Local Commercial and Activity Centre Strategy 2023

The City of Kwinana acknowledges the Traditional Custodians of the land in which we live, work and play, the Nyoongar people, and we pay our respect to Elders past and present.

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1 Summary

The City of Kwinana (City) has experienced considerable economic, development and population growth since the adoption of the City's first Local Commercial and Activity Centre Strategy in 2014 (LCACS 2014).

It is anticipated that the City will continue to undergo a high rate of growth and it is forecast that retail and commercial land uses may increase by an additional 170,000m² (a 60% increase on the 2021 floor area) by 2042. This growth in commercial development and adoption of State Planning Policy 4.2 - Activity Centres, has necessitated the preparation of LCACS 2023 to guide the development of commercial and activity centres.

LCACS 2023 is based on robust modelling and analysis to ensure that a hierarchy of activity centres is distributed throughout the City to ensure that frequently required retail and service needs are situated in local centres and less frequently required retail needs and services are situated in higher order centres distributed throughout the City. The Activity Centre Hierachy is shown in Figure 1.

The recommended Activity Centre Hierarchy in LCACS 2023 is based on the current network of activity centres outlined in LCACS (2014). The Kwinana City Centre will remain the principal retail and service centre suitable for specialised retail, entertainment, medical services, and office uses.

Strategic Objectives

The strategic objectives of LCACS 2023 are as follows:

- Facilitate the provision and responsive evolution of a viable and conveniently accessible network of functional and attractive activity centres to serve the needs of the population over time. This entails:
  - An assessment of the future retail needs of the population and providing guidance to the market in relation to the population forecasts and estimated future trade potential of all existing and planned activity centres through a Needs Assessment.
  - Defining and consistently implementing a hierarchy of mixed use activity centres that aim to achieve a balance between recommending floorspace requirements and providing the private sector with the flexibility to choose the location of location of their operations.
  - Ensuring the Kwinana City Centre remains the City's largest and most complex activity centre hosting higher-level commercial, civic and cultural activities, but also supporting mixed land use/ activities in other activity centres appropriate to their role in the hierarchy
  - Permitting the development of new centres only when they clearly fill a gap in the defined network.
- Encourage and facilitate the improvement of existing activity centres to enhance their utility and attractiveness to the community. This involves:
  - Allowing for development or changes in use that will improve the condition and/ or performance of an existing local activity centre.
  - Taking a pro-active role in encouraging and facilitating improvement to existing activity centres.
  - Ensuring that enough land is provided for the long term floorspace potential of planned mixed use activity centres.
- Encouraging a high standard of design and development of new activity centres in accordance with relevant State-level policies. This includes liaising with developers and other key stakeholders during the planning and design process and exercising development control powers to ensure centres are sustainable and align with urban design principles. Encouraging and facilitating compatible

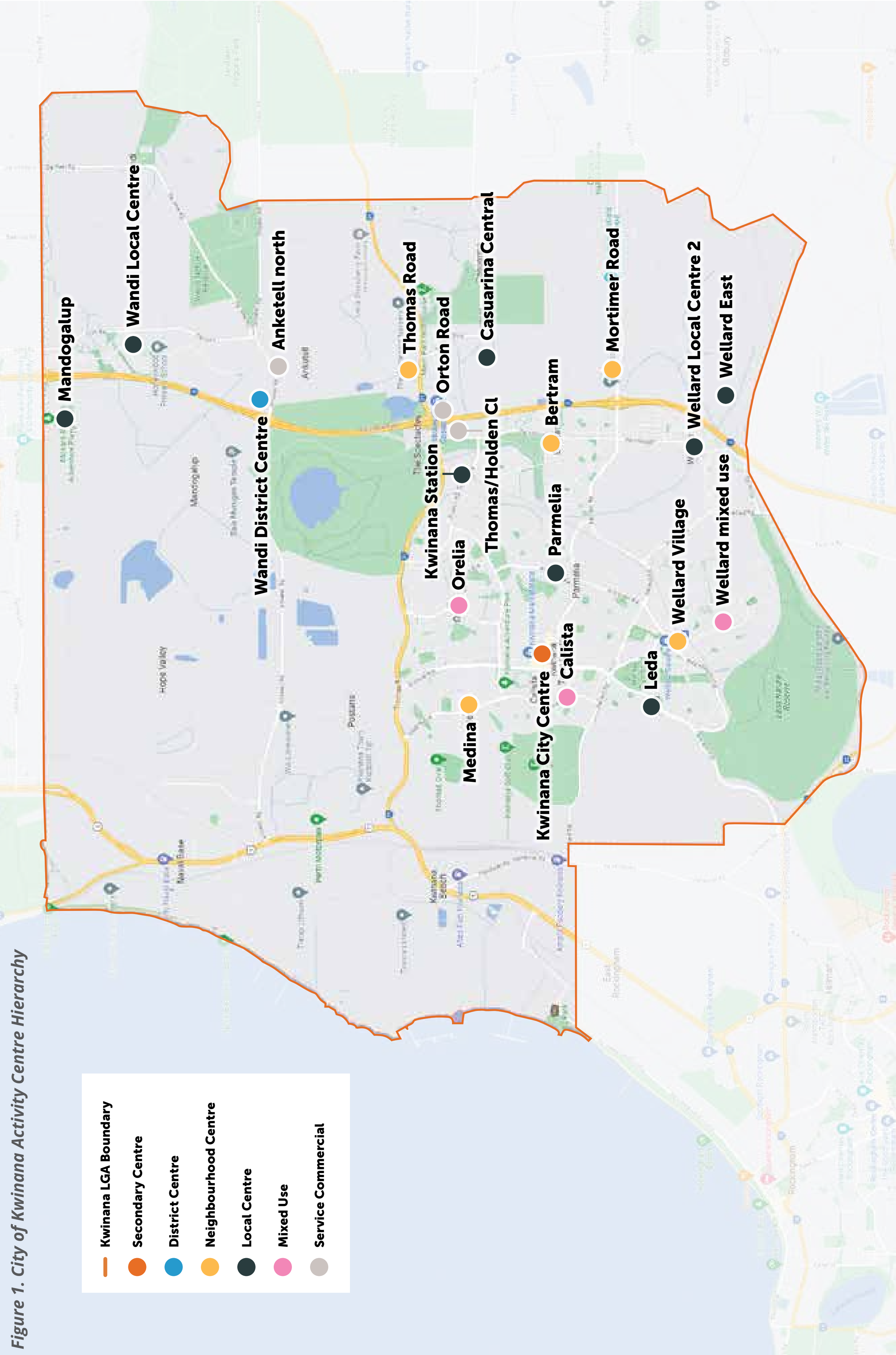

Figure 1. City of Kwinana Activity Centre Hierarchy

SUMMARY

non-retail uses in activity centres at all levels in the hierarchy to improve their convenience and utility.

- Encouraging and facilitating development of higher density housing in the vicinity of activity centres to enhance centre viability, housing affordability and reduce car dependence.
- Enhance and develop Kwinana's local and neighbourhood centres to meet the different needs of the local community, including access to goods and services and social interaction.
- Enhance the Kwinana City Centre as the primary place for retail shopping, commercial, educational, entertainment, civic and recreation activities.

Needs Assessment

The Needs Assessment conducted as part of the preparation of LCACS 2023 determined the commercial floorspace required in the Activity Centre Hierarchy and identified suitable locations to provide for demand as new residential areas develop.

The floorspace estimates provided should be interpreted as flexible floorspace targets that are relevant to a modelled population. They are an indicator of market potential over time and can guide the City of Kwinana's decision making with regards to development of its activity centres. These can be related to the population forecasts to understand how timing may fluctuate based on the population level achieved at a certain point in time (if the projection for population in 2032 were achieved by 2027, the supportable floorspace could be greater in 2027).

Figure 2. City of Kwinana - Activity Centre Hierarchy (LCACS 2023)

Centre Classification	Centre Name	2027		
		Shop Retail	Other Retail	Non-Retail
Secondary	Kwinana City Centre	37,053	3,217	27,899
District	Wandi District Centre *	5,159	4,093	5,004
Neighbourhood	Bertram	2,015	-	1,315
Neighbourhood	Medina (Pace Road)	3,500	-	5,323
Neighbourhood	Thomas Road (Anketell South)	-	-	-
Neighbourhood	Mortimer Road (Casuarina South)	3,825	356	3,581
Neighbourhood	Wellard Village	8,203	2,335	1,736
Local	Leda	927	194	110
Local	Parmelia	724	-	400
Local	Casuarina Central	-	-	-
Local	Wandi	1,636	-	1,188
Local	Mandogalup	1,242	-	901
Local	Kwinana Station	572	-	415
Local	Wellard Local Centre 2	-	-	-
Local	Wellard East	-	-	-
Mixed Use	Orelia	357	-	1,345
Mixed Use	Calista			
Mixed Use	Wellard Mixed Use	1,134	-	823
Service Commercial	Orton Road	4,000 (Costco)	9,680	-
Service Commercial	Anketell North	238	-	206
Service Commercial	Thomas Road / Holden Close	-	350	200

* Wandi District Centre- A total floor area up to 20,000m² shop retail floorspace is feasible with appropriate evidence of need and net benefit to the community, as per SPP4.2 Implementation Guidelines.

Source: LUES 2015, City of Kwinana 2022, WA Tomorrow 2021, Pracsys 2022

Floorspace and Employment Projections

Required retail and non-retail floorspace for the City of Kwinana has been estimated for high and low scenarios. The high scenario is a hypothetical scenario representing turnover that each centre could achieve based on size and distance from dwellings, while the low scenario is an estimate of future turnover levels based on the current reported and estimated turnover levels of existing centres.

The high scenario has been used to develop the Activity Centre Hierarchy floorspace estimates set out in Figure 2 as it allows greater flexibility for developers to meet demand. It is likely that continued population growth and expansion of centres in surrounding areas will encourage a competitive response from centres within the City that will support improved performance required to achieve the high scenario.

2032			2037			2042		
Shop Retail	Other Retail	Non-Retail	Shop Retail	Other Retail	Non-Retail	Shop Retail	Other Retail	Non-Retail
38,480	2,785	31,605	42,427	3,035	37,684	49,854	3,316	45,531
5,360	3,510	5,520	6,014	3,953	6,381	7,246	4,488	7,522
2,093	-	1,517	2,393	-	1,859	2,910	-	2,317
3,500	-	5,660	3,500	-	6,162	3,684	-	6,741
2,392	328	2,510	2,606	369	2,883	3,092	416	3,370
3,873	306	3,954	4,446	349	4,591	5,413	399	5,443
8,421	2,064	2,547	9,462	2,341	3,903	11,265	2,660	5,676
927	176	199	1,000	193	343	1,179	212	528
760	-	473	858	-	596	1,032	-	759
896	-	650	1,019	-	796	1,238	-	991
1,738	-	1,355	1,904	-	1,628	2,303	-	1,990
2,026	-	1,096	2,232	-	1,416	2,732	-	1,846
598	-	473	675	-	569	812	-	697
1,365	-	131	1,563	-	355	1,896	-	654
1,439	-	139	1,640	-	374	1,980	-	685
369	-	1,381	404	-	1,438	473	-	1,513
1,153	-	934	1,293	-	1,119	1,537	-	1,361
4,000 (Costco)	18,325	-	4,000 (Costco)	20,707	-	4,000 (Costco)	23,568	-
244	-	230	266	-	268	316	-	318
-	350	200	-	350	200	-	350	200

Total Shop/Retail floorspace in the City of Kwinana is predicted to grow by approximately 30,000m² in the low scenario and 50,000m² in the high scenario. Other Retail floorspace is predicted to grow by approximately 13,000m² in the low scenario and 31,000m² in the high scenario. Non-Retail floorspace is projected to increase to 81,000m² and 90,000m² in the low and high scenario, respectively.

These projections are slightly lower than LCACS 2014 for Shop/Retail and significantly lower for Other Retail, with LCACS 2014 projecting only until 2031[1]. This slightly more conservative forecast is considered appropriate as LCACS 2014 indicated approximately an additional 12,000m² Shop/Retail floorspace and 15,000m² Other Retail by 2021 than what was actually developed. The current performance of centres and developments in surrounding areas are likely contributing to these discrepancies, along with developers seeking to develop floorspace outside of planned centres.

Employment estimates have been developed for both low and high scenarios. It is estimated that by 2042 the low scenario will contribute an additional 2,315 jobs while the high scenario will contribute an additional 3,446 jobs (Figure 3).

The City's Employment and Economic Development Study identified the need for 12,000 jobs by 2036 to maintain the City's Employment Self Sufficiency level, of which 33% would be population driven. The City's Activity Centre Hierarchy would contribute approximately 21% (high scenario) or 13% (low scenario) to the 12,000 jobs target, respectively. This is seen as an appropriate number given some population driven employment will be provided at light industrial areas that are not considered as part of this this analysis.

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Kwinana City Centre

The Kwinana City Centre is the primary centre in the Activity Centre Hierarchy and the City should ensure that this primacy is retained. The current performance of the Kwinana City Centre has been identified as low[2] and there will likely need to be a collaborative approach between the City and key stakeholders in the Kwinana City Centre to improve the centre's performance.

A summary of key focus areas for supporting the Kwinana City Centre in achieving the High Scenario floorspace estimates, includes:

- Encouraging office development to occur in the Kwinana City Centre to create day-time activation.
- Facilitating entertainment, café/restaurant, recreation and cultural uses in the Kwinana City Centre to promote night-time activation and increased liveability
- Encouraging any future redevelopment of the Kwinana Marketplace to connect with Chisham Avenue.
- Creating a stronger connection between civic and retail uses in the Kwinana City Centre to promote multi-use visits and pedestrian activity.
- Short term activation of Chisham Ave through alfresco dining, a strong link with Aldi and additional activities in the Market Square area between Chisham Ave and the Public Library.
- Offer family amenity or encourage proponents to provide family amenity.
- Support more residential offerings in the Kwinana City Centre to increase the local expenditure pool.
- Work with stakeholders to understand short-term accommodation potential identified in the Employment and Economic Development Study.
- Future development to the south of Challenger Ave should complement and not compete with current uses. It is recommended that Shop/Retail uses only be allowed to support residents and visitors to the future development and not act as an activity centre that supports daily shopping needs for a surrounding catchment. The purpose of this recommendation is to prioritise the connection of the Kwinana Marketplace and the Civic uses to the north of Chisham Avenue.

The other centres in the Activity Centre Hierarchy may develop ahead of the Kwinana City Centre, particularly if they are newer and have potentially been developed in

Figure 3. Additional Employment by Scenario

Scenario	2027			2032			2037			2042			Total 2042
	Shop Retail	Other Retail	Non-Retail	Shop Retail	Other Retail	Non-Retail	Shop Retail	Other Retail	Non-Retail	Shop Retail	Other Retail	Non-Retail	
High	711	207	291	1,026	309	534	1,307	356	822	1,839	411	1,196	3,446
Low	449	83	251	666	130	459	777	151	691	1,157	174	985	2,315

Source: DPLH 2016, Pracsys 2022

1 The high projections from LCACS 2014 were partially due to high State Government population projections that were not realised. Current projections apply a lower growth rate

2 See Section 8, Needs Assessment – Shop/Retail and Other Retail Floorspace Projections

a way that is more competitive with new centres outside of the City. This should be allowed as:

- They are playing a critical role in providing for the daily and weekly shopping needs of the City's residents.
- Limiting the expansion of other centres will not directly transfer the additional expenditure to the Kwinana City Centre, particularly if there are no changes to its current performance. The expenditure will be split between convenient centres outside of the City (centres near where people work) and the Kwinana City Centre, reducing the overall benefit to the City of Kwinana community and businesses.
- SPP 4.2 considers community benefit when assessing the suitability of a development. Allowing planned activity centres to expand based on community need achieves the highest community benefit.

Wandi District Centre

The Wandi District Centre is planned to reach a size up to 20,000m² shop retail floorspace subject to appropriate evidence of need and net benefit to the community, as per SPP4.2 Implementation Guidelines.

Planning an activity centre hierarchy needs to account for appropriate distribution of centres with high levels of access to support the goods and services needs of the population. The Wandi District Centre is a critical centre in the activity centre hierarchy and its successful development is a priority. The modelling undertaken for LCACS 2023 (Figure 2) provided a conservative estimate of viable floorspace at the Wandi District Centre, it is likely that higher levels of floorspace are supportable, particularly from passing traffic due to its location at the intersection of the freeway and Anketell Road.

Access to the centre may be affected by its proximity to the future Anketell Road / Kwinana Freeway interchange;.

The Wandi District Centre also fills an important gap in higher order centres between Kwinana City Centre and the Cockburn Gateway which are approximately 19km apart. The Wandi District Centre will reduce the need for local residents to travel longer distances to other centres and warrants a larger centre than was indicated in the original modelling (Figure 2).

SPP4.2 indicates that district centres serve populations of between 20,000 and 50,000; the City is already home to approximately 50,000m² and will grow to 80,000m² by 2041. Based on this population, a larger district centre is appropriate, and it is recommended that a centre of up to 20,000m² shop retail floorspace be allowed for with appropriate evidence of need and net benefit to the community, as per SPP4.2 Implementation Guidelines.

SUMMARY

Figure 4. Wandi District Centre Assessment

Attributes	Analysis
Purpose	Wandi is a district centre that will be the primary centre service the Mandogalup, Wandi, Anketell, Casuarina and Wellard. SPP4.2 describes district centres as having a greater focus on servicing the daily and weekly needs of residents. Their relatively smaller scale and catchment enables them to have a greater local community focus and provide services, facilities and job opportunities that reflect the needs of their catchments.
Users	The primary users of the Wandi District Centre are anticipated to be City of Kwinana residents who would not visit the Kwinana City Centre due to distance and barriers. Other major users include motorists from the Kwinana Freeway and the Anketell-Thomas Road Freight Corridor.
Destinations	Destinations should be positioned so that they encourage pedestrian traffic that passes in front of other businesses.
Access and Origins	Access will need to be clearly marked particularly once the Anketell Road / Kwinana Freeway interchange upgraded is completed. Origins (i.e. parking lots) should be located towards the boundary of the centre to encourage pedestrian foot traffic along activated frontages.
Control	The City of Kwinana should work closely with the developer to ensure that the centre activates key sites. Depending on the desired layout for the centre (main street or fully internalised shopping centre) there will be an opportunity to activate corner locations and key pedestrian traffic passages.
Retail Floorspace	The Wandi District Centre also fills an important gap in higher order centres between Kwinana City Centre and the Cockburn Gateway which are approximately 19km apart. The Wandi District Centre will reduce the need for local residents to travel longer distances to other centres and warrants a larger centre than was indicated in the original modelling. State planning Policy 4.2 indicates that district centres serve populations of between 20,000m² and 50,000m²; the City is already home to 50,000m² and will grow to 80,000m² by 2041. Based on this population, a larger district centre is appropriate, and it is recommended that a centre of up to 20,000m² shop retail floorspace be allowed for with appropriate evidence of need and net benefit to the community, as per SPP4.2 Implementation Guidelines.
Non-Retail Floorspace	Non-retail floorspace projections for the Wandi District Centre are based on benchmark ratios of retail to non-retail floorspace from District Centres. Expanding beyond this level of non-retail floorspace would be more suitable for certain uses of floorspace than others. For example, some service commercial uses (those suited to highway commercial) would be appropriate in greater concentrations in suitable areas of the Wandi District Centre. Other uses such as office-based uses that could be supported in the Kwinana City Centre should be limited to small scale offerings that cater to a more local catchment.

Neighbourhood Centres

A summary of implementation recommendations for each centre has been developed (Figure 5).

Figure 5. Neighbourhood Centre Recommendations

Centre	Analysis
Medina Neighbourhood Centre (Pace Road)	This centre appears to be turning over moderately well with a low vacancy rate. It is unlikely that the centre will grow significantly in future given that residential dwellings within the Study Area are already established and there is little vacant land to grow. It is recommended that increases in demand be allowed to increase the productivity of the centre's existing floorspace.
Bertram Neighbourhood Centre	The LCACS 2014 noted that this centre was intended to be a main street centre but was not necessarily performing as one. This may be due to the lack of active shop frontages and a fairly inhospitable microclimate, which could potentially be remedied with cafes and restaurants offering alfresco dining, parklets and street trees (see Section 5.7).
Wellard Village	This centre appears to be performing well and is in a suitable location adjacent to a train station and in close proximity to urban development. Neighbourhood centres can generally grow up to 10,000m² Shop/Retail floorspace; it is recommended that this centre be allowed to expand to this size in the long term to cater for nearby population growth. It is recommended that this be the maximum floorspace over the analysis period (pending review of this document and at the City's discretion) to ensure that the role of the centre does not change to that of a District Centre and begin to directly compete with the Kwinana City Centre.
Mortimer Rd (Casuarina South)	The analysis identified that this centre will require up to 5,800m² Shop/Retail floorspace in the long term. Any short-term development at this centre that is smaller than the identified demand should be developed in a way that will allow for future expansion.
Anketell South (Thomas Rd)	The Thomas Road centre is expected to support demand for up to 3,100m² Shop/Retail floorspace in the long term. This level is sufficient to support a single small to medium sized shopping centre with some specialty offerings. The proposed Shop/Retail development to the south of Thomas Road would essentially absorb the opportunity for the planned Thomas Road centre to develop with an anchor tenant. This is particularly the case when considering the Shop/Retail-like offering at the newly developed Costco. Out of centre Shop/Retail development is inconsistent with both the Local and State Planning Frameworks. SPP4.2 identifies that development at such a location may only be appropriate where it is: • sufficiently separated from nearby activity centres to minimise negative impacts to those activity centres (as demonstrated through the NB Test); • in proximity to existing housing at an average dwelling density of at least 25 dwellings per gross Urban Zone hectare within a 400m walkable catchment of the development; and • accessible to its catchment community by walking and cycling, minimising the need for additional private vehicle trips. The site south of Thomas Road does not meet any of those requirements, particularly given the only planned residential dwellings within a 400m walkable catchment are to the north of Thomas Road where the current planned centre is located.
Centre Evaluation	Refer to Appendix 3: Activity Centre Performance Monitoring and Evaluation for an overview of the evaluation questions, criteria and metrics that can be used to assess activity centre performance on an ongoing basis.

Local Centres

A summary of implementation recommendations for each centre has been developed (Figure 6).

