Population Forecast and Dwelling Yield

Analysis

Jointly

Planning your way



CITY OF WANNEROO

DECEMBER 2022

DOCUMENT CONTROL

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Version 1.2	Final Draft		JJ

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EXECUTIVE SUMMARY

The City of Wanneroo is in the process of preparing their Local Planning Strategy (the Strategy), which when complete will set out the long-term planning directions for the City, including how land use changes and development will be managed over the next 15-years to meet the needs of current and future communities.

A key priority of the City's LPS will be to encourage a diverse housing supply and support greater affordability, while protecting distinctive character in local neighbourhoods.

Just as important as the supply of housing, is the need for the right type of housing in the right locations. Therefore, another key priority for LPS will be to support appropriate housing density within the City's activity centres, station precincts and integrated transport corridors.

Population growth in the City is expected to be largely through development of greenfield areas, with some areas also designated for infill development.
This report has analysed a number of factors pertaining to the City's future population and projected required dwelling targets for the years 2022 through to 2041. These include:

- Existing demographic, socio-economic and housing data for the year 2021/22, including aged population segment and social housing stock;
- Projected population growth and number of new dwellings for the year 2041, and the implications for the City;
- An in-depth new and infill dwelling yield analysis based on existing and proposed structure plans.

Based on the below comprehensive analysis, there are a number of important considerations for the future of the City's population and planning and delivery of its housing stock.

These include:

- The City's population will increase by approximately 150,000 people, who will need to be accommodated in an additional 54,500 dwellings.
- An analysis of the City's infill and greenfield dwelling yield capacity has revealed the City has sufficient supply of land to accommodate this influx.
- Approximately 20,000 of these dwellings need to be developed in urban infill locations as per the State requirements. The likelihood of achieving this target is slim however, considering the current patterns of residential development across the City.
- Demand for aged care and retirement shows that whilst the City currently has an adequate supply of both types of accommodation, the aging and growing population will mean that new supply will be needed over the next 10 to 15 years. Additionally, It will be important to ensure that new dwelling supply is able to be spread across the City to cater for local demand as people are often not wanting to move too far from their home when relocating at this stage of their life.
- There were very few households living in units and apartments across the City. The analysis suggested that the minor shift towards living in terraces / townhouses that has been observed over the last 10 years will continue to increase, particularly for these household types. However, emphasis needs to be put on the delivery of a range of housing types in appropriate locations.

LOCAL PLANNING STRATEGY - HOUSING STUDY

1 BACKGROUND

1.1 CITY OF WANNEROO - HOUSING STUDY
INTRODUCTION

The City of Wanneroo population is forecast to expand by more than 60%, or grow to 370,273 by 2041[1]. The number of dwellings in the City of Wanneroo is forecast to grow from 70,773 in 2016 to 133,341 in 2041, with the average household size falling from 2.88 to 2.75 by 2041[1].

Although this sizable increase in population does present various challenges for Council, it also creates the opportunity to bring about positive change, provided growth is directed to areas that have the required existing or planned transport infrastructure to lay the foundations for a liveable and sustainable city.

It should also mean a rethink in the way the City plans for housing, services and job creation for a growing population that will inevitability be more diverse and older.

The City's Draft Local Planning Strategy (the Strategy) will provide a pathway forward in this broader context that gives strategic direction to the City and its communities for the future of Wanneroo, including guidance on the areas that should be protected and those areas that will undergo the most change.

The Strategy will be focused around a number of main planning themes including:

- prioritising growth and investment in Activity Centres and Corridors;
- job creation and growth;
- integrating and coordinating transport and land use; and
- improving the quality and liveability of the City.

In 2021 the State Government released new Local Planning Strategy Guidelines. The Guidelines outline the need and purpose of a local planning strategy, guiding principles, procedural steps and recommended content.

The guidelines are also supported by appendices which provide more detailed guidance on specific components of a local planning strategy, including the Population Forecast and Dwelling Yield Analysis (the Analysis).

In line with the Guidelines, the City requires a comprehensive and forward-looking Analysis for the 15-year timeframe of the local planning strategy that encapsulates:

- Updated demographic, socio-economic and housing data from the ABS 2021 census data;
- Updated population trends and projections in line with the State Government's WA Tomorrow Population Report No. 11; and
- Relevant findings, recommendations and high level implications and considerations for the City over the next 15 years.

The purpose of this report is to support the development and implementability of the LPS by setting out the anticipated population and housing needs for the City over the lifetime of the Strategy (the next 15 years) and beyond.

The findings of this report will go a way toward providing the City of Wanneroo Council, residents, investors and businesses with the required knowledge to make confident and informed decisions about the

[1]City of Wanneroo Forecast .id (2021)

1.2

CITY OF WANNEROO - HOUSING STUDY

HISTORY OF HOUSING

History of Wanneroo

The City of Wanneroo is one of the fastest growing and largest local government authorities in Australia, and includes 32 kilometres of coastline, natural environments, agricultural and bush land. The local government area lies on the north-eastern urban corridor of the Perth metropolitan area, approximately 12km from the Perth CBD at its nearest point and 62km at its farthest point.

Today the City is home to more than 219,000 people across 36 distinctive suburbs from Two Rocks in the north to Koondoola in the south. The City continues to grow at an exponential rate and is expected to more than double its population by 2041.

Wanneroo Housing Strategy

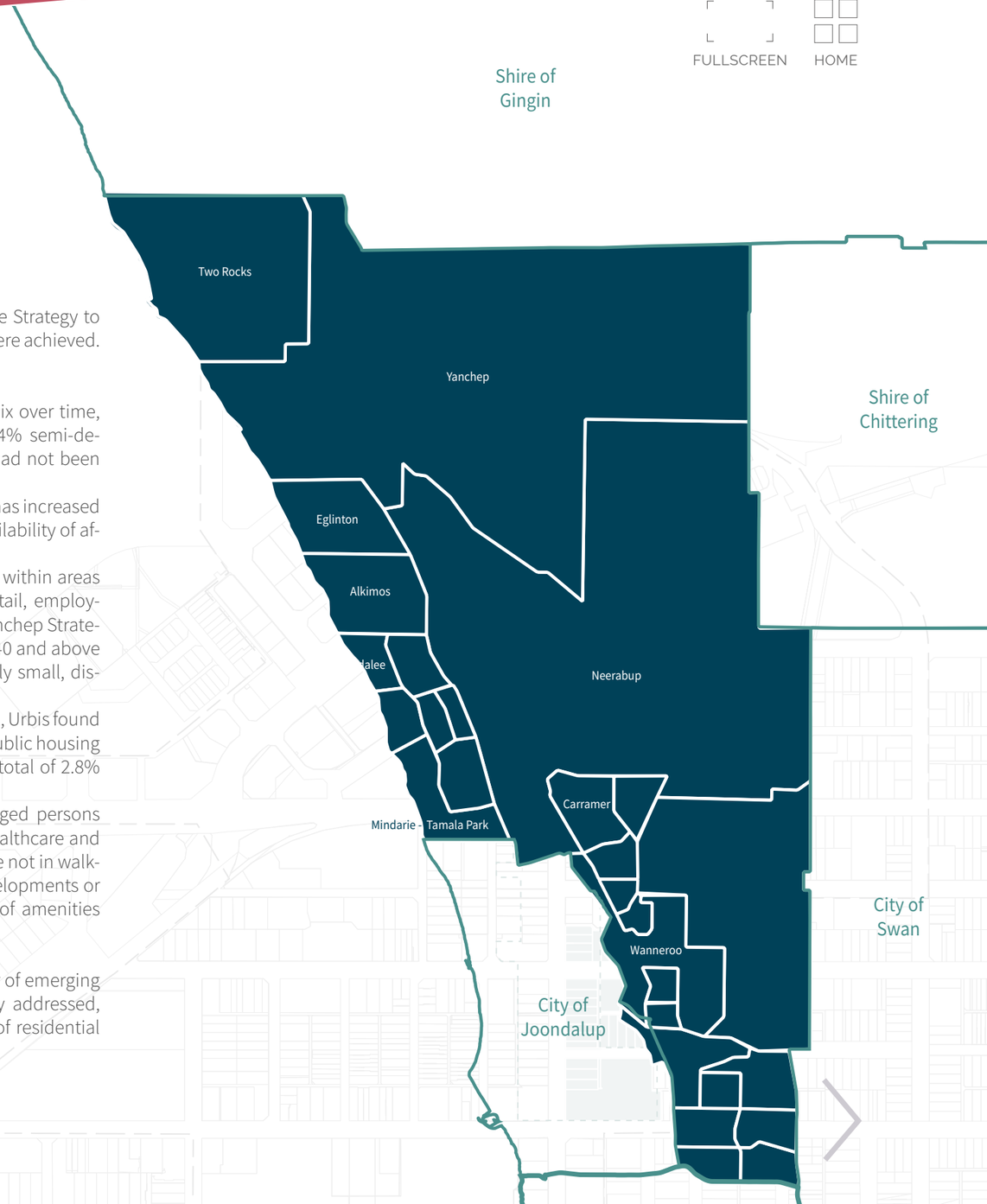
In order to coordinate and guide this expected exponential growth, the City's Housing Strategy (LHS) was adopted in 2005 with the aim to guide future housing development in new residential areas; protecting existing residential areas from inappropriate development and ensuring adequate housing choice is available to meet the changing social and economic needs of the community.

One of the key objectives of the Strategy was to ensure that an adequate supply of affordable housing is provided, particularly for first home buyers, and to promote appropriate forms of housing close to existing and proposed community facilities and services. The Strategy listed six actions that were to be addressed through 36 recommendations.

In 2020 Urbis undertook an analysis of the performance of the Strategy to date, in order to determine the extent to which these actions were achieved. Their key findings included:

- There was a minor shift towards a more diverse housing mix over time, however the strategy target mix (76% separate houses, 14% semi-detached dwellings and 9% flats/units/apartments by 2021) had not been achieved.
- The proportion of low income households in housing stress has increased over time, particularly for renters. This indicates the non-availability of affordable housing in the City.
- The Strategy recommended higher densities be considered within areas that have easy access to public transport, major roads, retail, employment, and community facilities. With the exception of the Yanchep Strategic Metropolitan Activity Centre, a range of pockets coded R40 and above were identified across the City, however these were typically small, dispersed, and not always around activity centres.
- In response to the Strategy's 10% public housing ration target, Urbis found that the City of Wanneroo ranked at 20 in the proportion of public housing out of all the LGA's in the Perth Metropolitan region with a total of 2.8% social housing recorded by the ABS in 2016.
- The Strategy recommended the appropriate location of aged persons housing in terms of public transport, proximity to shops, healthcare and activity centres. While many of the existing developments are not in walking distance to an activity centre, the majority are large developments or combined retirement / aged care campuses with a range of amenities provided on site.

From the above findings it is apparent that there are a number of emerging trends of housing provision that have not been successfully addressed, including increased affordable housing stock , the provision of residential infill development and housing diversity.



1.3

CITY OF WANNEROO - HOUSING STUDY

PLANNING POLICY CONTEXT

WESTERN AUSTRALIA'S STATE PLANNING FRAMEWORK

The State Planning Framework is the basis for coordinating and promoting land use planning, transport planning and land development in a sustainable manner (refer to Figure 1). They provide guidance and certainty to State Government agencies, local government and the development sector.

The *Planning and Development Act 2005 (the Act)* is the primary piece of legislation governing development and subdivision in Western Australia, and its stated purposes are to provide for an efficient and effective land-use planning system in the State, and to promote the sustainable use and development of land in the State.

The *Planning and Development Regulations 2015* prescribe the procedures by which local planning strategies, local planning schemes and amendments to local planning schemes must be prepared and adopted by local government, the WAPC and the Minister for Planning; and establish a Model Scheme Text for local planning schemes.

Recent reform to the WA Planning System resulted in an increased focus on good urban design outcomes with regard to density and residential development.

The State Planning Framework is now centered around the key themes of housing affordability, ageing in place, increased housing diversity and facilitating infill development in appropriate locations.

The advent of the global COVID-19 pandemic has resulted in the government issuing a number of stimulus packages or grants aimed at boosting the construction industry. The State Government also accelerated a number of measures within the Action Plan for Planning Reform as part of COVID-19 economic recovery plans, together with a proposal to establish a new development application process for significant projects.

A resultant program of major legislative, regulatory and policy changes were thus implemented to create a more robust planning system and support Western Australia's economic recovery.

State Planning Strategy 2050

Wanneroo is located within the identified 'South-West Sector' of the State. Projections indicate that the South West sector will continue to be the population centre of the State. This means that the highest level and greatest range of social services (health and education services, cultural activities) and employment opportunities will continue to be available in the South West.

The Strategy further recognises that the Government's 'Directions 2031 and Beyond' spatial framework and strategic plan for the Perth and Peel regions foreshadows an increase in density and urban land supply for the greater Metropolitan area.

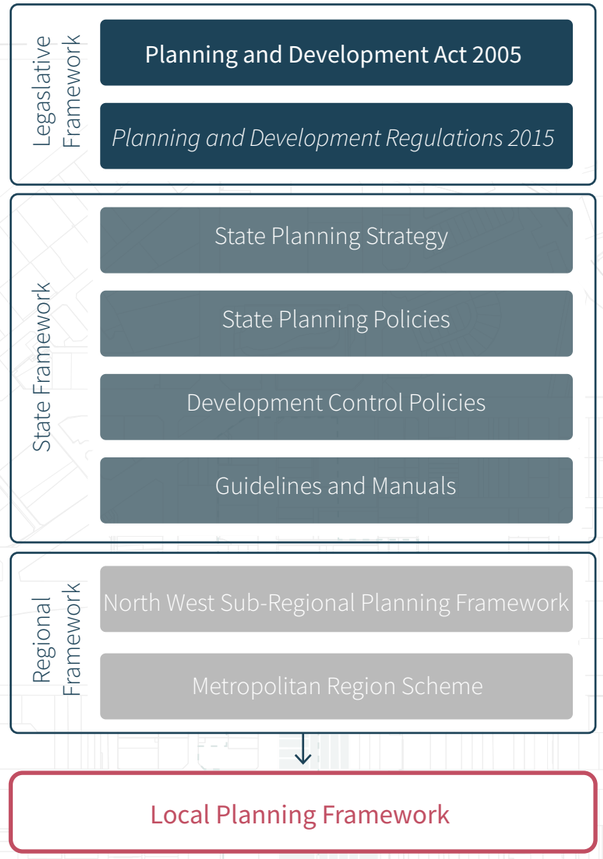
WA Housing Strategy 2020 - 2030

The WA Housing Strategy sets the direction for 10 years (up to 2030). It commits to:

- connecting 150,000 WA households to a home
- building liveable, inclusive and connected communities that improve social and economic participation
- creating jobs and contributing to the State's economy
- improving outcomes through a more integrated approach to housing and service assistance.

The Strategy sets out 5 focus areas and aims to lead WA to a more agile housing system by:

- creating sustainable communities that are inclusive and connected
- working with communities to design and create housing solutions that meet their needs and aspirations
- better matching housing supply and diversity to need and demand to enable greater housing choice
- supporting access to safe, stable,sustainable homes for the current generation without compromising the capacity of future generations
- improving flow through the housing system, addressing key blockages and gaps
- making better use of current housing stock
- providing people with the resources and skills to sustain their homes.



WESTERN AUSTRALIA'S STATE PLANNING FRAMEWORK CONT'D

State planning policies provide the highest level of planning policy control and guidance in Western Australia.

Planning Reform and Design WA

A Modernising WA's Planning System Green Paper on WA's Planning System was released for public comment mid 2018 which proposed five key reform areas – strategically-led, legible, transparent, efficient and delivering smart growth. Responses to the Green Paper showed clear stakeholder support for reform of the planning system. A subsequent Action Plan for Planning Reform was released in August 2019 which sets out the State Government's vision for the planning system through a program of 19 reform initiatives, centred around three fundamental goals:

1. Planning creates great places,
2. Planning is easier to understand and navigate, and
3. Planning systems are consistent and efficient.

The process has thus far introduced a newly adopted State Planning Policy No. 7.0 - Design of the Built Environment (SPP 7.0) and associated State Planning Policy No. 7.3 - Apartment Design (SPP 7.3) and State Planning Policy No. 7.2 - Precinct Planning Guidelines (SPP 7.2) as the first and second stages in the Design WA initiative. It has also released a draft Medium Density Code (SPP 7.3) which comprises Stage 3.

Environmental			
SPP 2.5	Rural Planning - 2016	• To protect and preserve Western Australia's rural land assets • To ensure broad compatibility between land uses is essential to delivering this outcome	• The City has an approximate total of 5,000 hectares of Rural and Rural Residential zoned land that requires management and protection from subdivision as a State resource. • SPP specifically aims to prevent the creation of new or smaller rural lots on an unplanned or ad-hoc basis, particularly for intensive or emerging primary production land uses
SPP 2.6	State Coastal Planning - 2013	• To provide a balanced approach to the competing needs and desires of recreational, residential and commercial uses in a way that takes into account the values of the coastal zone	• The City's coastal suburbs are expected to account for a significant portion of the City's population growth over the next 20 years. • As the coastal corridor continues to grow, it is important to encourage sustainable development within future coastal nodes, whilst managing challenges associated with development and climate change.
Urban Settlement			
SPP 3.0	Urban Growth and Settlement - 2006	• To manage the growth and development of urban areas in response to the social and economic needs of the community	• The City has an approximate total of 2,300 hectares of greenfields land that are currently unplanned and unserviced • A number of additional planning instruments including local structure plans are required to guide the planning and development of these areas
SPP 3.2	Aboriginal Settlements - 2011	• To provide for the recognition of Aboriginal settlements through schemes and strategies • To collaboratively plan for the orderly and coordinated development of Aboriginal settlements.	• Wanneroo's lakes, caves and coastline are part of Dreaming stories which remain important to Noongar people today. • Although there are no recognised Aboriginal Settlements as identified in SPP 3.2, the City nevertheless has an obligation to respect and protect any and all aboriginal heritage sites that may be impacted in the course of residential expansion and development.
SPP 3.7	Planning in Bushfire Prone Areas - 2015	• To ensure that higher order strategic planning documents, strategic planning proposals, subdivision and development applications take into account bushfire protection requirements	• To mitigate loss due to clearing associated with development and to protect local biodiversity, the City needs to identify and preserve significant vegetation in key areas and replenish vegetation in others. • This will result in an increased bushfire risk and the need to put in place, implement and maintain proper bushfire protection measures such as low fuel areas around dwellings.

