers the locational context of the proposed Trinity Western Activity Centre as well as providing an overview of the relevant planning framework.

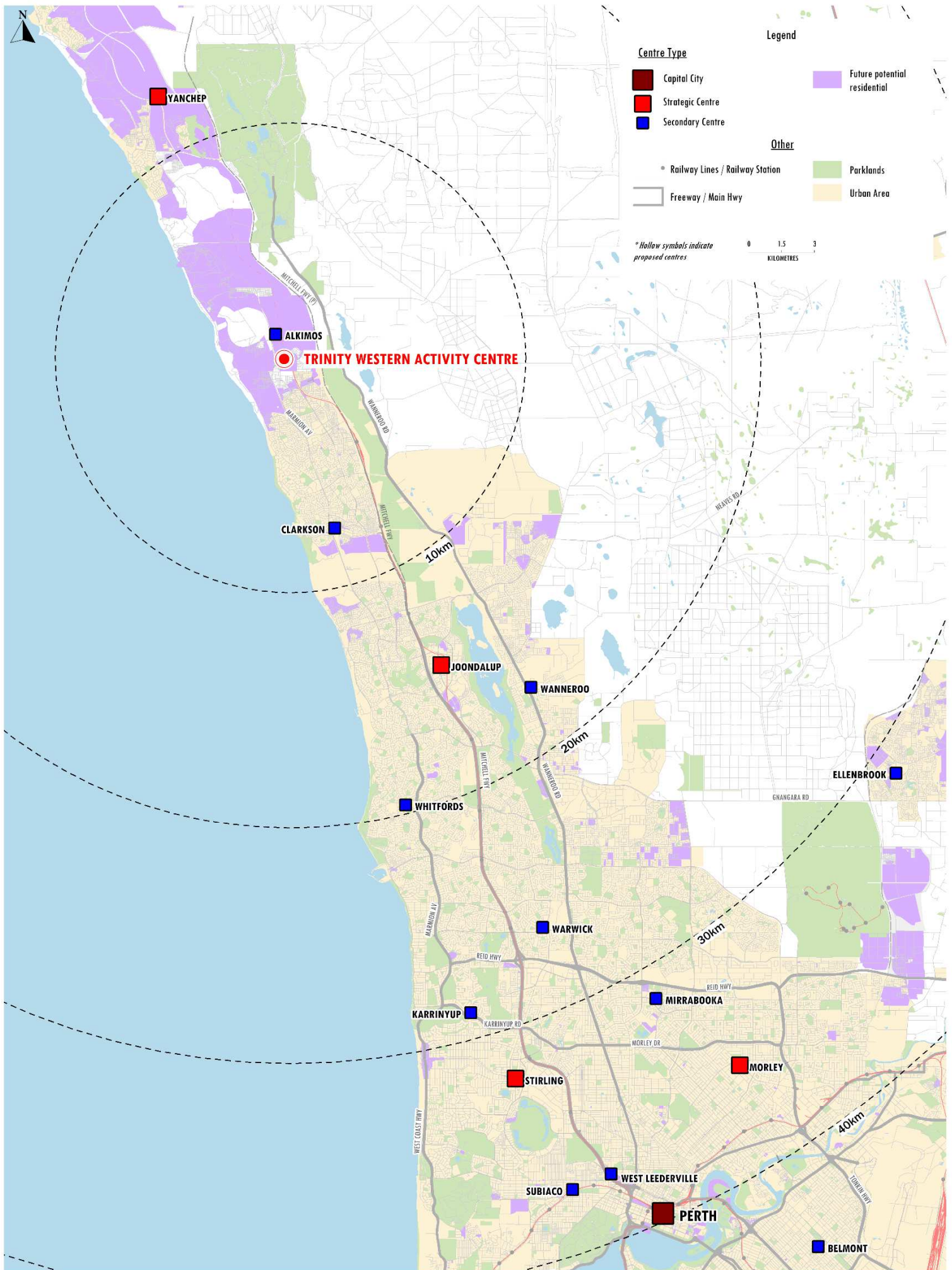
1.1 Regional and local context

Map 1.1 shows the location of the planned Trinity Western Activity Centre (TWAC), within the development at Lots 1001 and 1002 Marmion Avenue (Trinity Estate), in Alkimos, and the broader regional context of the site.

Alkimos is an emerging suburb located within the City of Wanneroo, approximately 40 km north-west of the Perth CBD and 17 km north of the Joondalup Strategic Metropolitan Centre. The City of Wanneroo has been one of the fastest growing Local Government Areas in Western Australia over the last decade, with population growth averaging 6.4% per annum over the last decade. Future residential growth will occur in the coastal north-west corridor of the Perth metropolitan area and will extend northwards past Alkimos and eventually consolidate to Yanchep.

The local context of the TWAC is illustrated in Map 1.2. The TWAC is located on the intersection of Marmion Avenue and Santorini Promenade. Marmion Avenue is a major north-south thoroughfare in this part of Perth, extending north to Yanchep and south to Perth's inner north-western suburbs. Santorini Promenade is an east-west road within the Trinity Estate, linking to the eastern part of the estate, known as Agora Village.

The region is expected to be well serviced in terms of public infrastructure in the future. Public rail transportation is available from the Butler railway station to the south, with the future extension of the Joondalup railway line to connect to the planned Alkimos City Centre to the north. The Alkimos City Centre is expected to provide an array of retail, commercial, mixed-use and community facilities.



Map 1.1: Trinity Western Activity Centre, Alkimos
Regional context

1.2 Planning framework

This sub-section reviews the relevant planning documents for the proposed TWAC.

Activity Centres Policy for Perth and Peel

The *Activity Centres Policy for Perth and Peel* (the Policy) is a state planning policy (SPP 4.2), released in August 2010, which sets out the policy directions for the planning and development of activity centres throughout Perth and Peel, and supersedes the previous Metropolitan Centres Policy.

The purpose of the Policy is to provide broad policy guidance to local governments, state agencies and other stakeholders on matters such as:

- The preferred spatial distribution for retail and commercial use;
- The planning and development of new activity centres;
- The redevelopment and renewal of existing centres in Perth and Peel; and
- The urban design considerations for new activity centres, and the associated transport and infrastructure provision.

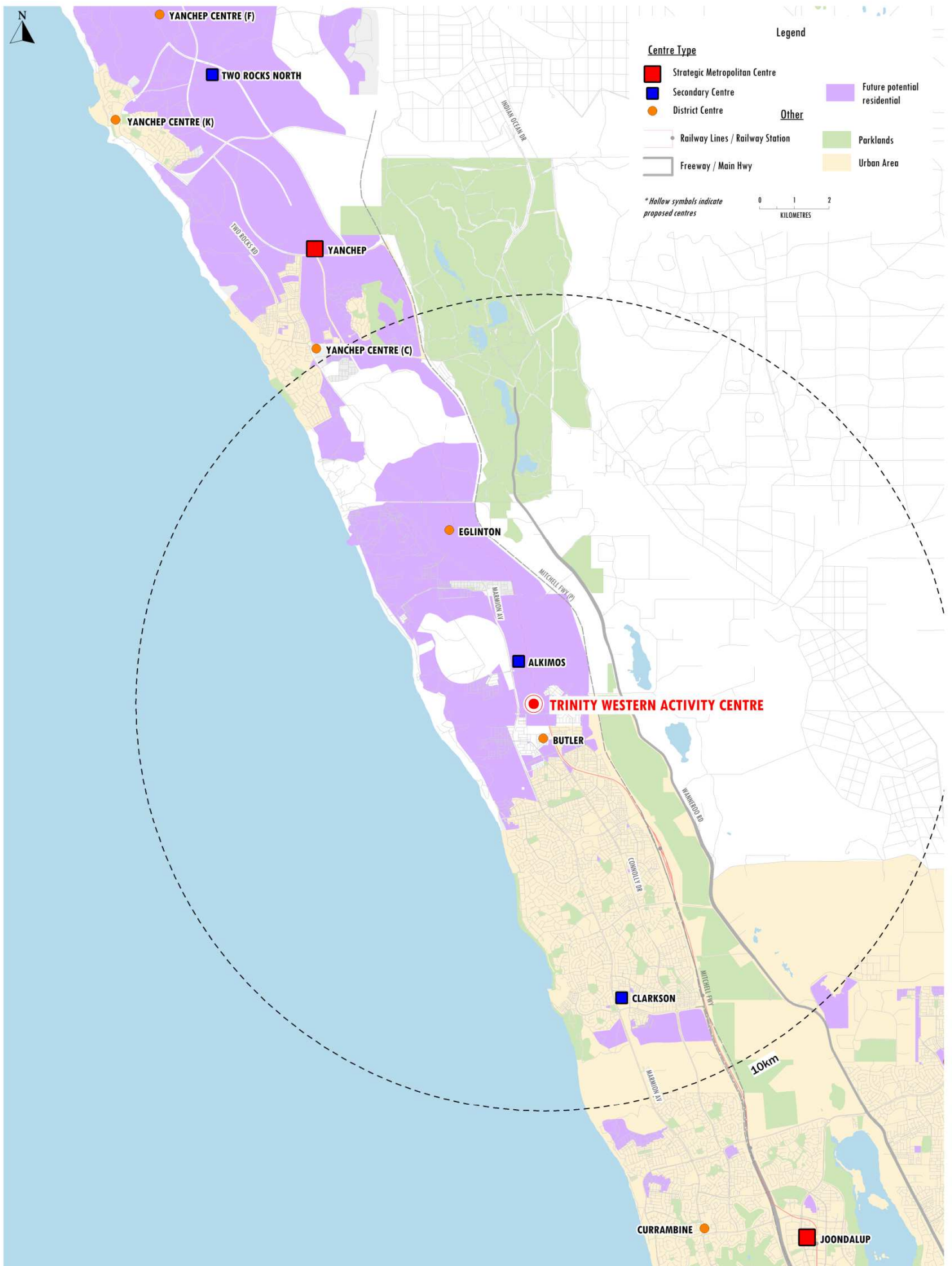
In order to achieve its objectives, the Policy provides for a hierarchy of activity centres, which differentiates such centres and their planning principles in terms of their roles and functions within the overall network; their indicative retail catchments; and their housing density and mix of land uses. This activity centres hierarchy is illustrated in Figure 1.1 and the relevant activity centres surrounding the proposed TWAC are further illustrated in Map 1.3. The characteristics of the activity centres are as follows:

- The Perth Capital City is the largest and highest ranking of the activity centres, providing the largest concentration of development in the region, with the greatest range of services and employment facilities.