Figure 6. Local Centre Recommendations

Centre	Analysis
Leda Neighbourhood Centre	This centre underwent a redevelopment which resulted in a significant reduction of its floorspace. As a result, the Centre has been reclassified from a neighbourhood centre to a local centre.
Orelia Local Centre	This centre is in poor condition and has underutilised vacant land. It is recommended that the City of Kwinana support the development and delivery of an approved structure plan that allows for retail and residential development at the site. This should be classified as a mixed use centre where residential uses area able to be developed alongside a small amount of shop retail. (ie; Multiple Dwelling with shop/office on ground floor).
Calista Local Centre	There are likely higher and better uses for this site, particularly given the current layout of the centre. Given the proximity of the centre to the Kwinana City Centre, redevelopment of the centre for residential uses would be appropriate. This should be classified as a mixed use centre where residential uses area able to be developed alongside a small amount of shop retail (ie; Multiple Dwelling with shop/office on ground floor).
Parmelia Local Centre	This centre currently provides predominantly health related services. Given its proximity to the Kwinana City Centre, additional Shop/Retail uses should be limited to supporting walkable daily shopping trips for the local population.
Wellard Mixed Use 1	This centre was proposed in the LCACS 2014 and is located at the intersection of Portobello Pde and Lambeth Circle. The Wellard Mixed Use will enable residential uses area to be developed alongside a small amount of shop retail.
Wellard Local Centre 2	This local centre has developed with non-retail uses including a childcare centre and medical centre. The analysis has identified that the local centre could support up to 1,500m² Shop/Retail floorspace in the long term.
Wellard East	A potential Local Centre was assessed in Wellard, to the east of the Kwinana Fwy. This area will require access to daily shopping goods and services as further residential development occurs. The analysis identified that a local centre of up to 1,500m² Shop/Retail floorspace could be supported in the long term.
Wandi Local Centre	Analysis indicated that the high levels of potential demand could support a local centre up to 1,500m² Shop/Retail floorspace in the long term.
Mandogalup	Analysis indicates increasing demand; a local centre of 1,500m² Shop/Retail floorspace could be supported in the long term. State Government has adopted a concept plan for the development for Improvement Plan 47. The majority of the land within Improvement Plan 47 will be developed for industrial purposes.
Casuarina Central	This centre provides a local offering between the Thomas Road and Mortimer Road neighbourhood centres. Analysis indicates that demand could support a smaller local centre up to 1,300m² Shop/Retail floorspace.
Anketell North	This local centre is in close proximity to the Wandi District Centre. Analysis indicates that only a very small local centre of approximately 300m² could be supported. It is not likely that this is viable as a standalone centre. It is recommended that the centre be zoned as Mixed Use and that these uses be allowed as incidental in the Service Commercial section of the Wandi District Centre to the south of Anketell Rd. Any offering would need to be supporting the local workforce only (e.g. a sandwich bar, café)
Centre Evaluation	Refer to Appendix 3: Activity Centre Performance Monitoring and Evaluation for an overview of the evaluation questions, criteria and metrics that can be used to assess activity centre performance on an ongoing basis.

Service Commercial Centres

A summary of implementation recommendations for each centre has been developed (Figure 7).

Figure 7. Service Commercial Centre Recommendations

Floorspace	Comments
East of Thomas Rd and Kwinana Fwy Interchange (and Orton Rd)	This area has a significant proportion of land which is zoned to support Service Commercial/ Bulky Goods uses. It is also home to a newly developed Costco that will act as an anchor for other businesses. It is seen as likely to become the primary Service Commercial area in the City. The component of this centre that is made up of the Orton Road centre identified in LCACS 2014 is unlikely to be required within the analysis timeframe for Service Commercial uses. It is considered appropriate should proponents of light industrial uses seek to locate there.
Thomas Road / Holden Close	This area was previously identified as a key service commercial area in the LCACS 2014. The development of the service commercial area to the west of this location is likely to attract any demand that may have gone to this location. Given the importance of having commercial land available in the long term, it is recommended that the current commercial zoning be maintained but be reviewed by the City every five years to see if it may be appropriate for the site to transition to mixed use or even residential zoning.
Guidance for Shop/Retail Uses	There are limited Shop/Retail uses permitted in these centres (refer to Clause 5.6.2 of SPP4.2). The only Shop/Retail uses that should be considered at these centres should support the local workforce and the daily needs of visitors (e.g. sandwich bar).
Service Commercial Uses Along Rockingham Rd	Industrial areas along Rockingham Rd currently support approximately 2,842m² of service commercial (bulky goods) uses within the area based on LUES data. This is down from the 6,399m² identified in LCACS 2014. It is expected these uses will be phased out as Westport develops. It is recommended the current zoning be maintained with allowance for incidental Shop/Retail uses such as sandwich bars to cater to the daily shopping needs of workers.
Westport	The Westport development may increase the potential demand for Service Commercial uses, particularly along Anketell Road.

SUMMARY

2
Introduction

Pracsys was engaged by the City of Kwinana to prepare LCACS 2023 for incorporation into the City's Local Planning Strategy (LPS).

LCACS 2023 includes:

- A strategic review of relevant local and state policies and frameworks.
- A floorspace demand and supply profile of the defined Study Area.
- Consideration of a mixed-use office precinct at the Thomas Road/Kwinana Freeway Interchange.
- A principle-led discussion at improving the economic activation of selected centres, including the Kwinana City Centre and Bertram Neighbourhood Centre.
- Benchmark gap analysis to justify greater diversity at the Kwinana City Centre.
- A Needs Assessment to determine supportable retail and non-retail floorspace based on expected future demand.
- An Activity Centre Hierarchy from 2022 to 2042 based on low and high growth scenarios.
- A discussion on the City's role in supporting centre development.

3 Current Policy Environment

3.1 State Planning Framework

State Planning Policy 4.2

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

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

SPP4.2 is used to inform the development of planning instruments such as Local Commercial Strategies and has three specific policy objectives:

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

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

- Support the overall precinct design objectives.
- Deliver net community benefit and not result in a loss of community service to residents.
- Provide an impact test for major developments.
- Ensure the activity centre network meets different levels of community need and enables employment, goods and services to be accessed efficiently and equitably by the community.
- Ensure the importance of active centres is reinforced, and out-of-centre development that undermines the hierarchy of activity centres is discouraged.
- Ensure new activity centres or the expansion and consolidation of existing activity centres does not unreasonably undermine existing centres.

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

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

South Metropolitan Sub-Regional Planning Framework

The South Metropolitan Sub-Regional Planning Framework is a part of the Perth and Peel @3.5 million suite of land use planning and infrastructure frameworks. The South Metropolitan Peel Sub-Region covers an area of almost 5,000km² and comprises the cities of Armadale, Cockburn, Gosnells, Kwinana, Mandurah and Rockingham, as well as the Shire of Murray, Serpentine-Jarrahdale and Waroona (Figure 8).

This framework sets out proposals to:

- Achieve a more consolidated urban form.
- Facilitate increasing the number of people living close to where they work with the identification of suitable sites for employment within the sub-region.

- Protect employment land from other competing land uses.
- Maximise the use of and add value to existing infrastructure, including transport, community/social and service infrastructure.

The City of Kwinana has been identified as a key area for housing growth due to its strategic industrial land and proximity to other strategic employment centres.

There are a number of key themes in the planning framework that are relevant to LCACS 2023, including:

- The need for an appropriate activity centre hierarchy to provide suitable access to goods, services and employment in the City.
- The need for a mix of commercial and community uses in activity centres to ensure appropriate provision of social infrastructure across the City.
- Ensuring there is appropriate provision of activity centres to contribute to the sub-region's employment self-sufficiency.

3.2 City of Kwinana Local Planning Framework

Local Planning Scheme No 2.

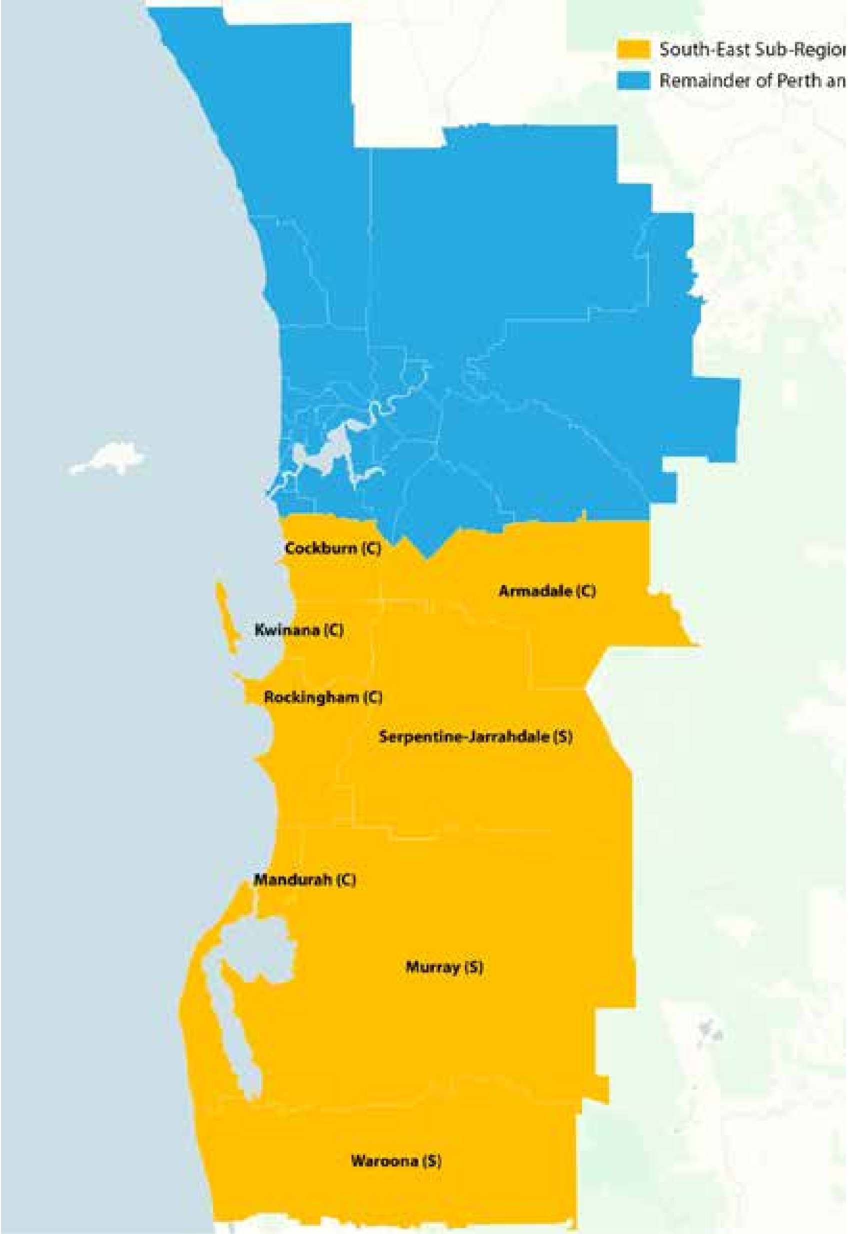
The City of Kwinana Local Planning Scheme No 2 (LPS 2) includes 22 Policy Areas that establish broad land use objectives and seek to guide planning decisions across the Scheme area. These Policy Areas also incorporate zones including:

- Residential
- Commercial
- Service Commercial
- Mixed Use 1
- General Industry
- Light Industry

A zoning table is then incorporated into LPS2 which outlines the land uses that are permitted in each zone.

LPS2 has been considered to develop an understanding of the long-term purpose for the different commercial areas. These intended uses/purposes have been assessed in developing

Figure 8 South Metropolitan Sub-Region



Source: DPLH 2018, Pracsys 2022

findings for the updated Activity Centre Hierarchy to ensure it is consistent with the City's broad land use objectives.

Local Planning Scheme No 3. and City Centre Masterplan

The intended use of the Kwinana City Centre has evolved over time, initiating the approval of subsequent planning documents, including Local Planning Scheme No 3 (LPS No 3).

The 1998 LPS No 3 defined the zones within the Kwinana City Centre as:

- The General Town Centre Zone to encourage the development of Public and Private Sector services and facilities in order to meet the civil, cultural, medical and entertainment needs of the community.
- The Market Square Zone to encourage the development of small-scale retail, leisure and entertainment establishments focused on a traditional market square which provides a venue for temporary open market stalls and community activities.
- The Town Centre Residential Zone to encourage the development of medium density residential accommodation including aged persons and group housing units close to civic and shopping/business activities.

Figure 9. City Centre Masterplan[3]

Source: City of Kwinana 2019

3 The number references on the map are described in Appendix 8: Kwinana City Centre Masterplan Summary

- The Shopping/Business Zone to accommodate retail and commercial use/development necessary to meet the district level shopping needs of the community.

The City adopted a master plan for the City Centre in 2019 (Figure 9). The City Centre Master Plan Vision is the first step by the City to overhaul the existing Kwinana Town Centre Master Plan and Design Guidelines, 2007. It aims to provide a framework for the future development of the City Centre, reinforcing quality urban design outcomes that will contribute towards a vibrant, diverse and thriving centre. These have been considered when developing recommendations for the Kwinana City Centre to ensure that the Activity Centre Hierarchy aligns with the intended uses for the Kwinana City Centre and the City of Kwinana's planning objectives.

Local Planning Scheme No.4

The City is drafting Local Planning Scheme No.4 (LPS4) which will replace the existing LPS2 and LPS3. LPS4 will respond to the objectives and recommendations of the City's Local Planning Strategy and support the local planning framework in meeting the current and future needs of the community.

Employment and Economic Development Study

The Employment and Economic Development Study (2019) identifies the major employment centres in Kwinana, including the Western Trade Coast, Westport and Kwinana City Centre and opportunities for Kwinana's economy to grow.

Key points made in the Study that are relevant to LCACS 2023, include:

- Employment growth is not keeping up with population growth - an additional 12,000 jobs are required by 2036 to maintain the 2018 Employment Self Sufficiency rate of 78%. Approximately one-third of these jobs will be population-driven; however, the remaining two thirds will need to be strategic and externally orientated jobs. Therefore, land use planning is required to ensure the City provides places of employment for the growing population. The City must also consider that as the level of skills and education in the population changes over time, a different mix of employment opportunities may be required.
- The Western Trading Coast is expected to continue growing due to defence industries, new energy materials, energy projects and a waste-to-energy plant, as well as the expansion of existing activities including grain exports and petroleum products processing and handling. New energy materials could be the main activity of the Western Trade Coast however, land must be made available for this to occur.
- While industry intensity has grown, employment intensity at the Western Trade Coast has declined between 1997 to 2017 with the exception of office and business use, which has increased. However, office and business use could be located elsewhere, freeing up land for industrial purposes and moving businesses away from the Kwinana air buffer. The site also has limited facilities providing for worker amenity and is not well serviced by public transport.
- The Kwinana City Centre is not expanding as fast as previously forecast and it is now only expected to provide amenity only to local residents[4]. Reasons cited included a constrained catchment, leakage to Cockburn for new and proposed residential areas east of the Kwinana Freeway and no significant commercial spin-off from Western Trade Coast activities. Nevertheless, expected job gains in the tertiary and postgraduate education sectors will increase the importance of the Kwinana City Centre as a place where people congregate and interact on a personal basis.
- Given Rockingham Hospital is the primary regional health campus, Kwinana may focus on community-focused health services including expanded GP services, tele-connected to specialists with visiting services to patients' homes. There is the potential for these services to be located in the Kwinana City Centre.
- Population growth for people over the age of 85 in the City of Kwinana indicates the need for two to three additional aged care centres by 2036, with these centres also providing significant ongoing employment.
- The Kwinana Freeway provides opportunity for very large format retail outlets that have a metropolitan wide catchment and offer retail employment opportunities for younger people.
- The findings from the employment study highlight the importance for the City's centres in addressing future population related demand for goods and services. This will ensure that the base population driven employment contribution to Employment Self Sufficiency is achieved. Key opportunities for health services, aged care and retail have been considered in developing recommendations for LCACS 2023.

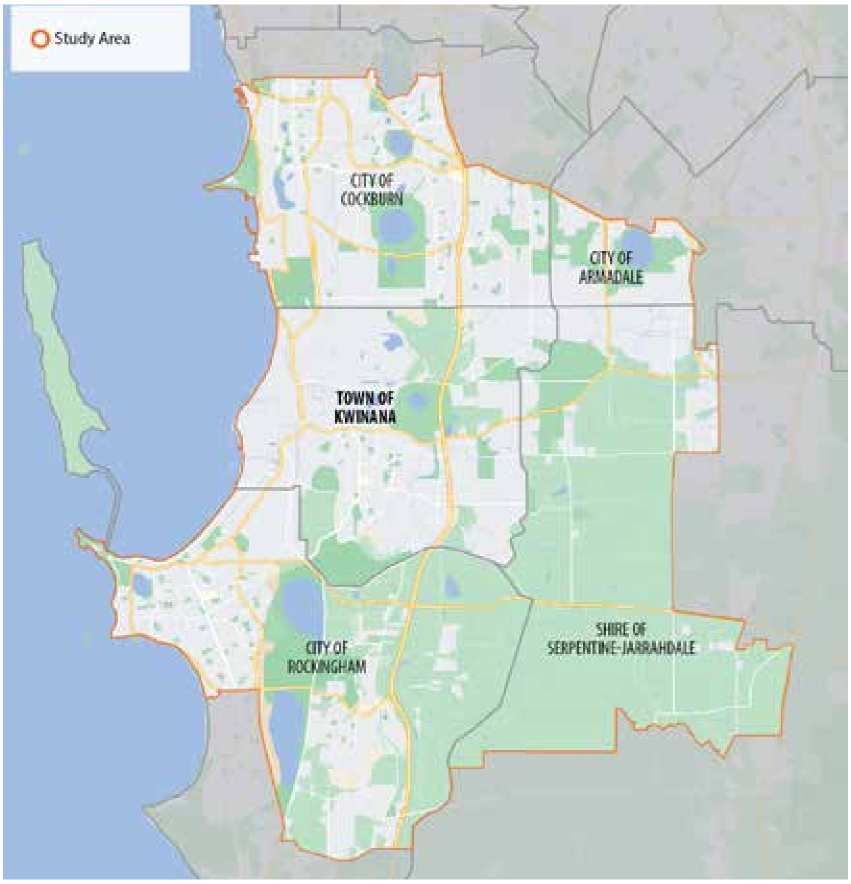
4 The employment study is referring to the projections from LCACS 2014. The high floorspace projections were partially due to high State Government population projections that were not realised. Current projections apply a lower growth rate.

4
Demand Profile

The demand profile has been developed based on an analysis of the Study Area (Figure 10).

The City's Activity Centre Hierarchy Study Area is largely defined by the Kwinana City Centre which is a secondary centre and has a catchment that stretches outside of the City's boundaries. The Study Area has therefore been set to account for the Kwinana City Centre's likely trade area and to account for major competing centres (e.g. Gateway, Rockingham City Centre).

Figure 10. LCACS 2023 Study Area



Source: ABS Census Maps 2016, Pracsys 2022

4.1 Demographic Analysis

An understanding of the City of Kwinana's population growth and demographic profile is required to plan for local commercial centres that will meet the needs of current and future generations.

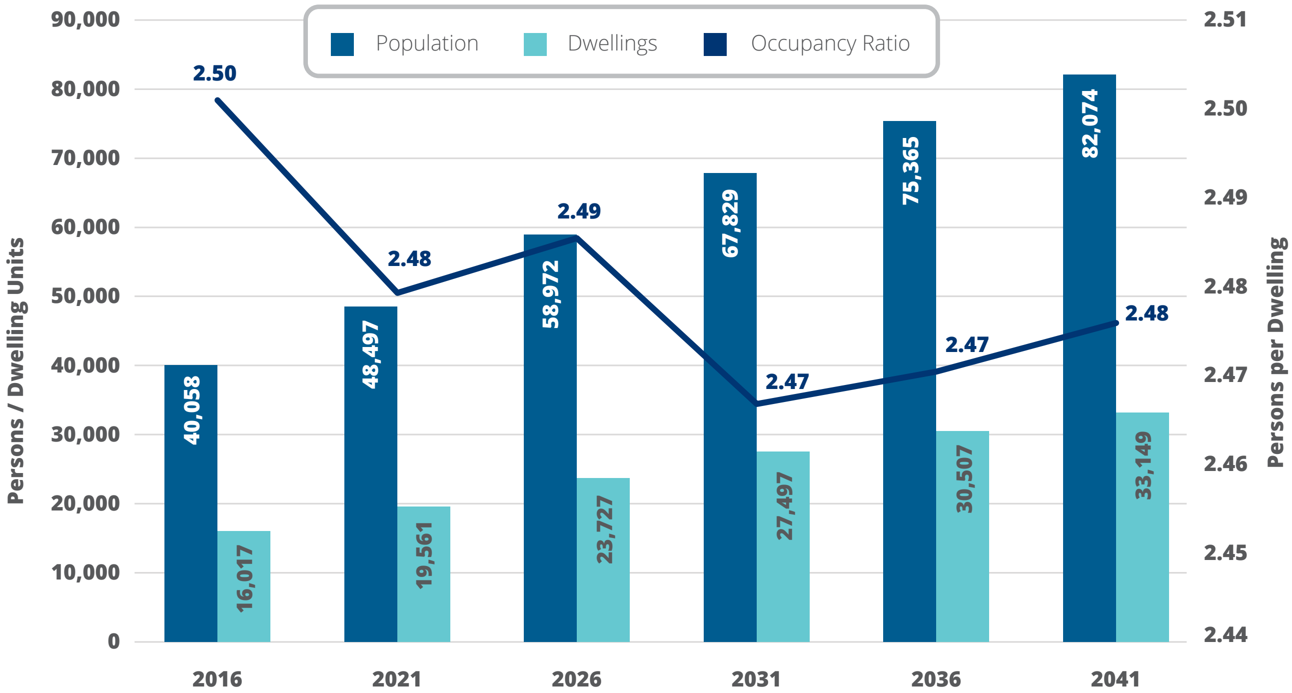
Population Growth

Strong population growth is projected for the City of Kwinana and Study Area relevant to the City's activity centres (Figure 11). This growth will require significant additional commercial floorspace to address the goods, services and employment needs of the population.

Age Profile

The age profile for the City of Kwinana and the Study Area is younger than Greater Perth. The higher proportion of people 25 to 44 and 0 to 14 in both the City of Kwinana and the Study Area (Figure 12) indicate there are a high proportion of young families compared to Greater Perth. Consequently, the City of Kwinana may need to cater for the retail needs of young families when designing and planning activities, including providing suitable amenities such as playgrounds within viewing distance

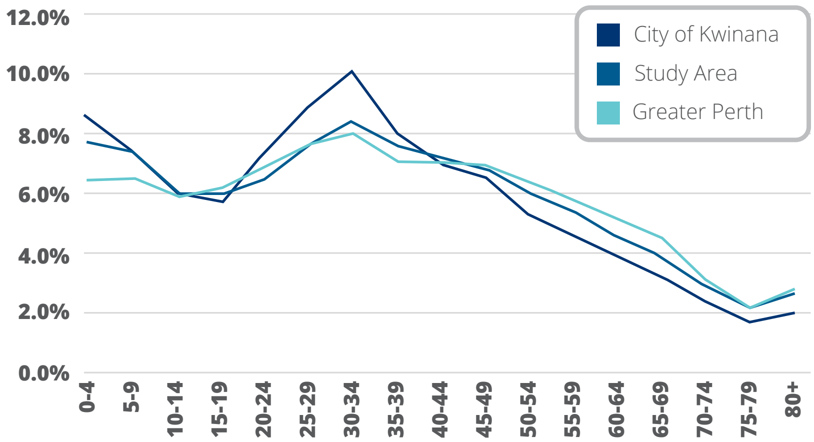
Figure 11. Projected Population, Dwelling and Occupancy Rate – City of Kwinana



Source: REMPLAN 2022, Pracsys 2022

of cafes and restaurants. Older children could also benefit from activity centres with convenient public transport options. There may also be greater disposable income and greater demand for childcare and primary and secondary education services, particularly as the current 0 to 14 cohort ages. The aging of this cohort will also create significant demand for low skill and entry level employment opportunities in the next 5 to 10 years.