WESTERN AUSTRALIA'S STATE PLANNING FRAMEWORK CONT'D

Liveable Neighbourhoods

Liveable Neighbourhoods (LN) is the Western Australian Planning Commission's operational policy for the design and assessment of structure plans and subdivision to guide the future development of Perth and Peel and the State's regional centres.

Liveable Neighbourhoods 2009 provides guidance on the design and assessment of structure plans and subdivision for new urban infill areas in the metropolitan area, related to both greenfield and large urban infill sites. LN promotes a robust urban structure and site-responsive design for sustainable, safe and 'liveable' communities; and walkable, accessible, attractive mixed-use neighbourhoods with interconnected street layouts supported by an efficient movement network.

The newer version, Draft Liveable Neighbourhoods 2015, has undergone a format restructure , resolves policy conflict and duplication and has been updated to reflect current best practice.

Residential and Urban Design			
SPP 7.0	Design of the Built Environment - 2019	• Addresses design quality and built form outcomes in Western Australia. It seeks to deliver the broad economic, environmental, social and cultural benefits that derive from good design outcomes and supports consistent and robust design review and assessment processes across the State.	• Provides the overarching framework for a range of supporting State Planning Policies that provide design quality guidance for specific types of planning and development proposals. • Sets out Design Principles, the purpose of which is to establish a definition of 'good design' that can inform the design, review and decision-making processes for built environment proposals across the State. The WAPC maintains the Design Principles, which are: context and character; landscape quality; built form and scale; functionality and build quality; sustainability; amenity; legibility; safety; community; and aesthetics. Schedule 1 includes a full description of each Design Principle.
SPP 7.2	Precinct Design - 2021	• Guides the preparation and assessment of planning proposals for areas that require a high level of planning and design.	• Defines Precincts as areas that require a higher level of planning and design focus. Precinct outcomes are defined which are expected to be achieved when planning and designing for precincts • General types of precincts are Activity centres, rail stations, urban corridors, residential infill areas and Heritage precincts.
SPP 7.3	Residential Design Codes Vol 1 - 2021	• To provide a comprehensive basis for the control of residential development throughout Western Australia.	• To provide residential development of an appropriate design for the intended residential purpose, density, context of place and scheme objectives. • To encourage design consideration of the social, environmental and economic opportunities possible from new housing and an appropriate response to local amenity and place.
	Residential Design Codes Vol 2 - Apartments - 2019	• Provides planning and design standards for residential apartments (multiple dwellings) in areas coded R40 and above, within mixed use development and activity centres.	• To provide residential development of an appropriate design for the intended residential purpose, land tenure, density, place context and scheme objectives. • To encourage design consideration of the social, environmental and economic opportunities possible from new housing, and an appropriate response to local context.
	DRAFT Medium Density Code - 2020	• Provides planning and design standards for medium density development, specifically single houses and grouped dwellings in areas coded R30 and above; and multiple dwellings (apartments), in areas coded R30 to R60 inclusive.	• To provide for a consistent and coordinated approach to residential built form and development • To ensure that residential development meets community expectations in regard to appearance, use and density. • To promote a range of lot sizes to support housing diversity and a variety of built form typologies.

WESTERN AUSTRALIA'S REGIONAL PLANNING FRAMEWORK

In 2010 the Directions 2031 Spatial Frameworks for Perth and Peel superseded Network City and replaced Metroplan and all other metropolitan strategies as the highest level spatial framework and strategic plan for the metropolitan Perth and Peel region. It recognises the benefits of a more consolidated city while working from historic patterns of urban growth. Importantly, the policy sets achievable goals that will promote housing affordability over the longer term.

The frameworks define the urban form for the next 30 years, limit unsustainable urban sprawl and encourage greater housing diversity to meet changing community needs.

They encourage significantly greater infill development[2] with almost half of the required 800,000 new homes – 380,000 at a minimum - to be built through infill development. The majority of these – around 214,000 – will be built in existing suburbs and particularly through alignment with METRONET and the State Government's Our Priorities: Sharing Prosperity initiative.

Perth and Peel @ 3.5 Million and NWSRPF 2018

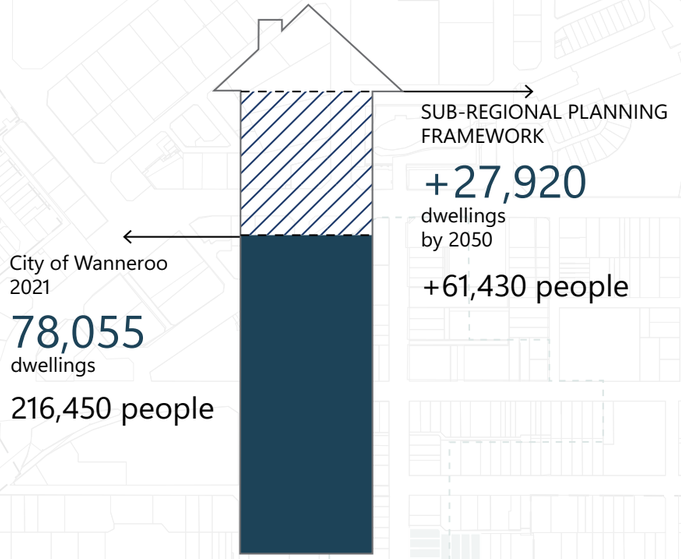
The North-West Sub-Regional Planning Framework (March 2018) or the NWSRPF determines where new homes and jobs are to be located and sets the groundwork for the development of vibrant new communities, particularly around key transport links, including METRONET station precincts and activity centres, within a compact and connected city.

The NWSRPF provides the following key principles for planning for both greenfields as well as infill housing:

- Consolidated urban form, with more emphasis on urban infill;
- Avoid high bushfire risk areas;
- Limit new rural residential development;
- Increase potential for people to live close to work / employment lands;
- Protect employment land from competing land uses;
- Integrate land use and public transport;
- Maximise use of and add value to existing infrastructure,
- including transport, community / social and service where there are urban / employment opportunities;
- Promote shared infrastructure corridors and sites for transport, community / social and service infrastructure;
- Manage water resources;
- Avoid, protect and mitigate from environmental impacts;
- Identify land for industrial and public purposes; and
- Retain land for agricultural and food production.

The NWSRPF recognises that the City of Wanneroo has significant reserves of undeveloped urban zoned land, and identifies East Wanneroo and South Pinjar as Urban Expansion areas.

The City of Wanneroo has a 2050 urban infill dwelling target of 27,920 to accommodate an estimated population of 61,430 people within established urban areas. This equates to an additional 20,000 dwellings by the year 2041. The aim is for areas with proximity to transit corridors and stations, within activity centres, urban corridors and areas with high-quality open space to accommodate the majority of the infill dwellings required for the subregion by 2050, while the remaining infill dwellings may be delivered within suburban areas outside of these locations.



[2]Infill or urban infill is defined in the NWSRPF as *'the redevelopment of existing urban areas at a higher density than currently exists'*

CITY OF WANNEROO LOCAL PLANNING FRAMEWORK

Strategic Community Plan 2021 - 2031

The City's Strategic Community Plan 2021 - 2031 sets out a number of strategic goals that have been identified by the community along with the supporting priorities to help achieve them. These include:

- A sustainable City that balances the relationship between urban growth and the environment; and
- A well-planned safe and resilient City that is easy to travel around and provides a connection between people and places.

District Planning Scheme No. 2 (amended)

The City's District Planning Scheme No. 2 promotes revitalisation of existing urban areas, aims to provide high standards of amenity, safety and welfare, and aims to encourage energy efficient new developments. The City's District Planning Scheme No. 2 is currently in the process of being amended in order to align it with the State's Model Scheme Text, and is anticipated to be finalised by end 2023.

City of Wanneroo Housing Strategy (to be incorporated into the LPS)

The City's LHS was adopted in 2005 and is now considered outdated. The Strategy addressed a number of aspects related to housing provision however, which are still relevant today. These are:

- Diversity
- Affordability
- Environmental sustainability
- Proximity to facilities and services
- Relationship between density and transit
- Design for all ages and abilities
- Assist decision making on development applications and rezoning proposals
- Integration into Local Planning Framework
- Promotion of universal design principles in building design

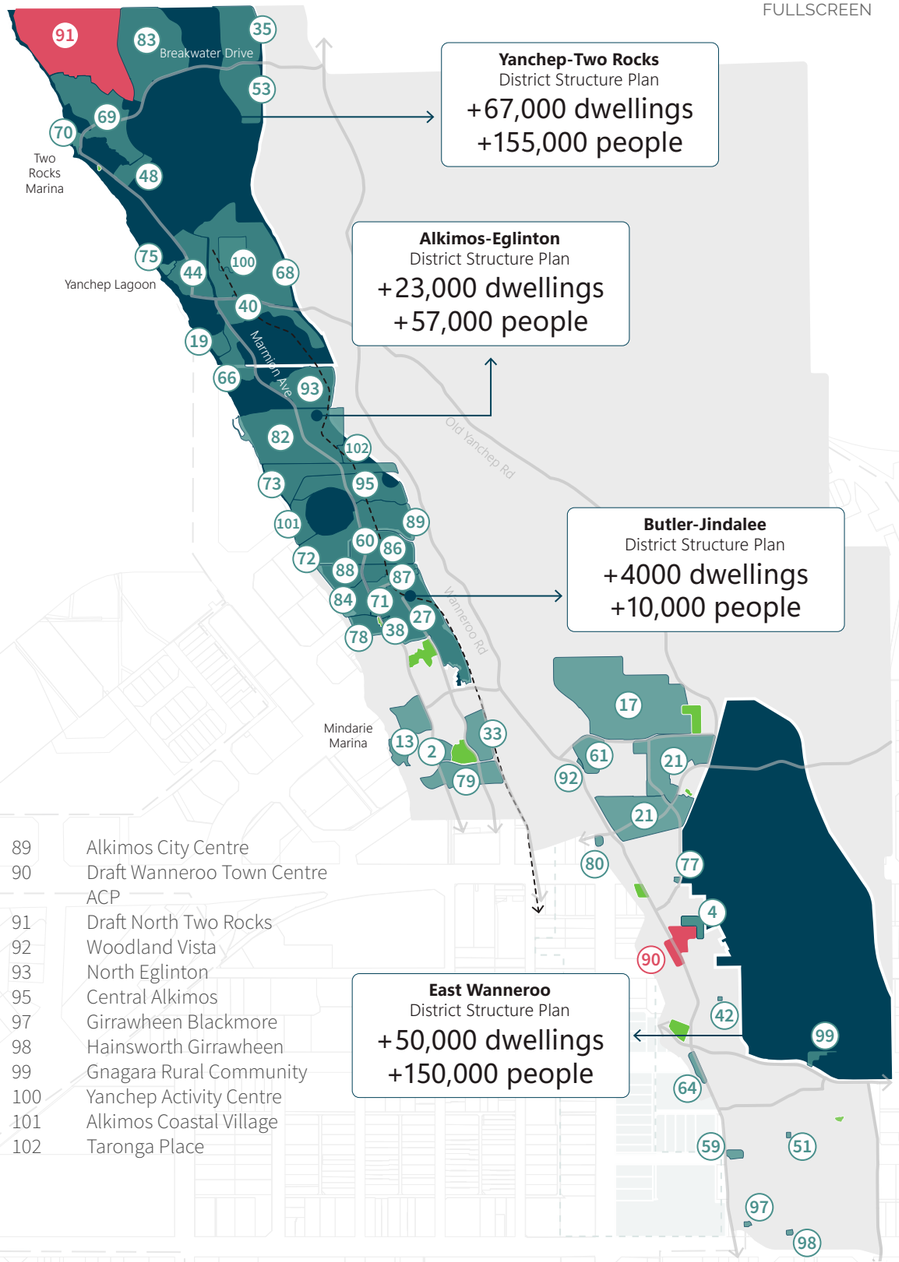
City of Wanneroo - Applicable Local Planning Policies		
LPP 2.6	Ancillary Accommodation	Self contained ancillary accommodation may be attached or detached from the main dwelling, but need to have living quarters serviced by a bathroom, toilet and kitchen. Sets out criteria for ancillary dwellings in locations where R Codes do and do not apply.
LPP 3.1	Local Housing Strategy Implementation	Provides a framework to guide the planning and development of Increased housing density in existing suburbs. Addresses infill housing for: • Housing Precincts large areas of a number of suburbs identified for increased residential density; and • Other Infill Development to allow for proposed additional precinct and other proposed increased density on parcels of land in other established suburbs not identified in the LHS.
LPP 4.19	Medium Density Housing Standards	Provides single house development standards for medium density housing in development zones (R MD Codes), replacing identified clauses of the R Codes where an approved structure plan identifies R MD standards. Objectives are to: • Ensure consistent application of variations to the deemed to comply provisions of the R Codes to medium density single houses located in development zones; • Reflect changes in housing trends on smaller lots and adequately respond to market pressures; and • Provide a mechanism which allows the WAPC adopted R MD provisions to be implemented.
LPP 5.2	Wanneroo Town Centre	Sets out additional provisions to the existing Wanneroo Town Centre Structure Plan provisions to provide greater control and influence over development outcomes and the quality of built form in the Town Centre. Key outcomes of the structure plan: • Facilitate development of the Town Centre into a secondary centre; • Establish higher density residential development within the Town Centre; and • Concentrate a diversity of land uses, including mixed use development, within the Town Centre.
LPP 5.3	East Wanneroo	• Provides planning guidance preceding the East Wanneroo District Structure Plan finalisation. • Provides for a general presumption against subdivision and development that may detrimentally impact on the orderly and proper planning of the area, specifically prior to the finalisation of a district structure plan, a local structure plan and development contribution schemes.

LOCAL PLANNING FRAMEWORK CONT'D

A number of approved Structure Plans and Activity Centre Structure Plans are being rolled out across the City, including 45 local structure plans and 4 district structure plans.

In addition, two draft structure plans have been advertised for public comment and are awaiting WAPC approval. These include draft Wanneroo Town Centre Activity Centre Structure Plan and Draft Two Rocks Local Structure Plan.

The City is currently in the process of incorporating structure plans that are no longer required and are considered 'built-out' into the Scheme through a number of scheme amendments. This results in the relevant structure plans being revoked so that they are no longer in operation.



- District Structure Plan
- Local Structure Plan
- Revoked Structure Plan
- Draft Structure Plan

2	Clarkson Activity Centre	44	Yanchep Capricorn Coastal Village	72	South Alkimos	89	Alkimos City Centre
4	East Wanneroo Cell 2 - Sinagra			73	North Alkimos	90	Draft Wanneroo Town Centre ACP
13	Mindarie Keys	48	Two Rocks	75	Yanchep - Capricorn Coastal Node	91	Draft North Two Rocks
17	Neerabup	51	Darch Neighbourhood Centre	77	Ashby Neighbourhood Centre	92	Woodland Vista
19	Yanchep South	53	Two Rocks Breakwater Drive	78	Jindalee Coastal Village	93	North Eglinton
21A	Banksia Grove	59	Kingsway	79	Tamala Park	95	Central Alkimos
21B	Carramar South	60	Alkimos Marmion Ave	80	Drovers Place Precinct	97	Girrawheen Blackmore
27	Butler Ridge	61	Carramar Flynn Drive	82	Eglinton	98	Hainsworth Girrawheen
33	Clarkson Lot 16	64	Woodvale	83	East Two Rocks	99	Gnagara Rural Community
35	Two Rocks Breakwater Drive	66	South Yanchep	84	Jindee	100	Yanchep Activity Centre
38	Butler Brighton Village	68	Yanchep City	86	Agora Village	101	Alkimos Coastal Village
40	Yanchep Lot 1 and 102	69	Two Rocks	87	Butler District Centre	102	Taronga Place
42	Hocking Neighbourhood Centre	70	Two Rocks Town Centre	88	Jindalee North		
		71	Jindalee Primary School				

LOCAL PLANNING STRATEGY - HOUSING STUDY

2 LOCAL PROFILE

2.1

CITY OF WANNEROO - HOUSING STUDY

POPULATION AND DEMOGRAPHIC ANALYSIS

The City's total ABS Estimated Resident Population was recorded at 216,450 in 2021, a growth of 3.45% from the previous 2016 census year.

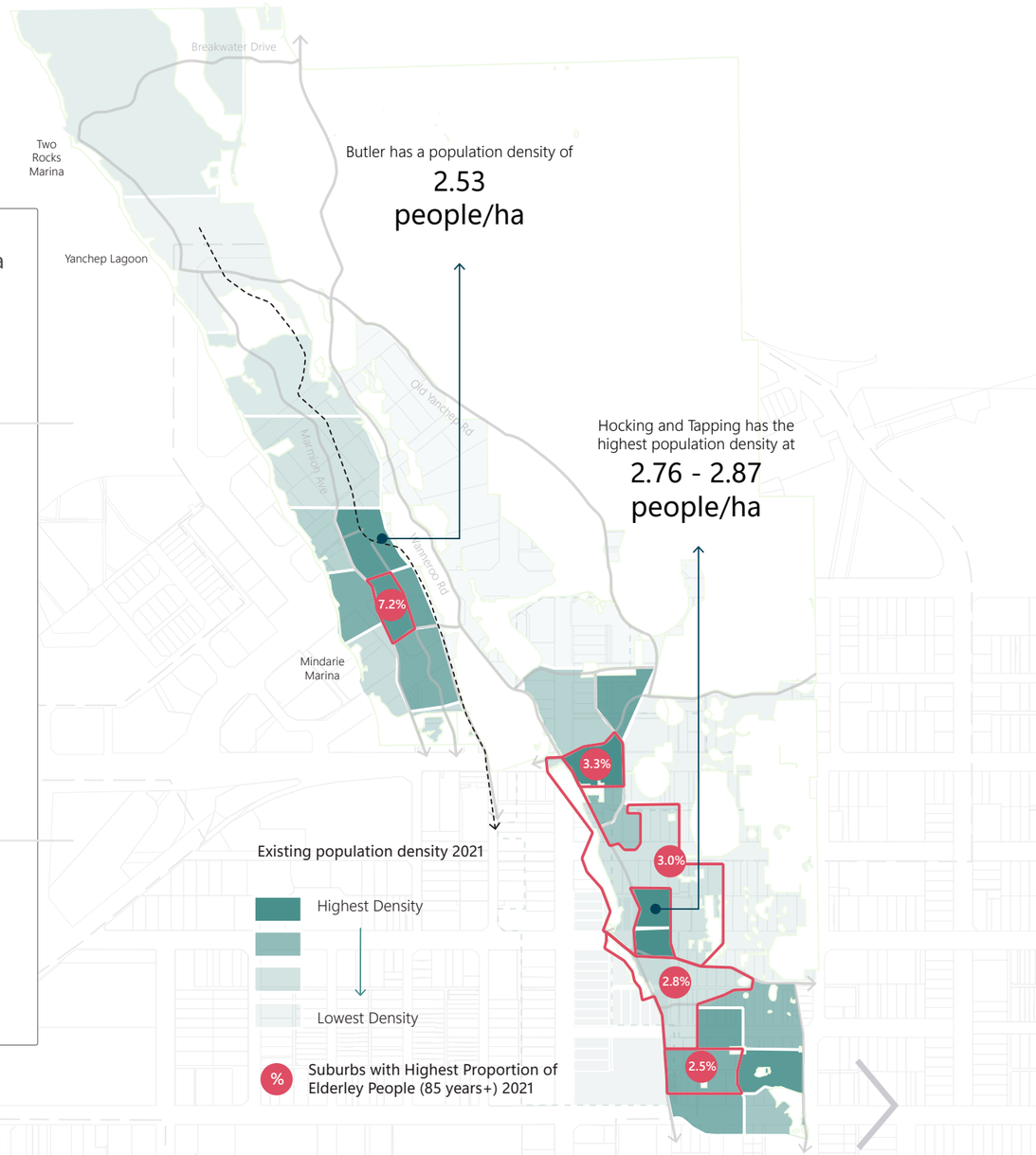
The average population density for the City is slightly lower than for the remainder of Greater Perth, largely due to the large proportion of tracts of uninhabitable State Forest, Bushland and wetlands contained within the municipal boundary.