- Strategic Metropolitan Centres – 10 such centres are designated, at Yanchep, Joondalup, Stirling, Morley, Midland, Fremantle, Cannington, Armadale, Rockingham and Mandurah. The Strategic Metropolitan Centres are the main regional activity centres, intended to provide a diverse mix of economic and community uses for their extensive catchments.
- Secondary Centres – The Policy identifies 19 Secondary Centres, which are generally evenly distributed across the Perth urban area. Secondary Centres, similar to Strategic Metropolitan Centres, are also intended to offer a diverse range of services and facilities, including community and employment opportunities. There is one future Secondary Centre of relevance to the subject region, located at Alkimos.
- District Centres – A network of District Centres is designated throughout the Perth urban area. These centres are expected to focus on servicing the daily and weekly needs of residents within their local respective catchments. There are two designated District Centres located in the surrounding region, namely at Butler (Brighton) and Eglinton.
- Neighbourhood Centres – Such centres are expected to provide local community hubs to service the day-to-day needs of the immediately surrounding residents. The Policy does not provide the locations of the neighbourhood centres, but emphasises the important role of these centres, which should be recognised in local planning strategies and structure plans.



Figure 1.1



Map 1.3: Trinity Western Activity Centre, Alkimos
 Surrounding activity centre hierarchy

City of Wanneroo Local Planning Policy 3.2: Activity Centres

The *Local Planning Policy 3.2: Activity Centres* (LPP 3.2) was published by the City of Wanneroo. The purpose of the policy is to provide guidance on the planning and development of activity centres in the City of Wanneroo, and provide a framework for implementing the principles and objectives of SPP 4.2 and the Department of Planning's Structure Plan Preparation Guidelines.

Lots 1001 and 1002 Marmion Avenue, Alkimos Agreed Structure Plan No. 60

The *Agreed Structure Plan No 60 (Consolidated to include Amendment 1 and 2) Lots 1001 and 1002 Marmion Avenue, Alkimos* (ASP 60) was endorsed by the City of Wanneroo in September 2014 and by the Western Australian Planning Commission (WAPC) in December 2014. This follows the initial final approval of the ASP 60 by the City of Wanneroo in May 2011 and by WAPC in September 2011.

The ASP 60 states that the primary objectives of Activity Centres and Employment are:

“To establish accessible and amenable main street based village centres in accordance with Liveable Neighbourhoods principles to best service the commercial, social and employment needs of the community and act as a focus for community activity and interaction;

“To create a robust urban framework within and around centres which enhances the opportunity for mixed use local based employment and active focal points.”

Two activity centres are identified in ASP 60, the Western Activity Centre (which is the subject of this report) and the Eastern Activity Centre. As stated in the ASP 60, the main objective of the activity centres is to:

“facilitate the creation of vibrant centres with a diverse mix of uses including commercial and retail activities as well as leisure, health and community services...”

The maximum Retail Nett Leasable Area (NLA) for the two activity centres are set out in the ASP 60 as follows:

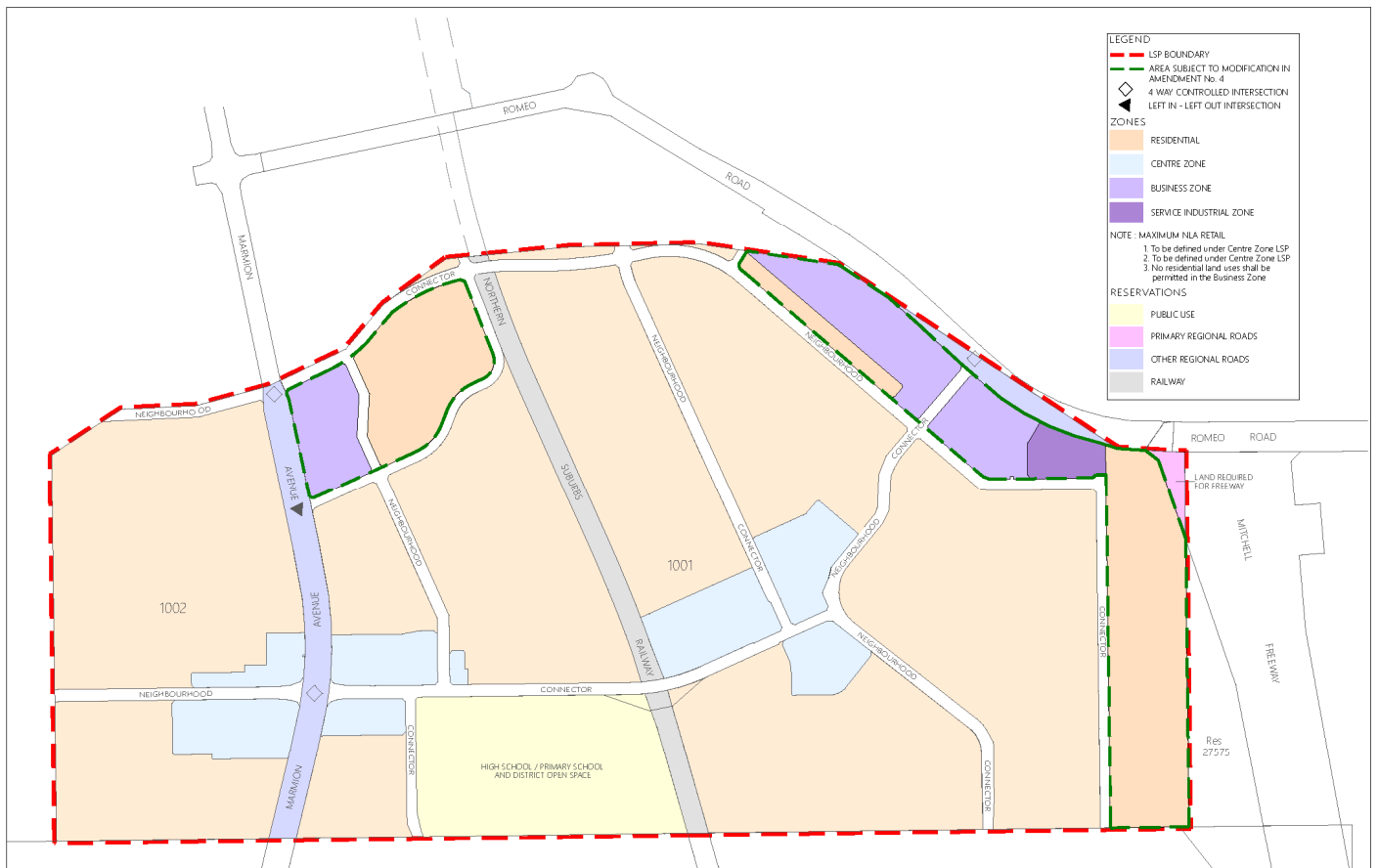
- Western Activity Centre : 2,600 sq.m; and
- Eastern Activity Centre: 1,500 sq.m.

Amendment No 3 to ASP 60 was prepared by Gray & Lewis Landuse Planners in a document dated October 2014, and mostly seeks to provide zoning to areas defined as ‘subject to further planning’ in the ASP 60.

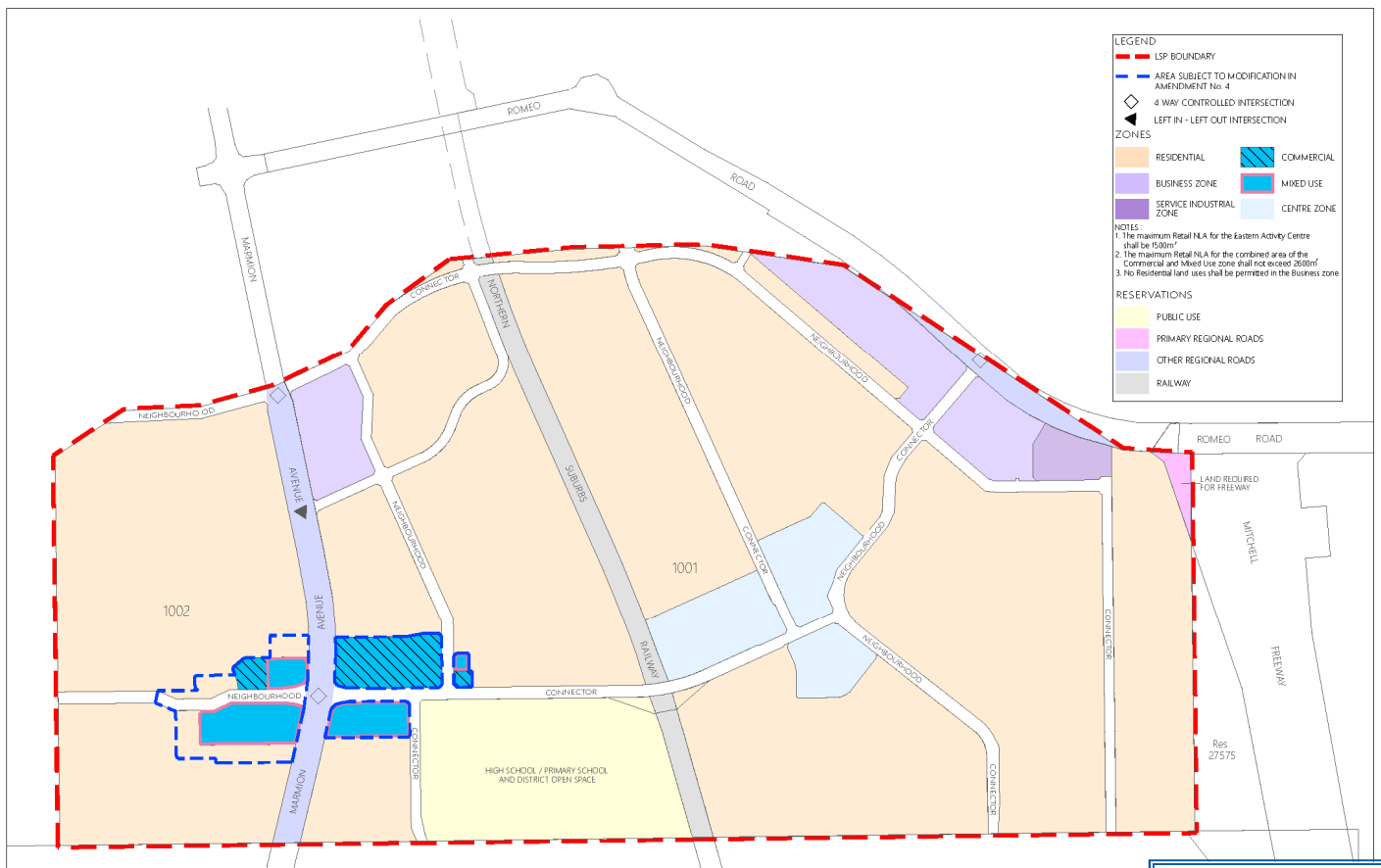
Amendment No 4 to ASP 60 was also prepared by Gray & Lewis Landuse Planners in a document dated December 2014. This amendment relates to the western part of the ASP 60 subject area, and in particular proposes to introduce more specific zones for the Western Activity Centre – the subject site (refer Figure 1.2). The area of the Western Activity Centre located at the intersection of Marmion Avenue and Santorini Promenade is to be zoned commercial, while the majority of the balance of the activity centre is to be zoned mixed use. These new zones are proposed as there is now greater certainty over the location of the retail core and mixed use areas.