Figure 12. Age Profile



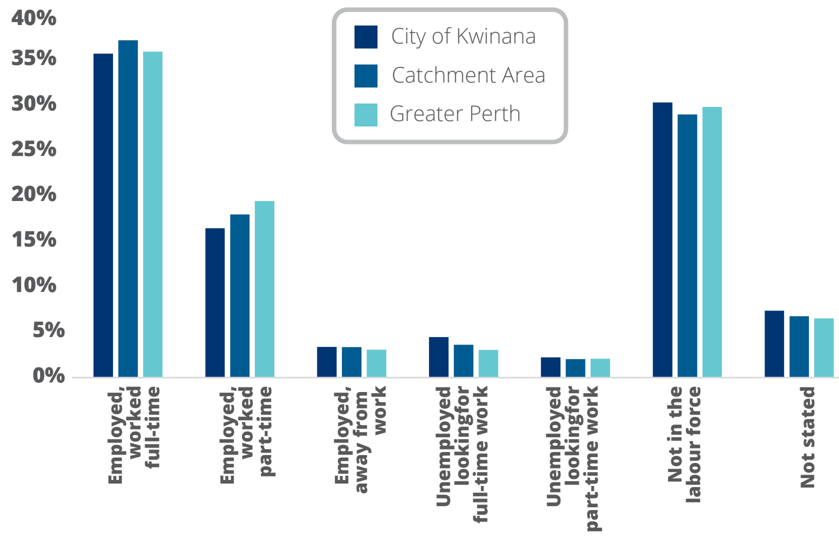
Source: ABS Census 2016, Pracsys 2022

Labour Force Status

The City of Kwinana has a higher proportion of unemployed people and people not in the labour force and a lower proportion of full time and part-time workers than the Study Area and Greater Perth (Figure 13).

When planning activity centres, the City may need to provide additional community services and facilities to support well-being and people returning to employment. Activity centres are also a source of low skill and entry level employment that can support youth entry into the workforce and re-entry of unemployed persons who are already part of the workforce.

Figure 13. Labour Force Profile



Source: ABS Census 2016, Pracsys 2022

DEMAND PROFILE

Education and Occupation Profile

The Study Area and the City of Kwinana have a higher proportion of persons with a Certificate III and IV Level (as their highest level of educational) (Figure 14). This indicates that a large portion of residents work in trades, which aligns with the employment opportunities available locally in the Kwinana Strategic Industrial Area and the Rockingham Industry Zone.[5] The proportion of people working in trades may potentially increase in the short term as construction work on Westport begins and in the long term as Westport becomes operational.[6] As Westport develops, it is likely to support additional strategic employment and will likely result in an increase in the number of workers and residents with higher education levels, creating demand for a greater range of goods and services.

Dwelling Type Profile

A higher proportion of people in the City of Kwinana and the Study Area live in single residential dwellings compared to Greater Perth (Figure 16). The suburban nature of the area indicates people will generally use a car to access activity centres.

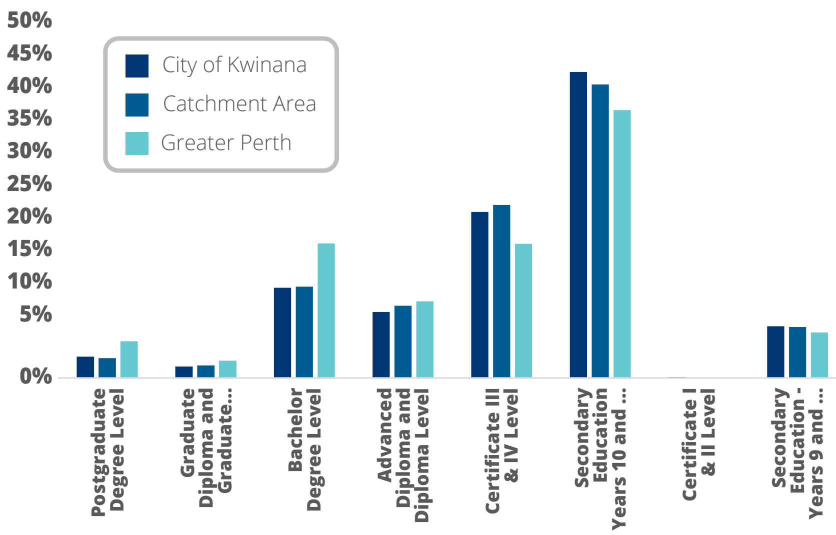
Fewer residents in the City of Kwinana live in terrace houses and apartments than the Study Area and Greater Perth. There may be the opportunity to provide greater density around activity centres, which would support walkable access, and increase centre vibrancy and viability.

Diversity Profile

Both the City of Kwinana and the Study have a higher concentration of Aboriginal and Torres Strait Islander people than the Greater Perth region (Figure 17).

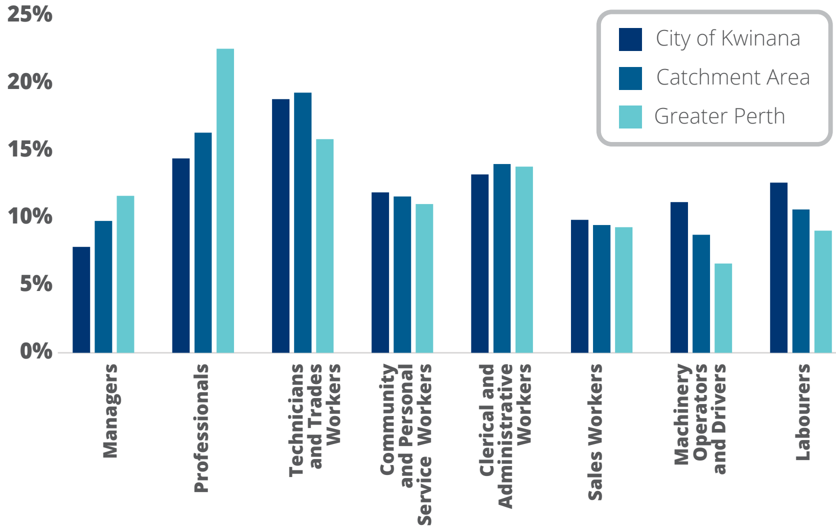
The level of diversity in the Study Area and in the City of Kwinana was assessed based on the proportion of residents who speak a language other than English at home (Figure 18). The City of Kwinana has a more linguistically diverse population than

Figure 14. Education Profile



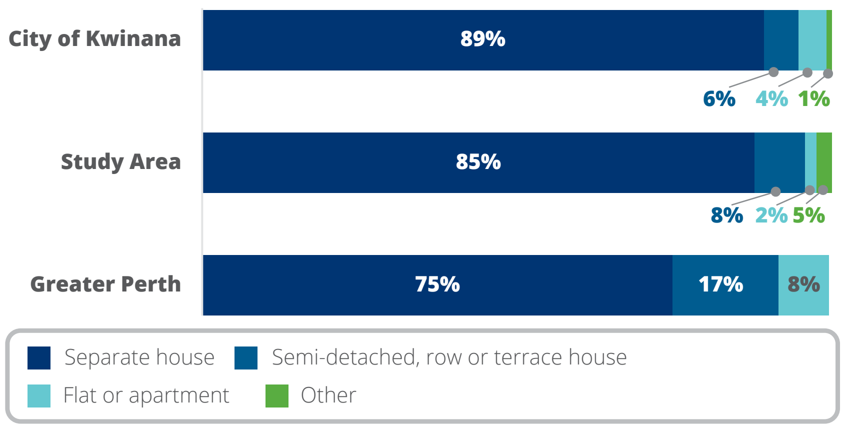
Source: ABS Census 2016, Pracsys 2022

Figure 15. Occupation Profile



Source: ABS Census 2016, Pracsys 2022

Figure 16. Dwelling Type Profile



Source: ABS Census 2016, Pracsys 2022

5 Department of Jobs, Tourism, Science and Innovation, 'Western Australia's strategic industrial areas', 2022. Available from: https://www.wa.gov.au/organisation/department-of-jobs-tourism-science-and innovation/western-australias-strategic-industrial-areas.

6 Department of Transport, 'Westport', 2022. Available from: https://www.transport.wa.gov.au/projects/westport.asp.

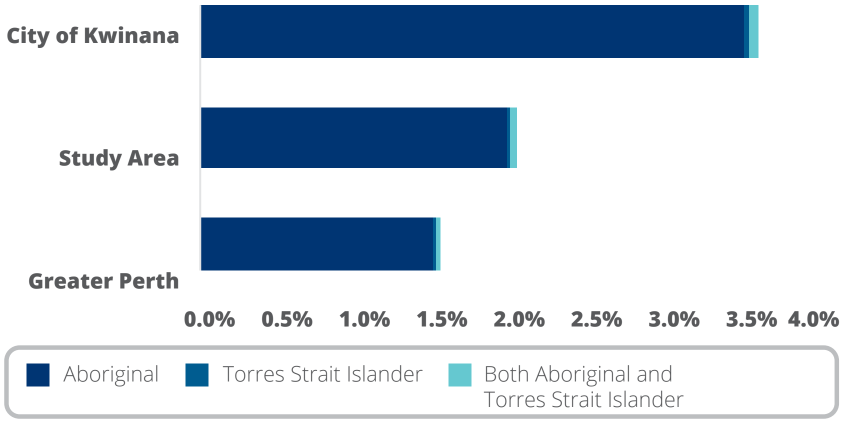
the Study Area and Greater Perth, and there may be the opportunity to diversify the floorspace uses in centres to cater for different demand patterns of goods and services.

Socio-economic Profile

The Study Area and the City of Kwinana have a lower proportion of high-income earners, with 11% of the Study Area's and 7% of the City of Kwinana's households in the top income quintile, compared to 14% for Greater Perth (Figure 19). Furthermore, a higher proportion of City of Kwinana households are middle income households (households within the second and third income quintiles) compared to the Study Area and Greater Perth.

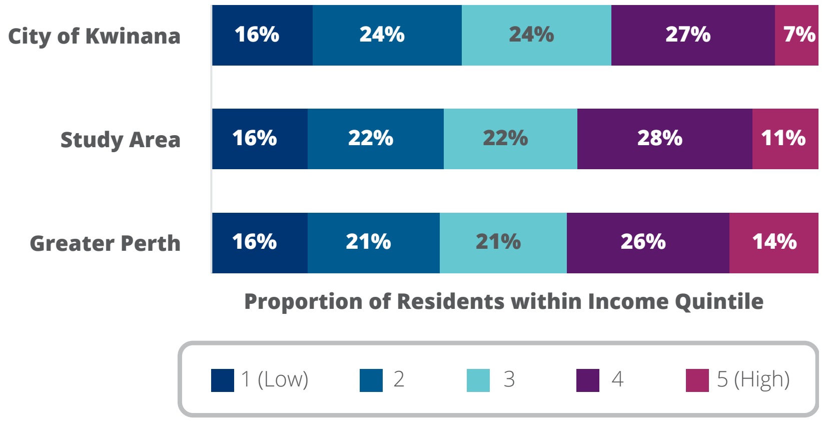
A lower proportion of higher income households and a higher proportion of middle-income households indicates that residents are likely to spend a greater portion of their income on convenience retail and accordingly, will spend less on comparison items. There could be a shift in income levels as Westport develops and attracts more strategic and knowledge-intensive employment to the sub-region. This would likely increase the per person spending available for comparison retail.

Figure 17. Aboriginal and Torres Strait Islander Profile



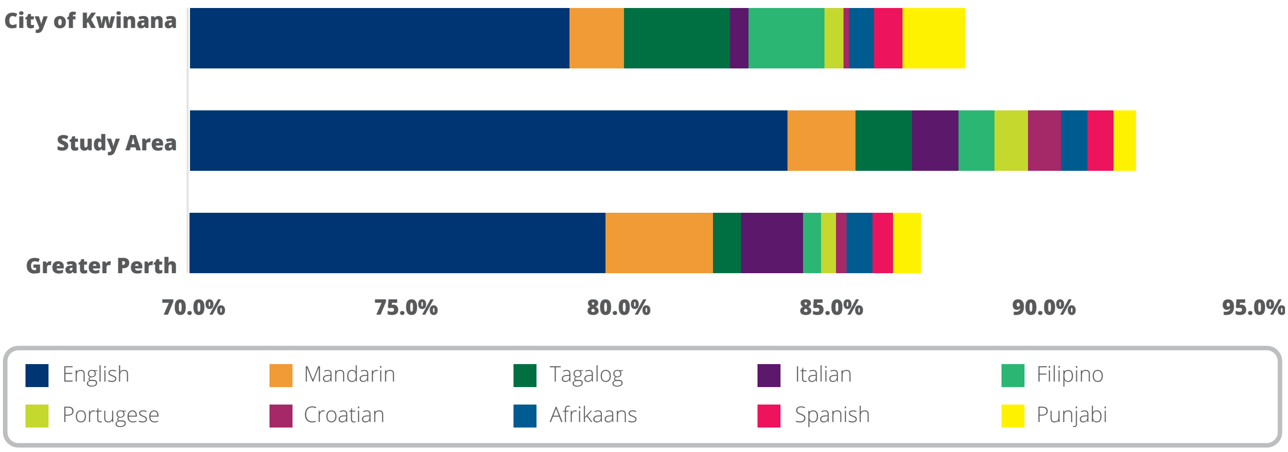
Source: ABS Census 2016, Pracsys 2022

Figure 19. Household Income Profile



Source: ABS Census 2016, Pracsys 2022

Figure 18. Language Spoken at Home Profile



Source: ABS Census 2016, Pracsys 2022

4.2 Employment Profile

Employment Type

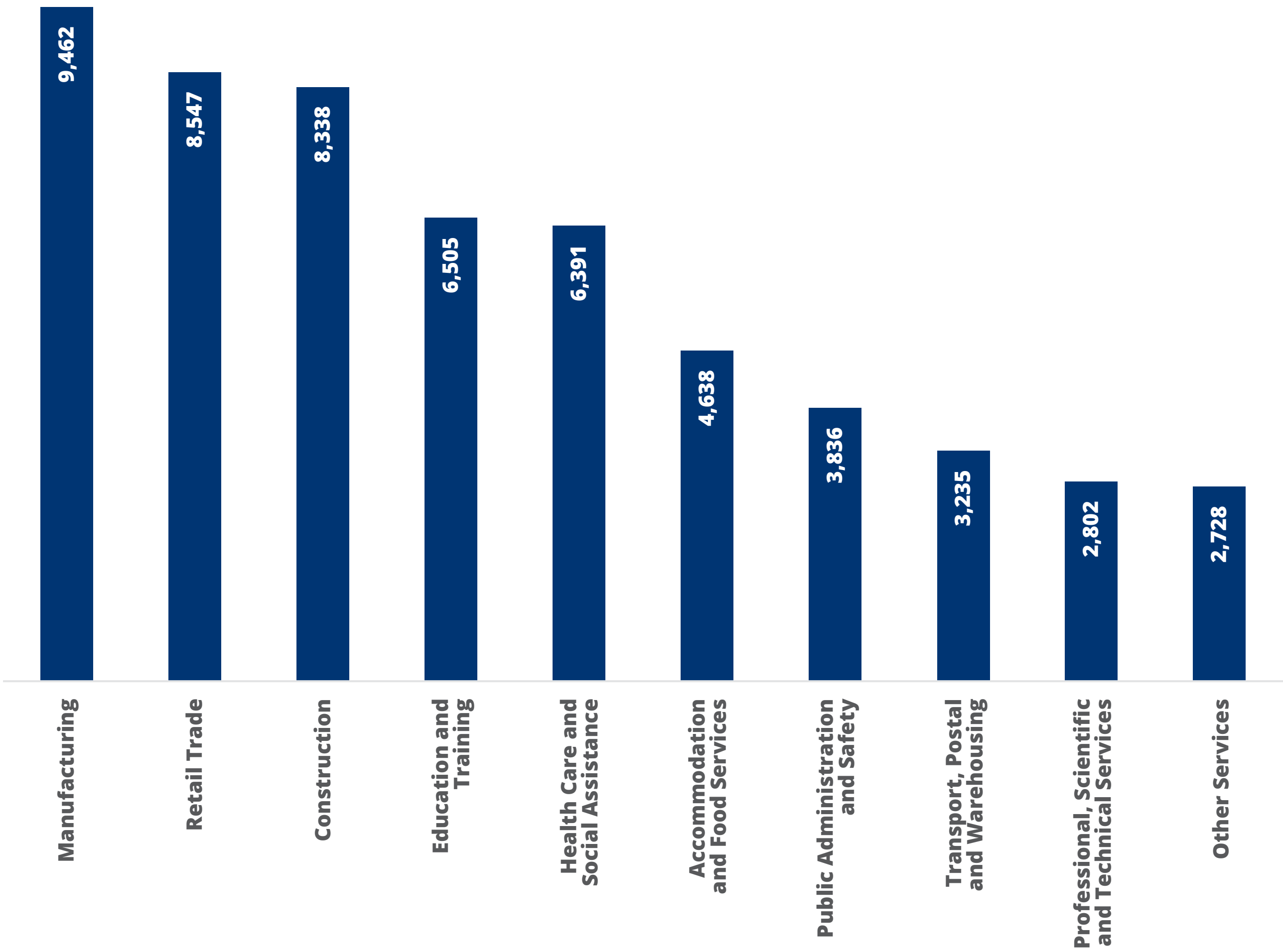
The top three employing industries in the Study Area are Manufacturing, Retail Trade and Construction (Figure 20). Manufacturing was also the dominant industry of employment for the City of Kwinana, employing 25% of workers, followed by Construction and Education and Training.

The City of Kwinana accommodates a significant workforce with an Employment Self-Sufficiency of 67%. Activity centres will provide additional employment in a number of key industries including retail, education and health services. These will provide a mix of both low and high skilled employment. Low skilled employment is most suited to younger working cohorts that live locally, while high skilled employment will likely support a mix of local and external workforce.

Westport is expected to increase the number of port related jobs in the Study Area. Spending at activity centres also has the potential to increase due to an increase in demand for goods and services from the additional workers associated with Westport.

Consistent with national trends, the City of Kwinana is expected to experience an increase in Construction, Retail Trade, Education and Training, Health Care and Social Assistance and Accommodation and Food Services related employment resulting from population growth.[7]

Figure 20. Top Ten Employing Industries within the Study Area



Source: ABS Census 2016, Pracsys 2022

7 National Skills Commission, 'Five-year employment projections'. Available from: https://www.nationalskillscommission.gov.au/five-year-employment-projections.

5 Economic Activity Assessment of Kwinana's Activity Centres

The most recently available Western Australian Planning Commission (WAPC) data on the activities and floorspace within the commercial and industrial complexes within the City of Kwinana are presented in the following table (Figure 21).

Figure 21. City of Kwinana commercial and industrial centres floorspace

Complex		Floorspace type (m^2)										
No:	Name[8]	ENT	HEL	MAN	OFF	RES	RET	SER	SHP	STO	UTE	VFA
429	Thomas Road/ Holden Close	0	0	0	0	0	350	200	0	0	0	0
801	Kwinana Centre (City Centre)	14,413	4,594	0	8,131	0	2,270	601	26,421	160	122	1,492
802	Pace Road (Medina)	1,435	770	0	514	0	0	45	627	2,559	0	530
803	Orelia	690	0	0	0	0	0	0	354	655	0	582
805	Summerton	0	471	0	180	0	0	348	394	0	0	0
806	Calista Avenue (Calista)	0	0	0	0	0	0	415	153	0	0	0
832	Parmelia	0	250	0	150	0	0	0	521	0	0	0
835	Casuarina (Bertram)	300	600	0	215	0	0	0	1,515	200	0	230
838	Leda	0	110	0	0	0	140	0	888	0	0	380
9470	Wattleup Road	0	0	0	400	0	0	0	0	1,000	0	0
9471	Sayer Road	0	0	0	0	600	0	0	0	9,000	0	0
9472	Wattleup Road 2	0	0	0	0	0	0	0	0	0	0	0
9473	Sayer Road 2	0	0	0	0	0	0	0	0	500	300	0
67	Naval Base	510	850	201,234	21,260	190	4,741	39,673	899	49,295	53,652	14,580
68	Kwinana Beach	581	505	379,302	40,495	0	1,497	39,780	575	104,861	14,562	87,628
69	East Rockingham	0	0	0	0	0	0	0	0	10,220	0	0
448	Orton Road	0	0	0	0	0	0	0	0	0	0	0
469	Alcoa Tailings	0	0	3,637	550	0	0	0	0	0	0	0

Source: LUES 2016

8 Names in brackets are those used in the Activity Centre Hierarchy)

There have been a number of expansions, reductions and developments within the activity centre hierarchy since the most recent Land Use and Employment Survey (LUES) data was published (Figure 22 and Figure 23)

Figure 22. Existing Centre Expansions / Reductions

Complex		Floorspace type (m²)										
No:	Name[8]	ENT	HEL	MAN	OFF	RES	RET	SER	SHP	STO	UTE	VFA
Expansion												
801	Kwinana Centre	14,413	4,594	0	8,131	0	2,270	601	32,716	160	122	1,492
802	Pace Road	1,435	770	0	514	0	0	45	3,500	2,559	0	530
Reduction												
838	Leda	0	110	0	0	0	140	0	888	0	0	380

Source: LUES 2016

Figure 23. New Centres since 2016

Complex Name	Floorspace type (m²)										
	ENT[9]	HEL[10]	MAN	OFF	RES	RET	SER	SHP	STO	UTE	VFA
Wellard Village	758	325	0	0	0	0	0	6,500	0	0	0

Source: City of Kwinana 2015, Pracsys 2022

Blue indicates that the current floorspace differs from the expected floorspace, while yellow indicates that the current floorspace matches the expected floorspace. In most instances, developments and expansions that were expected did not actually occur (the original LCACS 2014 map has been included in Appendix 10 to provide a spatial understanding of the centres).

Figure 24. Expected supply in 2021 vs Actual Supply of Floorspace in 2022

Activity Centre Name Used in Report	Total Shop Retail Floorspace (m²)	Total Other Retail Floorspace (m²)	Total Non-Retail Floorspace (m²)
Kwinana City Centre	35,000	5,000	
Wandi District Centre	Total 20,000m²		
Medina	3,500	500	
Bertram	5,500	0	
Leda	3,068	140	
Thomas Road	0	0	
Mortimer Road	2,500	300	
Wellard East 01	5,000	2,000	
Orelia	655	0	
Calista	153	0	
Parmelia	370	0	
Anketell 02	0	0	
Casuarina 02	0	0	Non-retail floorspace projections were not previously provided
Casuarina 03	0	0	
Wandi LC	1,500	0	
Mandogalup 01	0	0	
Station	500	0	
Wellard East 02	500	0	
Wellard 03	0	0	
Wellard E 01	0	0	
Wellard E 02	0	0	
Thomas Road/Holden Close	0	13,000	
Orton Rd	0	5,000	
Postans 01	500	3,000	
Spectacles 01	0	3,000	

Source: City of Kwinana 2015, Pracsys 2022

9 Estimated using Google Maps

10 Estimated using Google Maps

Kwinana City Centre

5.1 Kwinana City Centre

The Kwinana City Centre is designated as a Secondary Centre under the SPP4.2 and the primary activity centre in the City of Kwinana (Figure 25). It provides access to significant retail, educational, civic, cultural and recreational activities. It will remain the primary activity centre in the future with the potential to focus on diversifying uses to encourage multi-purpose visits and increased duration of visit time.

A Coles and Aldi have been added to the centre since the most recent Land Use and Employment Survey was developed. These are high productivity uses and have been accounted for in the analysis through an increase in the modelled turnover of the Kwinana City Centre.

The development of the Kwinana City Centre is guided by the Kwinana City Centre Masterplan. This provides the design guidelines for future residential and commercial development. An assessment of the Kwinana City Centre from a spatial economic perspective has been undertaken to support ongoing development alongside the Masterplan.

Economic Activation Assessment

The Kwinana City Centre was assessed using the six principles of economic activation. These principles enable consideration of factors that can contribute to the improved functionality of the centre (Figure 27). Some of the challenges and/ or opportunities identified may not be easily addressed in the short term given the centres stage of development.