The median age of residents have increased by two years, and household composition has seen a change in the number of families with children and lone person households, which has shown a 70% growth in the last 5 years.

In 2021, Merriwa had the highest proportion of elderly people (aged 85 years and over), followed by Ashby and Wanneroo.

The City continues to be home to a large proportion (41%) of immigrants.

Change 2016 - 2021		City of Wanneroo	Greater Perth	Western Australia
	Land Area (km^2)	**687.1**	6,300	2.65mil
	Population Characteristics			
+3.5%	Resident Population	**216,450**	2,116,631	2,660,062
+0.3%	Average Population Density (p/ha)	**3.15**	3.29	1.1
+2	Median Age	**35**	37	38
+0.4%	% Born overseas	**41%**	36%	32%
+0.5%	% Aboriginal/Torres Strait Islander	**1.9 %**	2.0%	3.3 %
+0.4%	Language at home other than English	**21%**	21%	18%
	Household Composition			
-1.2%	Couples with Children	**39%**	32%	30%
+0.9%	Older Couples w/o Children	**8%**	10%	10%
+2.5%	Lone Person Households	**19%**	24%	24%



2.2

CITY OF WANNEROO - HOUSING STUDY

SOCIO-ECONOMIC ANALYSIS

An analysis of the jobs held by the resident population of Wanneroo in 2021 shows the three most popular industry sectors were:

- Technicians and Trades Workers (18,242 people or 17.4%)
- Professionals (17,222 people or 16.5%)
- Community and Personal Service Workers (13,956 people or 13.3%)
- Clerical and Administrative Workers (13,906 people or 13.3%)

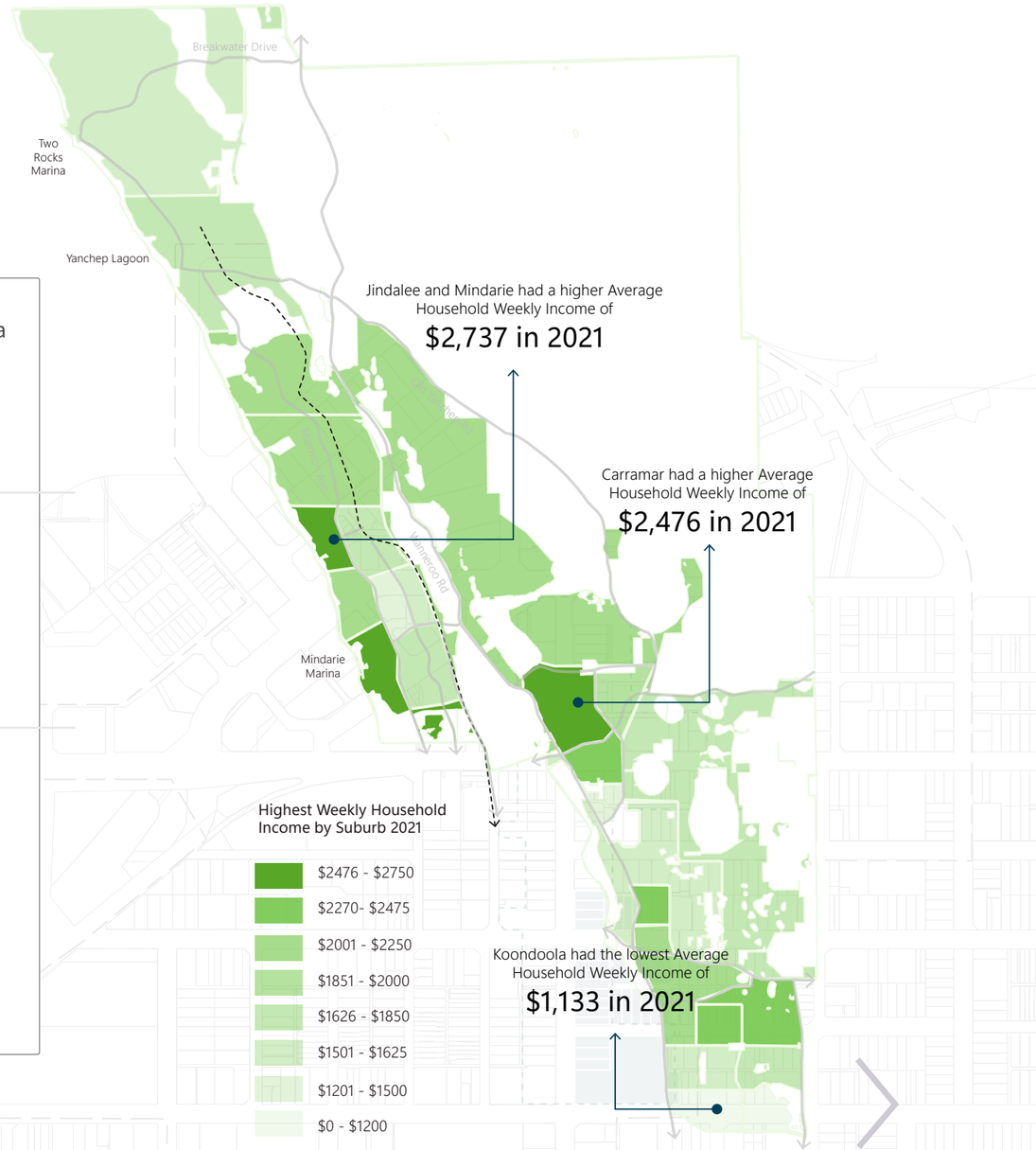
In combination, these four industries employed 60.5% of the City's total employed resident population.

Unemployment in the City sits at 5.7%, and even though it decreased by almost 3% from 2016, unemployment is still slightly higher than Greater Perth and WA.

The City of Wanneroo's SEIFA index indicates that the City's areas of lowest socio-economic advantage remain Koondoola and Girrawheen.

Outright home ownership has however increased by a modest 1.9% since 2016.

Change 2016 - 2021		City of Wanneroo	Greater Perth	Western Australia
	Land Area (km^2)	**687.1**	6,300	2.65mil
	Education and Training			
+2.6%	No. of People with Tertiary Degree	17%	26%	24%
+0.9%	Labour Force	68%	65%	64%
-2.8%	Unemployment	5.7%	5.3%	5.1%
	Income and Assets			
+$170	Median Household Weekly Income	$1,866	$1,866	$1,834
-$25	Median Weekly Rent	$350	$350	$340
+1.9%	Home Ownership - Outright	21%	28%	28%
+0.4%	Home Ownership - Mortgage	52%	40%	38%
+0.3%	Renting	21%	26%	26%



2.3

CITY OF WANNEROO - HOUSING STUDY

EXISTING HOUSING AND DEVELOPMENT ANALYSIS

There is a significantly higher proportion of separate houses in the City (91.6%) compared to Greater Perth and WA.

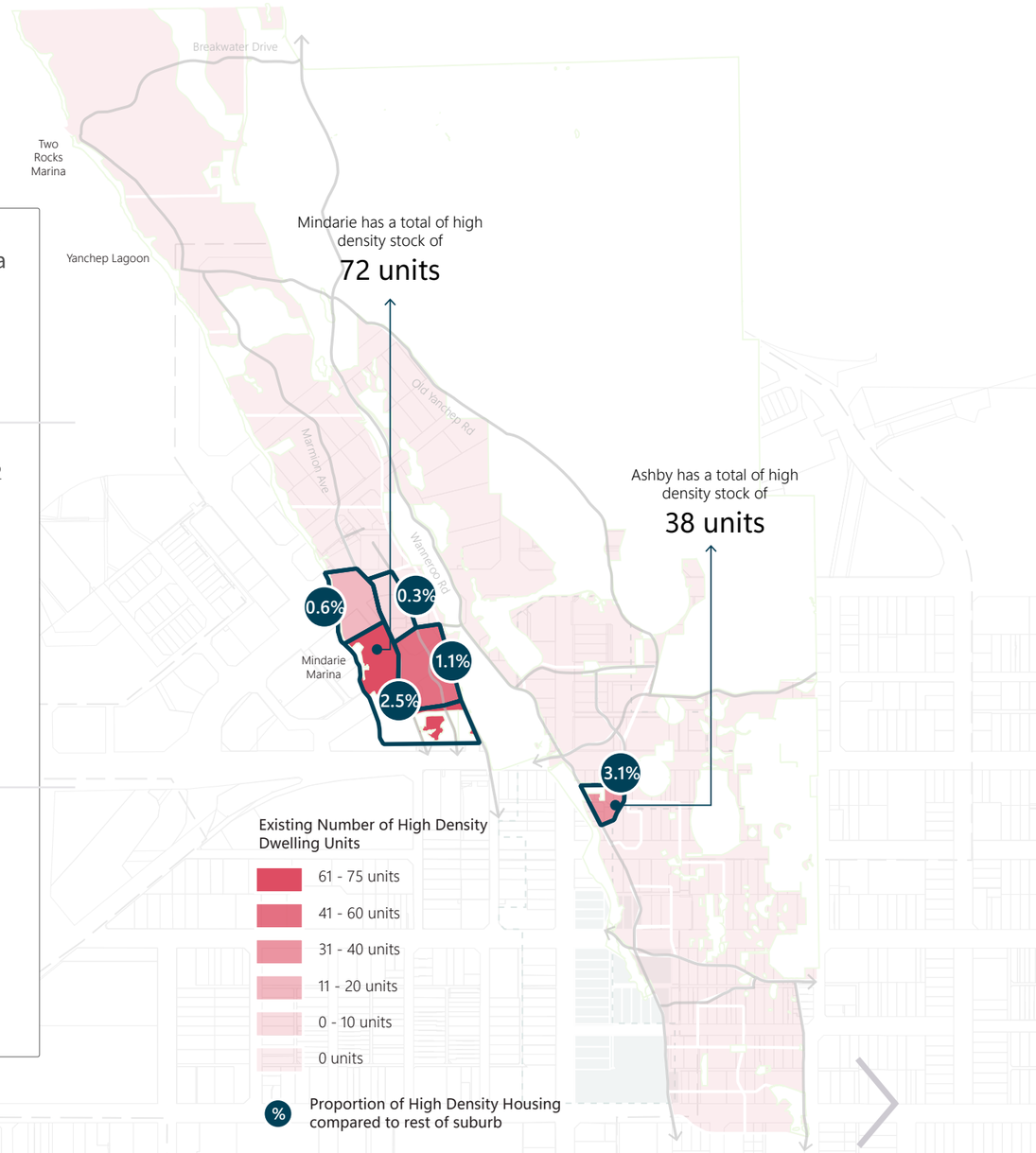
Between 2016 and 2021, Alkimos had the greatest increase in development of new dwellings in the City of Wanneroo, amounting to approximately 1,000 new residences.

In City of Wanneroo, 8% of dwellings are comprised of medium or high density housing stock, compared to 24% in Greater Perth. Importantly, there has been a 3% decrease in the medium density housing stock supply between the census years of 2016 and 2021.

Apartments are not a substantial part of the housing composition of the City of Wanneroo, with a negligible number of people living in these dwellings.

The 2021 Census also shows that the City's social housing stock has kept pace with the increase in population over the last 5 years.

Change 2016 - 2021		City of Wanneroo	Greater Perth	Western Australia
	Land Area (km^2)	**687.1**	6,300	2.65mil
	Dwellings			
+10%	Total No. of Dwellings	78,872	882,376	1,147,872
+2.6%	Single/Separate Dwellings	91.6%	75.6%	77.1%
-3.0%	Grouped Dwellings (Medium Density)	7.8%	17.6%	15.9%
+1.0%	Apartments (High Density)	0.2%	6.1%	4.8%
	Households and Housing Types			
-0.28	Average Household Size	2.75	2.5	2.5
+1.0%	Dwellings - Retirement Living	3.2%	3.5%	1.1%
+1.0%	No. of Beds - Aged care	736	14,223	16,663
+0.3%	Percentage Social Housing	2.5%	2.9%	3.5%



AFFORDABLE AND SOCIAL HOUSING

Affordable Housing

Housing is considered affordable when it costs no more that 30% of gross household income (ABS Census 2021).

The current investment in major road and rail transport infrastructure in the northern growth corridor of Wanneroo, coupled with the proximity of new estates to the beach and the proposed delivery of major facilities and amenities, will all contribute to price and value growth in the local residential market over time.

This value growth is regarded as an appropriate response to the fundamental amenity and accessibility attributes of the transit-oriented nature of the northern corridor suburbs. Additionally, many established central suburbs such as Mindarie and Jindalee enjoy high levels of amenity, which has raised market values of the years.

However, this value and price growth has the potential to raise affordability challenges for some purchaser groups in the market if not appropriately managed. The most common driver of general affordability challenges is a lack of diversity of housing stock, with households that otherwise would seek smaller and higher density dwellings forced by a lack of options into larger and more expensive product.

Current statistics of the income groups most at risk in the City show that households where mortgage repayments are more than 30% of their household income constitutes 14.4%. Additionally, households where rent payments are more than 30% of their weekly household income comprises 33.2% of the resident population of the City of Wanneroo. This suggests that approximately 44.4% of the City's current population require affordable housing.

Social/Public Housing

Dwellings that are rented and are owned by the State or Territory housing authority, housing co operative, community or church group (ABS Census 2016).

Social housing programs provide rental housing at below market rates to those who may otherwise struggle to find affordable housing. Given the increasing rental stress, especially since the advent of the COVID19 pandemic, social housing is more important than ever.

According to the National Housing Assistance Data Repository (2020/2021) the City of Wanneroo currently has approximately 1,941 of social housing units, mostly concentrated within the City's southern suburbs. This accounts for approximately 2.2% of the City's housing stock.

The suburbs which contain a larger proportion or very high numbers of public housing in 2021 included Koondoola (10.8%) and Girrawheen (6.2%), followed by Banksia Grove (4.6%) and Marangaroo (4.2%).

LGAs with highest number of social housing dwellings and families of Commonwealth Rent Assistance (CRA)

	SOCIAL HOUSING	RENT ASSISTANCE
Stirling	4,467	10,973
Wanneroo	1,985	10,506
Swan	1,941	7,793

Adapted from AIHW National Housing Assistance Data Repository (2020/2021).

Of the existing approximately 2,000 public houses in Wanneroo, the ABS 2021 Census revealed that 1,349 houses or units were leased by the Department of Communities and the remainder were managed by private not-for-profit community housing providers.

Department of Communities housing stock is managed in three different ways:

- Social rentals for an area's most vulnerable citizens;
- Discounted private rental homes for people on low incomes; and
- Shared equity opportunities for home buyers on modest incomes most of who were formerly renting.

The Australian Housing Research Conference (AHRC), conducted a study in 2015 to determine the demand for social housing for each local government area within Western Australia using the WA DoH Demand Model. The WA DoH Demand Model provides an estimate of the need for public and affordable housing for those on very low to moderate incomes at the LGA level.

The AHRC found that the top ranked LGAs requiring a social housing response included Wanneroo, who at the time had a total of 1,527 public houses and an unmet demand of approximately 1300 public houses. The need thus amounted to a total of 4% of the existing dwelling stock across the City at the time.

Despite an increase in the number of social houses that have been developed in the last 7 years, extrapolation of the above data based on population growth suggests that today, the City requires approximately 950 extra public / social houses to cater for increased demand.

RETIREMENT UNITS AND AGED CARE

Aged care and retirement housing options should aim to create a balance between institutional and non-institutional care. Many existing housing options for older people in Wanneroo have been created to meet the diversity of needs in the community. These include villages, naturally-occurring retirement communities, cohousing and park homes.