Butler-Jindalee Agreed District Structure Plan No.39

ASP 60 was prepared in accordance with the *Butler-Jindalee Agreed District Structure Plan No. 39* (BJDSP), which was prepared by Chappell & Lambert Town Planners in April 2003 and was adopted by WAPC for final approval in October 2006. BJDSP covers Lots 1001 and 1002 Alkimos, as well as Lots 7, 8, 11, 31, 32 and 33 Butler and Ridgewood, and Lots 9, 10 and 12 in Jindalee, and provides the district level planning framework for development in the region. Amendment 1 to the BJDSP is being processed concurrently with the related Amendment No 3 to the ASP 60, and will bring conformity to the two structure plans.



AGREED LOCAL STRUCTURE PLAN WITH AMENDMENT 3 - PROPOSED ZONING PLAN*



AMENDMENT 4 LOCAL STRUCTURE PLAN - PROPOSED ZONING PLAN

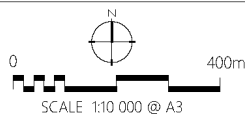
Figure 1.2

PROPOSED AMENDMENT 4 TO AGREED LOCAL STRUCTURE PLAN 60

PLAN 3 - ZONING PLAN

17th FEBRUARY 2015

THE DOCUMENT MAY ONLY BE USED FOR THE PURPOSE FOR WHICH IT WAS COMMISSIONED AND IN ACCORDANCE WITH THE TERMS OF ENGAGEMENT FOR THE COMMISSION. UNAUTHORISED USE OF THIS DOCUMENT IN ANY FORM WHATSOEVER IS PROHIBITED.



* AMENDMENT 3 HAS BEEN LODGED SEPARATELY TO THE CITY OF WANNEROO AND IS SUBJECT TO SEPARATE APPROVAL. AMENDMENT 3 MAPPING HAS BEEN INCLUDED FOR INFORMATION PURPOSES ONLY.



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MGA Town Planners: Retail Potential Analysis – Western Activity Centre – ASP 60

MGA Town Planners prepared a retail potential analysis for the Western Activity Centre, for the City of Wanneroo in a letter dated 11 March 2015. The report was prepared to determine the viability of a proposed increase in the retail floorspace of the Western Activity Centre in the ASP 60.

The analysis in the report is based on a retail gravity model to forecast potential impacts on surrounding centres from a proposed increase in the amount of retail floorspace at the Western Activity Centre. The analysis tested a proposed increase in the retail floorspace at the Western Activity Centre from 2,600 sq.m to 4,000 sq.m (net leasable area). The analysis indicated that the potential impacts on other designated activity centres in the region would range from 0.76% for the Brighton NAC to 1.0% for the Alkimos District Activity Centre. The analysis concluded that there would be no substantial impact on the viability of the surrounding planned activity centres from a 1,400 sq.m increase in retail floorspace at the proposed Western Activity Centre.

Urbis: Lot 3, Romeo Road

Urbis prepared Lot 3, Romeo Road, Alkimos in February 2008, which is now known as Lots 1001 and 1002 Marmion Avenue, Alkimos. The key findings from this report are as follows:

- The ultimate population capacity of the area is 7,940, which is assumed to be reached by 2018.
- The retail spending market of trade area residents is estimated to be \$97 million in 2018, quoted in constant 2007 dollars.
- The proposed retail centre at the Western Activity Centre is well placed to capitalise on the convenience shopping needs of passing vehicular traffic through via its exposure to Marmion Avenue.
- The Eastern Activity Centre is expected to serve only a local market reflecting its internalised location.

- A mid-sized supermarket of up to 2,200 sq.m is likely to be supportable at the Western Activity Centre, which will in turn provide support to a further 1,200 sq.m of specialty shop floorspace.
- A small neighbourhood centre of up to 700 sq.m is likely to be supportable at the Eastern Activity Centre, including a small food & grocery shop and some convenience oriented specialty shops.

Urbis: Employment Assessment of Amendment No. 1 to Butler-Jindalee District Structure Plan

Urbis also prepared the *Employment Assessment of Amendment No. 1 to Butler-Jindalee District Structure Plan* in July 2014. The purpose of the report was to assess the employment impacts of the original BJDSP with the latest Development Concept Plan for Lots 1001 and 1002 Marmion Avenue, Alkimos, which form the basis of Amendment No. 1 to the BJDSP. The plans relate to a proposed change of land use, on Lots 1001 and 1002 from “service industry” to “business” zoning, and a redistribution of the commercial/business uses from the most eastern part of the property to the Romeo Road and Marmion Avenue frontages. Amendment No. 1 also reflects the changes to location of the planned primary and high schools.

The key finding of the study was that Amendment No. 1 to BJDSP is expected to generate 257 or more jobs compared with the original BJDSP. This was forecast to see a higher Employment Self Sufficiency level of 55% compared with 43% under the original plan.

City of Wanneroo Strategic Community Plan

The *Strategic Community Plan* (the Community Plan) was published by City of Wanneroo in 2014. It sets out the long-term vision and aspirations of the community and describes the objectives of the Council. It is a document that has been determined by the community and Council through extensive community engagement. Based on the outcome of the community engagement program, the Council endorsed the following vision: “Building a future together”. Further to this, a range of community priorities were identified which fall under four pillars – environment, society, economy and civic leadership.

Section 2: Trade area analysis

This section of the report analyses the potential catchment or trade area for the proposed Trinity Western Activity Centre (TWAC). The analysis includes an assessment of the current and projected population levels, the socio-demographic profile of the population, and the estimated current and future retail expenditure capacity of the catchment residents.

2.1 Trade area definition

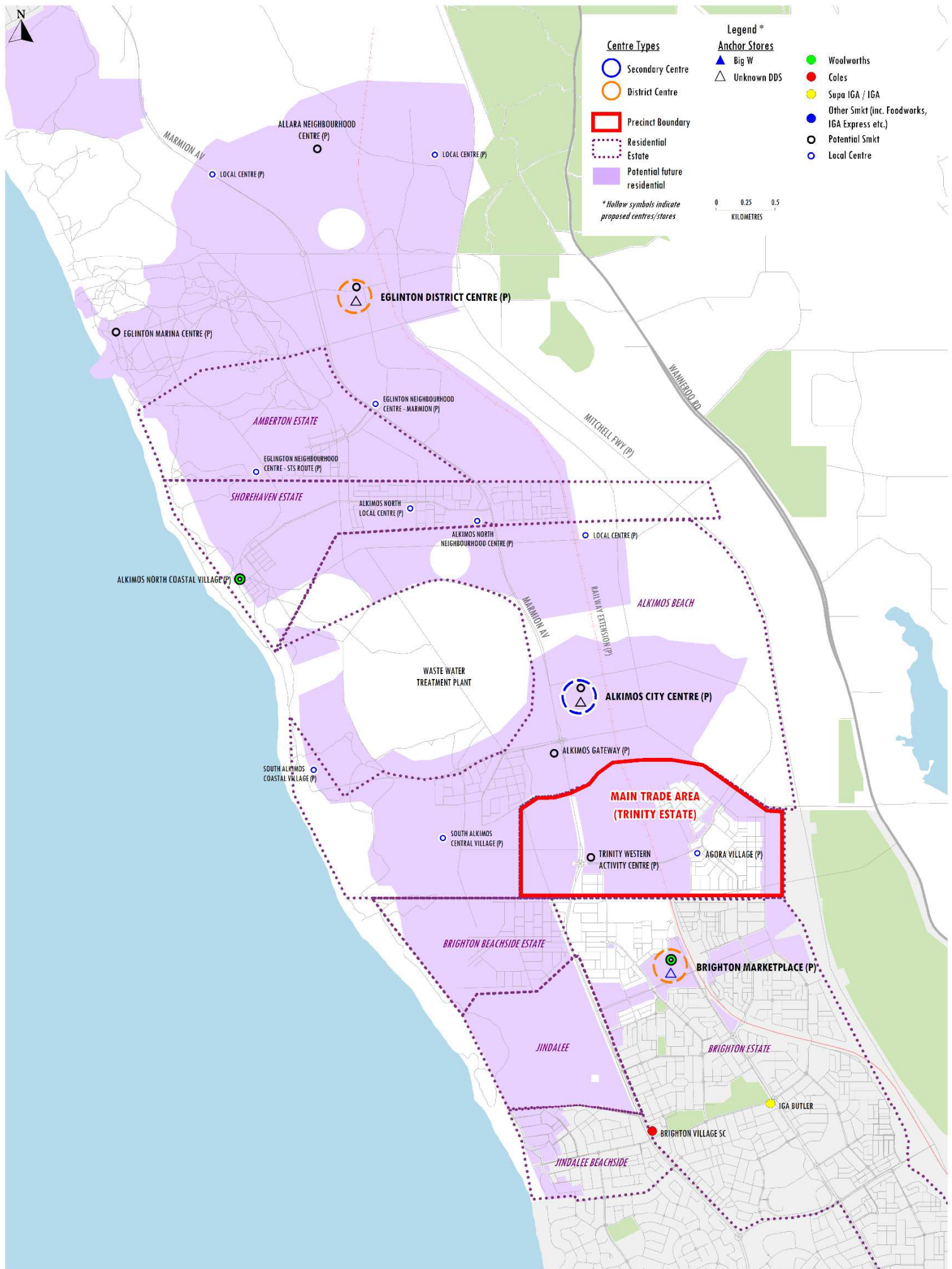
The extent of the catchment or trade area for any shopping centre or retail precinct is shaped by a number of key factors, as follows:

- The most important factor impacting on the trade area of any particular centre is the scale and composition of the centre, and particularly the major trader (or traders) that are included within it. The layout and ambience/atmosphere of the centre, as well as the amount and quality of carparking, also determine the strength and attraction of a particular retail facility.
- The available road network and public transport system are also important factors impacting on the relative attractiveness of any retail facility, as they affect the ease of access to the centre.
- The proximity and attraction of competitive retail facilities also have an influence on a particular centre's trade area. The locations, compositions, quality and scale of competitive centres in the region therefore impact on the extent of the trade area which a centre is effectively able to serve.
- Significant physical barriers (e.g. freeways, rivers and railways) which are difficult to negotiate or which take considerable time to cross can often act to delineate the boundaries of the trade areas that are able to be served by specific centres.