Figure 25. Kwinana City Centre

Source: City of Kwinana 2022

Figure 26. Kwinana Marketplace Coles

Source: KPA Architects 2015

Figure 28. Centre Assessment Map

Figure 27. Kwinana City Centre Assessment

Attributes	Analysis
Purpose	The most significant centre offering retail, commercial, educational, civic and cultural activities for its growing user base.
Users	The primary users of Kwinana City Centre are anticipated to be local residents. Other secondary users include workers at the Kwinana City Centre, Kwinana Industrial Area, residents from the Shire of Serpentine-Jarrahdale, City of Rockingham and City of Cockburn.
Access and Origins	The Kwinana City Centre is accessed predominantly by car with the primary access points being Gilmore Ave, Challenger Ave and Sulphur Rd. There are a number of individual bus stops around the centre, however, the primary public transport access is the Kwinana Hub Bus Station which provides access almost directly to the Kwinana Marketplace Shopping Centre. Carparks are dispersed around the City Centre, reducing pedestrian movement around the City Centre. The scale and spread of the centre and the parking lots that surround the shopping centre to the west, north and east reduce the likelihood of people walking and making multi-purpose trips to the Centre.
Exposure	The Kwinana City Centre has minimal activated frontages despite its size. The bulk of activity is internalised within the Kwinana Marketplace Shopping Centre. Most frontages in the centre are one-sided, mainly looking onto parking lots, reducing the potential to capitalise on foot traffic. The Chisham Avenue corridor and the Market Square (currently public space on the corner of Robbos Way and Chisham Ave) were intended to be recognised as the focus of public activity in the City, however, there is no clear way to attract the majority of users who are visiting the shopping centre to the open space. To improve the activation of these areas in the short term, alfresco dining should be encouraged for shops opposite the Market Square, the Market Square should be activated with events/markets or similar offerings and a stronger link should be created with Aldi, including signage, to encourage pedestrian traffic along Chisham Ave.
Destinations	The Kwinana City Centre is home to several destinations, including the Koorliny Arts Centre, the City of Kwinana, Kwinana Recquatic, Kwinana Public Library, Aldi, Woolworths, Coles and Big W. It is important that key destinations are better linked to encourage pedestrian traffic around the Kwinana City Centre and not just areas in the centre (people just going to the shopping centre, people just going to the Library). The movement of people by foot between destinations creates opportunities for activated spaces that can support both the viability of businesses and the vibrancy of a place. The centre currently consists of a number of islands centred around key destinations that do not encourage movement between each other. As each location has its own parking it disperses activity and reduces the concentration of activity, which is required for the vibrancy of the centre, the perceived safety of the centre and the potential for businesses to capture expenditure. As the Kwinana City Centre develops in future, there should be a strong push to centralise activity and better integrate the civic and retail aspects of the centre. Should the Kwinana Marketplace Shopping Centre redevelop, it should move closer to Chisham Avenue with parking that encourages patrons to access the shopping centre via Chesham Ave. Internalised parking should be avoided as it would further reduce the potential that Kwinana Marketplace customers will undertake a multi-purpose visit outside of the shopping centre.
Control	The City of Kwinana has control over a large portion of the northern area of the Kwinana City Centre but has limited control of other areas of the City Centre. The area to the south of Challenger Ave is controlled by the State government with plans for mixed use to the south of the Kwinana Marketplace. Should the City of Kwinana want to change the configuration of the Kwinana City Centre, a collaborative approach with businesses and commercial land holders will be required.
Centre Evaluation	Refer to Appendix 3: Activity Centre Performance Monitoring and Evaluation for an overview of the evaluation questions, criteria and metrics that can be used assess activity centre performance on an ongoing basis.

Orelia Local Centre

5.2 Orelia Local Centre

The Orelia centre is a small local centre (Figure 29). The retail component, including car park, is in poor condition. At the time of reporting the tenancies include a convenience store, a deli, vaporizer store, newsagent, hairdresser, a Chinese restaurant and a fish and chip shop. Much of the existing zoned Commercial area is vacant land.

A high level assessment of the centre has identified the following:

- There is limited potential for the centre to grow due to its proximity to the Kwinana City Centre (approximately 1km).
- The centre's current condition severely limits its ability to support viable businesses.
- The centre is set back from the street, reducing its exposure to passing traffic.
- The current layout limits the potential for higher and better uses of undeveloped land (e.g. residential).

There is currently a local structure plan to redesign the centre and allow for unused space to be developed for residential uses.[11] The local structure plan proposes 600m² of retail floorspace and a total of 49 residential units at the centre. It is recommended that the City of Kwinana support the implementation of the structure plan and redevelopment at the site including both retail and residential uses; the site can be rezoned to mixed use.

Figure 29. Orelia Local Centre

Source: realcommercial.com.au 2022

11 City of Kwinana 2020, 'Orelia Local Centre Local Structure Plan'. Available from: https://www.kwinana.wa.gov.au/council/documents,-publications-and-forms/publications-and-forms-(all)/plans-and-strategies/2020/lsp-orelia-plan

Parmelia Local Centre

5.3 Parmelia Local Centre

This is a busy small centre with a large medical centre and associated facilities (pharmacy, blood collection) having taken over the bulk of the centre (Figure 30). There appears to be no vacant tenancies with the only Shop/Retail uses being the pharmacy and food operator. Unlike the other centres there is no bus stop, but there are bus routes located approximately 300m distant to the north and south.

With the current health uses there may be the opportunity for some additional Shop/Retail uses to develop on adjacent vacant land, although this would be limited in scale due to its proximity to the Kwinana City Centre. The aim would be to provide a true local centre that supports walkable daily shopping trips for the immediate population.

Figure 30. Parmelia Local Centre

Source: Google 2022

ACTIVITY CENTRES

Figure 31. Leda Neighbourhood Centre

Source: SLIP 2022, Google 2022

Figure 32. Calista Local Centre

Source: SLIP 2022, Google 2022

5.4 Leda Neighbourhood Centre

This centre has been redeveloped and reduced in total floorspace since the adoption of LCACS 2014. The centre now houses a pharmacy, news agent, local grocer and fuel station (Figure 31). Given the consolidation of floorspace, it is expected that the centre will function sustainably in the long term. Residential uses in the area would further support the viability of the remaining centre should they be developed.

5.5 Calista Local Centre

The Calista Local Centre has three components including an automotive service centre, fuel station and a small retail area accommodating a barber and hairdresser (Figure 32). A high-level assessment of the centre has identified:

- The Shop/Retail component is poorly designed with no active frontages to passing traffic despite being on a corner lot.
- The Shop/Retail uses appear to be accessed via enclosed walkways. The design restricts visibility from the road and likely creates safety concerns, particularly at night.
- There appears to be limited mobility between the three components (service station, Shop/Retail, automotive services).
- The centre is approximately 600m from the Kwinana Marketplace, restricting growth potential.

There are likely higher and better uses for the site. It is recommended that should the opportunity arise for redevelopment of the site, the following should be considered:

- Removing Shop/Retail uses from the location would not likely disadvantage residents in terms of access to goods and services as there is less than 1km between the east most residential area within Calista and the Kwinana City Centre.
- The location of the development will only be able to support a small local centre given its proximity to Kwinana City Centre.
- It is recommended that the City of Kwinana that the centre should be zoned as Mixed Use to allow small shop/residential rather than a stand-alone shop.

Medina Neighbourhood Centre

5.6 Medina Neighbourhood Centre

This centre appears to be operating sustainably with a reasonable mix of Shop/Retail and Non-Retail uses (Figure 33). The residential development that occurred to the north of the centre has a pedestrian passage leading into the centre; however, the storage sheds behind the Medina shops on Pace Road have been a site of antisocial behaviour (known as the Medina sheds) and are potentially detracting from the perceived safety of the centre.[12] At the time of writing, there were three vacancies, indicating the centre is likely close to its maximum demand floorspace with any future increase in expenditure likely to improve the viability of operators.

Figure 33. Medina Neighbourhood Centre

Source: Google 2022

12 'Medina sheds in the spotlight for attracting squatters, drug use and dumping', Perth Now, 2019. Available from: https://www.perthnow.com.au/community-news/weekend-kwinana-courier/medina-sheds-in-the-spotlight-for-attracting-squatters-drug-use-and-dumping-c-884623
'Youth rejuvenate Medina Sheds with artwork', City of Kwinana, 2022. Available from: https://www.kwinana.wa.gov.au/council/news/2022/march/youth-rejuvenate-medina-sheds-with-artwork.

Bertram Neighbourhood Centre

5.7 Bertram Neighbourhood Centre

This is a neighbourhood centre, centrally located in the relatively new suburb of Bertram, and currently anchored by a SUPA IGA of about 1,300m² (Figure 34). LCACS 2014 suggested the centre had been designed primarily as a main street centre but was not performing as such. A spatial assessment of the centre has been undertaken as part of LCACS 2023 to support future activation.

Figure 35. Bertram Neighbourhood Centre Assessment

Attributes	Analysis
Purpose	Bertram Neighbourhood Centre provides locals with walkable access to daily and weekly household shopping needs, community facilities and a smaller range of other convenience services.
Users	Expected users are residents of the surrounding area, including those south of Mortimer Rd and Bertram Rd and east of Parmelia Ave and the Kwinana Freeway.
Access and Origins	Access to the centre is well enabled by several roads converging at the centre. There are no public transport options from the eastern side of the Kwinana Freeway. Each section of the centre has its own carpark, discouraging pedestrian movement around the centre. Potentially, carparks should be consolidated to encourage pedestrian movement. To achieve centre activation it would be better for users to park at the Community Centre, encouraging them to walk along Hero Cres and Champion Drive.
Exposure	While Champion Road, Hero Crescent and Price Parkway have street-facing shop frontages, there is a certain element of bareness that could be reducing the activation of the centre. More cafes and restaurants with alfresco dining could help reduce the bareness of the walkways and make the microclimate more hospitable.[13] Furthermore, businesses advertising their services across the entire surface areas of their doors/windows prevents people from seeing into the business and reduces the possibility of developing an active frontage.
Destinations	The centre has sufficient destinations (the IGA and the William Bertram Community Centre) for its size.
Control	The City of Kwinana has limited control over the retail component of the centre, which is privately owned, and must work collaboratively with these private owners to implement any changes.
Centre Evaluation	Refer to Appendix 3: Activity Centre Performance Monitoring and Evaluation for an overview of the evaluation questions, criteria and metrics that can be used to assess activity centre performance on an ongoing basis.

Figure 34. Bertram Neighbourhood Centre

Source: Google 2022

Figure 36. Bertram Neighbourhood Centre Assessment Map

13 An example of a sheltered, inviting place to walk in Kwinana is The Strand (Wellard Village) and Phar Lap Parade (Baldivis Square) in Baldivis.

Wellard Village Neighbourhood Centre

5.8 Wellard Village Neighbourhood Centre

Wellard Village is anchored by a Woolworths supermarket (Figure 37) and incorporates a medical centre and community centre. It is located adjacent to the Wellard bus train interchange. The centre has parking to the rear with foot access guided through the main street area to gain access; this is a suitable design and should support the long-term sustainability of the main street area. Additional residential development is set to occur around the centre and would support additional floorspace, which would be appropriate given its high levels of accessibility by public transport.

Figure 37. Wellard Village Neighbourhood Centre

Source: Realcommercial.com.au 2022

5.9 Thomas Road/Holden Close

At present this activity centre comprises a large, busy service station and integrated convenience store. To its immediate south, a couple of large sites have been earth-worked in preparation for future mixed-business development, for which the site is zoned. There is also a car wrecker yard at the intersection of Johnson Road and Holden Close.

A multi-criteria analysis has been used to assess potential uses at the site (Figure 38). The multi-criteria analysis uses standard business locational preferences to determine the suitability of the site for business to business (office related uses) or population driven uses (e.g. bulky goods retail, service commercial). The location has been scored (with 5 being the highest possible score) against each criteria and is then weighted by the relevance of the criteria to the different types of business being assessed.

The high-level multi criteria analysis indicates that population driven uses are likely more suited to the location due to its proximity to passing traffic along the Kwinana Freeway, distance from other employment centres and the lack of current activity at the site. Qualitative analysis has considered the following elements in further detail:

- Proximity to similar uses: The nearest commercial development is currently the Kwinana City Centre; uses related to the Kwinana City Centre should develop there and not at this location. The Western Trade Coast is approximately 6-7km away; uses related to the Western Trade Coast are likely to develop in the Western Trade Coast or if they are office-based, in the Kwinana City Centre or Rockingham SMC.
- Site isolation: The isolation of the location from other commercial uses makes it less appropriate for office uses. Office-based businesses choose their location based on different factors to retail and bulky goods businesses. These factors generally include proximity to customers, proximity to suppliers, amenity, parking, access, internet speed, suitability of premises and cost of premises, to name a few. Office-based businesses would want to pay less at this location due to its isolation from other uses; by contrast, retail and bulky goods uses would likely pay a premium at this location as it sits at the intersection of the Kwinana Freeway and Thomas Road.
- Attractiveness compared to competing centres: The site will be competing with the Kwinana City Centre and the Rockingham SMC for office uses.

Figure 38. Multi-Criteria Analysis of Thomas Road / Holden Close

Locational Preference Criteria	Score	Relevance		Consideration
		B2B	B2C	
Proximity to a large residential catchment	5	Low	High	This supports population driven businesses. The location provides proximity to high levels of passing traffic that are suitable to retail and/or service commercial type activities.
Proximity to business clients	1	High	Low	The location is currently isolated from other businesses. Proposed service commercial uses that are going to locate on the opposite side of the Kwinana Freeway (Costco) are not likely to require B2B inputs at a local level.
Access to professional services	2	Medium	Medium	The location is somewhat isolated from businesses that might provide services. These types of uses should remain in centres such as the Kwinana City Centre and Rockingham Strategic Metropolitan Centre (SMC). Distance from this use is somewhat mitigated by the ability to access professional services virtually.
Affordability of premises	4	High	Medium	The location will need to offer lower rent prices to compete with other centres.
Access to specialised facilities or equipment	1	Medium	Low	Office-based businesses that require specialised equipment are not likely to choose this location as they are generally attracted by an anchor (e.g. research businesses that require labs generally locate in proximity to hospitals or universities).
Access to a skilled workforce	3	High	Low	Office-based businesses tend to employ workers with higher education levels. The catchment population has higher levels of workers in trade and labouring occupations.
Public transport links	4	High	Medium	The location provides good access via train with some bus access.
Availability of parking	5	High	Medium	There is ample room for parking.
Weighted Score		**3.1**	**3.67**	

Source: Pracsys 2022

Although it may be marginally more accessible due to its proximity to Kwinana Freeway and adjacent to a train station, the other centres provide high levels of amenity (e.g. retail, entertainment, health services) that will support worker preferences.

- Ability to achieve critical mass: The development will require significant investment in order to achieve critical mass at this location. This would include providing high levels of amenity to support worker population daily needs (e.g. a food court). Most successful office-based developments occur around some type of anchor, for instance, office floorspace is developing at the Murdoch Health and Knowledge Precinct anchored by both the hospitals and the university.
- Development risk: The risk associated with developing office floorspace at this location is seen as high given it is an undeveloped site with no other commercial drivers (anchor uses) to attract businesses.
- Established activity: There is no established activity, generating interest in office uses at the location will rely entirely on the City of Kwinana and potential developers.

Office-based uses are not recommended at this location. Should demand for these uses arise, it should be directed to the Kwinana City Centre to support increased activation during daytime hours. The site is suited to bulky goods and service commercial uses however there is a significant provision of these uses to the eastern side of the Kwinana Freeway with Costco as an important anchor tenant.

The City could consider retaining the area for commercial uses to cater for any overflow once the eastern side of the Kwinana Freeway has developed. This being said the land borders potential residential uses to the south and if such uses developed directly south of Holden Close, there could be potential for conflict with certain uses.

Given the importance of maintaining commercial land for employment uses, it is recommended the City reassess whether these uses are appropriate every five years.

5.10 Planned Activity Centres

Three additional substantial activity centres – one district and two neighbourhood centres – are planned for the future urban areas on the eastern side of the Kwinana Freeway. There are also a number of local centres planned to provide for the daily shopping needs of residents. The future retail floorspace potential for planned centres will be explored in the Needs Assessment section of this report (see Section 8.1: Modelling Inputs, Sub-section Future Supply).

Since LCACS 2014 was adopted two centres have been identified as not likely to develop for retail purposes due to other development (both commercial and residential) occurring (refer to LCACS 2014 in Appendix 2. These centres are:

- Casuarina South 03
- Wellard 02 (replaced by Wellard Mixed Use)
- Wellard East 01 (merged with Wellard East 02 - now named Wellard East)

These have been removed from the analysis with other locations explored to address any potential gaps.

5.11 Service Commercial Areas

There are no significant service commercial areas in the City of Kwinana at present with only a relatively small precinct on the eastern side of the city centre and some historical uses in the industrial areas along Rockingham Road. A small pocket of service commercial uses is also present along Meares Ave in the Kwinana City Centre.

LCACS 2014 identified service commercial areas at the following locations:

- Between Thomas Road and Holden Close
- At the Spectacles
- At Postans
- In the Kwinana City Centre
- In the Wandi District Centre

Service commercial land has since been planned to the east of the Thomas Road/Kwinana Freeway intersection making it unlikely there will be sufficient demand for additional floorspace between Thomas Road and Holden Close and at the Spectacles in the near future. The Postans site is also not likely to develop for service commercial purposes and has been removed as a potential Other Retail centre.

The significant Other Retail floorspace planned for the Kwinana City Centre does not appear to fit within the purpose of the centre given the large format nature of the offering and greater requirement for parking and truck access due to the bulky nature of the goods. The Retail Needs Assessment tests the demand for Other Retail floorspace and provides recommendations as to the most suitable future locations for service commercial uses.

Service Commercial Uses in Strategic Industrial Areas

The City has a number of industrial areas that form part of the Western Trade Coast industrial area. Some of these areas accommodate legacy uses such as service commercial (bulky goods), particularly along Rockingham Rd (please see Appendix 11: Industrial Land). The State Government is planning to develop Westport in Kwinana and eventually all container imports / exports for the Metropolitan area will arrive through Westport. The development of Westport will attract significant demand for industrial land to the Western Trade Coast. This demand will increase prices for land in the industrial areas and will cause population related service commercial (bulky goods) uses to relocate to make way for uses that obtain an advantage from proximity to Westport.

This effect can already be seen through demand created by the current strategic uses in the Western Trade Coast, which include all Bulk cargo movements for the Metropolitan area. There is approximately 2,842m² of service commercial (bulky goods) uses within the area based on LUES data. This is down from the 6,399m² identified in LCACS 2014. With continued development of the area, these uses will likely be phased out. This is seen as appropriate and should be allowed to occur. The current zoning of the industrial areas can be maintained given the effectiveness of market forces in driving land use changes.

As the worker population grows in the Western Trade Coast, there will be demand for Shop/Retail uses to satisfy the daily shopping needs of workers (i.e. sandwich bars, deli type offerings, etc.). These uses should be allowed but should be restricted to meeting the needs of the worker population only.

6
Retail Trends

The City of Kwinana needs to ensure planning for its activity centres allows developers and operators to adapt to retail trends and maximise expenditure capture (e.g. it is key to ensure that planning for activity centres allows for flexibility in uses and floorspace areas as these may change with technological advancements). The identified trends highlight the fast-changing nature of retail. The following trends are worth considering as activation and development opportunities arise.[14]

Trend	Description	Drivers
Conscious Retail	Conscious retail is increasingly keeping customers loyal to a brand /distributor.	Many consumers have made a lifestyle choice to have a smaller global footprint, support brands that provide better conditions for factory workers in developing countries or support local products. Consumers are often willing to pay a premium for these products.
Data Retail	'Big Data' is being used to con-tinually monitor and respond to changing consumer desires, shortening the product cycle.	Collecting and analysing data on retail sales is being used to inform all parts of the retail sale process, from supply chain to understanding customer satisfaction with their purchase. Retailers who don't use data to inform their decisions are much less likely to understand their customer's preferences or forecast demand and may find it difficult to remain competitive with those who do.
International Retail	The last few years have seen an influx of international brands penetrating the Australian market.	An untapped Australian market and Aus-tralian's demanding goods they can see online but cannot purchase locally. Addi-tionally, the ability to geoblock products and charge higher prices in the Australian market has driven demand.
Omnichannel Retail	Digital marketing has been used to keep customers loyal to a brand/distributor.	The emergence of digital marketing across a range of devices, platforms and applications have provided multiple channels for retailers to market their products. Physical stores need an online presence to be competitive, as a consumer may shop using both means at different times.
Mobile Devices	Accessing retail via mobile devices and integrating mobile devices.	Mobile devices are providing unprecedented 24/7 access to retail offerings.

14 Baptist World Aid Australia, The Australian Ethical Consumer Report, 2021. Available from: https://baptistworldaid.org.au/wp-content/uploads/2021/05/BWA-Australian-Ethical-Consumer-Visualised-Report_McCrindle.pdf.
KPMG, Australian Retail Outlook, 2021. Available from: https://assets.kpmg/content/dam/kpmg/au/pdf/2021/australian-retail-outlook-2021-report.pdf.
ABC, How COVID-19 changed the way we shop – and what to expect in 2022 and beyond, 2022. Available from: https://www.abc.net.au/news/2022-01-04/covid-changed-the-way-we-shop-contactless-cashless/100728038.

Trend	Description	Drivers
Subscription retail	Subscription retail allows retailers to encourage increased loyalty and connection to their brand.	Retailers need a business model that 'locks in' customers to increase the threshold of switching brand.
Fast Retail	Business models comprised of virtual stores accessible from anywhere with fast distribution networks.	Technology has enabled customers to decide when, how and where to go. Consumers are no longer restricted to opening times or physical geography, consumer desires rather than retailers are driving consumption.
Retailtainment	Entertainment as an integral part of the retail experience.	The popularity of online retail channels has resulted in physical retailers needing to provide a retail experience or social experience as a point of difference. Millennials integrate retail and entertainment as a single social experience.
Small Retail	Speciality shops and smaller floorplates are becoming more popular.	Smaller stores with more curated selections, and specialty shops with niche products and more knowledgeable staff are predicted to be more competitive than larger stores where products can be harder to find.
Personal Retail	Consumers are increasingly desiring products that can be personalised.	Consumers are going shopping with a strong idea of what they want, rather than shopping to see what is available and fits their needs. They want to find a product that reflects their personal brand and is tailored to their needs rather than generic and mass-produced.
Ethical Consumerism	Consumers are considering the ethical and environmental im-pact of their purchases; where the product was produced and if it reflects their values.	This has been driven by a range of factors such as COVID-19, social media raising awareness around working conditions and environmental impact, news, Oxfam and other organisations that rate brands.
Ecommerce	The rise of online shopping coincides with a rise in e-commerce. Online shopping provides the ability of consumers to stay home and e-commerce has revolutionised who can be a retailer.	This has been driven by fast-paced lives, the rise of social media, more people starting online businesses. Online shopping is what customers are doing and ecommerce is what businesses are doing. This also means in-store shopping has to be enticing or convenient enough to attract consumers.
Buying Local	Supporting local businesses and individuals	Consumers are becoming increasingly willing to purchase from small businesses and locally. This has been exacerbated by COVID-19, with small businesses struggling and a lack of imported goods.
Open Air Shopping Experiences	People are starting to prefer outdoor malls rather than enclosed malls.	People wanting to be in nature, prefer to walk between shops outside rather than in a shopping centre, however, the trade area pull is larger for indoors than outdoors.
Circular Fashion	More consumers are turning to be a part of a circular economy model in which they consume and give away items in a more sustainable manner.	This has been driven by second-hand ecommerce like Etsy, people both buying and selling as individuals or small 'brands' and the growth of the sharing economy.
Authenticity	Customers are increasingly wanting to feel a personal connection with brands and are becoming more aware of manipulative advertisements.	Increased availability of information is making consumers more aware of marketing tactics. This is making consumers more inclined to purchase from brands/retailers they feel are authentic.
Automation	Chatbots, digital shopping assistant and self-serve technol-gy take roles traditionally performed by staff members.	COVID-19 pandemic restrictions and illness accelerated automation as fewer staff were available to perform these duties and remaining staff were under pressure to deliver the same standard of service.