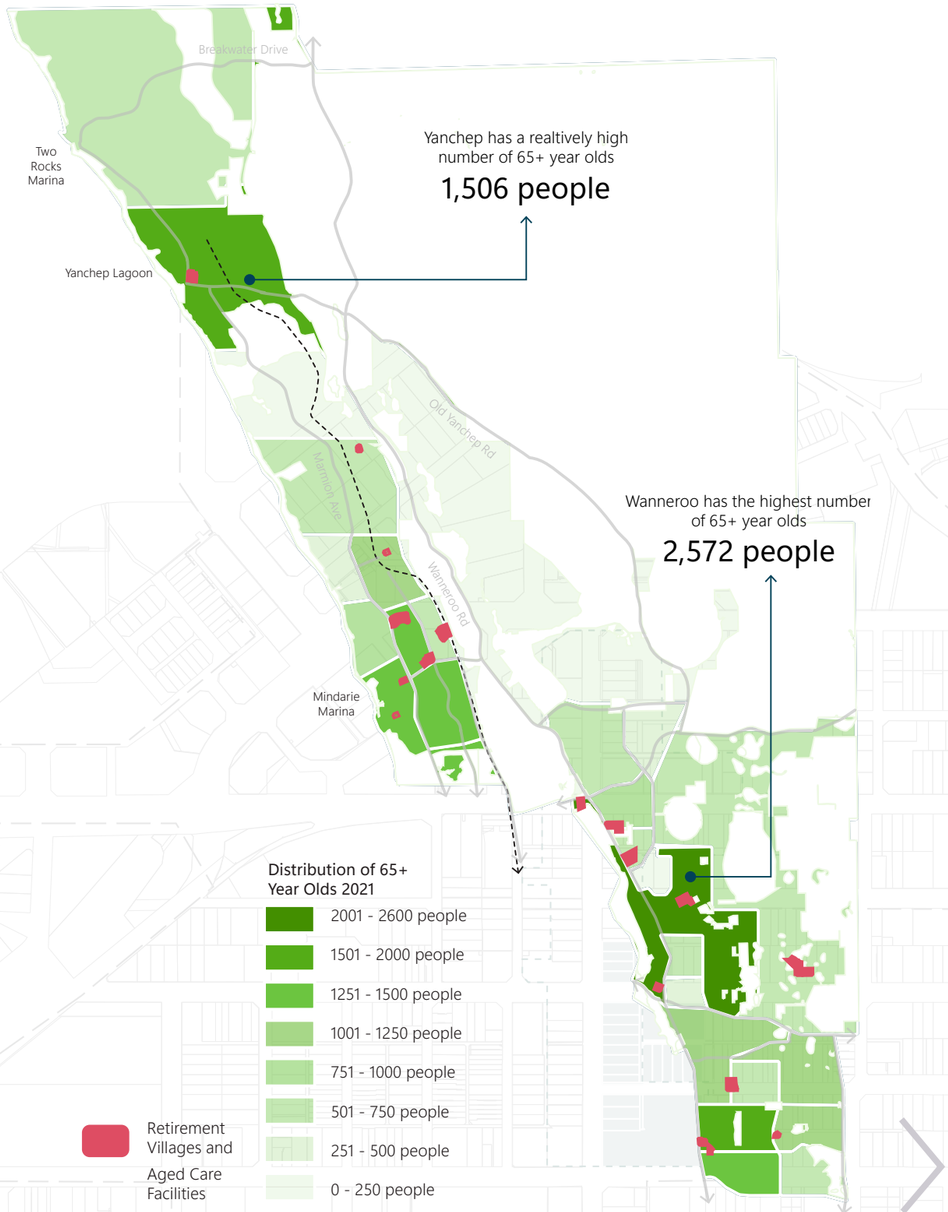
Retirement villages have become a viable housing option for older people since they address some of the physical and social issues for older people, which are usually reflected in improving the service quality and promoting the convenience of facilities*. In Australia, the retirement village industry currently accommodates approximately 5.7% of Australians aged 65+ and 10% of those 75+. Uptake is expected to rise to around 7.5% (over 380,000 aged 65+) by 2025 (Australian Institute of Health and Welfare). The industry is perceived by government and society as delivering a critical element of housing options for older Australians.

There are currently 14 Retirement Villages located across the City of Wanneroo with varying standards of care packages and recreation facilities located on site. This includes Lakelands Lifestyle Village in Gnagara that comprises 112 individual park homes.

The retirement living propensity rate is the proportion of people living in retirement dwellings who are of retirement age. This rate is applied to population projections to estimate the future net demand at a point in time (ABS, 2021). The current City of Wanneroo propensity rate is 5.3% compared to 3.6% for Greater Perth. The City's current high propensity rate is an indication that the area is attractive for retirement living, and demand is expected to continue to increase over the coming years (Urbis, 2021).

Based on the above propensity rate and the current resident population of over 65 year olds of approximately 25,000 people (2,600 of which are 85 years and older), it is apparent that the current supply of retirement dwellings are well above the number of dwellings required to accommodate this key demographic.

City of Wanneroo - Retirement Villages		Units
1	Lendlease Harbourside Village Mindarie	150
2	Aegis Anchorage (Kitchener Gardens)	28
3	Air Force Association (WA Division) Inc.	
	Cambrai Village Merriwa	273
	Merriwa Estate	234
4	Bethanie Beachside	134
5	The Rise by Teman (Ridgewood)	240
6	NLV – Pineview	233
7	NLV - Lake Joondalup	315
8	Fairway Villages - The Green	290
9	Lakelands Lifestyle Village	112
10	Kallista Gardens	56
11	Belgrade Park Village	240
12	Sevenoaks Village	40
13	Kingsway Court Brightwater	168
14	Italian Aged Care Inc. - Villa Terenzio	41
	TOTAL	2554
City of Wanneroo - Aged Care Facilities		No. of Beds
1	Aegis Shorehaven	134
2	Air Force Association (WA Division) Inc.	
	Cambrai Village Merriwa	79
	Merriwa Estate	189
3	Regents Garden Nursing Home	100
4	Wanneroo Community Nursing Home	65
5	Jacaranda Lodge	65
6	Italian Aged Care Inc. - Villa Terenzio	152
7	Brightwater Madeley	110
8	Juniper John Bryant	42
	TOTAL	736



2.4

CITY OF WANNEROO - HOUSING STUDY

CURRENT HOUSING TRENDS

THE RESIDENTIAL PROPERTY MARKET

Greater Perth

The residential property market has been performing strongly over the past 2 years, despite the challenges that COVID-19 has presented. March 2022 quarter REIWA figures show that the median house price in Perth is $527,000 (up from $505,000 in March 2021 quarter), displaying a little over 4.35% growth over 12-months. More significantly however, the median price has risen from its low of $475,500 in the June 2020 quarter, representing strong growth over this period.

The Perth listings and median selling days has rapidly declined from a consistent average of 40 to 60 selling days in the last few years to 16 selling days in the March 2022 quarter. The number of listings has also declined and remained relatively tight in recent times.

Median house rents have risen from $450 in the December quarter to $480 per week in the March quarter, and up from $430 per week 12 months ago. Units have followed a relatively similar trend, though the increase in the most recent quarter has not been as pronounced, rising from $410 per week up to $420 per week (Adapted from the ABS, 2021).

City of Wanneroo

Wanneroo experienced major development during the 1970s with gradual increases experienced from the mid-1990s as new properties were built in the area.

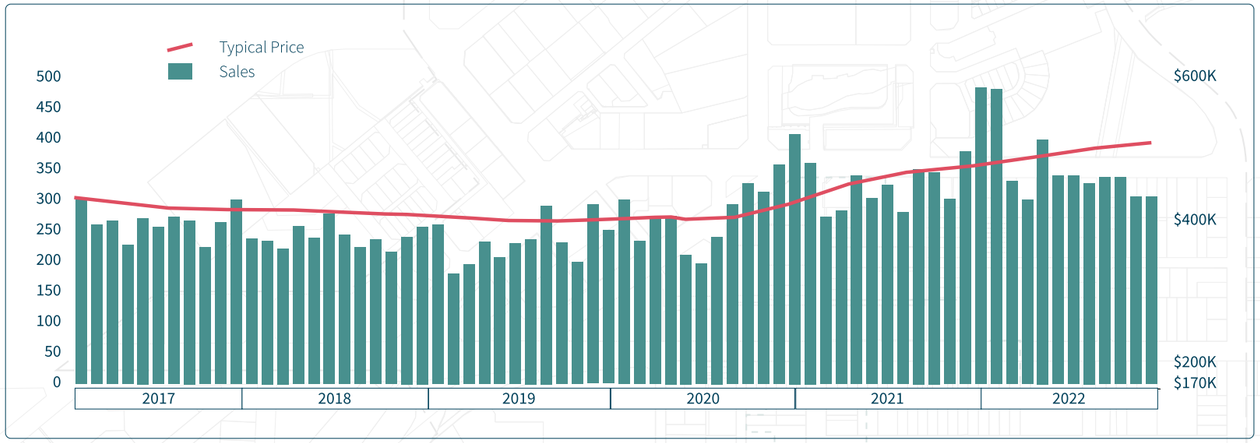
Long term trends for the City's residential market show a consistency of single house sales. Listings and median selling days have steadily declined over the last 5 years to 25 selling days.

Median rents are up 8% in the September quarter of 2022 to 430 per week, slightly lower than Greater Perth.

Sales of other housing types are appearing particularly volatile due to much lower supply (REIWA, 2021).

The short-term ability of the market to deliver compact residential products (e.g. apartments) in outer metropolitan locations is challenging and will remain so given the relative affordability of prevailing green title residential house & land product (e.g. $425,000 to $525,000 at Alkimos).

The graph to the right illustrates the typical house price for the City from 2016 to 2022.



Adapted from HtAG, 2022.

THE RESIDENTIAL PROPERTY MARKET

Building Approvals 2016 - 2021

Single houses remain the predominant dwelling type in the City of Wanneroo. However since 2010 semi detached and units have seen a minor surge in supply.

There is limited apartment supply in the City, however as seen through the WA Tomorrow's State Lot Activity Reports 2016 - 2022, there has been a slight increase in the supply of semi-detached dwellings and units since 2010 in the suburbs of Wanneroo, Mindarie, Quinns Rocks, Jindalee and Tapping.

As expected, there has been consistent increases in building approvals for the growth suburbs of Eglinton and Alkimos over the past 5 years. This is followed by Banksia Grove and Jindalee.

Approvals were at their highest in the last quarter of 2020 and the first quarter of 2021, which is consistent with the advent of COVID19 and the release of the Government stimulus packages.

NOTE - Construction may take several years from the date of approval. A high rate of building approvals can indicate a growth area with a construction-led economy. A low rate of building approvals may indicate a settled area with established infrastructure, or an area with little growth (Forecast id., 2022).

City of Wanneroo	16/17		17/18		18/19		19/20		20/21		21/22	
Area		Jul-Dec		Jul-Dec		Jul-Dec		Jul-Dec		Jul-Dec		2016-2021
Gnangara - Jandabup - Mariginiup	**0**	0	**0**	0	**0**	0	**0**	0	**0**	0	**0**	**0**
Carramar	**0**	0	**2**	0	**0**	2	**2**	0	**0**	0	**0**	**4**
Merriwa	**2**	0	**0**	2	**2**	2	**2**	0	**0**	0	**0**	**6**
Clarkson	**5**	2	**2**	0	**0**	0	**0**	0	**0**	0	**0**	**7**
Butler	**10**	0	**0**	0	**1**	0	**0**	0	**0**	0	**0**	**11**
Alexander Heights	**2**	2	**4**	2	**2**	2	**2**	2	**2**	0	**2**	**14**
Ridgewood	**7**	0	**0**	0	**8**	2	**2**	0	**0**	0	**7**	**24**
Marangaroo	**2**	4	**6**	2	**4**	0	**0**	2	**5**	4	**9**	**26**
Darch	**0**	5	**5**	0	**18**	4	**8**	13	**15**	0	**0**	**46**
Tapping	**7**	0	**2**	0	**0**	0	**5**	57	**57**	0	**0**	**71**
Quinns Rocks	**13**	5	**17**	14	**19**	6	**10**	6	**8**	2	**11**	**78**
Koondoola	**4**	4	**23**	8	**24**	2	**11**	21	**45**	8	**15**	**122**
Neerabup - Pinjar - Nowergup - Carabooda	**0**	0	**0**	3	**44**	0	**114**	0	**0**	0	**0**	**158**
Ashby - Sinagra	**58**	17	**24**	0	**0**	18	**19**	29	**29**	4	**35**	**165**
Hocking - Pearsall	**81**	70	**85**	14	**47**	18	**18**	9	**11**	0	**4**	**246**
Girrawheen	**2**	3	**16**	87	**147**	12	**22**	23	**57**	13	**20**	**264**
Mindarie - Tamala Park	**67**	57	**93**	3	**3**	38	**38**	17	**39**	34	**37**	**277**
Wanneroo	**13**	5	**19**	16	**28**	12	**25**	76	**115**	69	**97**	**297**
Two Rocks	**123**	0	**20**	36	**36**	0	**23**	67	**67**	0	**60**	**329**
Madeley - Woodvale	**134**	31	**67**	41	**120**	2	**17**	9	**11**	0	**12**	**361**
Landsdale	**146**	137	**163**	11	**79**	62	**143**	24	**90**	14	**26**	**647**
Yanchep	**16**	135	**135**	106	**158**	19	**27**	107	**150**	59	**205**	**691**
Jindalee	**72**	62	**111**	29	**63**	40	**135**	139	**178**	82	**168**	**727**
Banksia Grove	**103**	44	**143**	0	**75**	43	**132**	186	**208**	60	**143**	**804**
Eglinton	**91**	26	**116**	0	**88**	47	**138**	140	**209**	198	**282**	**924**
Alkimos	**78**	32	**217**	73	**132**	94	**221**	353	**462**	97	**233**	**1343**
TOTAL	**1036**	**641**	**1270**	**447**	**1098**	**425**	**1114**	**1280**	**1758**	**644**	**1366**	**7642**

FACTORS IMPACTING WANNEROO'S HOUSING GROWTH

Population growth

Western Australia's population is expected to grow significantly in the longer term with the state government predicting that Perth will hit between 3.6 and 5.9 million people by 2066. Two years ago, WA held the title of the fastest growing Australian state for over a decade thanks to significant interstate and overseas migration stimulated by the booming mining industry and associated job opportunities.

However, in the last 2 years growth has slowed quite dramatically as the mining downturn led to rising unemployment and tighter economic conditions. This is also due to WA's recent hard border stance which had eased on 3rd of March 2022, which had put constraints on interstate and overseas migration.

Nevertheless, even when adjusted for the above factors, the City of Wanneroo's population is expected to grow by more than 60% by 2041.

Unemployment

The Australian unemployment rate has recovered from the high unemployment levels we saw in 2020, with the unemployment rate currently sitting at a rate of just 3.9% (as at April 2022). This is a very strong position; however, it is also been blamed by some industries as a contributing factor to supply shortages and price increases.

The labour market is also strong. Employment has grown significantly and the unemployment rate is 3.9 per cent, which is the lowest rate in almost 50 years. Job vacancies and job ads are at high levels and a further decline in unemployment and underemployment is expected.

In the 2022 June quarter, the unemployment rate in the City of Wanneroo was 4.1% (Forecast id., 2022), a decrease of almost 3% from the previous 2016 census.

Consumer Price Index

Rising house prices have direct effects on household wealth and neighbourhood affordability.

The Consumer Price Index (CPI) measures the weighted average of the price of a hypothetical basket of consumer goods and services, these include and are not limited to items such as transportation, food and medical care. The CPI is used by the Reserve Bank and other institutions to measure inflationary pressure.

The CPI in Australia increased 2.1% in the March 2021 quarter, representing a 5.1% increase over the previous 12 months. One of the most significant rises nationally were New dwelling purchases by owner-occupiers which rose 5.7% and Automotive fuel which rose 11%, due to higher dwelling construction costs and automotive fuel prices. The significant inflationary pressures caused by the rise in CPI has been a contributing factor in the recent upward movements in the cash rate.

Interest Rates

The official cash rate as set by the RBA has been trending down since October 2011 to reach the lowest levels in approximately 50 years. At the 4 March 2020 meeting, the RBA cut the cash rate by 25 basis points to 0.50% to support the economy as it responded to the global coronavirus outbreak. The rate was further reduced in November to a new record low of 0.1% and remained unchanged until May 2022, when the RBA decided to increase the cash rate by 25 basis points and then another 50 basis points at the June meeting.

Inflation is expected to increase further, but then decline back towards the 2–3 per cent range next year. Higher prices for electricity and gas and recent increases in petrol prices mean that, in the near term, inflation is likely to be higher than was expected a few months ago. As the global supply-side problems are resolved and commodity prices stabilise, even if at a high level, inflation is expected to moderate.

COVID19 Pandemic

While the economic impacts of COVID19 are increasingly understood, the long-term implications for consumer and household dwelling preferences is not.

In particular, it is possible that the pandemic, and associated social distances and travel restrictions, may accelerate emerging trends in areas such as house and amenity/service co-location/integration and SOHO type offerings.

Government policy responses alleviated uncertainty regarding the direct and indirect impacts of COVID-19 on the property market and combined with the material decline in mortgage interest rates, has seen property prices rise dramatically in the past year.

However, residential property price growth is expected to temper over the next 2 to 3 years as lower population growth, reversion back to equilibrium and higher mortgage lending rates weigh on property prices (KPMG, 2022).

LOCAL PLANNING STRATEGY - HOUSING STUDY

3 FUTURE PROJECTIONS

3.1

CITY OF WANNEROO - HOUSING STUDY

METHODOLOGY

VARIOUS SOURCES - POPULATION FORECASTS

WA Tomorrow and Report No. 11

Demographic change across Australia is recorded by the Australian Bureau of Statistics (ABS) in the Census collections every five years.

WA Tomorrow 2016 utilises ABS data to produce a trend-based forecast - what the future population is likely to be if current trends in fertility, mortality and migration continue in line with the census data. Trend-based forecasts are better suited over the short to medium term[3].

Additionally, WA Tomorrow supplements its data from the Urban Land Development Outlook 2020/21 (ULDO). It spatially displays the future land and dwelling development over the short, medium and longer terms within the Perth metropolitan and Peel region, drawing on input from State and local government and the private sector.

An analysis of the 2021 Census showed that until recently, population growth for the City has been most closely aligned with WA Tomorrow Band A population projections (ABS, 2021). In fact, the WA Tomorrow projection for Wanneroo for 2021 was 224 660 people, whereas the 2021 census only recorded a total of 209,111 people.

Forecast .id Social Atlas

Forecast.id is a forecasting body that provides bespoke forecasts for Local Governments across Australia.

These population experts analyse and convert raw Australian Bureau of Statistics (ABS) figures into stories of place to inform council staff, community groups, investors, business, students and the general public.

The forecasts take into account the macro drivers of demographic change (fertility, mortality and migration) as well as a detailed understanding of the future land use strategy of Councils and status of the residential development pipeline. Thematic maps are created using data from the 2021 and 2016 Censuses of Population and Housing, with an option to view the data for the 2021 year, the 2016 year, or change in number or percentage between the two Censuses.

Tables, charts and concise factual commentary are also available for each Census year individually, and they provide longer forecasts than WA Tomorrow.

The City of Wanneroo .id data and forecasts are therefore considered to be more localised and up to date.

Preferred Data Source

According to WA Tomorrow as well as the ABS, it is unreasonable to expect that the stated population projection trends will prevail in the long term due to issues such as government policy and plans, economic cycles or natural disasters, which will change trends.