The extent of the trade area available to be served by the TWAC has been defined taking into consideration the following key points:

- The location of the proposed TWAC on a high profile site at the intersection of Marmion Avenue and Santorini Promenade, enabling easy accessibility to the site.
- The planned locations of the future activity centres in the region, including the future Alkimos City Centre to the north, and the proposed district centre at Butler to the south, which will contain the proposed Brighton Marketplace shopping centre.
- The ability of the proposed TWAC to conveniently serve residents of the Trinity Estate, in terms of their food and convenience shopping needs.

Map 2.1 illustrates the trade area defined for the TWAC, which is the extent of the Trinity Estate (ASP 60 area of Lots 1001 and 1002 Marmion Avenue, Alkimos) and is referred to as the **main trade area** for the centre throughout the remainder of this report.



Map 2.1: Trinity Western Activity Centre, Alkimos
Main trade area and competitive context

2.2 Trade area population

Table 2.1 details the current and projected population levels for the TWAC main trade area. At 2015, the main trade area population is estimated at 2,440, and reflects recent residential development within the eastern part of the Trinity residential estate.

Population growth over the forecast period to 2026 in the main trade area is projected to be very strong. The population of the main trade area is projected to reach 8,280 people by 2023, when the Trinity residential estate is expected to reach its population capacity.

Table 2.1				
Trinity Western AC main trade area population, 2015-2026*				
	Est. population	Forecast population		
	2015	2018	2021	2026
Main trade area	2,440	5,140	7,240	8,280
Average annual growth (no.)				
	2015-18		2018-21	2021-26
Main trade area	900		700	208
Average annual growth (%)				
	2015-18		2018-21	2021-26
Main trade area	28.2%		12.1%	2.7%

*As at June
Source: ABS Census 2011; Western Australian Planning Commission 2015; MacroPlan Dimasi

2.3 Trade area population profile

Table 2.2 and Chart 2.1 summarises the likely socio-demographic profile of the main trade area residents, compared with the respective averages for the Perth metropolitan area and Australia, based on the results of the 2011 ABS Census of Population and Housing.

As there were no residents in the main trade area at the time of the 2011 ABS Census, we have examined an area to the south of the main trade area (the majority of the Brighton Estate) as a proxy to understand the likely socio-demographic and spending profile of the anticipated population. The eventual socio-demographic profile of the future population might well differ slightly from this proxy, however we do not expect that any such differences would result in a significant change to the conclusions presented in this report.

The key points to note regarding the anticipated socio-demographic characteristics of the main trade area population are as follows:

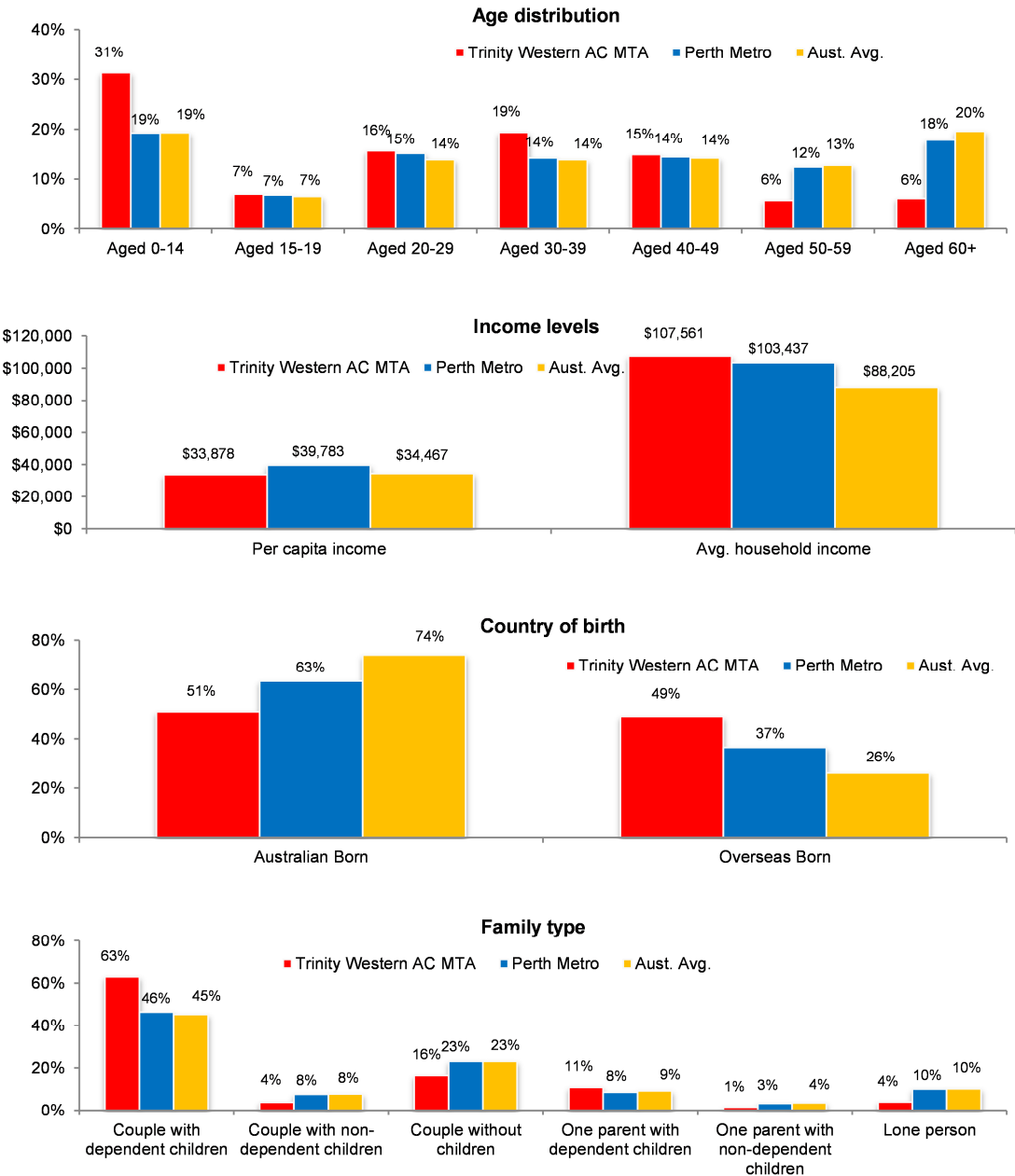
- Per capita income levels earned by study area residents are on average lower than the Perth metropolitan benchmarks, though household incomes are above average.
- There is an average of 3.2 persons per household in the Brighton area, compared with an average of 2.6 across the Perth metropolitan area.
- The average age of the study area population is lower than the Perth metropolitan area benchmark, reflecting the higher than average proportion of residents aged 0 - 14 years and a lower than average proportion of residents aged 50 and over.
- Home ownership levels are above average.
- The proportion of overseas born residents is above the Perth metropolitan benchmark, and is particularly high for European born residents (32.1% of residents).
- The area contains a significantly above average proportion of traditional families (i.e. households comprising couples with dependent children).

In general, the population of the defined main trade area is expected to be reflective of a growing outer suburban area. The area is expected to be popular with traditional families in their early life stages, which are attracted to the area by the affordability of housing and the future amenity proposed in the surrounding region.

Table 2.2 Trinity Western AC main trade area - socio-demographic profile, 2011			
Census item	Main TA*	Perth Metro avg.	Aust. avg.
Per capita income	\$33,878	\$39,783	\$34,467
<i>Var. from Perth Metro benchmark</i>	-14.8%		
Avg. household income	\$107,561	\$103,437	\$88,205
<i>Var. from Perth Metro benchmark</i>	4.0%		
Avg. household size	3.2	2.6	2.6
<u>Age distribution (% of population)</u>			
Aged 0-14	31.3%	19.2%	19.3%
Aged 15-19	7.0%	6.8%	6.5%
Aged 20-29	15.6%	15.1%	13.8%
Aged 30-39	19.4%	14.2%	13.8%
Aged 40-49	14.9%	14.4%	14.2%
Aged 50-59	5.7%	12.4%	12.8%
Aged 60+	6.1%	17.8%	19.6%
Average age	27.8	36.9	37.9
<u>Housing status (% of households)</u>			
Owner (total)	71.7%	70.7%	68.7%
• Owner (outright)	8.4%	30.0%	32.9%
• Owner (with mortgage)	63.3%	40.7%	35.8%
Renter	27.9%	28.2%	30.4%
Other	0.4%	1.2%	0.9%
<u>Birthplace (% of population)</u>			
Australian born	50.9%	63.4%	74.0%
Overseas born	49.1%	36.6%	26.0%
• Asia	2.9%	9.6%	8.6%
• Europe	32.1%	17.6%	10.5%
• Other	14.2%	9.3%	7.0%
<u>Family type (% of households)</u>			
Couple with dep't children	62.9%	46.4%	45.3%
Couple with non-dep't child.	3.8%	7.5%	7.7%
Couple without children	16.4%	23.1%	23.0%
One parent with dep't child.	10.9%	8.5%	9.2%
One parent w non-dep't child.	1.4%	3.2%	3.5%
Other family	0.7%	1.3%	1.1%
Lone person	3.9%	10.0%	10.2%

* The socio-demographic profile of the Brighton Estate used as a proxy.
Source: ABS Census of Population & Housing, 2011; MacroPlan Dimasi