7
Kwinana City Centre Floorspace Analysis

An analysis of floorspace at Kwinana City Centre was undertaken to understand potential gaps in the quantum and mix of uses. Benchmark comparisons were used to compare the Kwinana City Centre to other metropolitan secondary centres of a similar scale and composition to identify its strengths and weaknesses in terms of the quantum and diversity of floorspace. A 5km Study Area was used for the analysis consistent with expected local demand for the type of uses at the centre.[15]

7.1 Selected benchmarks

The benchmarks selected for comparison were:

- Wanneroo
- Baldivis
- Warwick
- Maddington

These centres were chosen because they have secondary/ district centres meeting similar needs of their catchment with some being comparable in size to Kwinana Secondary Centre (e.g. Wanneroo) while others are larger and may reflect a more aspirational benchmark (e.g. Maddington).

An aggregate benchmark (summed data from the four benchmarks) was developed by combining the benchmark centres to assess the strengths and weaknesses of the Kwinana City Centre using Land Use and Employment Survey data.

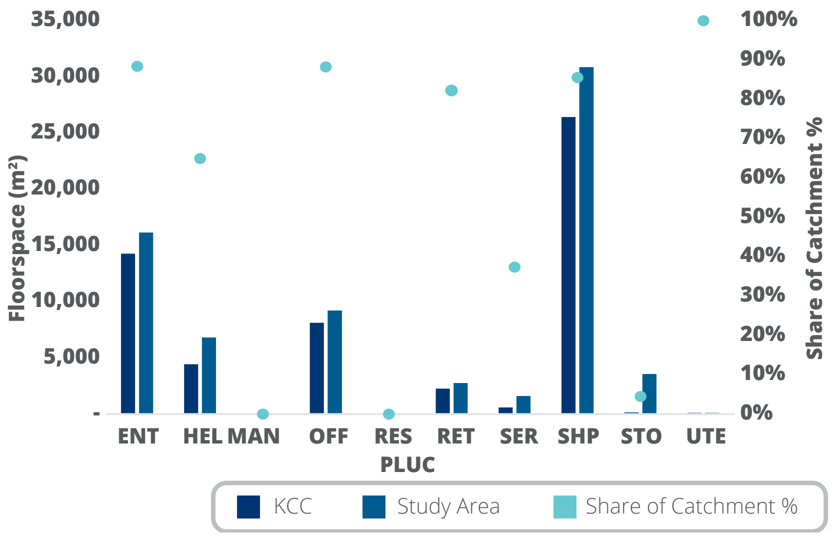
7.2 Current supply

The top three types of floorspace at Kwinana City Centre (excluding vacant floor area) are Shop/Retail (26,241 m²), entertainment (14,278 m²) and office (9,212 m²) (Figure 39). As discussed previously, the Kwinana City Centre has a lower-than-recommended diversity than recommended for secondary centres.

The Kwinana City Centre provides a significant proportion of total floorspace within the area. Potential gaps for investigation include the quantum and diversity of office, entertainment, residential and health floorspace.

The commercial floorspace in the Study Area and for the aggregated benchmark is summarised below (Figure 41). The Kwinana City Centre Study Area has approximately half the vacancy of the benchmark Study Area (5% versus 10%).

Figure 39. Kwinana City Centre Floorspace



Source: LUES 2016, Pracsys 2022

15 This is different to the broader Study Area and has been used to establish a comparable area for analysis with benchmark centres

Figure 40. PLUC Abbreviation and Description

PLUC Abbreviation	PLUC Category Description
ENT	Entertainment/Recreation/Cultural
HEL	Health/Welfare/Community Services
MAN	Manufacturing/Processing/Fabrication
OFF	Office/Business
RES	Residential
RET	Other Retail
SER	Service Industry
SHP	Shop/Retail
STO	Storage/Distribution
UTE	Utilities/Communications
VFA	Vacant Floor Area

Source: DPLH 2017

Figure 41. Commercial Floorspace - Study Area and Aggregated Benchmark

Planning Land Use Category	KCC Study Area (m^2)	Aggregated Benchmark Study Area (m^2)
Other Retail	2,270	10,444
Shop/Retail	26,421	107,581
Total Retail	**28,691**	**118,025**
Entertainment/Recreation/Culture	14,278	38,937
Health/Welfare/Community Services	4,431	19,993
Manufacturing/Processing/Fabrication	0	2,645
Office/Business	8,131	32,471
Primary/Rural	0	2,600
Residential	0	0
Service Industry	601	8,282
Storage/Distribution	160	1,135
Utilities/Communications	122	1,580
Vacant Floor Area	1,492	13,181
Total Non-Retail	**29,215**	**120,824**
Total Commercial	**57,906**	**238,849**

Source: DPLH 2016, Pracsys 2022

7.3 Kwinana City Centre Gap analysis – Planning Land Use Category

A gap analysis was undertaken to identify the quantum of potential floorspace gaps at the Kwinana City Centre. Gaps were identified at a:

- broad level using Planning and Land Use Category (PLUC) data.
- granular level using Western Australian Standard Land Use Classification (WASLUC) data.

Study Area

Service ratios for the Study Area (m² per person for a specific floorspace use) were calculated (Figure 42).

The difference between the Kwinana City Centre Study Area service ratio and the Aggregated Benchmark Study Area service ratio was used to identify gaps (Figure 43). Differences greater than 0 indicated that the Kwinana City Centre Study Area underprovided floorspace compared to the Aggregated Benchmark Study Area (there were more people per square metre of floorspace in the Kwinana City Centre Study Area). Differences less than 0 indicated that the Kwinana City Centre Study Area overprovided floorspace compared to the Aggregated Benchmark Study Area (there were fewer people per square metre in the Kwinana City Centre Study Area).

The analysis revealed that Kwinana City Centre Study Area potentially underprovided floorspace for all floorspace types, with those relevant to the City's activity centres; including:

- Health – 1,762m²
- Shop/Retail – will be determined by Gravity Model
- Other Retail – will be determined by Gravity Model
- Office – 3,797m²
- Entertainment – 9,081m²

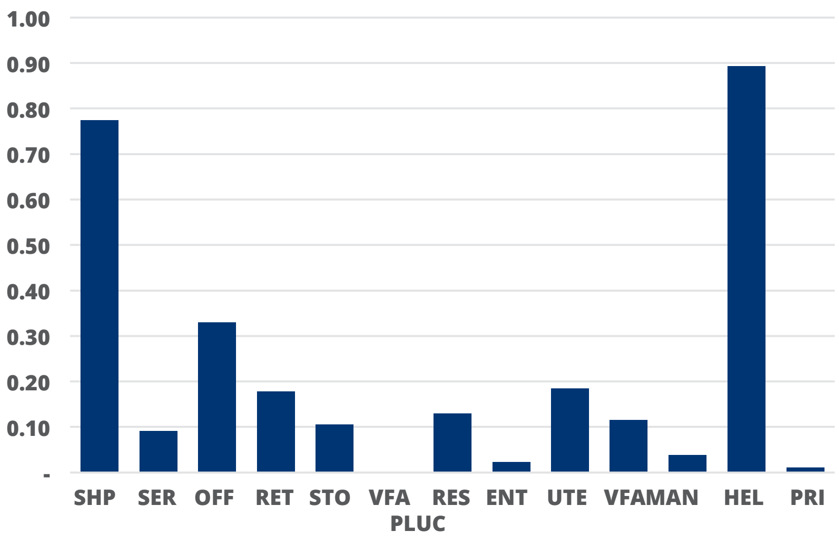
These Planning Land Use Category level gaps are included in the projections of non-retail floorspace. Note that findings related to Shop/Retail and Other Retail floorspace will be determined by gravity modelling and reported in the Needs Assessment section of this report (following this section).

Figure 42. Study Area Service Ratios

Planning Land Use Category	Kwinana City Centre Study Area (m² per person)	Aggregated Benchmark Study Area (m² per person)
Other Retail	0.08	0.26
Shop/Retail	0.95	1.72
Total Retail	**1.03**	**1.98**
Entertainment/Recreation/Culture	0.49	0.52
Health/Welfare/Community Services	0.21	1.10
Manufacturing/Processing/Fabrication	0	0.04
Office/Business	0.28	0.61
Primary/Rural	0	0.01
Residential	0	0.13
Service Industry	0.05	0.14
Storage/Distribution	0.11	0.21
Utilities/Communications	0	0.19
Vacant Floor Area	0	0.21
Total Non-Retail	**1.24**	**3.16**
Total Commercial	**2.27**	**5.14**

Source: DPLH 2016, Pracsys 2022

Figure 43. Kwinana City Centre Study Area Service Ratio vs Aggregate Benchmark Study Area Service Ratio



Source: DPLH 2016, Pracsys 2022

Kwinana City Centre

Service ratios were also calculated for the Kwinana City Centre (Figure 44).

The Kwinana City Centre provides a higher concentration of all types of floorspace compared to the centres making up the aggregate benchmark (with the exception of agricultural land, which is not relevant for the Kwinana City Centre). It is still prudent to consider addressing certain floorspace gaps in the Study Area using the Kwinana City Centre as the it is the primary centre in the hierarchy.

7.3 Kwinana City Centre Gap analysis – Planning Land Use Category

The Western Australian Standard Land Use Classification (WASLUC) data has been used to identify specific gaps that could be targeted at the Kwinana City Centre and other relevant centres. A detailed list of potential gaps have been aligned with their suitability for different centre types to support the City in considering different development opportunities (see Section 16, Appendix 7: WASLUC Gap to Centre Type Alignment)[16]. For each Planning Land Use Category, the gaps at the WASLUC level have been summarised in the following sections.

Office Gaps

While some level of office provision is appropriate across all centre types, where possible office-based uses should be targeted towards the Kwinana City Centre. Any major office-based developments should be encouraged to consider locating in the Kwinana City Centre; this type of activity will be key to the Kwinana City Centre achieving its high scenario. Recommendations for office floorspace based on identified gaps and consultation with the City of Kwinana include:

- **Professional Services**: There are a number of gaps in professional services (e.g. marketing, architecture) that should be targeted towards the Kwinana City Centre as they are generally business to business providers and more suited to a larger centre with amenity for employees
- **Health services**: More health services, including general dental services and general practitioners could be provided in the Kwinana City Centre and at other centres. Additional dental practices are expected to develop east of the Kwinana Freeway, which may reduce the need for additional practices at the Kwinana City Centre
- **Banking services**: Although there is a banking services floorspace gap in the Study Area and in the Kwinana City Centre, it is unlikely that the full amount will be required as digital customer banking is expected to become the norm[17]

Figure 44. Centre Service Ratios

Planning Land Use Category	Kwinana City Centre	Aggregated Benchmark Centres
Other Retail	0.07	0.04
Shop/Retail	0.81	0.44
Total Retail	**0.88**	**0.48**
Entertainment/Recreation/Culture	0.44	0.16
Health/Welfare/Community Services	0.14	0.08
Manufacturing/Processing/Fabrication	0	0.01
Office/Business	0.25	0.13
Primary/Rural	0	0.98
Residential	0	0
Service Industry	0.02	0.03
Storage/Distribution	0	0
Utilities/Communications	0	0
Vacant Floor Area	0.05	0.05
Total Non-Retail	**0.9**	**1.44**
Total Commercial	**1.78**	**1.92**

Source: DPLH 2016, Pracsys 2022

Bulky Goods Retail Gaps

Bulky goods retail opportunities should be targeted to service commercial areas. Recommendations for bulky goods floorspace based on identified gaps and consultation with the City of Kwinana include:

- **Hardware – retail**: Given Bunnings has two other stores in Rockingham and Baldivis, it is unlikely that a third store would be established in Kwinana. A competitor to Bunnings would be required to enter the market.
- **Furniture, Electronics and Whitegoods**: These types of uses align well with the two modelled service commercial locations (Wandi District Centre and west of the intersection of Thomas Road/Kwinana Freeway). In the short term, these uses are likely to locate adjacent to the newly developed Costco which will act as an anchor for these businesses. A small electronics store (e.g. JB HiFi) would be suited to the Kwinana City Centre.
- **Motor vehicles (new/used cars)**: Rockingham already has a large centre for motor vehicle retailing, therefore it is unlikely that the gap in Kwinana will be addressed.

Entertainment, Recreation, and Cultural Gaps

Certain entertainment and recreation uses are suited to different centre types. Key infrastructure such as arts centres museums and high concentrations of night time uses are most suited to the Kwinana City Centre and will be critical to supporting the Kwinana City Centre achieve its high scenario. Recommendations for entertainment, recreation and cultural floorspace based on consultation with the City of Kwinana include:

- **Live entertainment theatres**: The City of Kwinana supports the addition of a theatre to the Kwinana City Centre.
- **Motion picture theatres (excluding drive-in)**: Given that Rockingham hosts two separate cinema complexes, it is unlikely another theatre is required in Kwinana despite the floorspace gap.

16 The alignment of floorspace use to centre is not absolute, it is possible that some uses will be found in a centre where it is indicated they would not be suitable

17 'Digital Disruption in Banking and its Impact on Competition', OECD, 2020. Available from: http://www.oecd.org/daf/competition/digital-disruption-in-financial-markets.htm.
'Banking reimagined – How disruptive forces will radically transform the industry in the decade ahead', Deloitte Centre for Financial Services, 2016. Available from: https://www2.deloitte.com/au/en/pages/financial-services/articles/banking-industry-outlook-future-banking.html.

- **Ten pin bowling**: Most ten pin bowling alleys in Perth have been situated in strategic metropolitan centres (e.g. Cannington, Joondalup, Morley, Fremantle and Rockingham) or redeveloped secondary centres (e.g. Karrinyup). This does not prohibit a ten pin bowling alley existing in the Kwinana City Centre, but it may mean there is limited private sector interest for an additional ten pin bowling alley.
- **Night time economy**: gaps in uses such as drinking venues and small bars/clubs contribute to activating centres at night. These uses can be appropriate across almost all centre types and should be included at an appropriate level for smaller centres. There is however an opportunity to encourage more of these uses to locate in the Kwinana City Centre along with food and beverage offerings to develop a stronger and more viable night time economy.
- **Playgrounds**: gaps in the provision of playgrounds should be addressed strategically to support young families and businesses. This can be achieved by including playgrounds in new centre developments or current centre expansions in such a way that parents can passively survey their children from a commercial premises.
- **Sport and Recreation**: Gyms are identified as a gap however several have been developed since the last Land Use and Employment Survey and there may be limited demand for any additional clubs.

Health, Welfare and Community Services Gaps

Small health-based uses (individual practices with only a few practitioners) can be suited to smaller centres. Larger health uses and concentrations of allied health services are suited to the Kwinana City Centre and will support multi-purpose visits that are necessary to achieve the Kwinana City Centre's high scenario. Recommendations for health, welfare and community services based on consultation with the City of Kwinana include:

- **Community health centres (medical)**: Increasing the number of medical community health centres would be consistent with the 2019 Employment and Economic Development Study's recommendation of focusing on community-focused health services in the Kwinana City Centre.
- **Child day care centres and nurseries**: A large child care gap was identified at the Kwinana City Centre; however, there are many operators in the Study Area, including several family day care businesses that would not be included in Land Use and Employment Survey data. If floorspace at the Kwinana City Centre reaches levels expected in the high scenario, childcare at the centre will be convenient for a greater number of employees and centre users
- **Schools**: The City of Kwinana has confirmed that this gap is unlikely to exist at present. Kwinana has several schools in the vicinity of the Kwinana City Centre, including Orelia Primary School, Gilmore College, Calista Primary School, Peter Carnley Anglican Community School St Vincent's School and Medina Primary School
- **Welfare and charitable services**: A gap in welfare and charitable services floorspace was identified; however, the City of Kwinana may deem the proportion of welfare and charity organisations is appropriate for the population. Additional provision of these use should be based on private sector interest.

Shop/Retail Gaps

Shop/Retail uses need to be distributed in a way that supports the daily and weekly shopping needs of the City's residents. Convenience based uses are those that are most susceptible to proximity (e.g., a person is likely to go to their closest or most convenient supermarket for a weekly shopping trip). Comparison uses are most suited to being concentrated in major centres (people will go to a shopping centre to compare clothing across multiple retailers).

The City's Activity Centre Hierarchy provides a suitable distribution of Shop/Retail floorspace however some centres that are planned have not been developed in areas where there are growing levels of demand. This can lead to residents spending outside of the City's Activity Centre Hierarchy as there may be a shopping centre more conveniently located between their dwelling and workplace. A number of gaps are related to these centres and are likely to be addressed as planned centres are developed.

Recommendations for Shop/Retail floorspace based on consultation with the City of Kwinana include:

- **Department stores – retail**: Although Kwinana has a 4,244m² department store gap, it already has a Big W and is unlikely to receive a Kmart (due to Kmart stores in Baldivis, Cockburn and Rockingham). The need for a department store east of the Kwinana Freeway could address this gap as the area develops. The most suitable location for such a store would be the Wandi District Centre; it should be noted that Costco will likely address some of this gap.
- **Restaurants, cafes and function centres**: The City of Kwinana has advised that there is a lack of functional existing building space for these uses in its centres. Appropriate amounts of these uses should be allowed to develop in smaller centres; any remaining private interest in developing this type of use should be targeted to the Kwinana City Centre to support night time activation.
- **Take away food and milk bars**: The western side of the Kwinana Freeway has many take away food options; this gap is likely most relevant to the eastern side of the Kwinana Freeway

8

Retail Needs Assessment

SPP 4.2 requires a Needs Assessment to support the development of the local planning strategy (formerly known as a Retail Needs Assessment).

The aim of this Needs Assessment was to determine the required provision of floorspace in the City of Kwinana until 2042. This was done through the following steps:

- **Defined Study Area**: The supply of floorspace captured in the Needs Assessment was based on the Study Area including Kwinana, and parts of Cities of Rockingham and Cockburn and the Shire of Serpentine-Jarrahdale (Figure 10) .
- **Assessed current demand and supply**: Demand for retail floorspace was based on existing household income and expenditure data from the ABS. The current supply of retail floorspace was identified using Land Use and Employment Survey data and was confirmed with the City of Kwinana.
- **Forecasted future demand and supply for retail floorspace based on low and high scenarios**: Future demand was projected based on WA Tomorrow population forecasts prepared by the Department of Planning, Lands and Heritage. Future supply was assessed based on planned developments confirmed with the City of Kwinana.

The expected productivity (the turnover per square metre of floorspace) was calculated for each of the centres using a gravity model. Two scenarios were then developed to show the possibilities for future development:

- **The low scenario (based on current performance levels)**: In the low scenario, the current productivity level of centres in the City of Kwinana for retail floorspace (which was found to be low overall) was maintained in the future. This scenario reflects a continuation of the current status quo (business as usual) without any major changes/responses by centres in the City.
- **The high scenario (based on the theoretical maximum performance)**: In the high scenario, the productivity level of the centres was a (higher) theoretical turnover based purely on their size and distance from dwellings. This scenario reflects an improvement of the offering at centres in the City that allows them to attract additional expenditure from within the Study Area.

- **Forecasted the future supply for non-retail floorspace based on low and high scenarios**: Non-retail floorspace was modelled based on the same scenarios outlined above and the Study Area dwellings growth rate.
- **Distributed additional required non-retail floorspace between the low and high scenarios**: additional floorspace required was distributed to new centres and existing centres based on existing centre non-retail floorspace ratios.

8.1 Modelling Inputs

Demand

Demand for retail and non-retail uses has been assessed over a 20 year period from 2022 to 2042 using population forecasts and ABS household income and expenditure data. WA Tomorrow population forecasts were used to estimate dwelling growth over the study period.[18] The forecasts are available to 2031 and have been extrapolated to derive estimates until 2042 (Figure 45). The Study Area has a higher expected growth rate than Greater Perth over the period with an average annual growth rate of 2.68% compared to approximately 1.8%, respectively.[19]

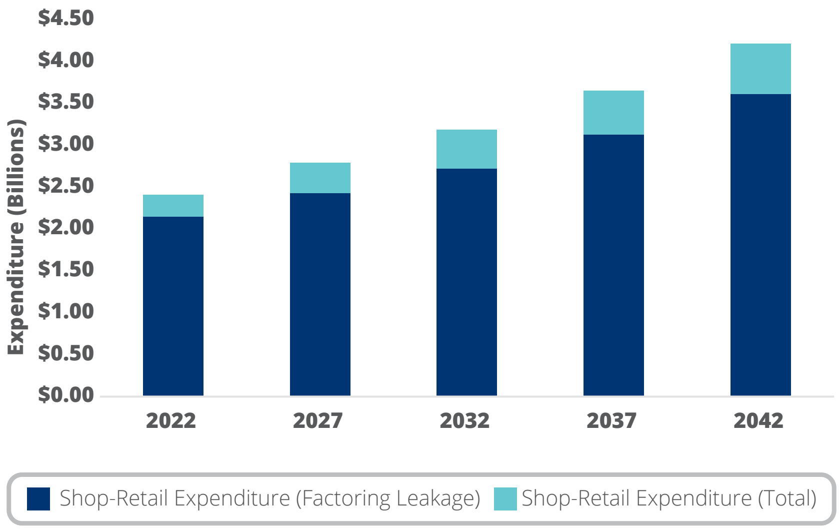
Household retail expenditure was assigned to dwellings based on their income quintile (see Figure 9) as income is highly linked with expenditure. Retail expenditure for the Study Area was estimated based on the propensity of each income quintile to spend on goods and services (Figure 46). Leakage was also factored into the expenditure estimates to obtain a more realistic idea of the total retail expenditure pool for the Study Area (refer to Appendix 4: Modelling Information for the leakage rates used).

Figure 45. Study Area Dwelling Projections 2022 – 2042

	2022	2027	2032	2037	2042
Dwelling Forecasts	80,412	92,184	104,377	118,993	136,529

Source: WA Tomorrow 2021, Pracsys 2022

Figure 46. Estimated Study Area Household Expenditure



Source: ABS HHES 2017/18, ABS Census 2016, Queensland Investment Corporation 2021, ABS 2021

Current Supply

The Study Area's current supply of floorspace is summarised below (Figure 47). The Shop/Retail and Other Retail floorspace uses were included in respective gravity models. Non-retail floorspace was analysed using floorspace to population ratios using the results of gravity modelling to support detailed changes by centre.

18 WA Tomorrow population projections were used as they have been developed by DPLH and are constrained by population growth in surrounding areas. Furthermore, Forecast.id/REMPLAN population growth data was not available for all Local Governments within the Study Area.

19 The Greater Perth estimate is based on the average annual growth for Greater Perth to achieve its 2050 target of 3.5 million population.