In early 2020 the world underwent one such unprecedented natural disaster. The COVID19 pandemic fundamentally changed Australia's and more specifically Western Australia's demographic and housing landscape, consequences of which include, among others -

- a decrease in foreign students, visas and longer term visitors across the State and Australia;
- stimulus packages released by the State Government in response to the pandemic, which resulted in a booming housing market;
- an increase in demand for rentals with vacancy rates at their lowest in nearly a decade[4]; and
- an overall change in the way people live.

In Australia overall, Forecast id. forecast there will be 1.9m fewer Australians in 2041 compared to pre-Covid forecasts. The impacts are disproportionately felt both demographically and geographically. Earlier forecasts (pre-pandemic trends) were therefore assessed by Forecast .id and adjusted where necessary to take into account the impacts of Covid19 at the local level.

Forecasts for 2041 (20 year timeframe)		
	DATA SOURCE	
	WA Tomorrow* BAND A	**Forecast .id**
No. of People - Total	434,153	370,273
No. of Dwellings**	157,874	134,645

* Data have been extrapolated
**Dwelling occupancy rate - 2.75 people per dwelling

[3] Source – WA Tomorrow: Population Report No. 11
[4] WA Housing Strategy 2020-2030

3.2

CITY OF WANNEROO - HOUSING STUDY

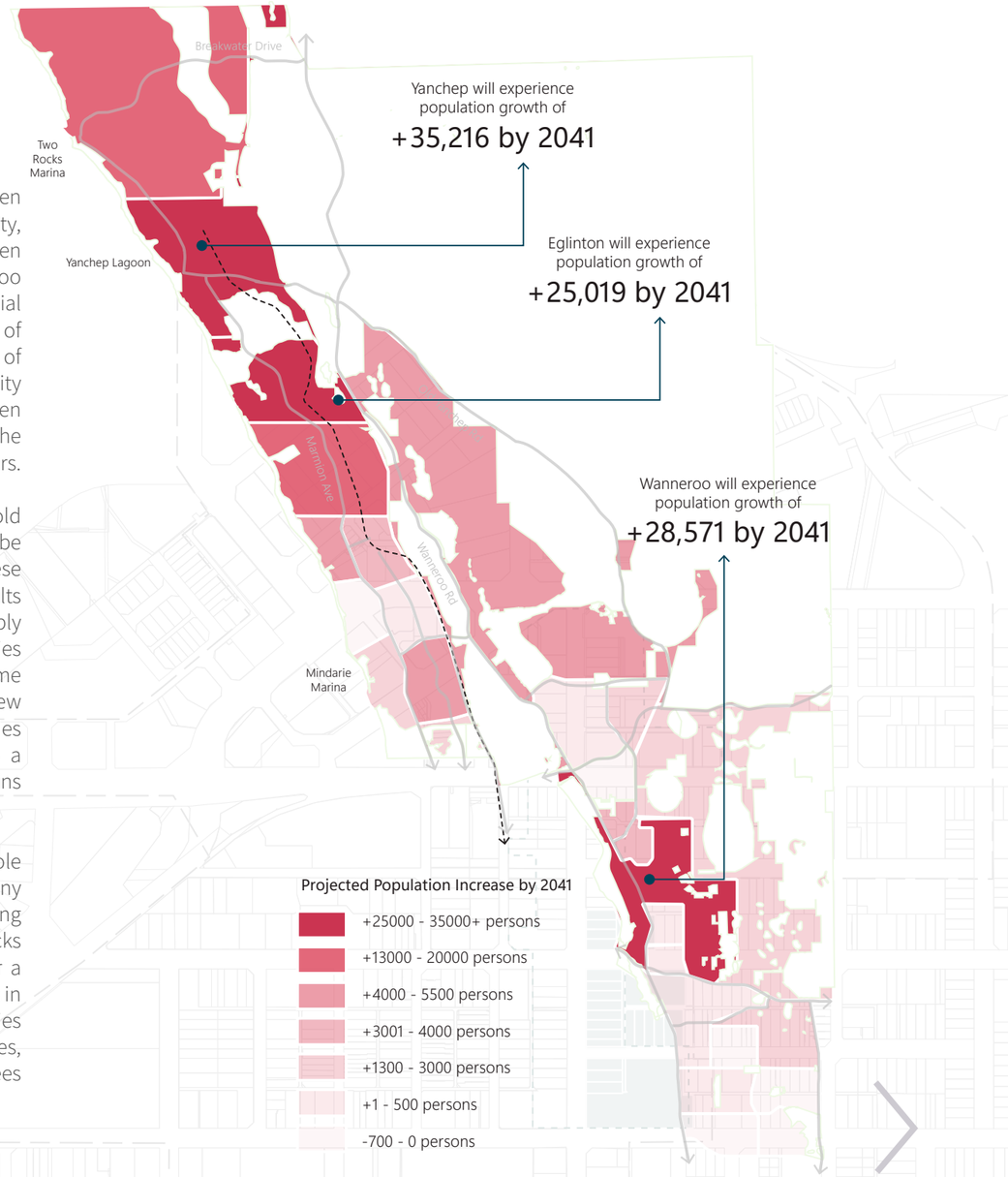
PROJECTED DEMOGRAPHICS 2022 - 2041

City of Wanneroo	2022	2041	Change between 2022 and 2041	
Area	No. of People	No. of People	No. of People	%
Tapping	9,810	9,117	-693	-7.1
Darch	7,399	7,227	-172	-2.3
Koondoola	4,096	3,932	-164	-4.0
Quinns Rocks	9,492	9,420	-72	-0.8
Alexander Heights	8,186	8,135	-51	-0.6
Girrawheen	9,519	9,489	-30	-0.3
Merriwa	6,035	6,110	+75	+1.2
Marangaroo	10,871	10,994	+123	+1.1
Madeley - Wangara - Woodvale	7,916	8,143	+226	+2.9
Hocking - Pearsall	11,563	11,889	+326	+2.8
Carramar	7,540	7,948	+408	+5.4
Ridgewood	5,231	5,731	+500	+9.5
Mindarie - Tamala Park	8,158	9,482	+1,324	+16.2
Banksia Grove	11,209	12,686	+1,477	+13.2
Landsdale	14,458	16,879	+2,421	+16.7
Gnangara - Jandabup - Mariginiup	2,409	5,075	+2,666	+110.7
Butler	13,902	16,916	+3,014	+21.7
Ashby - Sinagra	6,545	10,420	+3,875	+59.2
Neerabup - Pinjar - Nowergup - Carabooda	1,119	5,173	+4,054	+362.3
Clarkson	14,171	18,459	+4,288	+30.3
Jindalee	4,867	10,360	+5,493	+112.9
Two Rocks	4,774	17,983	+13,209	+276.7
Alkimos	10,553	29,937	+19,384	+183.7
Eglinton	4,761	29,779	+25,019	+525.5
Wanneroo	13,218	41,789	+28,571	+216.2
Yanchep	11,984	47,200	+35,216	+293.9
Total	219,788	370,273	+150,485	+68.5%

In recent decades there has been substantial population growth in the City, a process set to continue and heighten into the future with the City of Wanneroo becoming the primary focus for residential development in the northern suburbs of Perth. This is in part related to the lack of new residential opportunities in the City of Joondalup, which had previously been the major development focus area in the north-west over the last twenty-five years.

The reason for population and household growth in the City of Wanneroo can be attributed to several sources. These include the large number of young adults leaving home within the region (notably in areas to the south, such as the Cities of Joondalup, Stirling and over time Wanneroo itself) seeking to establish new households and families. It also includes the substantial net overseas and to a lesser degree interstate migration gains to the region (Forecast .id, 2021).

The City is also likely to play a role as a lifestyle destination, with many opportunities for coastal and rural living in northern areas, especially in Two Rocks and Yanchep. This should provide for a more diverse range of housing markets in the City, with first home buyers, families upgrading to second and third homes, as well as empty-nesters and retirees looking for a new lifestyle.



AN AGEING POPULATION

City of Wanneroo	2022	2041	Change between 2022 and 2041	
Area	No. of People 65+ years	No. of People 65+ years	No. of People 65+ years	%
Koondoola	540	662	+122	+22.5
Neerabup - Pinjar - Nowergup - Carabooda	147	665	+518	+352.5
Gnangara - Jandabup - Mariginiup	437	718	+281	+64.2
Ridgewood	630	894	+264	+42.0
Merriwa	1,055	1,066	+12	+1.1
Jindalee	298	1,100	+802	+269.1
Darch	700	1,196	+495	+70.8
Ashby - Sinagra	767	1,361	+594	+77.4
Carramar	699	1,379	+681	+97.4
Tapping	848	1,462	+615	+72.5
Girrawheen	1,247	1,465	+218	+17.5
Quinns Rocks	958	1,501	+543	+56.7
Alexander Heights	1,087	1,552	+464	+42.7
Banksia Grove	616	1,600	+984	+159.7
Madeley - Wangara - Woodvale	1,211	1,701	+491	+40.5
Two Rocks	646	1,820	+1,174	+181.8
Hocking - Pearsall	1,241	1,994	+753	+60.6
Marangaroo	1,680	2,086	+406	+24.2
Mindarie - Tamala Park	1,210	2,249	+1,039	+85.9
Eglinton	238	2,351	+2,113	+887.7
Clarkson	1,234	2,434	+1,200	+97.2
Butler	1,099	2,616	+1,517	+138.0
Alkimos	759	2,876	+2,117	+279.0
Landsdale	1,196	2,885	+1,688	+141.1
Yanchep	1,633	4,788	+3,155	+193.2
Wanneroo	2,503	4,861	+2,358	+94.2
City of Wanneroo	24,679	49,281	+24,602	+99.7

There is a significant ageing population in the City of Wanneroo, with an estimated current population of 24,679 residents aged 65+(aged residents of retirement age).

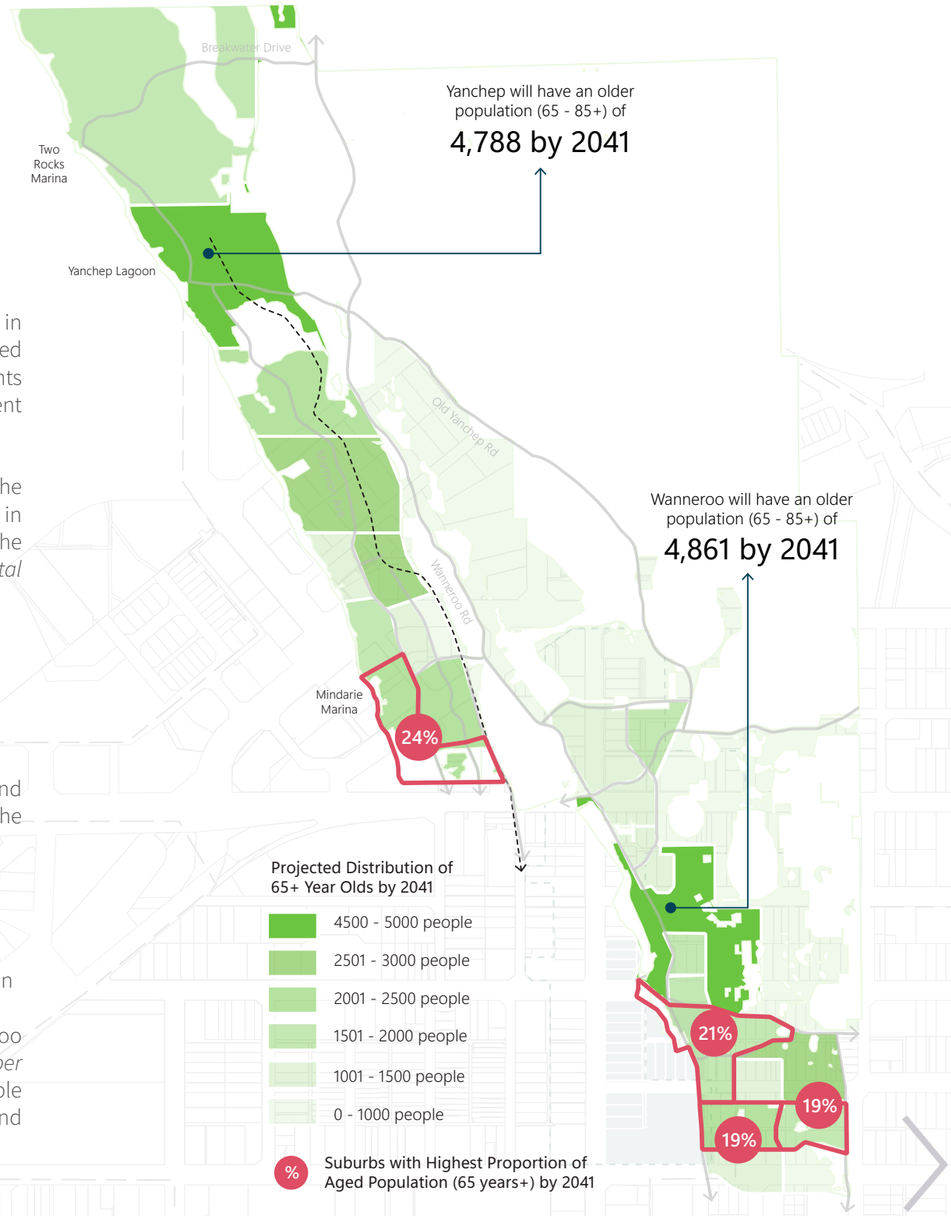
The suburbs set to continue to have the highest proportion of aged residents in 2041 in comparison with the rest of the suburb (not to be confused with the *total* number of aged residents) are -

- Mindarie - 22%
- Madeley/Wangara/Woodvale - 20%
- Alexander Heights - 20%
- Marangaroo - 19%

A more elderly population (85 years and above) will be concentrated within the following suburbs -

- Wanneroo - 0.3% of total population
- Yanchep - 0.22% of total population
- Alkimos - 0.12% of total population
- Marangaroo - 0.1% of total population

The suburbs of Yanchep and Wanneroo will be housing the highest *total number* of aged residents (almost 5000 people each), followed by Butler, Clarkson and Eglinton.



3.3

CITY OF WANNEROO - HOUSING STUDY

NEW DWELLING FORECAST 2022 - 2041

City of Wanneroo	2022	2041	Change between 2022 and 2041	
Area	No. of Dwellings	No. of Dwellings	No. of Dwellings	%
Koondoola	1,454	1,454	0	0
Tapping	3,294	3,328	+34	+1.0
Merriwa	2,354	2,411	+57	+2.4
Quinns Rocks	3,441	3,536	+95	+2.8
Alexander Heights	2,870	2,972	+102	+3.6
Girrawheen	3,655	3,758	+103	+2.8
Marangaroo	3,841	3,995	+154	+4.0
Darch	2,387	2,562	+175	+7.3
Madeley - Wangara - Woodvale	2,856	3,067	+211	+7.4
Ridgewood	1,890	2,144	+254	+13.4
Hocking - Pearsall	4,277	4,616	+339	+7.9
Carramar	2,527	2,888	+361	+14.3
Mindarie - Tamala Park	2,917	3,584	+667	+22.9
Banksia Grove	3,931	4,745	+814	+20.7
Gnangara - Jandabup - Mariginiup	844	1,844	+1,000	+118.4
Neerabup - Pinjar - Nowergup - Carabooda	406	1,747	+1,341	+330.7
Landsdale	4,718	6,066	+1,348	+28.6
Butler	5,032	6,432	+1,400	+27.8
Ashby - Sinagra	2,551	4,110	+1,559	+61.1
Clarkson	5,507	7,355	+1,848	+33.6
Jindalee	1,685	3,720	+2,035	+120.8
Two Rocks	1,906	6,963	+5,057	+265.3
Alkimos	3,845	11,493	+7,648	+198.9
Eglinton	1,823	11,180	+9,357	+513.4
Wanneroo	5,102	15,827	+10,725	+210.2
Yanchep	4,379	17,098	+12,719	+290.4
City of Wanneroo	79,492	138,895	+59,403	+74.7

Visualising the geographic pattern of growth in dwelling stock across the City of Wanneroo is a good starting point for assessing the scale and type of change each part of the area is undergoing.

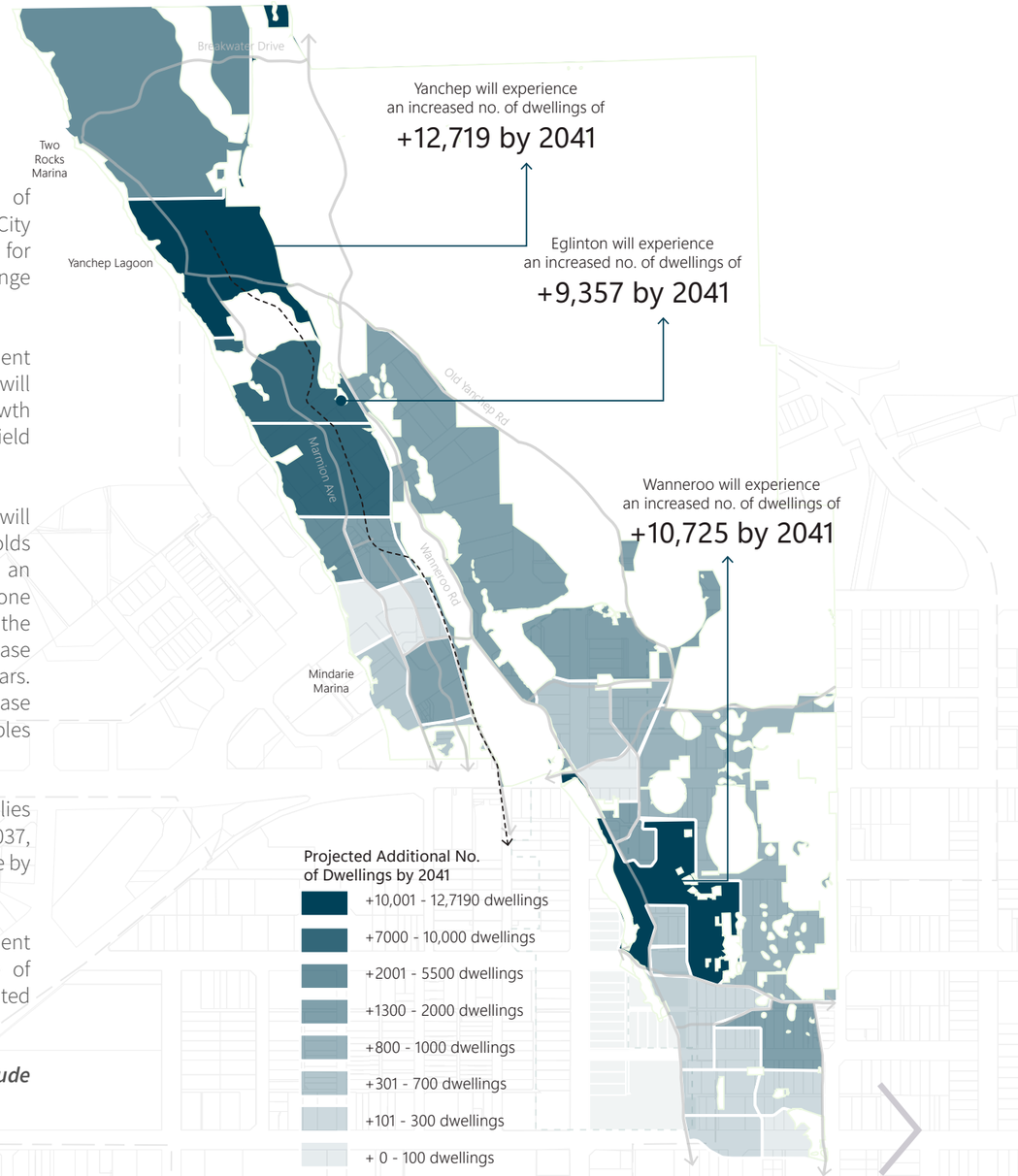
An analysis of the City's development trends suggest that some areas will be experiencing significant growth in new dwellings through greenfield development.