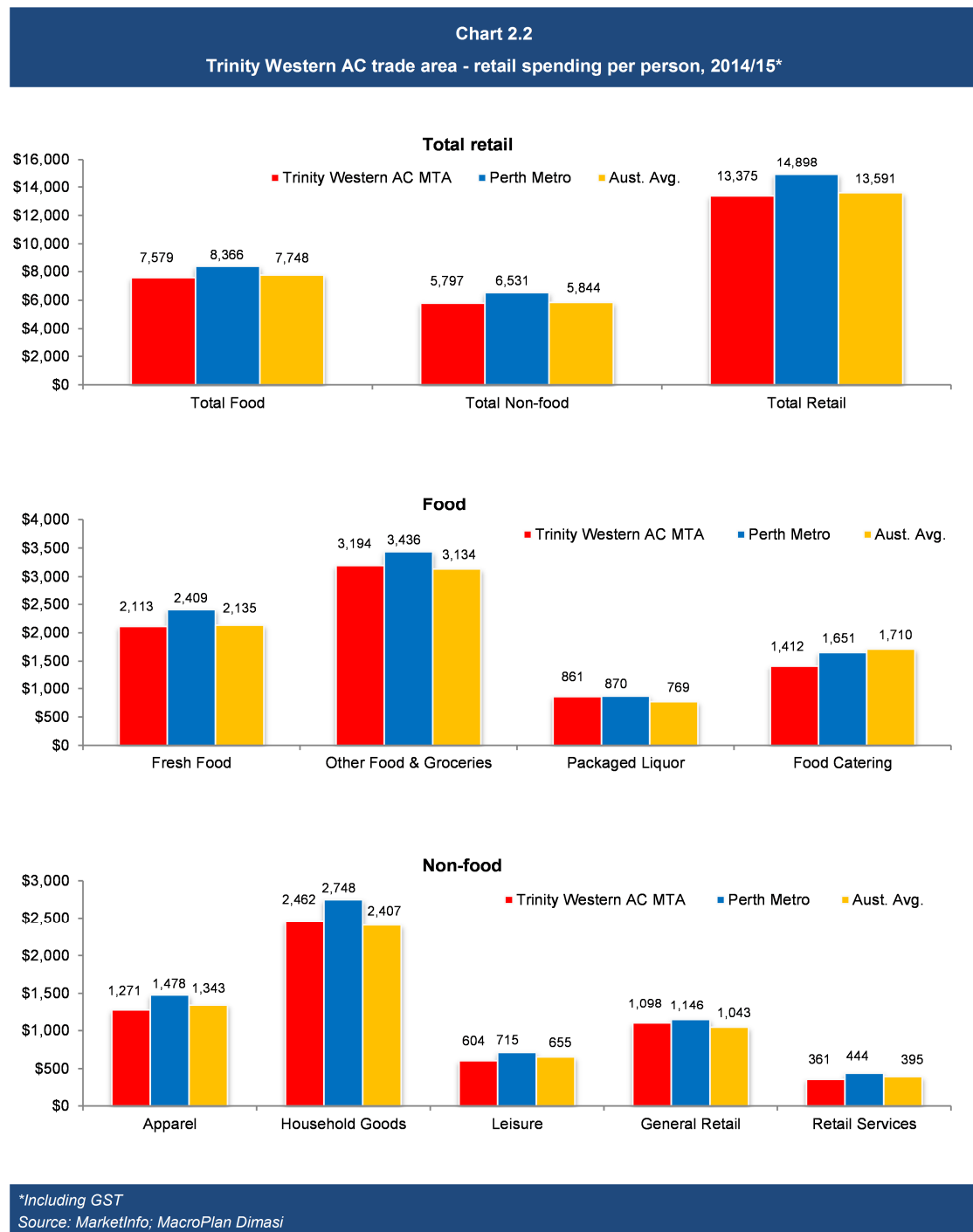
Chart 2.1
Trinity Western AC main trade area - socio-demographic profile, 2011



* The socio-demographic profile of the Brighton Estate used as a proxy.
 Source: ABS Census of Population & Housing, 2011; MacroPlan Dimasi

2.4 Trade area spending

Chart 2.2 illustrates the estimated per capita retail expenditure levels for the main trade area population, benchmarked against the respective Perth metropolitan area and Australian national averages. All spending figures in this report include GST.



The estimated retail expenditure capacity of the main trade area population is sourced from MarketInfo, which is developed by Market Data Systems (MDS) and utilises a detailed micro simulation model of household expenditure behaviour for all residents of Australia. The model takes into account information from a wide variety of sources including the regular ABS Household Expenditure Surveys, national accounts data, Census data and other information. The MarketInfo estimates for spending behaviour prepared independently by MDS are commonly used by all parties in Retail Sustainability Assessments.

Per capita retail expenditure levels of main trade area residents are slightly below the respective Perth metropolitan area averages, reflecting the lower per capita income levels. Total per capita retail expenditure for main trade area residents is estimated at \$13,375 for 2014/15, which is 10.2% below the Perth average.

Table 2.3 details the estimated retail expenditure generated by the future trade area population for the period from 2015 to 2026. All spending forecasts in this report are expressed in constant 2014/15 dollars (i.e. excluding retail inflation) and including GST.

Total expenditure on retail items by the main trade area population is estimated at \$25.9 million at 2015, and is projected to increase to \$123.5 million by 2026 (in constant 2014/15 dollars), reflecting an average real growth rate of 15.3% per annum.

The average annual growth rate estimate includes the following components:

- Population growth in the main trade area, which is estimated to average 14.3% per annum.
- Real growth in per capita retail expenditure, which is projected to average 1.0% per annum.

Table 2.3
Trinity Western AC main trade area - retail expenditure (\$M), 2015-2026*

Year ending June	Main TA
2015	25.9
2016	38.9
2017	51.5
2018	64.3
2019	75.9
2020	86.5
2021	97.3
2022	107.0
2023	115.7
2024	120.8
2025	122.1
2026	123.5
<u>Average annual growth (\$M)</u>	
2015-2021	11.9
2021-2026	5.2
2015-2026	8.9
<u>Average annual growth (%)</u>	
2015-2021	24.7%
2021-2026	4.9%
2015-2026	15.3%
*Constant 2014/15 dollars & including GST Source: MarketInfo; MacroPlan Dimasi	

Table 2.4 details the retail expenditure capacity of the main trade area population by product category over the forecast period, as well as the category definitions. Total expenditure on take-home food, groceries, and packaged liquor (FLG) by the main trade area population, which is the main category for supermarkets, is estimated at \$11.9 million at 2015, and is projected to increase in real terms to \$57.5 million by 2026 (in constant 2014/15 dollars), reflecting an average rate of 15.4% per annum.

Table 2.4 Trinity Western AC main trade area - retail expenditure by category (\$M), 2015-2026*								
Year ending June	FLG	Food catering	Apparel	Household goods	Leisure	General retail	Retail services	Total retail
2015	11.9	2.7	2.5	4.8	1.2	2.1	0.7	25.9
2016	18.0	4.1	3.7	7.2	1.8	3.2	1.1	38.9
2017	23.8	5.5	4.9	9.5	2.3	4.2	1.4	51.5
2018	29.7	6.9	6.0	11.8	2.9	5.2	1.7	64.3
2019	35.1	8.2	7.1	13.9	3.4	6.1	2.1	75.9
2020	40.1	9.4	8.1	15.8	3.8	7.0	2.3	86.5
2021	45.1	10.6	9.0	17.8	4.3	7.8	2.6	97.3
2022	49.7	11.8	9.9	19.5	4.7	8.6	2.9	107.0
2023	53.8	12.8	10.7	21.1	5.1	9.2	3.1	115.7
2024	56.2	13.4	11.1	22.0	5.3	9.6	3.3	120.8
2025	56.9	13.7	11.2	22.2	5.3	9.6	3.3	122.1
2026	57.5	13.9	11.2	22.4	5.3	9.7	3.4	123.5
<u>Average annual growth (\$M)</u>								
2015-2026	4.1	1.0	0.8	1.6	0.4	0.7	0.2	8.9
<u>Average annual growth (%)</u>								
2015-2026	15.4%	15.9%	14.8%	15.1%	14.8%	14.8%	15.4%	15.3%
*Constant 2014/15 dollars & including GST Source: MarketInfo; MacroPlan Dimasi								

Retail expenditure category definitions:

- FLG: take-home food and groceries, as well as packaged liquor.
- Food catering: expenditure at cafes, take-away food outlets and restaurants.
- Apparel: clothing, footwear, fashion accessories and jewellery.
- Household goods: giftware, electrical, computers, furniture, homewares and hardware goods.
- Leisure: sporting goods, music, DVDs, computer games, books, newspapers & magazines, stationery and photography equipment.
- General retail: pharmaceutical goods, cosmetics, toys, florists, mobile phones and pets.
- Retail services: hair & beauty, optical goods, dry cleaning, key cutting and shoe repairs.

Section 3: Competitive context

This section of the report reviews the retail environment within which the Trinity Western Activity Centre (TWAC) will operate in the future. Table 3.1 details the existing and proposed retail facilities in the surrounding area, while the previous Map 2.1 illustrates the distribution of these facilities.

Existing and proposed retail facilities in the region form a retail hierarchy as designated under State Planning Policy 4.2, previously detailed in Section 1.2, and includes the following activity centres/types:

- **Secondary centre** – Alkimos, which is to provide the main focus for shopping, community, business and recreation activity for the surrounding population;
- **District centres** – Butler (Brighton) and Eglinton, which typically include major supermarkets and serve the weekly food, grocery and other retail and personal services needs of residents in adjacent suburbs; and
- Several **neighbourhood and local centres** which serve the day-to-day convenience and top-up shopping needs of immediately surrounding residents.