Figure 47. Current supply of floorspace

City of Kwinana				
LUES Activity Centre Name	**Activity Centre Name Used in Report**	**Total Shop Retail Floorspace (m²)**	**Total Other Retail Floorspace (m²)**	**Total Non-Retail Floorspace (m²)**
Calista Avenue	Calista Local Centre	153	0	0
Casuarina	Bertram Neighbourhood Centre	1,515	0	1,315
Kwinana Centre	Kwinana City Centre	32,716	2,270	27,899
Leda	Leda	927	140	110
Medina Avenue	NA	0	0	0
Orelia	NA	354	0	1,345
Orton Road	NA	0	0	10,570
Pace Road	Medina Neighbourhood Centre	3,500	0	5,323
Parmelia	NA	521	0	400
Summerton	NA	394	0	999
Thomas Road/Holden Close	NA	0	350	200
NA	Wandi Local Centre	121	0	0
NA	Wellard Neighbourhood Centre	6,500	2,000	1,083

City of Cockburn				
LUES Activity Centre Name	**Activity Centre Name Used in Report**	**Total Shop Retail Floorspace (m²)**	**Total Other Retail Floorspace (m²)**	**Total Non-Retail Floorspace (m²)**
Adventure World		1,770	0	19,635
Atwell		1,443	0	860
Berrigan Drive		3,178	1,466	4,548
CCC Atwell & Jandakot		0	0	2,199
CCC Beeliar Et Al		0	0	0
CCC Spearwood Et Al		4,750	65	3,607
Cockburn Isolated Uses		1,545	2,632	20,779
Cockburn Liquor		340	125	535
Gateway		51,322	3,878	76,244
Hamilton Road		755	0	95
Jandakot North		1,349	297	25,240
Lakes S.C.		6,926	480	1,902
Lyon Road		3,628	0	1,959
Port Coogee Village Shopping Centre		5,500	0	0
Sayer Road		0	0	900
Spearwood Road		3,009	80	4,100
Spudshed Spearwood		2,570	0	0
The Grange		2,064	0	2,277
Wattleup		180	0	879
Wattleup Road		0	0	400
Wattleup Road 2		0	0	800
Yangebup		1,539	0	604
Yangebup Shopping		1,041	0	1,592

Figure 47. Current supply of floorspace cont'd

City of Rockingham				
LUES Activity Centre Name	**Activity Centre Name Used in Report**	**Total Shop Retail Floorspace (m²)**	**Total Other Retail Floorspace (m²)**	**Total Non-Retail Floorspace (m²)**
Baldivis		2,081	0	3,435
Baldivis Town Centre		29,435	3,795	13,411
Bayside		2,033	0	961
Belgravia Terrace		2,000	0	0
Bell		611	0	489
Bent Street		570	0	0
Charthouse Waikiki		1,166	0	0
Enterprise		7,298	17,368	2,787
Fisher		200	0	0
Malibu		1,090	0	912
Mandurah Road		0	0	3,310
Mclarty		0	0	482
Nicholson Road North		550	2,865	3,415
Paramount Estate		4,500	0	2,053
Parkin Street		246	0	130
Phoenix Park		19,377	860	8,627
Rae Road		0	0	336
Read Road		6,635	330	980
Rockingham Beach		13,848	306	35,661
Rockingham City		63,978	7,526	128,912
Rockingham Isolated Uses		3,602	2,060	4,962
Rockingham Wineries		320	0	18,962
Safety Bay Road		548	0	192
Ser-Jarr Isolated Uses		2,799	2,150	9,390
Shoalwater		3,260	219	1,254
Soraya Place		70	0	0
Spudshed Baldivis		5,500	0	0
Tuart Ridge		3,015	0	1,376
Waikiki		0	138	0
Warnbro		1,489	460	2,762
Yarra Promenade		2,913	0	1,778

Source: DPLH 2016, City of Kwinana 2022, Pracsys 2022

Future Supply

The developments and expansions that have occurred since 2016 and are planned until 2041 have been summarised in Figure 48.

Figure 48. Developments, expansions and contractions from 2016 to 2041

Expansions/Contractions				
Year of Expansion	**Activity Centre Name**	**Total Shop Retail Floorspace (m²)**	**Total Other Retail Floorspace (m²)**	**Total Non-Retail Floorspace (m²)**
2017	Kwinana City Centre	32,716	2,270	27,899
2021	Leda Neighbourhood Centre	927	140	110

Expansions/Contractions				
(Expected) Year of Completion	Activity Centre Name	Total Shop Retail Floorspace (m²)	Total Other Retail Floorspace (m²)	Total Non-Retail Floorspace (m²)
2016	Wellard Village Neighbourhood Centre	6,500	2,000	1,083
2022	Orton Road	4,000	10,346	NA
2026	Wandi District Centre	20,000	5,000	NA
2026	Wandi Local Centre	1,500	0	NA
2026	Mortimer Road Neighbourhood Centre	2,500	300	NA
2026	Mandogalup 01	1,000	0	NA
2026	Kwinana Station	500	0	NA
2026	Wellard Local Centre 1(potential new site)	1,000	0	NA
2031	Wellard East	1,000	0	NA
2031	Wellard Local Centre 2	1,000	0	1,400 (estimate)[20]
2027	Anketell 02	240	0	NA
2031	Thomas Road Neighbourhood Centre (Anketell South)	3,500	0	NA

Source: DPLH 2016, City of Kwinana 2022, Pracsys 2022

Floorspace from these yet to be developed activity centres is included in the Retail Gravity Modelling after their expected date of completion. Some centre locations have been developed for other uses and the following considerations have been made for their inclusion in the model:

- The Wellard 02 centre from the previous LCACS has been identified as a centre that is unlikely to develop due to other uses having been developed on the planned site. A new site will be tested in the analysis that agglomerates a number of the undevelopable centres from LCACS 2014 (Wellard Local Centre). A block of land to be developed for urban uses in Wellard has been used to test the potential centre; the lot is in between Brentford Parade, Lambeth Circle, and Portobello Parade. Shop/Retail floorspace of 1,000m² is tested at the site.
- Wellard East 02 from LCACS 2014 has been assumed to develop (renamed to Wellard East) while Wellard East 01 is no longer practical due to the proposed uses for the location. The floorspace has been merged and 1,000m² of Shop/Retail floorspace is tested at the site.
- Wellard 03 from LCACS 2014 (renamed to Wellard Local Centre 2) has developed with non-retail uses including a childcare centre and medical centre. It is assumed Shop/Retail uses can still develop at the location and 1,000m² of Shop/Retail uses is tested at the site

Growth in centres outside of the City has also been taken into consideration (Figure 49).

Figure 49. Centre Growth Outside City of Kwinana

Centres	Year of Expansion	Expanded Amount
Cockburn	2026 and 2036	72,322m² and 90,000m²
Rockingham City Centre	Every five years	118,524m² by 2042
Other Centres in Rockingham	Every five years	162,327m² by 2042

20 Estimated using google maps and applying a 0.9 ratio for Gross Lettable Area to Net Lettable Area

8.2 Floorspace Projections

Floorspace projections were developed for Shop/Retail, Other Retail and Non-Retail floorspace uses through the following methods:

- Shop/Retail and Other Retail were projected based on gravity modelling that allocates turnover to centres based on dwelling growth and supply growth within the Study Area.
- Non-retail floorspace was projected in two steps. The first step allocated the identified floorspace gaps to the City's centres (see Section 7.3, Planning Land Use Category Gap Analysis). Growth by centre was then apportioned based on the estimated change in Shop/Retail floorspace in the Gravity Model. This allows Non-Retail floorspace to align more closely with the spatial distribution of future dwellings and competing centres. New centres were allocated Non-Retail floorspace based on benchmarked ratios of Retail to Non-Retail floorspace by centre type.

Shop/Retail and Other Retail Floorspace Projections

Gravity modelling was used to allocate retail expenditure to the current and future centres in the low and high scenarios (Figure 50). Viable turnover productivity levels by centre type were then applied to relevant centre turnover to estimate the supportable floorspace at five year time points.[21] In the low scenario the model was calibrated using published moving annual turnover that indicated some centres in the City were underperforming (e.g. the most recent turnover available for the Kwinana City Centre indicated the Kwinana Marketplace shopping centre was achieving a turnover productivity of approximately $5,500m², which is well below benchmarked turnover levels for Secondary centres that are generally between $8,000m² and $9,000m²)[22] [23] The high scenario assumes that the performance of centres within the City improves and applies a neutral setting to the gravity model that allows expenditure to accrue to centres based purely on their size and distance from dwellings.

Shop/Retail floorspace is predicted to grow by approximately 30,000m² in the low scenario and 50,000m² in the high scenario.

Other Retail floorspace is predicted to grow by approximately 13,000m² in the low scenario and 31,000m² in the high scenario (Figure 51).

The high scenario achieves an additional 20,000m² and 18,000m² Shop/Retail and Other Retail floorspace respectively between 2022 and 2042. It is recommended that the high scenario be used for planning purposes as it allows greater flexibility for developers to meet demand and it is reasonable to assume that as other centre expansions occur outside of the City that there will be a competitive response by centres within the City.

These projections are slightly lower than LCACS 2014 for Shop/Retail and significantly lower for Other Retail, with LCACS 2014 projecting only until 2031. This slightly more conservative forecast is considered appropriate as LCACS 2014 indicated approximately an additional 12,000m² of Shop/Retail floorspace and 15,000m² by 2021 than what was actually developed. The current performance of centres and developments in surrounding areas are likely contributing to these discrepancies, along with developers seeking to develop floorspace outside of planned centres.

Figure 50. Shop/Retail Floorspace Scenarios

Shop/ Retail	2022	2027	2032	2037	2042
High Scenario	50,701	70,584	79,633	87,701	102,962
Low Scenario	50,701	63,039	69,277	72,475	83,375

Source: DPLH 2016, WA Tomorrow 2021

Figure 51. Other Retail Floorspace Scenario

Other Retail	2022	2027	2032	2037	2042
High Scenario	4,760	20,225	27,844	31,296	35,433
Low Scenario	4,760	10,983	14,487	16,003	17,740

Source: DPLH 2016, WA Tomorrow 2021

Non-Retail Floorspace Projection

Non-retail floorspace has been estimated based on the identified gap in relevant Planning Land Use Categories and the projected increase in demand for goods and services from population growth. The High and Low scenarios have been developed based on the results of the Shop/Retail gravity modelling to reflect the performance of centres as a whole. It is assumed that the identified current gap in Non-Retail floorspace is addressed in both scenarios.

Non-Retail floorspace is projected to increase to 81,000m² and 90,000m² in the low and high scenario, respectively.

21 See Section 14, Appendix 6: Benchmark Viable Turnover Productivity

22 SCA Property Group 2015, 'Property Portfolio'. Available from: https://www.scaproperty.com.au/Resources/pdf/SCA%20Property%20Portfolio_Email_Version%20FA.pdf Note: the information from this source has been adjusted in the Gravity Model to account for the addition of Coles and Aldi since publication

23 Property Council 2021, 'Shopping Centre Directory'.

Figure 52. Non-Retail Floorspace Scenario

Non-Retail	2022	2027	2032	2037	2042
High Scenario	39,696	51,814	61,941	73,934	89,511
Low Scenario	39,696	50,129	58,808	68,449	80,693

Source: DPLH 2016, WA Tomorrow 2021

Figure 53. Dwelling Forecasts

Small Area	2022	2027	2032	2037	2042
Anketell - Urban	113	482	1,151	1,437	1,539
Bertram	2,531	2,650	2,787	2,833	2,845
Calista	994	1,044	1,073	1,098	1,119
Casuarina - Urban	120	320	555	1,632	2,842
Leda	1,213	1,220	1,240	1,271	1,281
Medina	1,250	1,276	1,298	1,316	1,331
Orelia	2,307	2,431	2,645	2,835	2,977
Parmelia	3,005	3,309	3,585	3,634	3,654
Postans & Hope Valley (Includes Mandogalup)[24]	163	579	1,109	1,738	2,687
Rural - East of Freeway	1,004	1,009	1,012	1,017	1,021
Wandi - Urban	1,517	1,784	2,032	2,232	2,535
Wellard	5,198	6,909	7,771	8,076	8,119
Wellard East - Urban	819	1,360	1,723	1,838	1,866

Source: REMPLAN 2022

8.3 Activity Centre Hierarchy Summary

The high scenario has been used to develop the final Activity Centre Hierarchy that will guide implementation of LCACS 2023. The Activity Centre Hierarchy provides estimated floorspace requirements at each activity centre in the City at five year time intervals until 2042. The floorspace projections should be viewed in line with dwelling estimates to understand whether projections are being achieved.

Dwelling estimates from REMPLAN are provided above as they are regularly updated and easily accessible by the City.[25]

The revised Activity Centre Hierarchy has been adjusted to exclude centres that have either been developed for other purposes or that are not likely to develop, these centres include (using nomenclature from LCACS 2014, for a spatial representation see Appendix 10: Activity Centre Hierarchy 2014):

- Casuarina South 03
- Wellard E 01
- Postans 01
- Spectacles
- Thomas Road/Holden Close (this has been removed however it is recommended that zoning be maintained, see Section 5.9)
- Kwinana Beach (Wells Park)

There has been one change of centre type with the Leda Neighbourhood Centre transitioning to a Local Centre in light of its floorspace being following its redevelopment. The centres included in the activity centre hierarchy are shown (Figure 1).

8.4 Employment Implications

The activity centre hierarchy will generate significant employment as it develops. Additional employment has been estimated using the current floorspace to employment ratios in the City based on Department of Planning Lands and Heritage Land Use and Employment Survey data (Figure 54).

Employment estimates have been developed for both low and high scenarios. It is estimated that by 2042 the low scenario will contribute an additional 2,315 jobs while the high scenario will contribute an additional 3,446 jobs (Figure 55).

24 It should be noted that the majority of the dwelling growth in this spatial area is associated with new developments in Mandogalup west of the Kwinana Fwy. It is recommended that the City work with REMPLAN to refine this area to provide a specific spatial representation of Mandogalup that is separate from the industrial zoned land to the west.

25 They align quite well with modelled dwellings with REMPLAN estimating 33,149 dwellings by 2041 and the Pracsys model estimating 32,461 in 2042. A map is provided in Section 15, Appendix 6: REMPLAN Map

Employment will come predominantly from Shop/Retail floorspace and Non-Retail floorspace. Other Retail floorspace is generally less employment intensive due to high automation and large floorspace areas/showrooms.

The Shop/Retail and Other Retail employment opportunities are likely to be low skilled, providing opportunities for youth employment. These jobs are overwhelmingly part-time/casual in nature (67%) and will include salesperson and customer service type roles that are suited to people who are new to the workforce. Non-Retail employment opportunities are likely to support a mix of low and high-skilled employment ranging from hospitality to health services. Hospitality jobs are predominantly part-time and will support low skilled and youth employment, much like Shop/Retail. Office-based jobs will likely support a mix of new workforce entrants with a higher level of education and more skilled workers. Health and education related uses are likely to support high-skilled, highly educated workers.

The City's Employment and Economic Development Study identified the need for 12,000 jobs by 2036 to maintain the City's Employment Self Sufficiency level, of which 33% would be population driven. The City's Activity Centre Hierarchy would contribute approximately 21% or 13% to the 12,000 job target in the high and low scenario, respectively. This is seen as a suitable amount given some population driven employment will be provided for at light industrial areas that are not considered in this analysis.

Figure 54. Floorspace to Employment Ratios

	Other Retail	Shop Retail	Non-Retail
Floorspace per Employee	75	29	42
Low Scenario	39,696	50,129	58,808

Source: DPLH 2016

Figure 55. Additional Employment by Scenario

Scenario	2027			2032			2037			2042			Total 2042
	Shop Retail	Other Retail	Non-Retail	Shop Retail	Other Retail	Non-Retail	Shop Retail	Other Retail	Non-Retail	Shop Retail	Other Retail	Non-Retail	
High	711	207	291	1,026	309	534	1,307	356	822	1,839	411	1,196	3,446
Low	449	83	251	666	130	459	777	151	691	1,157	174	985	2,315

Source: DPLH 2016, Pracsys 2022

9 Implementation

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

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

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

- The floorspace projections in this analysis provide guidance for the City to understand the potential quantum of floorspace that may be demanded at a certain time point. Reaching a certain population or year does not automatically mean a centre should expand. Instead, the City will need to consider other factors affecting the activity centre hierarchy at the time of receiving an application (future developments that may not be in this analysis, changing floorspace per population requirements) in order to assess whether additional floorspace is required in future.
- The floorspace projections (by centre), population projections (by precinct) and dwelling density targets (for relevant centres) in the reported years (2027, 2032, 2037, 2042) should be used to monitor the provision of uses across the activity centre network. When a population level is reached in a precinct and/or target density is reached at a centre, this is an indication that further floorspace can be considered if private interest arises; even if this occurs prior to the year identified in the Needs Assessment. Interest from private industry can be an indicator of current or future potential demand and should be considered as part of the overall decision-making process. This being said, private interest may undermine the activity centre hierarchy and appropriate measures should be used to ensure development applicants have demonstrated an actual need for additional goods or services (see following dot points). If a population level does not occur by an identified year, the population level should be the guiding factor for potential development and not the year.
- The Needs Assessment provides floorspace quantum estimates for individual centres. These should not be treated as strict floorspace caps but as targeted supportable floorspace with some flexibility for small under or over provisions (the under or over provision should be based on identified need at the time).
- If a centre has not expanded to the level identified in the Needs Assessment, this fact should not be used to justify the expansion of another centre in a fully developed area. However, if a centre's growth has been constrained in a developing area, the expansion of another centre may be justified.
- New centres may be allowed to incorporate additional floorspace where a current centre cannot expand due to land or other constraints, with the caveat:
    - The new centre should be in a location that provides suitable access to residents of the current centre's catchment.

Considerations have been developed for service commercial and light industrial developments: [26]

- Shop/Retail uses should only be allowed in service commercial and light industrial areas where an applicant can be shown they are providing for demand from local workers and visitors to businesses in the commercial centre.
- Service commercial and light industrial uses should be focussed in identified employment centres or in future employment areas including the Intersection of Thomas Rd and the Kwinana Freeway (Western Side) and the Wandi District Centre.
- The following criterion should be used to assess any proposed developments for these uses in new locations:
  - Is there sufficient space for the use in a current employment centre. If there is not, the proposed location should have the following attributes:
  - Proximity to relevant consumer/customer (population – light industry, businesses – heavy industry)
  - Appropriate road and/or freight access
  - Compatible surrounding uses (heavy industry uses are not compatible with residential development)
  - Access to necessary infrastructure (e.g. special waste disposal requirements)
  - Land constraints (if site works will be too expensive, commercial uses may not be viable)
- The type of uses allowed in service commercial and light industrial areas should be flexible as these areas span both business to consumer and business to business supply chains. The primary goal for the City in planning these areas should be to minimise the encroachment of uses that are most appropriate for Activity Centres (Shop/Retail) unless supporting the employee and visitor populations

9.1 Activity Centre Specific Recommendations

Kwinana City Centre

The Kwinana City Centre is the primary centre in the Activity Centre Hierarchy and the City should ensure that this primacy is retained as the activity centre hierarchy develops. The current performance of the centre has been identified as low[27] and there will likely need to be a collaborative approach between the City and key stakeholders in the Kwinana City Centre to improve the centre's performance. Specific actions to support improved performance of the Kwinana City Centre have been identified in Section 5.1, Kwinana City Centre.

A summary of key focus areas for supporting the Kwinana City Centre in achieving the High Scenario floorspace estimates includes:

- Encouraging office development to occur in the Kwinana City Centre to create day-time activation.
- Facilitating entertainment, café/restaurant, recreation and cultural uses in the Kwinana City Centre to promote night-time activation and increased liveability.
- Encouraging any future redevelopment of the Kwinana Marketplace to connect with Chisham Ave.
- Creating a stronger connection between civic and retail uses in the Kwinana City Centre to promote multi-use visits and pedestrian activity.
- Short term activation of Chisham Ave through alfresco dining, a strong link with Aldi and additional activities in the Market Square area between Chisham Ave and the Public Library.
- Offer family amenity or encourage proponents to provide family amenity. Family amenity has been an important feature for several retail redevelopments, including the Karrinyup Shopping Centre Redevelopment and the Cockburn Gateway Expansion.
- Support more residential offerings in the Kwinana City Centre to increase the local expenditure pool. The City of Kwinana's 2019 Employment and Economic Development Study also identified an opportunity for Kwinana to be a residential and service location for personnel involved with defence assets maintenance at Henderson.
- Work with stakeholders to understand short-term accommodation potential identified in the Employment and Economic Development Study.
- Future development to the south of Challenger Ave should complement and not compete with current uses. It is recommended that Shop/Retail uses only be allowed to support residents and visitors to the future development and not act as an activity centre that supports daily shopping needs for a surrounding catchment. The purpose of this recommendation is to prioritise the connection of the Kwinana Marketplace and the Civic uses to the north of Chisham Ave

The other centres in the City's Activity Centre Hierarchy may develop ahead of the Kwinana City Centre, particularly if they are newer and have potentially been developed in a way that is more competitive with new centres outside of the City. This should be allowed as:

- They are playing a critical role in providing for the daily and weekly shopping needs of the City's residents.
- Limiting the expansion of other centres will not directly transfer the additional expenditure to the Kwinana

26 Note that these considerations are for population driven centres only and do not apply to strategic industrial land such as the Kwinana Industrial Area in the WTC.

27 See Section 8, Needs Assessment – Shop/Retail and Other Retail Floorspace Projections

City Centre, particularly if there are no changes to its current performance. The expenditure will be split between convenient centres outside of the City (centres near where people work) and the Kwinana City Centre, reducing the overall benefit to the City of Kwinana community and businesses.

- SPP 4.2 considers community benefit when assessing the suitability of a development. Allowing planned activity centres to expand based on community need achieves the highest community benefit.

Wandi District Centre

The Wandi District Centre is now planned to reach a size of approximately 20,000m² by 2042.

The Wandi District Centre will reduce the need for local residents to travel longer distances to other centres and warrants a larger centre than was indicated in the original modelling.

State planning Policy 4.2 indicates that district centres serve populations of between 20,000 and 50,000; the City is already home to 50,000 and will grow to 80,000 by 2041. Based on this population, a larger district centre is appropriate, and it is recommended that a centre of up to 20,000m² shop retail floorspace be allowed for with appropriate evidence of need and net benefit to the community, as per SPP4.2 Implementation Guidelines.

The location along Anketell Rd may provide additional support given its planned connection to Westport; however, access to the centre may be affected by its proximity to the future Anketell Road / Kwinana Freeway interchange. Ensuring that there is appropriate signage and access off Anketell Road will be key in supporting the centre's potential of capturing passing traffic.