In context, it is anticipated that there will be a 56% increase in group households during this time, approximating to an additional 1,138 group households. Lone person households will represent the most significant change, and will increase by more than 70% over the next 15 years. In addition, there will be a 66% increase in households representing couples without children.

Approximately 15,000 additional families will need to be accommodated by 2037, and single parent families will increase by another 49%.

This very diverse future resident profile will require a diverse range of housing /dwelling types and associated infrastructure and/or services .

NOTE - This table does not include potential infill development



3.4

CITY OF WANNEROO - HOUSING STUDY

KEY HOUSING REQUIREMENTS

THE CITY'S KEY HOUSING REQUIREMENTS OVER THE NEXT 20 YEARS

+150,000 people by 2041 → **+54,500** dwellings by 2041

+34,500 new dwellings + **+20,000** infill dwellings

+24,500 aged residents (65+)	+12,500 lone households	+24,500 single/families with children	+17,000 couples without dependents	+1,450 group households
16%	8%	16%	11%	1%
+8,900 dwellings	+4,500 dwellings	+8,900 dwellings	+6,200 dwellings	+530 dwellings

Mapping the distribution of different household types across the City of Wanneroo provides insight into the roles that different areas play in the housing market and how these are changing. It also identifies where there are concentrations of households which have specific service requirements.

Between 2022 and 2041, the population for the City of Wanneroo is forecast to increase by approximately 150,000 people, who will need to be housed in an additional 54,500 dwellings. The average household size is expected to continue at 2.75 people per household[5].

The number of dwellings required to support the key groups that will comprise the City's future 15-year population is therefore based on an average number of people per dwelling of 2.75.

5 WA Housing Strategy 2020-2030

3.5

CITY OF WANNEROO - HOUSING STUDY

IMPLICATIONS FOR THE CITY

RELEVANT FINDINGS

+24,500 by 2041

An ageing population

The age structure of the City of Wanneroo is indicative of the area's era of settlement and provides key insights into the level of demand for aged based services and facilities. The number and distribution of elderly people has particular significance for an area's health services, transport provision and aged care facilities.

Growth in the older population is two-fold. Firstly, the growing proportion of older age cohorts in Western Australia is the result of the large 'baby boom' population, born around 1946 to 1966, who are ageing. Secondly, life expectancy has been steadily increasing due to improved health services and advances in medicine and technology.

Knowing when and where to deliver age-based services is an essential part of local government planning. Mapping the distribution of selected age groups across the City of Wanneroo provides the evidence-base for efficiently targeting and delivering these services.

+24,500 by 2041

More diverse households and lack of housing diversity

The majority of the City's residents currently live in separate houses, as is apparent from the percentage of the City's housing stock that comprises low density housing. Importantly, it is anticipated that there will be a 56% increase in group households during this time, approximating to an additional 1,138 group households.

Lone person households will represent the most significant change, and will increase by more than 70% over the next 15 years. In addition, there will be a 66% increase in households representing couples without children.

Approximately 24,500 additional families will need to be accommodated by 2041, and single parent families will increase by another 49%.

This very diverse future resident profile will require a diverse range of housing /dwelling types and associated infrastructure and/or services.

2.75 by 2041

Smaller occupancy rates

Households are getting smaller. In 1911, the average number of people per household in Australia was 4.5. By 2016, that number had fallen to 2.6 (Australian Institute of Family Studies, 2022). People choosing to live alone or with partners caused the average household size to fall even further during the COVID19 pandemic (Reserve Bank, 2021).

With the City of Wanneroo's household sizes getting smaller, and with the lack of housing diversity throughout the City, it is important that there are opportunities for newer housing stock to improve on this by providing a range of housing options in appropriate locations.

Dwelling type is an important determinant of City of Wanneroo's residential role and function. A greater concentration of higher density dwellings is likely to attract more young adults and smaller households, often renting. Larger, detached or separate dwellings are more likely to attract families and prospective families.

rent +8% by 2041

Higher rental stress and more vulnerable households

The Rental Affordability Index (RAI) 2021 exposes the increasing unaffordability of rental properties across Western Australia for lower-income households and shows that many renters are worse off than before the COVID-19 pandemic.

In addition, it is likely in the short to medium term that the market will not be able to readily provide smaller and higher density housing product (e.g. apartments) that is affordable to lower income households in the community (such as socio-economically disadvantaged households, key service worker, students and new migrants).

These groups represent some of the most housing vulnerable cohorts in the community and will likely lack the purchasing power to access housing in the local market (outside of the rental market) in the absence of Government support (in the form of direct social housing provision and other Government-funded interventions).

LOCAL PLANNING STRATEGY - HOUSING STUDY

4 NEW AND INFILL DWELLING YIELD ANALYSIS

4.1

CITY OF WANNEROO - HOUSING STUDY

STRUCTURE PLAN ANALYSIS

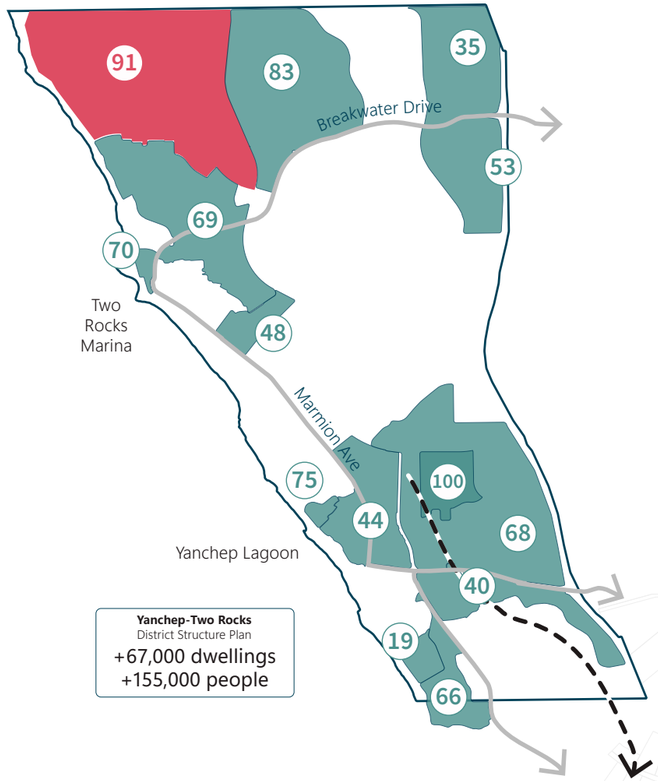
EXISTING AND PLANNED RESIDENTIAL AREAS

A total of 34 approved structure plans and 1 draft structure plan guide development in the northern coastal area, i.e. the northern coastal suburbs of Wanneroo including Butler, Alkimos, Eglinton and Two Rocks.

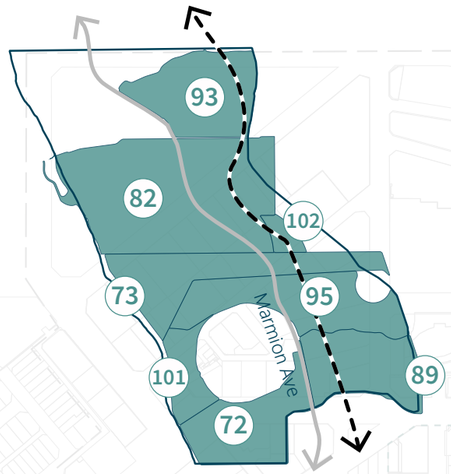
There are also several planned estates located in Alkimos, Eglinton, and Yanchep.

An analysis of these local structure plans reveal that approximately 53,700 dwellings are anticipated to be developed within the next 20 years and beyond.

With the development of the train line extending to Yanchep, there is also significant potential for higher rates of urban infill within a short drive of the rail corridor.



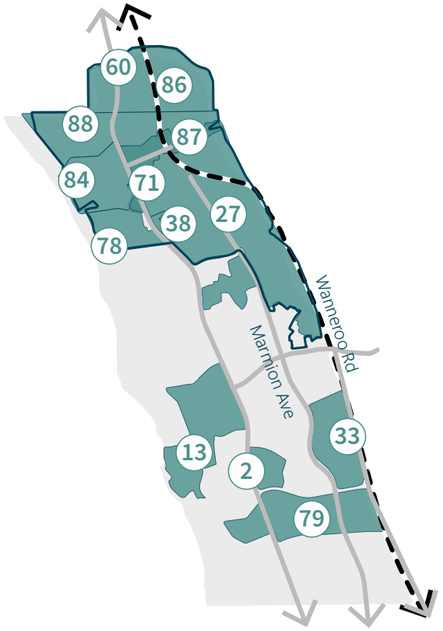
Anticipated Dwelling Yield	
Structure Plan	Yield
19 Yanchep South	n/a
35 Two Rocks Breakwater Drive	n/a
40 Yanchep Lot 1 and 102	1397
44 Yanchep Capricorn Coastal Village	860
75 Yanchep - Capricorn Coastal Node	
48 Two Rocks	659
53 Two Rocks Breakwater Drive	33
66 South Yanchep	1,618
68 Yanchep City	8290
100 Yanchep Activity Centre	
69 Two Rocks	5,463
70 Two Rocks Town Centre	n/a
83 East Two Rocks	7,500
Draft Structure Plan	Yield
91 DRAFT North Two Rocks	11,879
Total	37,699



Anticipated Dwelling Yield	
Structure Plan	Yield
72 South Alkimos	2,000
101 Alkimos Coastal Village	
73 Shorehaven (North)	1,282
82 Eglinton	4,131
89 Alkimos City Centre	3,335
93 North Eglinton	2,880
95 Central Alkimos	1,520
102 Taronga Place	890
Total	16,038

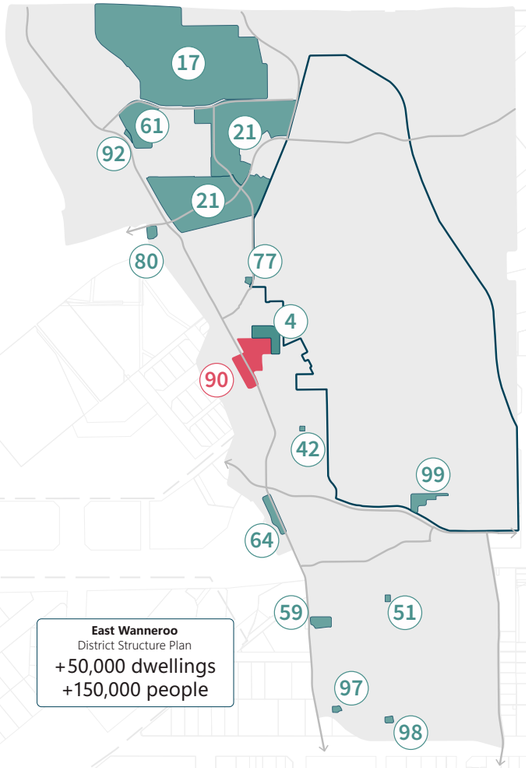
There are 22 active estates including 14 approved structure plans and 1 draft structure plan in the southern area of the City, however many of these are small estates.

Approximately 60,000 dwellings are anticipated to be developed within the lifetime of the structure plan areas, including an expected 55,000 dwellings to be developed in East Wanneroo.



Butler-Jindalee
District Structure Plan
+4000 dwellings
+10,000 people

Anticipated Dwelling Yield	
Structure Plan	Yield
2 Clarkson Activity Centre	186
13 Mindarie Keys	61
27 Butler Ridge	140
33 Clarkson Lot 16	n/a
38 Butler Brighton Village	n/a
60 Alkimos Marmion Ave	924
86 Agora Village	
71 Jindalee Primary School	n/a
78 Jindalee Coastal Village	207
79 Tamala Park	1,596
84 Jindee	1,121
87 Butler District Centre	659
88 Jindalee North	705
Other Residential Development	Yield
Quinns Rocks	8
Total	5607



East Wanneroo
District Structure Plan
+50,000 dwellings
+150,000 people

Anticipated Dwelling Yield	
Structure Plan	Yield
4 East Wanneroo Cell 2 - Sinagra	600
17 Neerabup	n/a
21A Banksia Grove	519
21B Carramar South	57
42 Hocking Neighbourhood Centre	n/a
51 Darch Neighbourhood Centre	
59 Kingsway	6
61 Carramar Flynn Drive	625
64 Woodvale	n/a
77 Ashby Neighbourhood Centre	24
80 Drovers Place Precinct	197
92 Woodland Vista	39
97 Girrawheen Blackmore	42
98 Hainsworth Girrawheen	8
99 Gnagara Rural Community	n/a
Draft Structure Plan	Yield
90 Wanneroo Town Centre ACP	834
Other Residential Development	Yield
Tapping	103
Pearsall	145
Landsdale	1367
Darch	491
District Structure Plan	Yield
East Wanneroo	50,000
Total	55.057

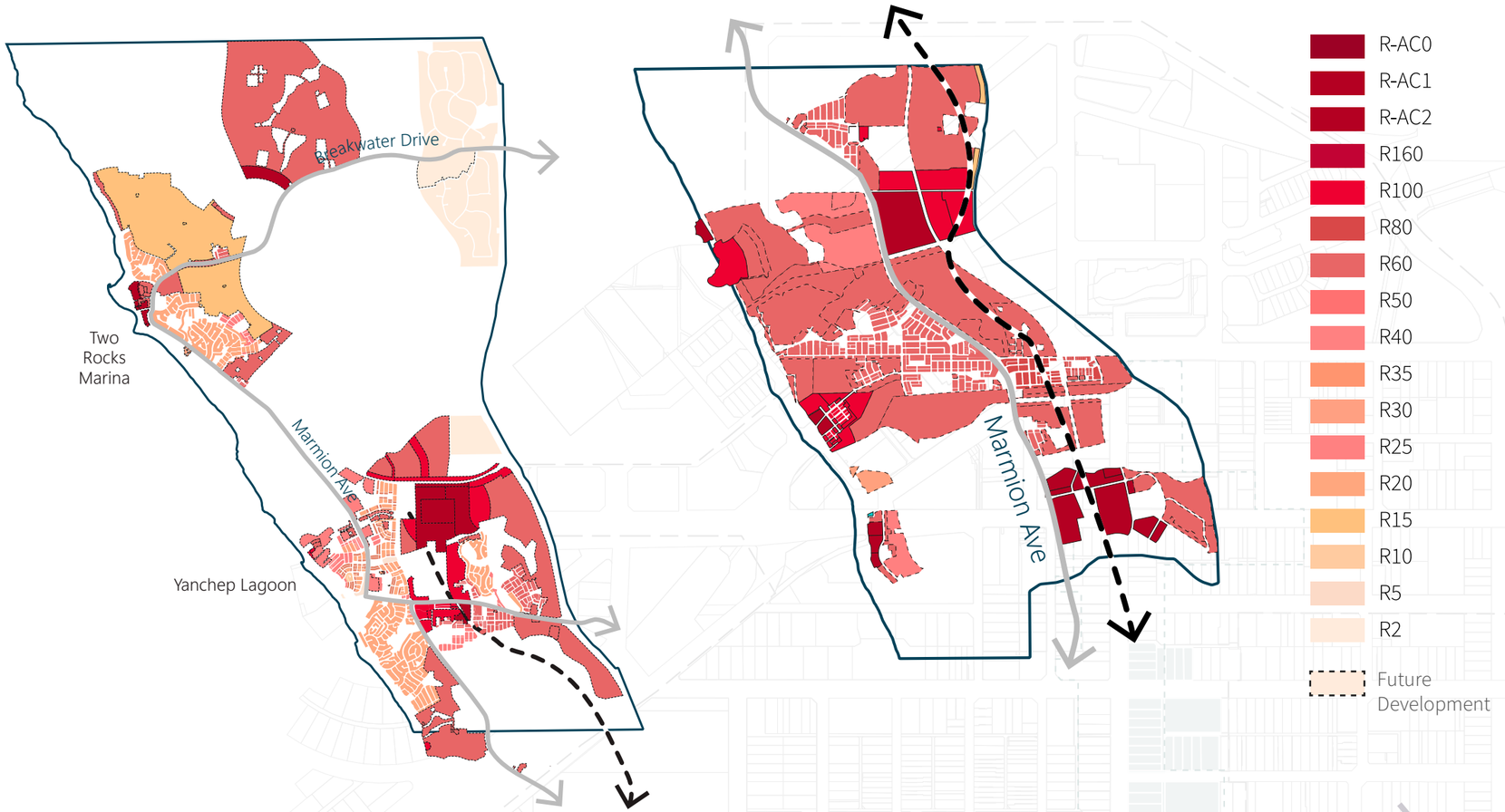
STRUCTURE PLAN AND ZONING ANALYSIS

From the following analysis it is apparent that there exists ample capacity of existing zoned land in Wanneroo to accommodate the required number of new dwellings over the next 15 years and beyond. In addition, there is significant potential for infill development.