Table 3.1
Trinity Western AC - schedule of surrounding existing & proposed retail facilities

Centre	Status	Planned/approved retail (sq.m)	Possible/planned major traders	Source
Secondary Centre				
<u>Alkimos</u>				
• Alkimos City Centre (p)	Early planning	Up to 75,000	dds, supermarket	Draft Alkimos City Centre Activity Centre Structure Plan
District Centre				
<u>Butler (Brighton)</u>				
• Brighton Marketplace (p)	Development approval	21,848	Big W, Woolworths	Metro North-West Joint Development Assessment Panel
• Balance (p)	Early planning	2,500		Butler District Centre Activity Centre Structure Plan No. 87
Eglinton	Early planning	15,851	dds, supermarket	Eglinton Local Structure Plan No. 82
Neighbourhood/Local Centre				
<u>Butler</u>				
Brighton Village SC	Existing	1,200	Supa IGA	n.a.
	Existing	4,500	Coles (2,800)	n.a.
<u>Trinity Estate</u>				
• Trinity Western Activity Centre (p)	Early planning	2,600	supermarket	Lots 1001 & 1002 Marmion Avenue, Alkimos Structure Plan No. 60
• Agora Village Eastern Activity Centre (p)	Early planning	1,500		Lots 1001 & 1002 Marmion Avenue, Alkimos Structure Plan No. 60
<u>South Alkimos/Alkimos Beach Estate</u>				
• Alkimos Gateway (p)	Development approval	3,500	supermarket (1,300)	South Alkimos Local Structure Plan No. 72
• South Alkimos Coastal Village (p)	Mooted	n.a.		Lendlease
• South Alkimos Central Village (p)	Early planning	1,500		South Alkimos Local Structure Plan No. 72
<u>Shorehaven Estate</u>				
• Alkimos North Coastal Village (p)	Early planning	3,577	Woolworths (3,200)	Draft North Alkimos Local Structure Plan No. 73; PEET
• Alkimos North Neighbourhood Centre (p)	Early planning	2,620		Draft North Alkimos Local Structure Plan No. 73
• Alkimos North Local Centre (p)	Early planning	1,051		Draft North Alkimos Local Structure Plan No. 73
Eglinton Marina Centre (p)	Early planning	3,282	supermarket	Eglinton Local Structure Plan No. 82
Eglinton Neighbourhood Centre - Marmion (p)	Early planning	2,051		Eglinton Local Structure Plan No. 82
Eglinton Neighbourhood Centre - STS Route (p)	Early planning	2,051		Eglinton Local Structure Plan No. 82

Source: various as stated; MacroPlan Dimasi

Alkimos Secondary Centre (Alkimos City Centre)

Alkimos is a designated Secondary Centre under State Planning Policy 4.2 and is planned to be a future regional employment and community hub for the rapidly growing north-west corridor of the Perth metropolitan area. **The Alkimos Eglinton District Structure Plan (DSP) No. 18** envisages the Alkimos City Centre to function not only as a major retail centre but to more importantly operate as a true regional centre incorporating a wide range of regional uses. The centre is expected to become the community, social and economic hub of the Alkimos Eglinton DSP area, and could accommodate the following uses:

- Major retail centre;
- Bulky goods retailing;
- Civic public buildings;
- Commercial offices;
- Entertainment (cinemas, bars, restaurants/cafés);
- Educational establishments (including potential TAFE and university campuses);
- Medium and high-density residential;
- Railway station; and
- Urban parks.

The major retail centre is envisaged to be located around the future railway station and include department stores, supermarkets, specialty shops in a mixed-use development. Bulky goods and destination retail are planned to be located adjacent to arterial roads in the region. Retail floorspace modelling prepared for The Alkimos Eglinton DSP suggests indicative traditional shop/retail floorspace provision of 65,000 sq.m in the Alkimos City Centre.

More recently, the **Draft Alkimos City Centre Activity Centre Structure Plan No. 89** was prepared for LandCorp and Lend Lease. Updated retail modelling indicated an estimated 75,000 sq.m of supportable shop/retail floorspace. The document was submitted to Council in 2014 and was advertised for public consultation. It is understood that an updated Structure Plan No. 89 will be re-lodged with the City of Wanneroo in the coming months.

Butler (Brighton) District Centre

The Butler District Centre is a planned activity centre to comprise of retail, business, mixed-use, residential, entertainment, community and recreational uses. **The Butler District Centre Activity Centre (BDCAC) Structure Plan No. 87** outlines the vision for the centre, including five precincts concentrated along Butler Boulevard, bound in the west by Marmion Avenue, and extending east past the Butler train station. The vision for the five precincts are detailed below:

- **Precinct A - Core** will be the main street centre core, characterised by uses that maximise development intensity adjoining the station, and built form that encourages pedestrian activity.
- **Precinct B - Boulevard** is planned to be a mixed use area, transitioning from the car based environment of Marmion Avenue to the pedestrian environment around the station and centre core.
- **Precinct C - Marmion**, the gateway to Butler Boulevard, allows for car-based retail uses at the edge of the centre, in their most appropriate location in closest proximity to Marmion Avenue.
- **Precinct D - Frame** is a residential and mixed use transition, providing an interface between the centre's non-residential core and surrounding residential areas.
- **Precinct E – Station** accommodates the Butler Station PTA park 'n' ride, recognising and facilitating opportunities for future redevelopment of all or part of the park 'n' ride with intensive land uses consistent with the principles of transit oriented development.

The BDCAC Structure Plan No. 87 estimates a total of traditional shop/retail floorspace of 22,500 sq.m to be distributed between Precinct A – Core (20,000 sq.m), Precinct B – Boulevard (1,500 sq.m), Precinct C – Marmion (500 sq.m) and Precinct E – Station (500 sq.m) of the Butler District Centre.

An application for a shopping centre development in Precinct A received approval in July 2014 from the Metro North-West Joint Development Assessment Panel. The proposed development is for a shopping centre (including a Big W discount department store, a Woolworths supermarket and around 70 specialty shops), associated town square, main street and other commercial and retail tenancies. Traditional shop/retail floorspace for the overall development has been approved for up to 21,848 sq.m.

Future Eglinton District Centre

The Eglinton District Centre is planned to provide district level facilities for residents of Eglinton and the broader catchment. The activity centre will be focussed around a main street and be part of a transit-oriented development with the adjacent proposed Eglinton railway station. The Eglinton Local Structure Plan No. 82 and the Alkimos Eglinton DSP No. 18 indicate that the Eglinton District Centre will be centrally located to serve its catchment, and expected to accommodate a mix of uses similar to the Alkimos Secondary Centre, but on a smaller scale.

Traditional retail within the Eglinton District Centre will possibly include a discount department store, a supermarket and a range of specialty shops. The Eglinton LSP allows for an indicative traditional shop/retail floorspace provision of 15,591 sq.m in the Eglinton District Centre.

Neighbourhood and Local Centres

There are a number of existing and planned neighbourhood/local centres located throughout the region. These centres typically serve the food and convenience needs of their respective neighbourhoods and localities.

Most of these centres range in size between 1,000 – 5,000 sq.m in terms of traditional shop/retail floorspace provision, and include the following:

- **Brighton Village SC** is an existing Coles supermarket based shopping centre located on Marmion Avenue in the Brighton residential estate, to the south of the Trinity residential estate. The centre includes approximately 4,500 sq.m of shop/retail floorspace.
- **Butler IGA** is an existing freestanding Supa IGA supermarket of approximately 1,200 sq.m.
- **Alkimos Gateway** is a proposed mixed use development which has development approval for approximately 3,500 sq.m of traditional shop/retail floorspace, including for a 1,300 sq.m supermarket. Alkimos Gateway is located 1 km north of the TWActivity Centre on Marmion Avenue, and immediately south-west of the proposed Alkimos City Centre.
- The **South Alkimos Central Village** is a proposed local centre to provide approximately 1,500 sq.m of shop/retail floorspace as detailed in the South Alkimos Local Structure Plan No. 72.
- **Shorehaven Estate** is planned to accommodate three retail centres according to the Draft North Alkimos Local Structure Plan No. 73, the largest of these being the **Alkimos North Coastal Village** providing 3,577 sq.m of shop/retail floorspace. The developer of the estate, PEET, announced that a Woolworths supermarket will anchor the centre.
- The Eglinton LSP area contains the Eglinton District Centre and three additional future retail centres. **Eglinton Marina Centre** is planned to be the largest of the three centres, envisaged to include 3,282 sq.m of shop/retail floorspace.

In summary, whilst a number of higher order as well as lower order shopping facilities are proposed or planned to service this growing corridor of Perth, the TWAC will form a key food and convenience shopping destination for the Trinity Estate residents. As such, an appropriate level of retail floorspace would need to be accommodated at the subject site to adequately service the local population, and is assessed in the following sections.

Section 4: Retail floorspace analysis and retail sales potential

This section provides an analysis of the amount of retail floorspace considered supportable at the Trinity Western Activity Centre (TWAC) and an assessment of the retail sales potential of the proposed centre.

4.1 Retail floorspace analysis

This sub-section provides an assessment of the amount of retail floorspace considered supportable at the future TWAC and which would not have undue impacts on other designated centres in the region. The amount of supportable retail floorspace can be estimated at various dates, based on the expected population and retail expenditure growth within the main trade area. Modelling retail demand for a given area is a complex task and we have used a retail expenditure methodology, which is widely used in economic studies, though the results should still be viewed as indicative.

Table 4.1 replicates the retail expenditure estimates for the main trade area population over the period from 2015 to 2023, when the population of the main trade area is expected to reach capacity, as detailed in Section 2 of this report.

Year ending June	Population (no.)	Retail expenditure by category (\$M)					Total Retail
		FLG	Food Catering	Non-food	Retail Sevices		
2015	2,440	11.9	2.7	10.5	0.7	25.9	
2016	3,340	18.0	4.1	15.8	1.1	38.9	
2017	4,240	23.8	5.5	20.8	1.4	51.5	
2018	5,140	29.7	6.9	25.9	1.7	64.3	
2019	5,840	35.1	8.2	30.5	2.1	75.9	
2020	6,540	40.1	9.4	34.7	2.3	86.5	
2021	7,240	45.1	10.6	38.9	2.6	97.3	
2022	7,940	49.7	11.8	42.7	2.9	107.0	
2023	8,280	53.8	12.8	46.0	3.1	115.7	

**Constant 2014/15 dollars
Source: Marketinfo; MacroPlan Dimasi*

Total indicative retail floorspace demand by the main trade area population can be first estimated by applying retail turnover densities (RTDs) to the projected retail expenditure levels of the future population. The RTDs applied by broad category are as follows:

- Food, liquor and grocery (FLG) – \$9,000 per sq.m;
- Food catering – \$6,000 per sq.m;
- Non-food – \$5,000 per sq.m; and
- Retail services – \$4,500 per sq.m.

To determine an appropriate level of supportable retail floorspace at the TWAC, proportions of the total retail floorspace demand, by retail category, which could reasonably be retained by the future centre, have been applied. These retention rates allow for retail expenditure to be directed to the designated smaller Trinity Eastern AC, as well as to the planned higher order centres in the region such as Alkimos to the north and Butler to the south. In addition, 15% of the floorspace demand was factored in from passing trade (i.e. from beyond the trade area), reflecting the site's location on Marmion Avenue. The applied retention rates are as follows:

- Food, liquor and grocery – 50%;
- Food catering – 25%;
- Non-food – 10%; and
- Retail services – 50%.