Figure 56. Wandi District Centre Assessment

Attributes	Analysis
Purpose	The original State Planning Policy (SPP) 4.2 expected the Wandi District Centre to be the primary centre serving the Eastern Residential Intensification Concept (ERIC) Urban Corridor.[28] The ERIC urban corridor included areas near the Kwinana Freeway in the suburbs of Mandogalup, Wandi, Anketell, Casuarina and Wellard.[29]
Users	The primary users of the Wandi District Centre are anticipated to be City of Kwinana residents who would not visit the Kwinana City Centre due to distance and barriers. Other major users include motorists from the Kwinana Freeway and the Anketell-Thomas Road Freight Corridor.
Destinations	Destinations should be positioned so that they encourage pedestrian traffic that passes in front of other businesses.
Access and Origins	Access will need to be clearly marked particularly once the Anketell Road / Kwinana Freeway interchange upgraded is completed. Origins (i.e. parking lots) should be located towards the boundary of the centre to encourage pedestrian foot traffic along activated frontages.
Control	The City of Kwinana should work closely with the developer to ensure that the centre activates key sites. Depending on the desired layout for the centre (main street or fully internalised shopping centre) there will be an opportunity to activate corner locations and key pedestrian traffic passages.
Retail Floorspace	State planning Policy 4.2 indicates that district centres serve populations of between 20,000 and 50,000; the City is already home to 50,000 and will grow to 80,000 by 2041. Based on this population, a larger district centre is appropriate, and it is recommended that a centre of up to 20,000m² shop retail floorspace be allowed for with appropriate evidence of need and net benefit to the community, as per SPP4.2 Implementation Guidelines
Non-Retail Floorspace	Non-retail floorspace projections for the Wandi District Centre are based on benchmark ratios of retail to non-retail floorspace from District Centres. Expanding beyond this level of non-retail floorspace would be more suitable for certain uses of floorspace than others. For example, some service commercial uses (those suited to highway commercial) would be appropriate in greater concentrations in suitable areas of the Wandi District Centre. Other uses such as office-based uses that could be supported in the Kwinana City Centre should be limited to small scale offerings that cater to a more local catchment.

28 'North Anketell Structure Plan Amendment Report', Creative Design + Planning, 2019. Available from: https://www.dplh.wa.gov.au/departmentofplanninglandsheritage/media/daps/metro%20outer%20jdap/agenda/2020/october/20201016%20-%20agenda%20-%20no%2043%20-%20city%20of%20kwinana.pdf.

29 'Town of Kwinana Eastern Residential Intensification Concept', Rowe Group, 2013. Available from: 'North Anketell Structure Plan Amendment Report', Creative Design + Planning, 2019. Available from: https://www.dplh.wa.gov.au/departmentofplanninglandsheritage/media/daps/metro%20outer%20jdap/agenda/2020/october/20201016%20-%20agenda%20-%20no%2043%20-%20city%20of%20kwinana.pdf.

Neighbourhood Centres

A summary of implementation recommendations for each centre has been developed (Figure 58). These centres are represented spatially in Figure 10.

Figure 57. Neighbourhood Centre Recommendations

Centre	Analysis
Medina Neighbourhood Centre (Pace Road)	This centre appears to be turning over moderately well with a low vacancy rate. It is unlikely that the centre will grow significantly in future given that residential dwellings within the Study Area are already established and there is little vacant land to grow. It is recommended that increases in demand be allowed to increase the productivity of the centre's existing floorspace.
Bertram Neighbourhood Centre	The LCACS 2014 noted that this centre was intended to be a main street centre but was not necessarily performing as one. This may be due to the lack of active shop frontages and a fairly inhospitable microclimate, which could potentially be remedied with cafes and restaurants offering alfresco dining, parklets and street trees (see Section 5.7).
Wellard Village	This centre appears to be performing well and is in a suitable location adjacent to a train station and in close proximity to urban development. Neighbourhood centres can generally grow up to 10,000m² Shop/Retail floorspace; it is recommended that this centre be allowed to expand to this size in the long term to cater for nearby population growth. It is recommended that this be the maximum floorspace over the analysis period (pending review of this document and at the City's discretion) to ensure that the role of the centre does not change to that of a District Centre and begin to directly compete with the Kwinana City Centre.
Mortimer Rd	The analysis identified that this centre will require up to 5,800m² Shop/Retail floorspace in the long term. Any short-term development at this centre that is smaller than the identified demand should be developed in a way that will allow for future expansion.
Anketell South (Thomas Rd)	The Thomas Road centre is expected to support demand for up to 3,100m² Shop/Retail floorspace in the long term. This level is sufficient to support a single small to medium sized shopping centre with some specialty offerings. Given the Shop/Retail like offering at the newly developed Costco, any further out of centre supermarkets like those that have been proposed to the south of Thomas Road would essentially absorb the opportunity for the planned Thomas Road centre to develop with an anchor tenant. This is inconsistent with both the Local and State Planning Frameworks.
Centre Evaluation	Refer to Appendix 3: Activity Centre Performance Monitoring and Evaluation for an overview of the evaluation questions, criteria and metrics that can be used to assess activity centre performance on an ongoing basis.

Local Centres

A summary of implementation recommendations for each centre has been developed (Figure). These centres are represented spatially in Figure 10.

Figure 58. Local Centre Recommendations

Centre	Analysis
Leda Neighbourhood Centre	This centre underwent a redevelopment which resulted in a significant reduction of its floorspace. As a result, the Centre has been reclassified from a neighbourhood centre to a local centre.
Orelia Local Centre	This centre is in poor condition and has underutilised vacant land. It is recommended that the City of Kwinana support the development and delivery of an approved structure plan that allows for retail and residential development at the site. This centre should be rezoned to Mixed-Business.
Calista Local Centre	There are likely higher and better uses for this site, particularly given the current layout of the centre. Given the proximity of the centre to the Kwinana City Centre, redevelopment of the centre for residential uses would be appropriate. The centre should be zoned as Mixed Use to allow small shop/ residential rather than a stand-alone shop.
Parmelia Local Centre	This centre currently provides predominantly health related services. Given its proximity to the Kwinana City Centre, additional Shop/Retail uses should be limited to supporting walkable daily shopping trips for the local population.
Wellard Local Centre	A potential Local Centre was assessed in Wellard to the south of the train station. This area is under provisioned with regards to access to activity centre uses and some provision should be made. The analysis identified that a local centre of approximately 1,500m² Shop/Retail floorspace could be supported in the long term. It is recommended that the land be zoned as Mixed-Businesses to allow for Shop/Retail and Residential uses to support the centre.
Wellard 02	This centre was proposed in the LCACS 2014 and is located at the intersection of Portobello Pde and Lambeth Cir. The Wellard Local Centre will now provide for the daily and weekly shopping needs for surrounding residents. It is recommended that the centre previously identified as Wellard 02 be zoned as Mixed Use to allow small shop/residential rather than a stand-alone shop.

Centre	Analysis
Wellard Local Centre 2	This local centre has developed with non-retail uses including a childcare centre and medical centre. The analysis has identified that the local centre could support up to 1,500m² Shop/Retail floorspace in the long term.
Wellard East	A potential Local Centre was assessed in Wellard, to the east of the Kwinana Fwy. This area will require access to daily shopping goods and services as further residential development occurs. The analysis identified that a local centre of up to 1,500m² Shop/Retail floorspace could be supported in the long term.
Wandi Local Centre	The Wandi Local Centre is in close proximity to urban development. Analysis indicated that the high levels of potential demand could support a local centre up to 1,500m² Shop/Retail floorspace in the long term.
Mandogalup	The proposed Mandogalup local centre is in close proximity to urban development. Analysis indicates increasing demand; a local centre of 1,500m² Shop/Retail floorspace could be supported in the long term. There is currently a high level of residential development underway around this location with many potential future local centres identified in the City of Cockburn. There is also uncertainty with regards to the final uses to be developed as part of the Investigation Area 47. The City should engage with the City of Cockburn to develop a coordinated approach to the delivery of local centres in the Mandogalup and Hammond Park areas.
Casuarina Central	This centre provides a local offering between the Thomas Road and Mortimer Road neighbourhood centres. Analysis indicates that demand could support a smaller local centre up to 1,300 m² Shop/Retail floorspace.
Anketell North	This local centre is in close proximity to the Wandi District Centre. Analysis indicates that only a very small local centre of approximately 300m² could be supported. It is not likely that this is viable as a standalone centre. It is recommended that the centre be rezoned as Mixed-Business and that these uses be allowed as incidental in the Service Commercial section of the Wandi DC to the south of Anketell Rd. Any offering would need to be supporting the local workforce only (e.g. a sandwich bar, café)
Centre Evaluation	Refer to Appendix 3: Activity Centre Performance Monitoring and Evaluation for an overview of the evaluation questions, criteria and metrics that can be used to assess activity centre performance on an ongoing basis.

Service Commercial Centres

A summary of implementation recommendations for each centre has been developed (Figure 59).

Figure 59. Service Commercial Centre Recommendations

Floorspace	Comments
East of Thomas Rd and Kwinana Fwy Interchange (Orton Rd)	This area has a significant proportion of land which is zoned to support Service Commercial/Bulky Goods uses. It is also home to a newly developed Costco that will act as an anchor for other businesses. It is seen as likely to become the primary Service Commercial area in the City. The component of this centre that is made up of the Orton Road centre identified in LCACS 2014 is unlikely to be required within the analysis timeframe for Service Commercial uses. It is considered appropriate should proponents of light industrial uses seek to locate there.
Thomas Road / Holden Close	This area was previously identified as a key service commercial area in LCACS 2014. The development of the service commercial area to the west of this location is likely to attract any demand that may have gone to this location. Given the importance of having commercial land available in the long term, it is recommended that the current commercial zoning be maintained but be reviewed by the City every five years to see if it may be appropriate for the site to transition to mixed use or even residential zoning.
Guidance for Shop/Retail Uses	There are limited Shop/Retail uses permitted in these centres (refer to Clause 5.6.2 of SPP4.2 (2010)). The only Shop/Retail uses that should be considered at these centres should support the local workforce and the daily needs of visitors (e.g. a sandwich bar).
West side of Anketell Road / Kwinana Freeway interchange	There is the potential that some land in Mandogalup will be zoned to allow for Service Commercial uses. While the location and potential size of uses are unknown; this should be monitored by the City and incorporated in this document at the time of its next update.
Service Commercial Uses Along Rockingham Rd	Industrial areas along Rockingham Rd currently support approximately 2,842m² of service commercial (bulky goods) uses within the area based on LUES data. This is down from the 6,399m² identified in LCACS 2014. It is expected these uses will be phased out as Westport develops. It is recommended the current zoning be maintained with allowance for incidental Shop/Retail uses such as sandwich bars to cater to the daily shopping needs of workers.
Westport	The Westport development may increase the potential demand for Service Commercial uses, particularly along Anketell Road.

9.2 Supporting Centre Development

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

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

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

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

There are a number of key drivers for population-driven industries that need to be considered when planning for activity centres.

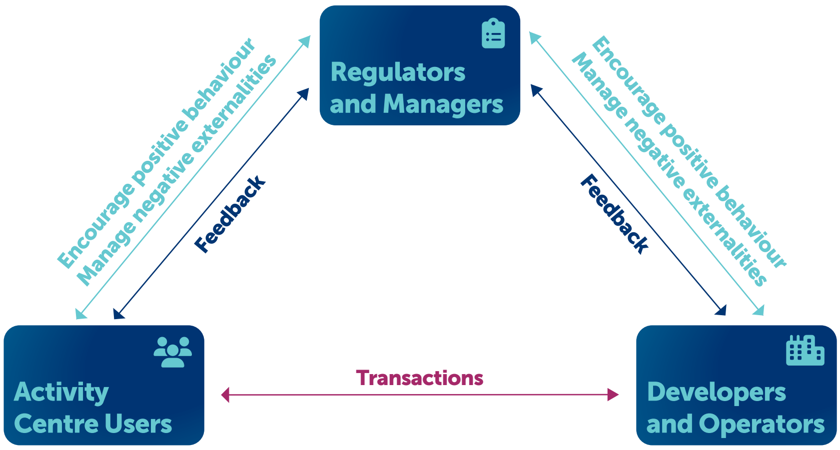
A change in any of the above characteristics will promote a change in floorspace and interest from the market for redevelopment. For example, on the demand side, an increase in the level of density surrounding the centre increases the effective userbase and proportion of expenditure that is likely to be directed and captured by the centre, this will provoke a competitive response from developers in which investment will be made to capture this extra expenditure pool.

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

Strategic Employment

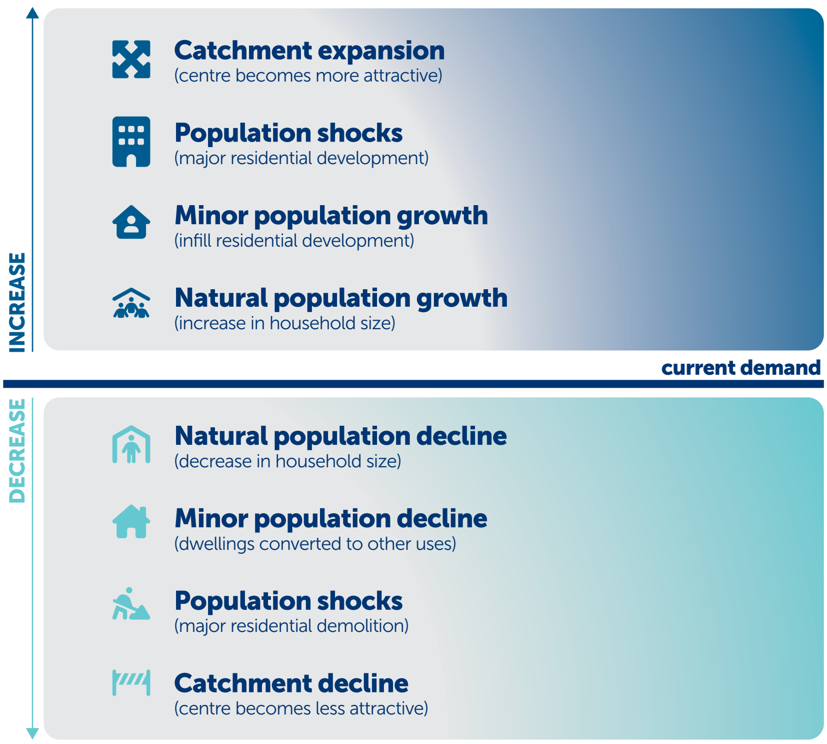
When considering strategic employment, the relevant industries are largely exogenous to changes in these drivers and principally rely on the comparative advantages of an area (resources, location) and individual decisions of businesses. Changes in strategic employment can be affected through promoting the unique advantages of the area to businesses, encouraging business collaboration and other business-friendly policies. Typical considerations include travel time to the CBD or major employment centres such as the Western Trade Coast (to access clients), travel time to work for employees and the cost of the premises. The 2019 Employment and Economic Development Study identified the following strategic employment opportunities for the City of Kwinana:

Figure 60. User group interactions



Source: Pracsys 2022

Figure 61. Examples of demand drivers for population-driven businesses



Source: Pracsys 2022

- Growth at the Western Trade Coast due to defence industries, new energy materials, energy projects and a waste-to-energy plant, as well as the expansion of existing activities including grain exports and petroleum products processing and handling. New energy materials could be the main activity of the Western Trade Coast; however, land must be available for this to occur. At the end of 2021, the State Government announced the formation Global Advanced Industries Hub Ministerial Taskforce, which aims to transform the Western Trade Coast into a global advanced industries hub.[30] It is expected that strategic employment will increase as the Western Trade Coast is transformed into this hub; however, it does not translate into greater employment intensity.
- The Kwinana Freeway provides opportunity for very large format retail outlets that have a metropolitan wide catchment and offer retail employment opportunities for younger people.
- The Kwinana City Centre could provide the base for community-focused health services including expanded GP services, tele-connected to specialists with visiting services to patients' homes, including to areas outside of the City of Kwinana that offer fewer services (e.g. the Shire of Serpentine-Jarrahdale).

The role of the City in encouraging these uses is considered in the following section.

9.3 The Role of the City of Kwinana

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

CONTROL	e.g. Establishing local policy and regulation, directing internal resources, utilisation of local government-controlled land and assets, implementing programs and events, and supporting projects with seed funding
INFLUENCE	e.g. Facilitating the strengthening of networks that encourage the sharing of knowledge and investment opportunities, and supporting communication with State and Federal governments regarding the influence of wider policy, projects or funding decisions
MONITOR	e.g. Tracking economic performance indicators and collecting feedback from businesses regarding current issues or opportunities which relies on communication channels with industry and the broader community

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

The City's activity centres are almost solely population driven. The levers available to the City have been considered in terms of centre and employment land type.

9.4 Implementation Summary

Key implementation points include:

- An evidence-based approach to activity centre development is recommended. This approach is aligned with SPP4.2 and provides the City with the flexibility to assess applications on a case-by-case basis to ensure the viability and vibrancy of the Activity Centre Hierarchy is maintained.
- Specific recommendations have been provided for each centre
- The role of the City is to act as a central regulator, coordinator and facilitator, working to understand the challenges facing local businesses to support sustainable activity centre development.
- The City has three levers that it can use through the Local Planning and Economic Development Frameworks:
    - Control (planning regulations)
    - Influence (advocacy)
    - Monitor (measurable outcomes to inform progress towards desired future)
- The City's activity centres are almost solely population-driven, with the possible exception of the Kwinana City Centre. For each type of centre/land use, the City should take a different approach to controlling, influencing and monitoring development.

30 'New taskforce to drive transformation of Perth's southern industrial precinct', WA Government, 2021. Available from: https://www.mediastatements.wa.gov.au/Pages/McGowan/2021/12/New-taskforce-to-drive-transformation-of-Perths-southern-industrial-precinct.aspx.

Figure 62. Role of the City of Kwinana in supporting development by centre and employment type

Lever	Centre Type	Application
Control	Kwinana City Centre	The City can control the population-driven uses (shop/retail) available in the Kwinana City Centre through planning and policy measures. It is recommended that these uses be allowed flexibility to develop based on private industry interest in the Kwinana City Centre. The City has less control over the attraction of strategic uses in the centre and needs to develop a planning approach that incentivises investment (allows for flexibility with regards to development considerations such as height and mix of appropriate uses). However, the City does hold several properties in the Kwinana City Centre that can be used strategically to support economic development activities and attract desired uses (e.g. health services, residential and service location for personnel involved with defence asset maintenance at Henderson).
	Other Activity Centres (e.g. district, neighbourhood)	The City has greater control of development at its smaller order centres and can use evidence-based decision making to ensure the centres are capable of meeting the needs of the current and future population while also maintaining a viable activity centre hierarchy. The Needs Assessment provides the evidence base with which the City and commercial stakeholders can understand markers for additional floorspace requirements. It is recommended that the floorspace estimates in this report be used as targets and not floorspace caps/limits due to the evolving nature of industries (particularly retail) and the changing nature of consumer demand.
	Heavy Industrial Land	The City has limited ability to control the development of strategic industries at heavy industrial areas such as the Kwinana Strategic Industrial Area; these should be allowed to develop based on industry demand. The main control the City should apply to these areas is to ensure that strategic industrial land is not taken up by less strategic, light industrial uses. This is particularly the case for any developable land that may be suitable to support uses related to Westport and the wider Western Trade Coast area.
	Light Industrial Land	The City should look to control the uptake of Shop/Retail uses in light industrial/ service commercial areas. These areas generally provide cheaper land and high levels of parking but do not support activated centres, the use of public transport and walkability. Bulky Goods Retail (Other Retail) can be suited to these areas; however, it should be targeted in specific centres and not be allowed to develop to a point that it constrains the development of light industrial uses (uses that require warehousing, large storage, large truck access, separation from residential developments).
Influence	Kwinana City Centre	The City has an important role in influencing development in the Kwinana City Centre, particularly for catalyst projects and more strategic uses. The City can establish and strengthen existing networks in line with the opportunities identified in the Employment and Economic Development Study.
	Other Activity Centres (e.g. district, neighbourhood)	Other centres should not require much influence to develop. They are driven by population growth that creates private developer interest. Should the City in the future wish to change the role of a centre it may need to use influencing tactics such as communication and advocacy.
	Heavy Industrial Land	The 2019 Employment and Economic Development Study identifies the need for industry collaboration structures to build the critical mass needed to break into global markets. The Global Advanced Industries Hub Ministerial Taskforce will be bringing together industry, government and union representatives; the City could support and complement this taskforce with local knowledge and established relationships
	Light Industrial Land	These land uses are similar in nature to those in activity centres, with population growth being the primary driver. There is an unlikely need for the City to influence the uptake of these areas.
Monitor	Kwinana City Centre	Ongoing monitoring should be undertaken to ensure that the activity centres and employment land in the City are meeting desired objectives. The Needs Assessment provides the evidence base for monitoring the change in floorspace across the Activity Centre hierarchy with an understanding of population levels at different time points that may indicate the need for additional floorspace. The City should monitor industry development, particularly for catalyst projects and strategic uses, based on economic development objectives. The City should ensure that it communicates with key stakeholders to understand the needs of businesses associated with Westport and the support that it can offer (e.g. information, planning/policy incentives) to facilitate business growth.
	Other Activity Centres (e.g. district, neighbourhood)	
	Heavy Industrial Land	
	Light Industrial Land	

Source: Pracsys 2022

10 Appendix 1
Activity Centre Hierarchy

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

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

Each of these centre types has a specific purpose and is considered complementary to the other groups in the hierarchy. The typical characteristics of each activity centre type are described in Figure 63. It should be noted that the City of Kwinana does not have any centres that come under 'Capital City' or 'Primary Centres' and accordingly, these centre types are not included in Figure 63.

Figure 63. Activity Centre Characteristics

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

Source: Department of Planning, Lands and Heritage, 2010, Pracsys 2022

APPENDIX 1

11 Appendix 2

Terminology

Needs Assessment (NA)	The study required under Clause 7.8 of SPP 4.2 when a major development for an activity centre(s) is proposed. It should estimate the retail needs and indicative distribution of floorspace across the activity centres in a local government area and to guide the preparation of district and activity centre structure plans
Net Lettable Area (NLA)	in square metres is the unit of measurement for all retail and other commercial floorspace. It includes all internal floorspace except stairs, toilets, lift shafts and motor rooms, escalators, tea rooms and other service areas, lobbies, and areas used for public spaces or thoroughfares. Note that non public storerooms within large shops (such as supermarkets) are not classified as "Shop / Retail" NLA, but as "Storage" NLA.
Other Retail	means retail that mostly includes those retail activities normally referred to as "bulky goods" (e.g. furniture, floor coverings), but also includes hardware.
Retail	in its non-technical, common-sense meaning is used frequently in the interests of general readability
Shop/Retail	means the SHP Planning Land Use Category. It includes virtually all retail activities normally found within shopping centres. It excludes most of the activities normally referred to as "bulky goods" retail, but does include household appliances
Total Retail	specifically refers to Shop/ Retail plus Other Retail

12 Appendix 3

Activity Centre Performance Monitoring And Evaluation

The evaluation questions, metrics and methods of measurement outlined in this section are intended as a guide only. It is recommended that the City of Kwinana develops its own evaluation process for measuring the performance of its activity centres and devising recommendations to improve the performance of its activity centres.