The urban infill capacity for existing residentially zoned land has been determined in the following tables, as well as the potential number of new dwellings that can be developed on vacant land in accordance with the R-code of each approved structure plan.

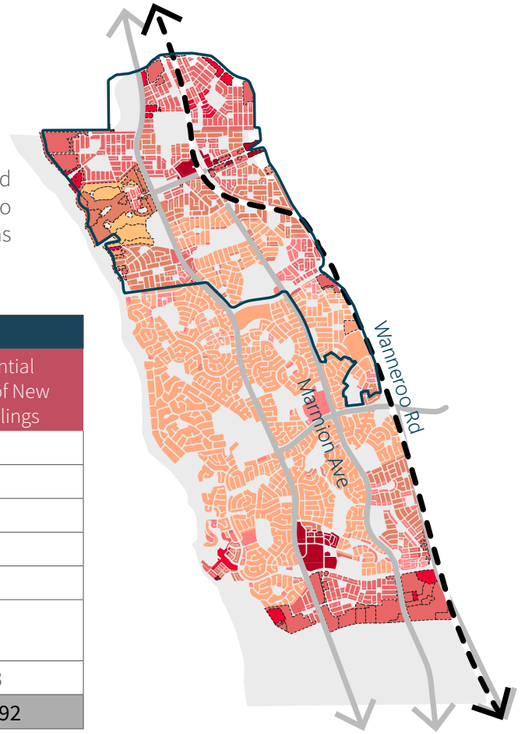
The methodology used to determine the infill dwelling capacity applies the relevant R-Code over land in the Scheme area to determine the maximum number of dwellings that could be achieved (latent capacity). 30% is then subtracted from this figure to account for land needed for roads, open space, infrastructure, and site constraints ensuring the yield reflects realistic, developable capacity rather than a theoretical maximums.

Development Capacity			
	Existing Number of Dwellings	Potential No. of Infill Dwellings	Potential No. of New Dwellings
Two Rocks	1,635	2,094	31833
Yanchep	4,317	855	21864
Alkimos	3,832	0	26061
Eglinton	1,423	7,232	25708
Total	**11,207**	**10,181**	**105,466**

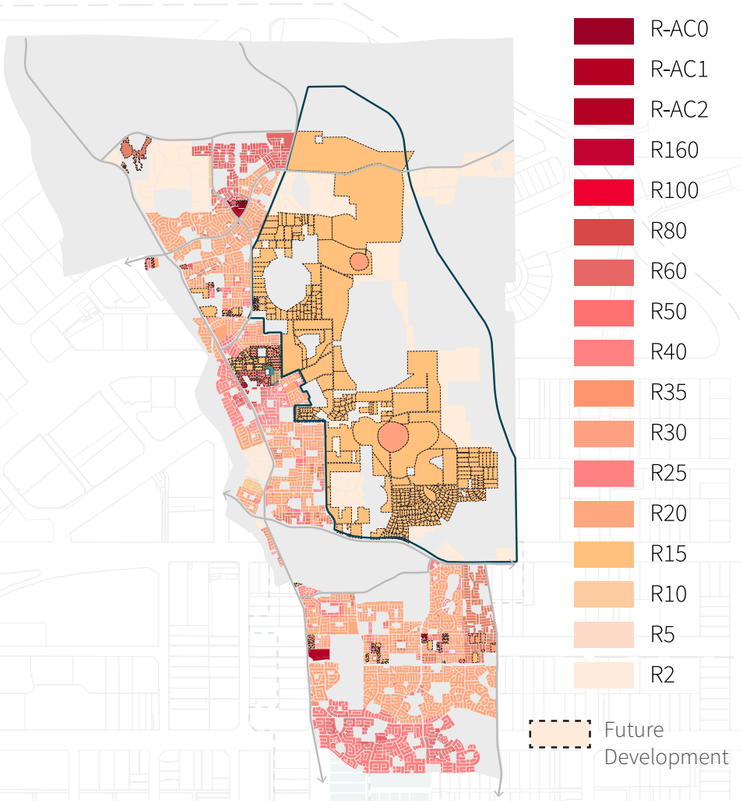


NOTE - These figures are gross figures and are indicative only. They do not take into account additional R-Code requirements such as frontage sizes, plot ratio, etc.

Development Capacity			
	Existing Number of Dwellings	Potential No. of Infill Dwellings	Potential No. of New Dwellings
Jindalee	1,478	1,712	4559
Butler	5,096	1,554	237
Quinns Rocks	3,398	1,079	8
Merriwa	2,335	139	0
Ridgewood	1,797	3,142	395
Mindarie - Tamala Park	2,863	1,125	731
Clarkson	5,608	901	4963
Total	**22,575**	**9,653**	**10,892**



Development Capacity			
	Existing Number of Dwellings	Potential No. of Infill Dwellings	Potential No. of New Dwellings
Carabooda - Nowergup - Neerabup - Pinjar	308	1,080	3104
Carramar	2,431	931	542
Banksia Grove	4,024	3,854	187
Ashby	1,236	9	414
Sinagra	1,112	233	2241
Tapping	3,246	295	298
Wanneroo	5,049	**15,550**	8341
Wangara - Mariginiup - Jandabup	2,814	1,490	23096
Hocking	2,485	193	0
Pearsall	1,656	120	0
Madeley - Wangara - Woodvale	2,814	16	138
Darch	2,264	271	242
Landsdale	4,872	1,208	864
Marangaroo	3,829	1,272	0
Alexander Heights	2,822	0	0
Girrawheen	3,679	**16,790**	0
Koondoola	1,478	**4,760**	0
Total	**46,119**	**48,072**	**39,467**



GREENFIELDS CAPACITY AND RESIDENTIAL EXPANSION

Greenfields Areas

There is a total of approximately 5600 ha of undeveloped land earmarked for urban development and/or expansion - greenfields land. These areas are earmarked for residential expansion in approved and draft local structure plans, as well as district structure plans such as East Wanneroo District Structure Plan.

The majority of this land is located in the northern corridor of Wanneroo. If developed at 10 lots per ha (low density residential development), this is expected to deliver approximately additional 42,000 lots.

Greenfields Development Scenarios	
	Expected Yield*
Low Density @ R10	42,000 lots
Medium Density @ R40	190,000 lots
High Density @ R80	350,000 lots

* 25% of the total amount of land have been deducted to account for required POS and services

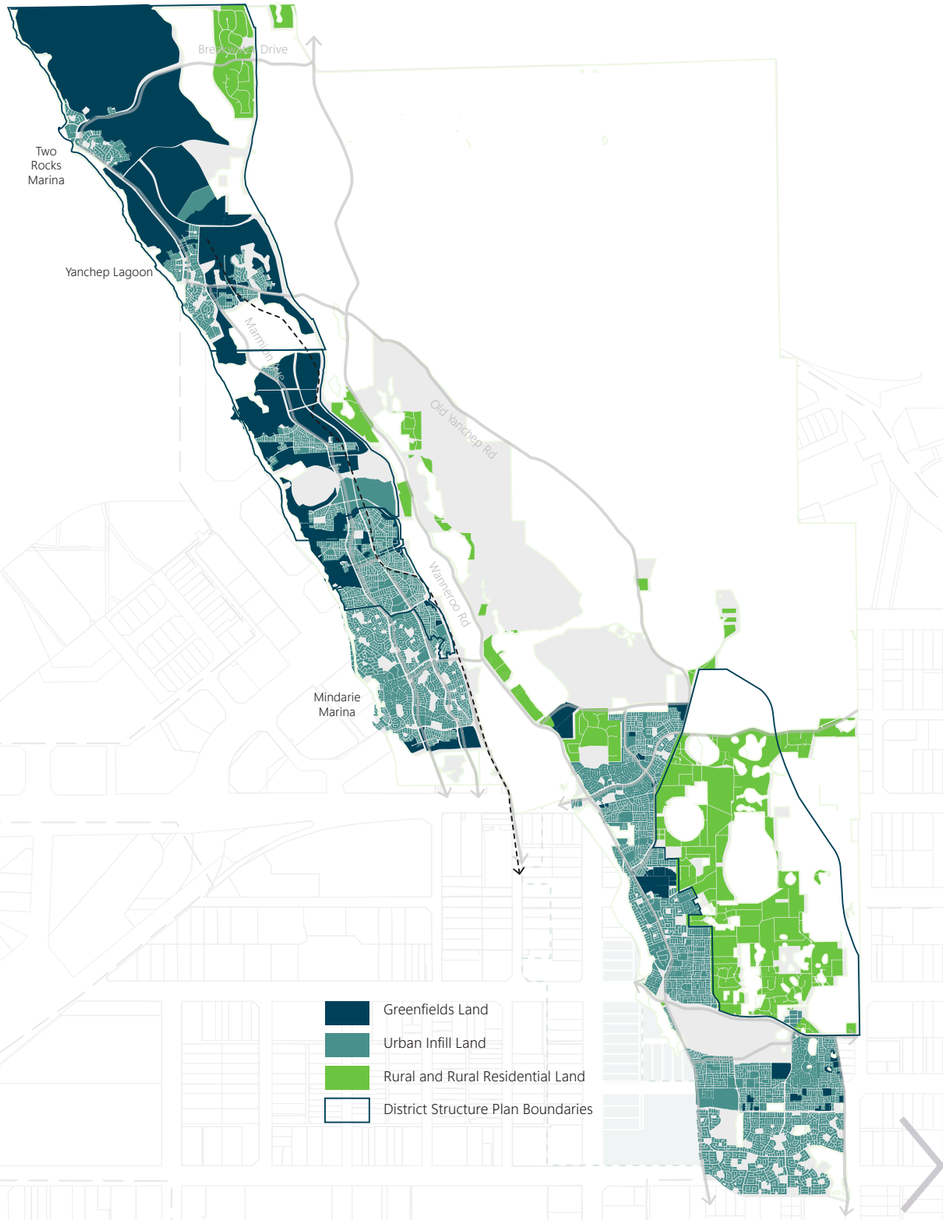
Rural and Rural Residential Land

The City of Wanneroo has approximately 5,100 ha of rural and rural residential zoned land.

According to the Department of Planning, Lands and Heritage's Development Control Policy 3.4 - Subdivision of Rural Land, Rural Residential land is an area that provides for opportunities for a range of limited rural and related ancillary pursuits on rural-residential lots where those activities will be consistent with the amenity of the locality and the conservation and landscape attributes of the land. These are typically on lot sizes between 1 - 4ha.

The LPS Guidelines state that as part of the preparation of a LPS, for regional and outer metropolitan local governments, the capacity of additional dwellings to be accommodated on rural residential or rural land may also be considered.

However, SPP 2.5 seeks to protect and preserve Western Australia's rural land assets due to the importance of their economic, natural resource, food production, environmental and landscape values. It seeks to manage rural-residential growth and therefore limits subdivision of rural land unless a local government can demonstrate an absolute need to do so.



4.2

CITY OF WANNEROO - HOUSING STUDY

STAGING AND TARGETS

ANTICIPATED RESIDENTIAL DEVELOPMENT STAGING

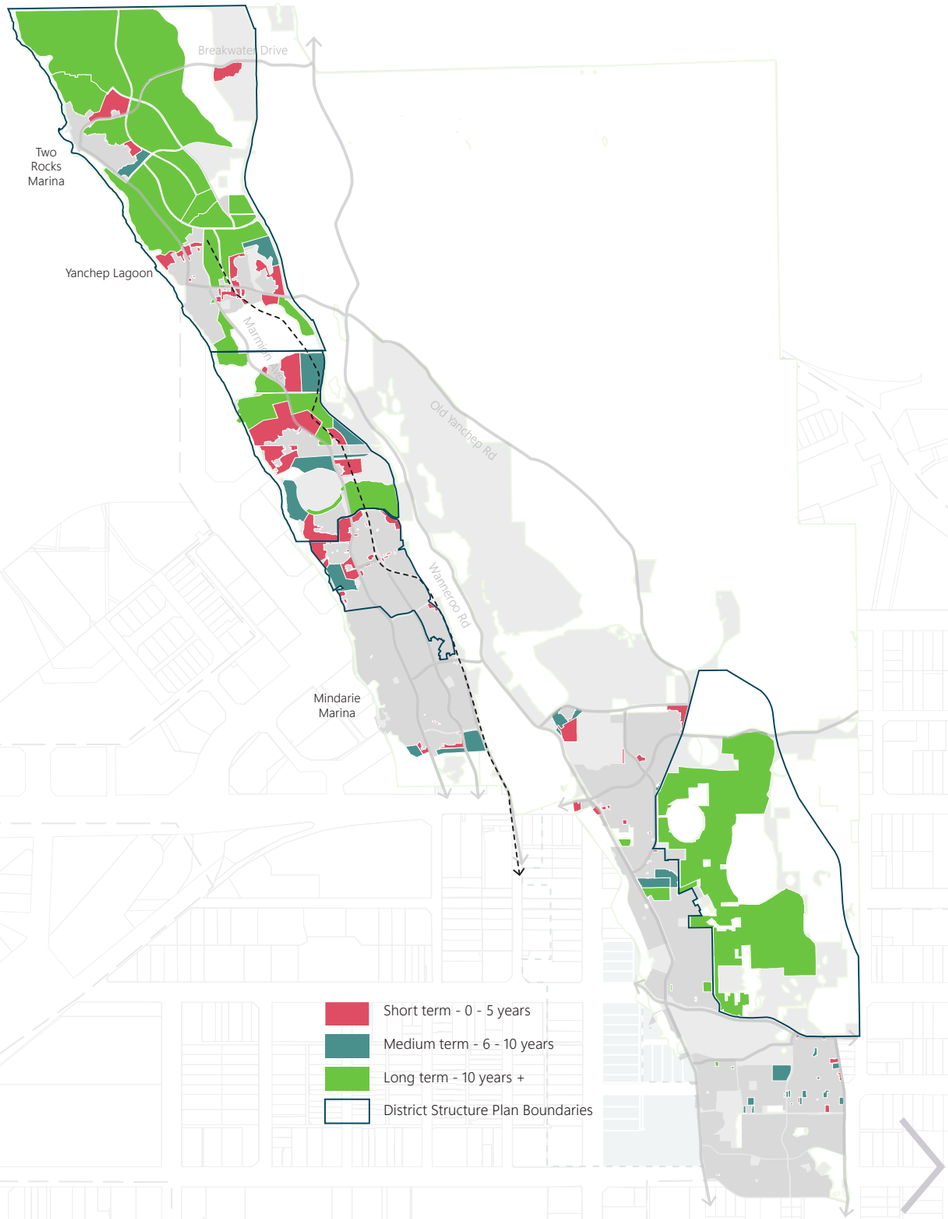
The Urban Development and Land Outlook (ULDO) is based on assessment of future land supply at all stages of the planning, zoning, approval, development and redevelopment pipeline. The ULDO database enables the monitoring of current land development projects in addition to the identification of likely future residential, industrial and commercial land development across Perth and Peel.

It enables and supports existing planning policies by giving a spatial context to future land development over the short (0-5 years), medium (6-10 years) and longer (10 years +) terms.

An analysis of the Urban Development and Land Outlook's approximate time-frames for development take-up has been analysed and a summary is illustrated in the table and the figure to the right.

Dwelling Growth - Anticipated Staging	
	Expected Yield*
Short Term	9,580 dwellings
Medium Term	11,624 dwellings
Long Term	69,351 dwellings

* These figures are based on the Urban Land Development Outlook Report 2020/21



PROGRESS TOWARD STATE INFILL DENSITY TARGETS

The NWSRPF 2018 (Perth and Peel @ 3.5million) requires 27,920 homes to be delivered across Wanneroo as 'urban infill' by 2050, which equates to approximately 20,000 dwellings by 2041

The State Government's infill density targets

By 2041, the City anticipates an additional 150,000 residents. This means approximately 54,500 additional dwellings will be required to accommodate this population growth.

The NWSRPF 2018 (Perth and Peel @ 3.5million) requires 27,920 homes to be delivered across Wanneroo as 'urban infill' by 2050. This equates to approximately 20,000 dwellings of the City's required 54,500 to be delivered as infill housing by 2041. This is considered to be an ambitious target given current patterns of residential development across the City.

Key locations for infill are required to be activity centres, urban corridors (i.e. transit corridors) and train/bus station precincts.

The City's Local Planning Policy 3.1 - Local Housing Strategy Implementation was prepared in 2018 with the aim to encourage infill development and thus contribute toward meeting the State's infill targets. LPP 3.1 identified a number of existing suburbs considered to be appropriate locations for urban infill development.

These Housing Precincts included the suburbs of Wanneroo, Koondoola, Girrawheen, Yanchep, and Two Rocks. Densities in these Precincts were increased from an average of R20 to up to R60.

The Housing Precincts are suitably located within walking distance to retail amenities, with some access to education and recreation amenities. In general they appear to be aligned with the 10 Urban Consolidation Principles for infill development set out in Perth and Peel@3.5 million.

Progress toward achieving density targets

The net infill rate[6], which accounts for demolition activity for the Perth metropolitan and Peel regions, was approximately 44% in 2020, up from 43% in 2019, 38% in 2018, and 42% in 2017 (Urban Growth Monitor, 2022).

The actual proportion of new dwelling creation that occurs in infill areas is expected to vary from year to year. Fluctuations can be attributed to factors such as dwelling demolitions, the number of background and major infill projects completed in the reporting year and the impact of major greenfield land releases (Urban Growth Monitor, 2022).

If applying the Perth and Peel rate of 44% to new dwellings to be developed as infill, projections indicate that the City will deliver approximately 24,702 dwellings of its infill target by 2041.

However, based on past building approvals from 2017 (lagged by 12 - 18 months), and expected future development the true localised infill rate for the City of Wanneroo is extremely low at an average of 4 - 10 dwellings per suburb per year except for Wanneroo, which produces an average of 11 - 20 infill dwellings per year (Forecast id., 2021). This is mostly dispersed infill development.

This is a negligible rate of infill and one that will result in not achieving the State's set density targets for the City.

[6] Net infill refers to dwellings constructed within infill areas minus the number of dwellings removed from the existing stock through demolition(Urban Growth Monitor, 2022).

The feasibility of increasing residential density in infill locations should be considered in the context of the City's changing housing trends such as median house prices and local housing propensity / preferences

The reason for this low take-up of urban infill can be attributed to a number of factors, including the following:

(1) With the large amounts of greenfield land consistently being released over the last number of years, development tends to occur in new estates in greenfields areas rather than in established urban areas (Forecast id., 2021). New dwellings tend to be a more feasible option, especially for first home buyers and young families and this competes with the attractiveness of infill development in existing urban areas.