Overall, the above retention rates by retail category, result in 25% of total retail expenditure of the main trade area population being retained. Table 4.2 details the amount of retail floorspace considered supportable at the future TWAC, allowing for the above assumptions, with the key findings as follows:

- The population of the main trade area is expected to reach capacity by 2023 – 8,280 residents.

- By 2023, assuming 50% of food, packaged liquor and grocery (FLG) expenditure is retained by the TWAC, an estimated 3,400 sq.m of FLG floorspace would be supportable at the subject site.
- A total of 5,400 sq.m of Retail NLA is estimated to be supportable at the TWAC by 2023.

This analysis reflects that a substantial amount of retail expenditure by trade area residents will be directed to higher order facilities in the broader region, including to Alkimos to the north and to Butler to the south. Around half of the available FLG and retail services expenditure of the main trade area is assumed to be captured by the future TWAC, with the centre assumed to capture only 10% of the available non-food expenditure of the main trade area population. Overall, the TWAC will be conveniently located for trade area residents, and will be well placed to serve the food, grocery and convenience retail needs of local residents.

Year ending June	Population (no.)	Estimated supportable retail floorspace (sq.m)				
		FLG	Food Catering	Non-food	Retail Services	Total Retail
2015	2,440	800	100	200	100	1,200
2016	3,340	1,100	200	400	100	1,800
2017	4,240	1,500	300	500	200	2,500
2018	5,140	1,900	300	600	200	3,000
2019	5,840	2,200	400	700	300	3,600
2020	6,540	2,600	400	800	300	4,100
2021	7,240	2,900	500	900	300	4,600
2022	7,940	3,200	600	1,000	400	5,200
2023	8,280	3,400	600	1,000	400	5,400
<i>% retail expenditure potentially retained</i>		<i>50%</i>	<i>25%</i>	<i>10%</i>	<i>50%</i>	<i>25%</i>

Source: MacroPlan Dimasi

4.2 Trinity Western Activity Centre retail sales potential

In order to be able to consider the question of potential economic benefits and impacts that may arise from the proposed increase in the maximum retail floorspace area of the proposed TWAC, the necessary first step is to quantify the level of incremental sales which the proposed centre can reasonably expect to achieve (i.e. the sales over and above the estimated sales for the centre under its current allocation).

The sales performance of any particular retail facility, be it an individual store or a collection of stores provided in a shopping centre, is determined by a combination of the following factors:

- The quality of the facility, with particular regard to the major trader/traders which anchor the centre; the strength of the tenancy mix relative to the needs of the catchment which it seeks to serve; the physical layout and ease of use; the level of accessibility and ease of parking; and the atmosphere/ambience of the centre.
- The size of the available catchment which the centre seeks to serve. This factor sets the upper limit of the sales potential able to be achieved by the centre or store.
- The location and strengths of competitive retail facilities and the degree to which those alternative facilities are able to effectively serve the needs of the population within the relevant trade area.

The key considerations for the proposed TWAC are as follows:

- The location of the site on Marmion Avenue, which is a major north-south traffic route in the area that extends from the inner north-western suburbs of the Perth metropolitan in the south through to Yanchep in the north, ensuring the proposed centre will enjoy excellent exposure to passing traffic and will be easily accessible for local residents.
- The available catchment or trade area the proposed centre is likely to serve, which has a planned capacity for 8,280 residents.

- The surrounding competitive context, which includes the designated Secondary Centre of Alkimos to the north and the future District Centre of Butler to the south.

In order to assess the increase in retail sales potential from the proposed increase in the maximum retail floorspace area of the TWAC, Table 4.3 provides a possible breakdown of the floorspace composition for the supermarket anchor and the retail specialties which could be provided in either a centre of 5,400 sq.m or 2,600 sq.m. An activity centre of 5,400 sq.m could reasonably be anchored by a supermarket of 3,000 sq.m and include 2,400 sq.m of retail specialty floorspace. This is consistent with the retail floorspace analysis presented in Table 4.2, where the amount of supportable FLG floorspace was assessed at 3,400 sq.m. A smaller centre of 2,600 sq.m could reasonably be anchored by a supermarket of 1,400 sq.m and include 1,200 sq.m of retail specialty floorspace.

Category	Centre of 5,400 sq.m		Centre of 2,600 sq.m	
	Retail NLA (sq.m)	% of retail	Retail NLA (sq.m)	% of retail
Supermarket	3,000	56%	1,400	54%
Retail specialties	<u>2,400</u>	<u>44%</u>	<u>1,200</u>	<u>46%</u>
Total centre - retail	5,400	100%	2,600	100%

Source: MacroPlan Dimasi

Supermarket considerations

The key points taken into consideration when assessing the sales potential for a supermarket on the subject site are as follows:

- Supermarkets generate almost all of their sales from the take-home food, grocery and packaged liquor (FLG) expenditure market, as detailed in Section 2 of this report. The main trade area population will provide the majority of the sales for the proposed supermarket at the subject site, with some sales coming from beyond the trade area. The

available FLG spending generated by the main trade area population is estimated at \$12 million at 2014/15, and is expected to increase to nearly \$54 million by 2023.

- In general, Australians direct around 70% – 80% of food and grocery spending to supermarkets and major foodstores (i.e. grocery stores greater than 500 sq.m). This ratio does vary from location to location and is dependent upon the provision of supermarkets and foodstores within the particular area or region. The likely share directed to supermarkets is expected to be at the higher end of this range in this case as there is a lower provision of fresh food options, such as major food markets, in the area.
- There are a number of sites in the surrounding region which are planned to include supermarkets including Brighton Marketplace (a Woolworths supermarket is approved), Alkimos (which is likely to include more than one supermarket reflecting its status as a Secondary Centre), and the Alkimos Gateway neighbourhood centre (a 1,300 sq.m supermarket is approved).

The estimation of sales potential for a supermarket at the TWAC firstly considers the available FLG expenditure market of the main trade area. The typical proportion of available FLG expenditure directed to supermarkets is then assessed, and a reasonable market share of this expenditure market is estimated. In addition, there is an allowance for some business to be captured from beyond the trade area.

Retail specialty considerations

The retail floorspace analysis (Sub-section 4.1 of this report) shows that around 2,400 sq.m of retail specialty floorspace is supportable at the TWAC, assuming a 3,000 sq.m supermarket anchors the proposed centre. The range of specialty store types considered supportable at the proposed centre, by retail category, are as follows:

- Food & liquor – Around 3 to 4 fresh food shops are considered supportable including possibly a green grocer, a bakery, a butcher, a poultry shop and a deli, as well as a liquor store.

- Food catering – 3 to 4 food catering outlets are likely to be supportable including a mix of take-away food options, cafes and restaurants. A restaurant/tavern would also be supportable on a pad site fronting Marmion Avenue.
- Non-food – The type of non-food specialty stores considered supportable include a pharmacy, a women’s apparel shop, a newsagent, a discount variety store, a homewares/giftware store, a florist, and a mobile phone outlet.
- Retail services – The proposed centre could support an optician, a drycleaners and 2 - 3 beauty salons and/or hairdressers.

In addition to the proposed retail specialty mix, the TWAC could provide a range of non-retail services such as a gymnasium, a medical centre, banking facilities, a travel agent and a real estate agent, which would add to the overall convenience offer of the future centre.

Total centre retail sales potential

Table 4.4 provides an estimate of the total retail sales potential for the proposed Western AC at 5,400 sq.m, compared with the potential sales for a smaller 2,600 sq.m centre. For the purposes of this analysis the sales are presented as at 2022/23, which is when the main trade area is expected to reach capacity population. In all likelihood, the TWAC may be supportable at an earlier date, however, by 2022/23 the broader region will be more established and the other proposed activity centres are expected to be developed, at least the first stages.

Based on the supermarket considerations outlined previously, the sales potential for a supermarket of 3,000 sq.m at the TWAC is estimated at \$21 million at 2022/23 (constant 2014/15 dollars and including GST). This is an estimated \$7 million more than for a supermarket of 1,400 sq.m at the subject site.

The trading levels achieved by the retail specialty shops at the proposed TWAC are expected to range from around \$10,000 per sq.m for the fresh food and liquor outlets, to around \$4,000 per sq.m for the apparel and household goods retailers. It is estimated that the retail specialties will perform at broadly similar trading levels at a category level (on a dollars

per sq.m basis) for both centre sizes. This reflects that the larger supermarket anchor at a 5,400 sq.m centre will be able to support a large range of retail specialties. The average trading level across all specialty retailers is estimated at around \$5,900 per sq.m for a centre with 5,400 sq.m of retail floorspace, and around \$6,500 per sq.m for a centre with 2,600 sq.m of retail floorspace. Overall, the sales potential of a 5,400 sq.m retail centre is estimated at \$35.2 million, and \$21.8 million for a 2,600 sq.m centre. **Therefore, if the size of the centre is increased from 2,600 sq.m to 5,400 sq.m Retail NLA, total retail sales is estimated to increase by \$13.4 million (constant 2014/15 dollars).**

Table 4.4 Trinity Western AC - Retail centre sales potential by retail category, 2022/23*								
Category	Retail of 5,400 sq.m			Retail of 2,600 sq.m			Variance	
	Retail NLA (sq.m)	Est. sales (\$'000)	Est. sales (\$/sq.m)	Retail NLA (sq.m)	Est. sales (\$'000)	Est. sales (\$/sq.m)	Retail NLA (sq.m)	Est. sales (\$'000)
<u>Major tenants</u>								
Supermarket	3,000	21,000	7,000	1,400	14,000	10,000	1,600	7,000
<u>Retail specialties</u>								
Food & liquor	400	4,000	10,000	350	3,500	10,000	50	500
Food catering	600	3,450	5,750	200	1,150	5,750	400	2,300
Non-food	1,000	4,750	4,750	400	1,900	4,750	600	2,850
Retail services	<u>400</u>	<u>2,000</u>	<u>5,000</u>	<u>250</u>	<u>1,250</u>	<u>5,000</u>	<u>150</u>	<u>750</u>
Total retail spec.	2,400	14,200	5,917	1,200	7,800	6,500	1,200	6,400
Total centre - retail	5,400	35,200	6,519	2,600	21,800	8,385	2,800	13,400

*Constant 2014/15 dollars & including GST
Source: MacroPlan Dimasi

Section 5: Economic impact considerations

This section outlines the potential economic benefits and trading impacts that can be anticipated following an increase in the maximum retail floorspace area of the proposed Trinity Western Activity Centre (TWAC).