(2) The City's existing urban areas are comparatively new and development of these areas tended to produce smaller lots compared to those in the older, more established suburbs across metropolitan Perth. This means that for a larger infill project to be feasible, a developer will potentially need to acquire a number of adjoining lots which could prove difficult given the areas' fragmented ownership and the propensity of their residents to age in place.

(3) The Department of Water have since advised the City that the State's infill sewerage program will not be including Yanchep and Two Rocks in the near future as funds have been diverted to higher priority areas elsewhere. Deep sewerage is essential to allowing infill development to occur, and the DoW have advised that there is currently no timeline for deep sewerage to be constructed in these suburbs.

(4) The suburbs or areas considered appropriate for infill residential development (including the identified Housing Precincts) are mostly considered lower socio-economic areas, with owners tending to have less available capital to fund such ventures/projects themselves. In addition, for mixed use developments, in neighbourhoods where vacancy rates are high, private developers cannot generate adequate returns on investment to justify the investment risk.

Notwithstanding the above, key locations for future residential infill development or the introduction of medium to high density residential or mixed use development remain the Wanneroo Town Centre, Yanchep Strategic Metropolitan Centre, a number of smaller town centre locations such as Koondoola Local Centre, and the remainder of the Housing Precincts.

Infill or redevelopment projects are generally more opportunistic than systematic. If a development proposal is deemed feasible from a regulatory, market, and financial perspective, it will tend to be pursued, regardless of whether other, potentially better, opportunities are available elsewhere (California's Institute of Urban and Regional Development, 2008).

To this end, the feasibility of increasing residential density in infill locations in the foreseeable future needs to be considered in the context of the residential housing market's performance, the cost to Government (local and State), vacancy rates, median house prices and local housing propensity / preferences.

As the City's suburbs establish and mature, infill development in the City of Wanneroo will occur naturally. In 15 -20 years' time, Wanneroo's supply of greenfield land will start to become exhausted and larger tracts of undeveloped land will become increasingly scarce. Ageing land parcels and dwelling stock, changes in home ownership, and changing economic conditions will result in residential development ceasing to grow outward, which will in turn result in the commencement of urban consolidation.

It is anticipated that the more established and comparatively higher socio-economic urban areas such as Wanneroo, Carramar and Banksia Grove in the South and Mindarie, Quinns Rocks and Clarkson in the central north will lead the way to a more consolidated urban form.

4.3

CITY OF WANNEROO - HOUSING STUDY

IMPLICATIONS FOR THE CITY

RELEVANT FINDINGS

+150,000
dwelling capacity

City has ample capacity to accommodate new dwellings

The City's urban infill capacity for existing residentially zoned land is high, with an additional gross number of approximately 30,000 dwellings that are potentially able to be accommodated throughout the City.

In addition, vast tracts of land are earmarked for residential expansion through approved and draft structure plans that are in place. These areas are mostly located within the City's north, i.e. Two Rocks, Yanchep, Alkimos and Eglinton. The majority of this land has an approved residential density of R60.

In the northern corridor alone, a gross number of approximately 100,000 new dwellings is able to be developed in the future (subject to relevant requirements).

5,100 ha
rural land

Rural and Rural Residential land should be protected

The City considers its approximately 5,000ha of rural and rural residentially zoned land as assets to protect and enhance due to the importance of their economic, natural resource, food production, environmental and landscape values.

Given the significant new and infill residential development potential across the remainder of the City, the consideration of the limited supply of Rural and Rural Residential land for residential subdivision and infill will likely not be prioritised by the State in the short to medium term.

Nevertheless, any proposals for subdivision within these areas should meet the requirements of State and local policy and be considered in the context of existing land supply.

20,000
by 2041

City's will likely not reach its infill density targets by 2041

In addition to protecting valuable farming and environmental land, infill development is a valid response to a clear demand for new housing options in established areas in Wanneroo.

Replenishing and upgrading conventional housing with new stock on smaller allotments will help to contain the spread of urban residential development and meet consumer demand for contemporary living, which includes living close to jobs, shops and services.

An analysis of residential building approvals across the City from 2017 onwards however reveal that the City has a negligible infill rate, which is mostly attributed to the release of new greenfield land for residential development in the City's north. The City will therefore likely not reach its infill target of 20,000 dwellings by 2041.

LOCAL PLANNING STRATEGY - HOUSING STUDY

5 CONCLUSION AND RECOMMENDATIONS

5.1

CITY OF WANNEROO - HOUSING STUDY

LESSONS LEARNED

PRINCIPLES OF HOUSING DELIVERY IN WANNEROO

Population and economic growth, and demographic changes in the community trigger housing demand. Additionally, an ageing demographic influences the services and housing types required. The City's planning framework is limited in its ability to change broader issues such as transport, homelessness, demographic change and the provision of social housing. However, it can encourage the provision of more diverse housing through its policy framework (i.e offering incentives for certain dwelling types). A key priority of the City's LPS needs to be to encourage a diverse housing supply and support greater affordability, while protecting distinctive character in local neighbourhoods. Just as important as the supply of housing, is the need for the right type of housing in the right locations. Therefore, another key priority for LPS needs to be to support appropriate housing density within the City's activity centres, station precincts and urban transport corridors.

In addition, a number of relevant principles should be applied at each stage of the housing delivery process. These include (but are not limited to):

Urban Consolidation

The ultimate goal for housing delivery should be the creation of a more compact, walkable and efficient City / urban footprint, with a range of residential densities delivered in appropriate locations. This will not only secure existing natural areas and rural land but ensure better utilisation of existing and proposed infrastructure, increased city productivity from the co-location of more intensive jobs and housing, etc.

Ageing in Place

As people get older it can be challenging to remain living in their home rather than entering residential aged care, as the impacts of old age affect mobility and mental ability. In order to minimise the impact on aged care facility provision, ensure that residents have the option to remain in their home and community safely, independently, and comfortably, regardless of age, income, or ability level.

Affordability

Ensure that a proportion of new housing stock is suited to lower socio-economic budget by for instance ensuring the availability of a variety of housing options. Communities that do not have affordable housing can struggle to attract and retain workers that support the local economy such as retail, childcare, health and education, so it is important that we ensure housing is affordable to all of our residents.

Built Form and Character

Local distinctiveness, derived from the street pattern, services, landscape, climate, and socio-cultural traits (among others), should be at the heart of future infill development or renewal projects. The inclusion of these elements will create identity and engender community acceptance, and address the transition areas between infill areas and more traditional residential areas.

Liveability

Liveability is directly related to a resident's physical and mental wellbeing. With people spending more time at home for work and recreation, the liveability of the home and its surroundings has become more important than ever and it is therefore essential to ensure that residents have access to public infrastructure including parks, community facilities, healthcare and recreational opportunities within a walkable distance.

Diversity

Ensure that housing stock is suited to the needs and means of the various population groups across the City. A lack of diversity often means that young adults seeking to live independently and older 'empty nesters' wanting to move to smaller accommodation are often forced to move away from their communities simply due to a lack of suitable accommodation.

URBAN RENEWAL AND CONSOLIDATION DONE RIGHT

The 'Missing Middle'

Perth, [and more so the outlying metropolitan regions such as Wanneroo], is a city with an entrenched preference for suburban living (Curtin University and Hames Sharley 2013).

Two divergent forms of redevelopment now characterize many cities in Australia, including Perth metro - high rise, high-density apartments, in areas of high land value; and small scale, low-density infill (Renouf et al. 2020, 12) that obviates risk. The latter defines development patterns typically found in the City of Wanneroo. Because of this polarization, commentators recognize that many cities have a 'missing middle.' The 'middle' refers to high-quality medium-density' multi-unit or clustered housing types (Opticos 2018).

Western Australia and Perth, in particular, has the lowest percentage of medium-density dwelling approvals (28%) of any other mainland State (Bankwest 2017).

Notwithstanding Activity Centre and Activity Corridor policies being the flagships of the Western Australian State Government Transit Oriented Development planning, a substantial volume of low-density urban infill development is occurring through the subdivision of suburban lots in Perth's inner and middle suburbs (Bolleter, Myers and Hooper, 2020).

This development is referred to as 'background' infill – namely, small projects that yield fewer than five group dwellings as per the WAPC's policy framework.

It differs from multi-unit medium-density development, which is aimed to 'plug' the missing middle because it involves the subdivision of land rather than the subdivision of airspace (Sharam, Bryant, and Alves 2015) and is typically lower density.

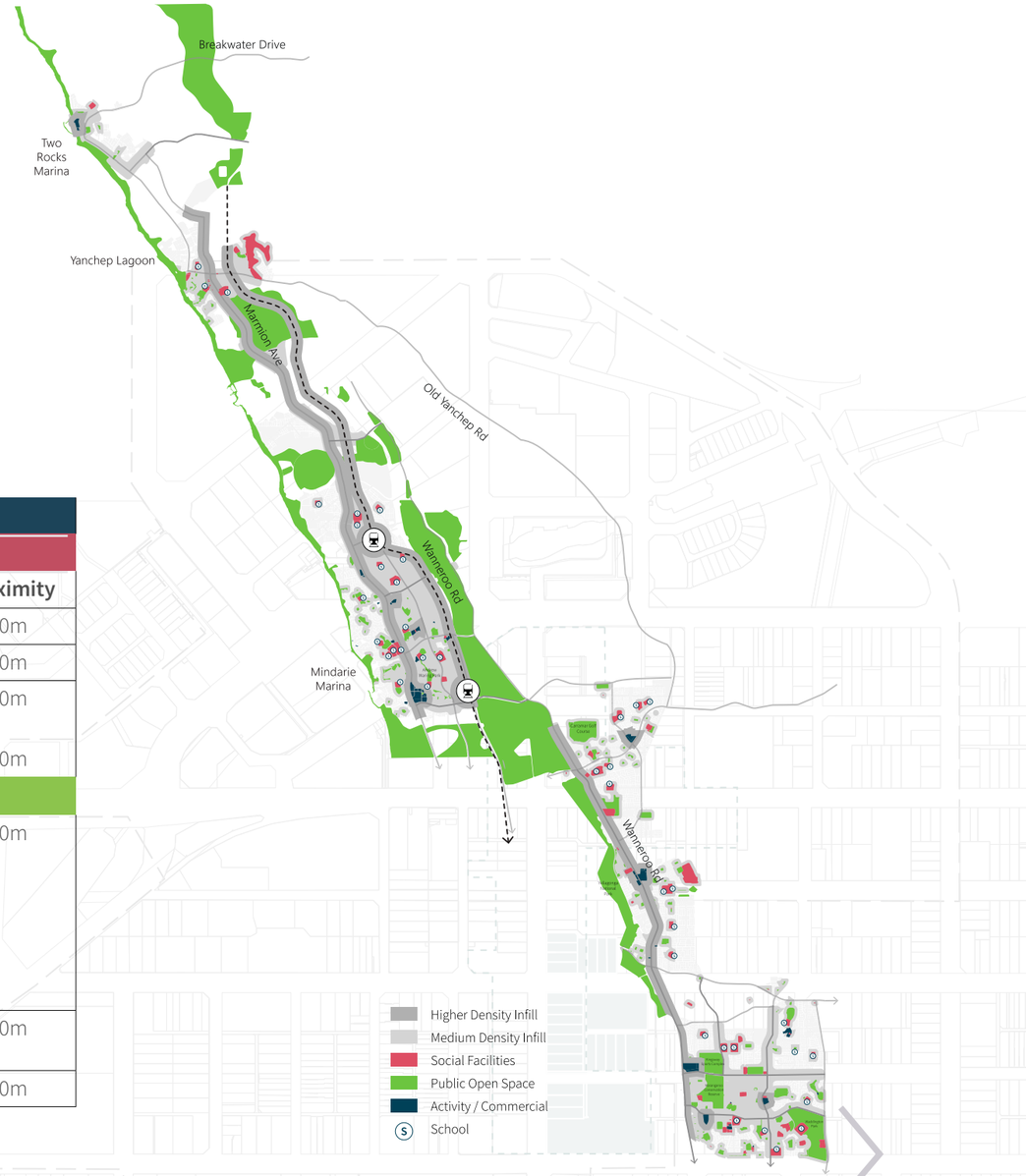
Background infill is a less desirable built form outcome not only because it tends to occur ad-hoc, but because it does not normally occur within activity centre catchments, nor within a walkable catchment of mass transit.

In addition, multi-unit medium density neighbourhoods in locations that are walkable and close to amenities aren't just for the younger generation. Well planned density can help to provide a range of housing sizes, styles, housing tenure and price options, and include flexible and adaptable housing for all ages and stages of life.

Recommended Density in Infill Areas

To this end, it is recommended that a distinction be made between background infill, medium density infill and higher density infill. As a general rule, the following criteria should be applied when considering the increase of density for infill development -

Criteria for Applying Increased Densities	
Higher Densities (R80 - R100)	
	Proximity
Existing Railway line	< 400m
Existing Rail stations	< 400m
Existing Commercial Areas Within Neighbourhood and District Activity Centres	< 400m
Main Transit Corridors	< 400m
Medium Densities (R40 - R60)	
Community Facilities • Schools • Public Open Space • Civic Buildings • Recreational facilities • Aged care facilities	< 200m
Existing Commercial Areas Within Local Activity Centres	< 200m
Commercial areas outside activity centres	< 200m



Areas where higher density residential infill is encouraged includes the City's main transit corridors, including the railway line, the southern section of Wanneroo Rd from Girrawheen to Tapping, and Marmion Rd from Mindarie to Two Rocks. Additionally, higher density is encouraged around existing rail stations as well as existing commercial areas within Neighbourhood and District Activity Centres. These areas are considered walkable and highly accessible via public transport.

Medium density infill is encouraged in close proximity to an array of community facilities (including aged care), local centres as well as public open space.

- Higher Density Infill
- Medium Density Infill
- Social Facilities
- Public Open Space
- Activity / Commercial
- (S) School







NOTE - Figures are indicative only

KEY RECOMMENDATIONS AND ACTIONS

	PRINCIPLE	RECOMMENDATION	POSSIBLE ACTIONS

1	Affordability	Encourage the development of various types of affordable housing in appropriate locations	• Collaborate with the State Government and developers to develop a robust, evidence-based, and integrated response to housing affordability in the form of a Housing Affordability Strategy:
			  • Set an overall affordable housing target of approximately 40% for new dwellings and specify targets to be met in relevant suburbs where affordable housing is most needed;
			  • Encourage the development of affordable housing in locations within the City which are characterised by significant socio-economic disadvantage such as Koondoola and Girrawheen.

2	Liveability	Ensure a high level of design and built form quality	• Consider including form based codes in the Scheme. A form-based code is a land development regulation that fosters predictable built results and a high-quality public realm by using physical form (rather than density) as the organizing principle for the code. • Prepare Precinct Plans for key areas to guide comprehensive future (re)development.
3	Urban Consolidation	Amend the Local Planning Framework to enable a more compact urban form	• Increased density around key strategic activity centres including rail stations and urban corridors - distinguish between high and medium density areas. • Remove dual density codes and adopt the higher R-Code in appropriate locations. • Incorporate existing structure plans into the new Scheme (LPS7). • Offer density bonuses in infill locations through the new Scheme. • Amend LPP 3.1 to include additional, targeted areas where infill density may be supported.

		Advocate the WAPC to review the NWSRPF	• In collaboration with the State Government, prepare a spatial Infill Development Strategy to provide the context for decision-making and to inform infrastructure investment:
			  • Identify evidence based targeted areas for additional housing and infrastructure provision.
			• Keep track of residential infill and identify trends over time as a means of tracking progress towards a connected city:
			  • Review of all activity centres, their walkability, and their proximity to schools every 5 years.
			  • Make a distinction between ‘background’ infill and ‘urban compaction’ in policy making going forward

	PRINCIPLE	RECOMMENDATION	ACTIONS
5	Ageing in Place	Enable Wanneroo’s ageing population to age in their own homes	• Enable zoning and infrastructure changes that could allow older adults to remain connected to their community such as walkability and access to social and recreational services • Develop a range of transportation services and mobility options in collaboration with Aged Care providers • Create a wider variety of housing supports and choices
		Enable Wanneroo’s ageing population to age in their own communities	• Locate retirement villages and aged care facilities in close proximity to areas of high levels of public transport, activity centres and amenity. Ensure walkability of these areas.
6	Character and Built Form	Protect existing character and amenity	• Achieve development form, scale and character that is appropriate to the context and moderates impacts on neighbouring properties. • Achieve building outcomes that promote excellent amenity for their interface to the public realm and for all neighbouring properties.
		Address design quality and built form outcomes	• Contribute to the neighbourhood character by facilitating suitable building typologies and street interfaces • Explore the adoption of Form based codes to protect and enhance character areas

CONCLUSIONS

Wanneroo occupies significant land to accommodate residential development growth with a high average density of residents per square kilometre. Growth is expected to continue for the next 15 - 20 years which will require further provisioning to ensure that infrastructure can keep up with demand.

Existing greenfield expansion areas and new transit orientated development will be key in delivering housing in the City over the next 15 years. There will however be more appetite for urban infill in the City's 'housing precincts' and more established suburbs when the existing amount of greenfields and large tracts of undeveloped land starts to become depleted.

When this does occur, the majority of the City's infill housing will likely be provided within station precincts and along transit corridors, within activity centres, urban corridors and in proximity to areas with high-quality open space.

The City's new station precincts of Alkimos, Eglinton and Yanchep, and established station precincts, Clarkson and Butler, are expected to accommodate a significant portion of the City's growth in the future. The City's activity centres of Wanneroo, Clarkson, Alkimos and Yanchep likewise has significant potential for medium to higher density housing.

Investigations into higher density housing along sections of the City's main transit corridors (i.e. Marmion Avenue & Wanneroo Road) can also support housing diversity, in line with the State's North West Sub-Regional Framework. However, conversations with the State Government need to be had with regard to reviewing residential infill targets and seeking a more pragmatic way of delivering high quality residential infill in appropriate locations.

It is also important for policy development that there is a full understanding of the financial costs to government, and ultimately the community, in meeting future urban development through greenfield or urban consolidation projects, or both.

Finally, the potential for innovative housing products to meet affordability, ageing in place, increased density and housing diversity objectives should be explored.