5.1 Economic and social benefits

The proposed increase in the retail floorspace area of the TWAC is likely to result in a range of economic and social impacts. From a trading point of view, impacts may be experienced by some competitive facilities located in the surrounding region, and the likely extent of these trading impacts is considered later in this section. On the other side of the equation, the proposed increase in the size of the TWAC will result in a range of economic benefits, particularly for residents of the main trade area. The key positive impacts will include the following:

1. Strengthening TWAC as a food and convenience shopping destination

The proposed increase in the maximum retail floorspace area of the TWAC will allow for the inclusion of a larger 3,000 sq.m supermarket supported by a range of specialty stores at the subject site. This will greatly enhance the food and convenience offer of the centre, which will be provided in a very convenient location to the benefit of local residents.

2. Substantially improving shopping choice and convenience for local residents

A larger TWAC will be able to offer a 3,000 sq.m supermarket in an easily accessible location, which will be able to provide a wider range of supermarket products for local residents. If the maximum retail floorspace area of the TWAC is not increased, the closest major supermarkets will be provided at the Alkimos City Centre (Secondary Centre) to the north and at Brighton Marketplace (District Centre) to the south. Both of these centres are designated as higher order centres compared with the TWAC, and in particular Alkimos City Centre is planned to serve a regional role.

The ability of TWAC to provide a 'full scale' supermarket (i.e. around 3,000 sq.m or larger) would greatly improve local convenience for surrounding residents, reducing the need to travel large distances to undertake their regular food and grocery shopping. The majority of non-food spending and part of FLG expenditure of local residents will still be directed to the planned higher order centres located in the region.

3. Addressing the supermarket shopping needs of local residents

The main trade area has a planned capacity for 8,280 residents, which is considered sufficient to support a 'full scale' supermarket. If a 'full scale' supermarket is not provided within the Trinity Estate, local residents will need to travel to higher order centres (beyond the trade area) to undertake their regular supermarket shopping. It is considerable preferable for some supermarkets in the region to be provided in lower order centres, in convenient and easily accessible locations. One example in the surrounding region is Brighton Village SC, which is anchored by a Coles supermarket and includes a range of supporting specialty stores, though is not designated as a higher order centre. The centre is located on Marmion Avenue and effectively serves the convenience and food and grocery needs of local residents.

4. Creating a focal point for local residents

Providing a 'full scale' supermarket at the TWAC will assist in creating a focal point for community activity and interaction in the area, which is an important consideration as stated in the ASP 60. Smaller supermarkets do not have the same drawing power as a supermarket of some 3,000 sq.m. A 'full scale' supermarket anchor at the TWAC will also allow for a much broader range of non-retail facilities to be supportable at the site, including possibly a medical centre, a gymnasium and a childcare centre, which will further assist in creating a major focal point for local residents.

5. Creation of additional employment

The proposed increase in the maximum retail floorspace area of the TWAC will create a number of additional local based jobs in the region, both direct retail jobs at the centre as well as construction jobs during the construction phase. This additional employment creation is discussed further in the next sub-section of this report.

5.2 Employment stimulus

Table 5.1 presents an estimate of the likely additional employment which would be generated by the retail component of the proposed TWAC, based on the amount and nature of floorspace to be included in the proposed centre.

Type of use	Estimated employment per '000 sq.m	5,400 sq.m centre		2,600 sq.m centre		Additional	
		Retail NLA (sq.m)	Employment (persons)	Retail NLA (sq.m)	Employment (persons)	Retail NLA (sq.m)	Employment (persons)
Supermarket	40	3,000	120	1,400	56	1,600	64
Specialty shops	60	<u>2,400</u>	<u>144</u>	<u>1,200</u>	<u>72</u>	<u>1,200</u>	<u>72</u>
Total centre ¹		5,400	264	2,600	128	2,800	136
Net increase²			251		122		129

1. Excludes non-retail components
2. Net increase includes allowance for reduced employment levels at impacted centres, estimated at 5% of the total increase
Source: Macroplan Dimasi

We estimate that around 264 ongoing jobs will be created at the TWAC for a 5,400 sq.m centre, or a net employment increase of 251 jobs allowing for 5% of the additional employment to be absorbed in job losses at other centres. **This is a net additional employment increase of 129 jobs compared with a smaller 2,600 sq.m centre, and would improve the employment self-sufficiency of the area.**

The TWAC will also create a number of additional jobs, both for the construction and related industries during the construction phase, and for the economy generally once the centre is completed.

Table 5.2 provides an estimation of both direct and indirect employment that would arise from the TWAC, for both a centre of either 5,400 sq.m or 2,600 sq.m. Based on the estimated construction costs of around \$15 million for a 5,400 sq.m centre, we consider that during the construction period of the project some 64 direct construction jobs will be created, with a further 103 jobs resulting from supplier induced multiplier effects during this

period. Jobs created include both full-time and part-time positions. The construction costs for a 2,600 sq.m centre are estimated at around \$8.5 million, which is likely to create 36 direct construction jobs, with a further 58 jobs resulting from supplier induced multiplier effects. **Therefore, an increase in the maximum floorspace area of the TWAC will result in an estimated 28 additional direct construction jobs created during the construction period of the project, with a further 45 jobs from supplier induced multiplier effects.**

Table 5.2 Trinity Western AC - estimated future additional centre employment levels*					
Original stimulus	Direct employment (long-term)	Direct employment (const'n period)	Supplier employment multiplier effects	Total	
<u>Total centre - 5,400 sq.m</u>					
Centre employment ¹	251		100	351	
Construction of project (\$15m. est. capital costs)		<u>64</u>	<u>103</u>	<u>167</u>	Job years ²
Total	251	64	203	518	
<u>Total centre - 2,600 sq.m</u>					
Centre employment ¹	122		49	171	
Construction of project (\$8.5m. est. capital costs)		<u>36</u>	<u>58</u>	<u>94</u>	Job years ²
Total	122	36	107	265	
<u>Difference</u>					
Centre employment ¹	129		51	180	
Estimated difference in construction of project		<u>28</u>	<u>45</u>	<u>73</u>	Job years ²
Total	129	28	96	253	
* Employment totals include both full-time and part-time work					
1. Indicates the estimated number of net additional ongoing jobs as a result of the proposed development					
2. Indicates the estimated number of jobs over the life of the construction project, for the equivalent of one year					
Source: Macroplan Dimasi					

5.3 Consideration of trading impacts

A number of factors need to be taken into account in determining the likely broad trading impacts and subsequent consequences arising from the proposed increase in the maximum retail floorspace area of the TWAC, on other retail facilities in the surrounding region. The following analysis presents an indicative projection of the anticipated impacts on other existing and planned shopping centres. Such projections should be considered as indicative only for the simple reason that it is very difficult to predict with certainty the precise impact on any one retailer or any other centre that will result from the change of retail structure serving a particular region.

The impacted centre or retailer has a number of possible actions which it may be able to take that may mitigate the extent of the impact or may eliminate it all together. Expansions and improvements may be undertaken at other centres throughout the region, and all of those factors can change the nature of the impact of the new centre being developed.

It is much more reasonable for the purposes of impact analysis, therefore, to consider the likely broad changes in competitive circumstances, and in particular the changes in availability of retail spending for competitive centres, that can reasonably be expected to result from the proposed TWAC. These broad changes effectively set the market conditions within which the competitive centres will operate as a result of this development, and reasonable conclusions can then be drawn about the possible impacts of these broad changes in market conditions.

Table 5.3 details the broad trading impacts on existing and planned centres in the surrounding region that can be anticipated following the development of the TWAC. All figures are expressed in constant 2014/15 dollars and include GST. For the purposes of this report we have used 2022/23 as the base year, when the main trade area will reach capacity population and the other planned shopping centres in the region are likely to be developed. In particular, it is assumed that Stage 1 of the Alkimos City Centre is open by 2022/23 and includes a retail component composed of a dds, a supermarket and a range of specialty retailers, with retail floorspace totalling some 20,000 sq.m.

Table 5.3 Trinity Western AC - trading impact assessment, 2022/23*				
	Estimated sales (\$M)		Estimated impacts from f'space increase	
	w/ 2,600 sq.m centre	w/ 5,400 sq.m centre	\$M	%
Shopping centres				
Alkimos City Centre	115.0	110.3	-4.7	-4.1%
Brighton Marketplace	127.0	122.3	-4.7	-3.7%
Brighton Village SC (existing)	47.8	46.5	-1.3	-2.8%
Alkimos Gateway	25.0	24.1	-0.9	-3.5%
Agora Village	10.0	9.6	-0.3	-3.4%
Other			<u>-1.5</u>	
Total			-13.4	

*Constant 2014/15 dollars & including GST
Source: MacroPlan Dimasi

The first step in determining potential impacts on surrounding existing and planned shopping centre is to estimate the likely trading performance of these centres. These estimates are based on the provision of floorspace and estimated trading levels for the major traders and specialty shops, and our knowledge of the performance of similar centres located throughout WA and Australia.

Total retail sales were then estimated for each shopping centre assuming the maximum floorspace area of the TWAC is increased to 5,400 sq.m. The combined estimated impacts match the total estimated incremental sales potential from the proposed increase in the size of the TWAC of \$13.4 million, as detailed in the previous Table 4.4.

The proposed increase in the maximum floorspace area of the TWAC is expected to result in modest impacts on other existing and planned centres in the region, ranging from 2.8% on the existing Brighton Village Shopping Centre (anchored by a Coles supermarket) up to 4.1% on the Alkimos City Centre. Overall the impacts on existing and future centres in the region are considered to be well within the reasonable bounds of normal competition, and are not considered to threaten the viability of any centre.

5.4 Summary and net community benefit

The analysis in this report has demonstrated that a range of economic and social benefits are likely to arise from the proposed increased floorspace at the TWAC, these benefits can be summarised as follows:

- Strengthening TWAC as a food and convenience shopping destination;
- Significantly improving shopping choice and convenience for local residents in undertaking their regular food and grocery shopping;
- Addressing the supermarket shopping needs of local residents;
- Creating a focal point for local residents; and
- Providing additional employment opportunities for residents and improving the employment self-sufficiency of the area.

Against these benefits, a minor level of impact is projected on centres within the surrounding region. These impacts will not threaten the ongoing viability of any existing or future centre. A net community benefit will therefore result from the proposed increase in the maximum floorspace area of the TWAC.