Centre type	Main evaluation question	Relevant Principles	Application	Metrics / Method of Measurement
Neighbourhood/ Local Centre	What attributes create/improve the ability of the centre to provide for the daily to weekly shopping needs of households within the centre's vicinity?	Accessibility	Can people access the centre using different modes of transport?	User survey
		Activity Diversity	Does the centre enable users to access multiple needs with fewer trips?	• Benchmark to comparable centre • User survey
		Control	Could a strategic site be considered as a future destination/suitable site for anchor tenants?	• City of Kwinana GIS
		Destinations	Is there a major attraction causing a significant number of people to come to the centre? (e.g. primary school, major supermarket)	• City of Kwinana GIS
		Exposure	Is the centre exposed to pedestrian traffic?	• Site assessment
		Mobility	Is it easy for all users to move around the centre? Are the transport options well linked to the centre?	• Site assessment • Shard Location Information Platform (SLIP) • User survey
		Safety	Can people move safely throughout the centre and do people perceive the centre to be a safe place?	• Site assessment • Security consultant review • User survey
		Urban Quality	Is the centre aesthetically attractive and does it have a pleasant physical environment encouraging to people it to use more frequently and for longer periods of time?	• User survey • Urban design consultant

Centre type	Main evaluation question	Relevant Principles	Application	Metrics / Method of Measurement
District / Secondary Centre	What attributes create/improve the centre's ability to provide goods and services, facilities and job opportunities for the local community?	Accessibility	Can people access the centre using different modes of transport?	• User survey
		Activity Diversity	Does the centre enable users to access multiple needs with fewer trips?	• Benchmark to comparable centre • User survey
		Activity Intensity	Are activities co-located within a vibrant, intense space to encourage walking, social interaction and economic activation?	• Site assessment
		Control	Could a strategic site be considered as a future destination/suitable site for anchor tenants?	• City of Kwinana GIS
		Destinations	Is there a major attraction causing a significant number of people to come to the centre? (e.g. primary school, major supermarket)	• City of Kwinana GIS
		Employment Quality	Does the centre prioritise knowledge or export-based employment (e.g. B2B services)	• Economics consultant
		Exposure	Is the centre exposed to pedestrian traffic?	• Site assessment
		Mobility	Is it easy for all users to move around the centre? Are the transport options well linked to the centre?	• Site assessment • Shard Location Information Platform (SLIP) • User survey
		Safety	Can people move safely throughout the centre and do people perceive the centre to be a safe place?	• Site assessment • Security consultant review • User survey
		Urban Amenity	Does the centre offer opportunities for recreation and leisure?	• Site assessment • User survey
		Urban Quality	Is the centre aesthetically attractive and have a pleasant physical environment encouraging to people it to use more frequently and for longer periods of time?	• User survey • Urban design consultant

Source: Pracsys 2022

13 Appendix 4

Modelling Information

12.1 Gravity Modelling Methodology

Gravity models allow for the measurement of spatial interaction as a function of distance to determine the probability of a given customer shopping at a centre and provide an approximation of trade area and sales potential for development. This modelling technique uses the distance between a household and each centre, and a measure of 'attractiveness' to define the probability model. The 'attractiveness' of a centre has been defined by total floorspace and the distance has been calculated by measuring straight-line distances between each centre and population. The gravity model probability formula is shown in Figure 64.

Figure 65 shows that the demand for retail category k[31], at centre j, is equal to the sum of the probabilities of customers living in statistical areas i to n, multiplied by the expenditure pool of statistical area i. In other words, the demand for retail is a function of the probability of customers from a particular statistical area attending the centre multiplied by the expenditure pool of that statistical area. The expenditure pool is derived through the population multiplied by its income distribution.

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

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

Figure 64. Gravity Model Probability Formula

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

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

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

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

Drivers of Retail Floorspace Supply and Demand

Demand changes can result in increased or decreased expenditure. The potential causes of demand changes are shown in Figure 52. These largely show that an increasing population increases demand, and vice versa. There are significant amounts of commercial floorspace, especially office floorspace, flagged for the central sub-region of Perth and beyond. There will also be significant numbers of new dwellings provided across Perth. This increase in residents has the potential to boost demand for goods and services in the area.

Demand can also increase from rising incomes, or wealth, because people have more disposable income to spend on retail.

Supply changes can result in increased or decreased retail floorspace. The potential causes of supply changes are shown in Figure 65.

Leakage

Leakage for retail is largely caused by online retail, as well as travelling to areas outside the Study Area. Leakage rates differ for comparison and convenience retailing, with a higher occurrence of leakage occurring for comparison retailing due to the offerings being more unique. The rates were calculated based on ABS and Queensland Investment Corporation predictions of online leakage (Figure).

Figure 65. Gravity Model Demand Formula

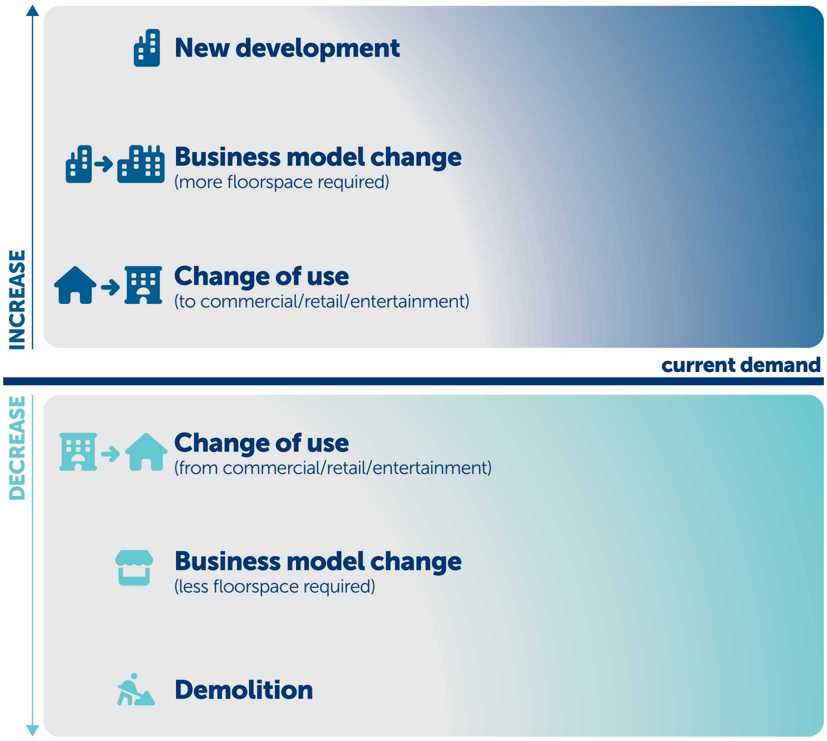
$$D_{kj} = \sum_{i=1}^{n} (P_{ij} * E_i)$$

D_{kj} = Demand for retail category k, at centre j.

E_i = Expenditure pool of statistical area i.

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

Figure 66. Drivers of Retail Floorspace Demand



Source: Pracsys 2020

Figure 67. Leakage rates

	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031
Comparison	11%	11%	12%	12%	13%	13%	13%	14%	14%	14%
Convenience	9%	10%	10%	10%	10%	10%	10%	10%	10%	10%

	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042
Comparison	14%	14%	14%	14%	14%	14%	14%	14%	14%	14%	14%
Convenience	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%

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Appendix 5
Benchmark Viable Turnover Productivity

The following benchmark productivity levels have been used to ensure that future floorspace projections can support viable businesses.

Retail Category	Productivity ($/m²)	Example Floorspace Use
Take Home Food	10,000	Grocery
Take Home Liquor	9,000	Bottleshop
Dine Out Food	6,500	Restaurant
Clothing/Footwear	5,000	Comparison
Convenience Retail	7,000	Deli / pharmacy
Bulky Goods Retail	5,500	Showroom

Source: Colliers 2017

The following benchmark productivity estimates by centre classification have been used to determine future potential floorspace at the City's centres. Centre expansions can only occur where they achieve a higher turnover than the identified benchmark turnover. The benchmarks have been estimated based on actual turnover data from appropriately classified centres in the Property Council Shopping Centre Directory 2021.

Centre Classification	Productivity ($/m²)
Secondary	7,200
District	8,300
Other Retail Centre	6,500
Local or Neighbourhood Centre	8,100

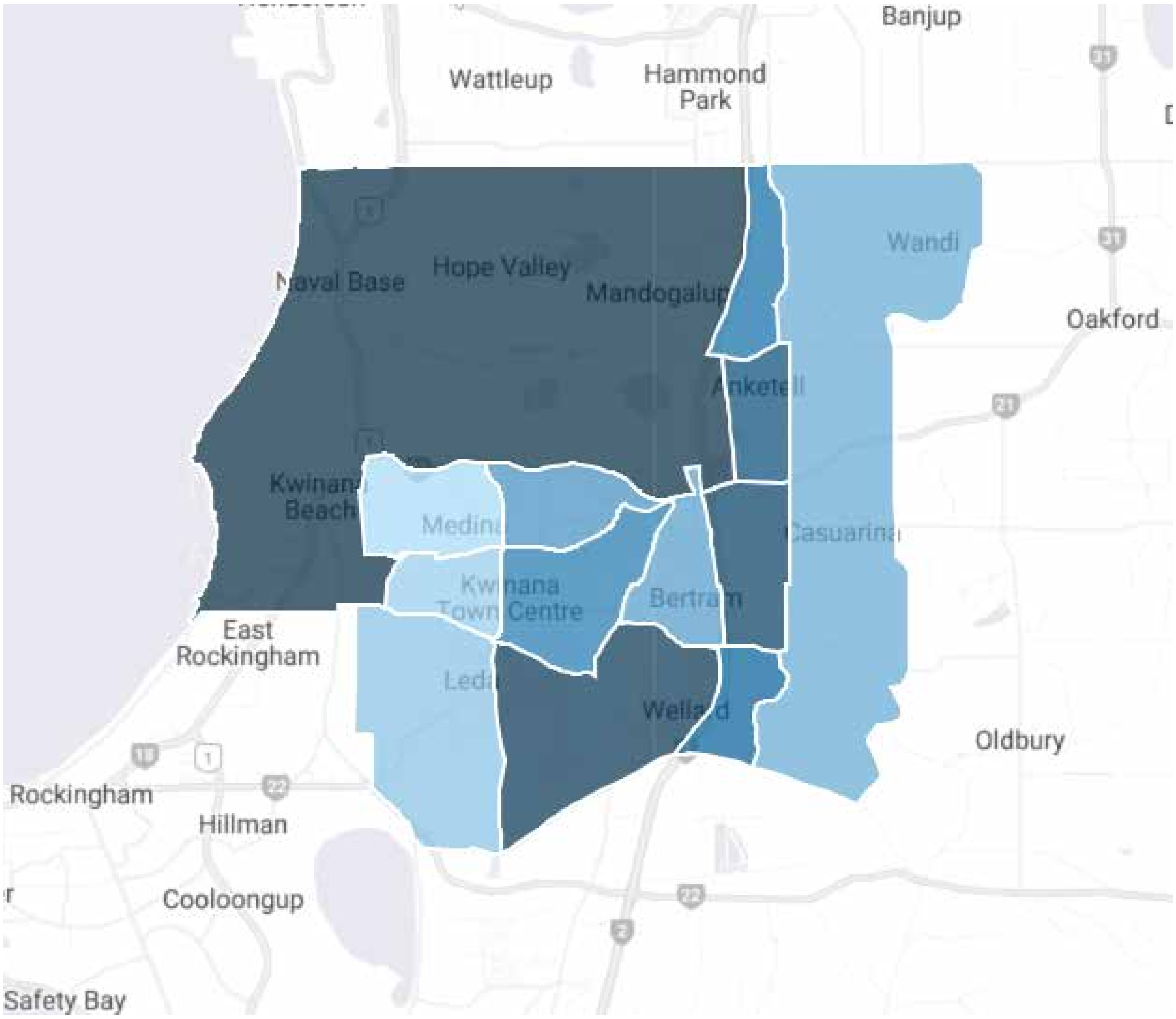
Source: Property Council 2021

15 Appendix 6

Remplan Map

The following map provides a heatmap of population growth for the spatial areas used in REMPLAN to support interpretation of population estimates. This map can be accessed at: https://app.remplan.com.au/kwinana/forecast/population?state=6zwXHgaJlHnJqqgl88qe7Svf3IRnbcWRv3UNskaQbwt7Izvo

Figure 68. REMPLAN Population Growth by Area



Source: Pracsys 2020

16 Appendix 7

Western Australian Standard Land Use Classification Gap To Centre Type Alignment

For each Planning Land Use Category, the gaps at the Western Australian Standard Land Use Classification level have been listed (Figure 69 to Figure 73).

Figure 69. WASLUC gaps by PLUC category – Office

WASLUC	Suitable use for centre type (yes/no)			
	Secondary	District	Neighbourhood	Local
Accounting, auditing & book-keeping services	Yes	Yes	Yes	No
Advertising services	Yes	Yes	No	No
Architectural services	Yes	No	No	No
Banking services	Yes	Yes	No	No
Business and management consulting services	Yes	No	No	No
Computing services	Yes	Yes	Yes	No
Dental practices	Yes	Yes	Yes	Yes
Employment services	Yes	Yes	No	No
General medical practices	Yes	Yes	Yes	No
Insurance agents, brokers and services	Yes	No	No	No
Insurance carriers (excluding health)	Yes	No	No	No
Legal services	Yes	No	No	No
Marketing services	Yes	No	No	No
Other business services not elsewhere classified (nec)	Yes	Yes	Yes	No
Other health services nec	Yes	Yes	No	Yes
Other professional services nec	Yes	Yes	No	No
Other specialist medical practices	Yes	Yes	No	No
Psychology practices	Yes	Yes	Yes	No
Real estate operators (except developers and lessors)	Yes	Yes	Yes	Yes
Settlement agents	Yes	Yes	Yes	Yes
Travel arranging services	Yes	Yes	No	No

Source: LUES 2016, Pracsys 2022

Figure 70. WASLUC gaps by PLUC category – Bulky Goods Retail

WASLUC	Suitable use for centre type (yes/no)		
	Suitable use for centre type (yes/no)	District	Neighbourhood
Boat,caravan & trailer hire	Yes	Yes	No
Building materials -retail	Yes	No	No
Business and computing equipment	Yes	Yes	Yes
Caravan Dealers	Yes	Yes	No
Electrical construction materials - retail	Yes	No	No
Electronic equipment and parts retail	Yes	Yes	Yes
Equipment hire	Yes	No	No
Fabric shop and dressmaking accessories retail	Yes	Yes	No
Furniture - retail	Yes	Yes	Yes
Furniture and home furnishings and equipment retail nec	Yes	No	No
Hardware - retail.	Yes	Yes	No
Household appliances - retail	Yes	Yes	No
Light fittings retail	Yes	Yes	No
Manchester goods and soft furnishings - retail	Yes	Yes	No
Music and musical instruments - retail	Yes	Yes	No
Pets and pet supplies - retail	Yes	Yes	Yes
Plumbing, heating & refrigeration equipment	Yes	No	No

Source: LUES 2016, Pracsys 2022

Figure 71. WASLUC gaps by PLUC category - Entertainment, Recreation and Cultural

WASLUC	Suitable use for centre type (yes/no)				
	Secondary	District	Neighbourhood	Local	Recreation Facility
Art and music schools	Yes	Yes	Yes	No	No
Art galleries	Yes	Yes	No	No	No
Basketball and/or netball courts	No	No	No	No	Yes
Cultural activities nec	Yes	No	No	No	No
Drinking places (alcoholic beverages) - hotels	Yes	Yes	Yes	No	No
Drinking places (alcoholic beverages) - Hotels	Yes	Yes	Yes	No	No
Gymnasiums, health clubs & martial arts club	Yes	Yes	Yes	No	Yes
Live entertainment theatres	Yes	No	No	No	No
Motion picture theatres (excluding drive-in)	Yes	No	No	No	No
Nightclubs	Yes	No	No	No	No
Other entertainment assembly nec	Yes	Yes	No	No	No
Penny arcades and electronic amusement/arcades	Yes	No	No	No	No
Playgrounds	Yes	Yes	Yes	Yes	Yes
Sports activities nec	Yes	Yes	No	No	Yes
Ten pin bowling	Yes	No	No	No	No
Tennis courts (outdoor)	Yes	No	No	No	Yes

Source: LUES 2016, Pracsys 2022

Figure 72. WASLUC gaps by PLUC category - Health, Welfare and Community Services

WASLUC	Suitable use for centre type (yes/no)			
	Secondary	District	Neighbourhood	Local
Child day care centres creche & nurseries	Yes	Yes	Yes	Yes
Colleges of advanced education	Yes	No	No	No
Combined primary and secondary schools	Yes	Yes	Yes	No
Community health centres (medical)	Yes	Yes	Yes	Yes
Community organisations nec	Yes	Yes	Yes	No
Other Health Services nec	Yes	Yes	Yes	No
Optometry and optical dispensing	Yes	Yes	Yes	Yes
Other personal services nec	Yes	Yes	Yes	No
Other Veterinary Services	Yes	Yes	Yes	No
Pet Services	Yes	Yes	Yes	No
Preschools	Yes	Yes	Yes	Yes
Primary schools	Yes	Yes	Yes	No
Welfare and Charitable Services NEC	Yes	Yes	Yes	No

Source: LUES 2016, Pracsys 2022

Figure 73. WASLUC gaps by PLUC category – Shop/Retail

WASLUC	Suitable use for centre type (yes/no)			
	Secondary	District	Neighbourhood	Local
Beauty salons	Yes	Yes	Yes	Yes
Bicycles - retail	Yes	Yes	No	No
Booksellers	Yes	Yes	Yes	Yes
Bread and cake stores	Yes	Yes	Yes	Yes
Craft and Art Supplies - Retail	Yes	Yes	Yes	No
Department stores - retail	Yes	Yes	No	No
Fish and seafoods - retail	Yes	Yes	Yes	Yes
Florists - retail	Yes	Yes	Yes	Yes
Footwear - retail	Yes	Yes	Yes	No
Fruits and vegetables - retail	Yes	Yes	Yes	Yes
General merchandise - retail	Yes	Yes	Yes	No
Gifts, novelties & souvenirs - retail	Yes	Yes	Yes	Yes
Health foods	Yes	Yes	Yes	Yes
Meats - retail	Yes	Yes	Yes	Yes
Men's and boys' clothing - retail	Yes	Yes	Yes	No
Men's hairdressers	Yes	Yes	Yes	Yes
Pharmacies, chemists	Yes	Yes	Yes	Yes
Restaurants, cafes & function centres	Yes	Yes	Yes	Yes
Sporting goods and trophies - retail	Yes	Yes	No	No
Sports store - clothing/equipment	Yes	Yes	Yes	No
Supermarkets and grocers	Yes	Yes	Yes	Yes
Take away food and milk bars	Yes	Yes	Yes	Yes
Womens hairdressers (including unisex)	Yes	Yes	Yes	Yes
Women's, girls' and infants' wear stores - retail	Yes	Yes	Yes	No

Source: LUES 2016, Pracsys 2022

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Appendix 8
Kwinana City Centre Masterplan Summary

The revised masterplan (Figure 9) is based on the outlined aims and design principles. The plan is illustrative only showing the desired layout of streets, public spaces and building footprints, guiding the development of the City Centre over a 30 year period.

1. Reinforce a slow speed pedestrian environment and continuous edge to Chisham Avenue Main Street providing visual interest and generous space for alfresco dining and pedestrian movement.
2. Creation of shared use pedestrian environment linking the Civic Square to surrounding destinations.
3. Redefine Gilmore Avenue as a slow speed entry boulevard facilitating safe and convenient access between the city and new activities on Calista Oval.
4. Reinforce legible and attractive north-south and east west primary pedestrian routes connecting uses within the City Centre to public transport, Calista Oval and surrounding residential development.
5. Integrate a diversity of residential dwellings and providing opportunities for residents to enjoy the City Centre location.
6. Development of a secondary community square providing a nodal link between the existing Public Transport Interchange and central civic square.
7. Introduce short-stay car parking on-street within the heart of the city.
8. Sleeving of longer-stay off-street car parking to the rear of buildings or partially screened from the street – preferably shared between many uses.
9. Tree planting along the primary north-south and east-west pedestrian routes providing canopy coverage and continuous sight lines between nodal links.
10. Promote shared use pedestrian environment to link main entry points between the Kwinana Market Place and the Main Street.
11. Integration of retail uses to the western edge of Kwinana Marketplace Shopping Centre addressing the primary north-south pedestrian route.
12. Bus stop accommodated either side of Gilmore Avenue to facilitate public transport connections north of Chisham Avenue.

18 Appendix 9

PLUC Definitions

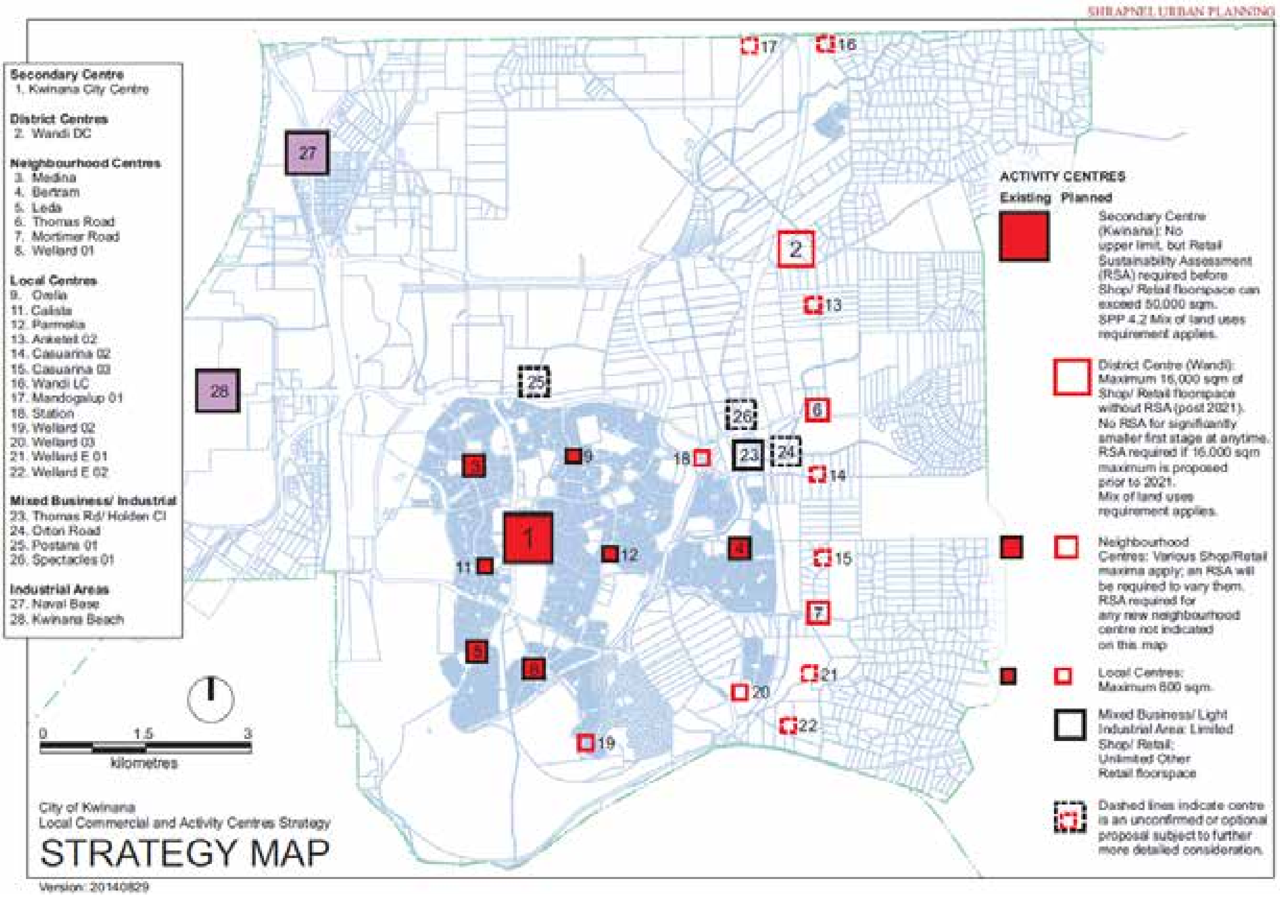
SHP – Shop/Retail	Any activity which involves the sale of goods from a shop located separate to, and/or in, a shopping centre other than those included in Other Retail.
RET – Other Retail	Many of these activities are not normally accommodated in a shopping centre. By virtue of their scale and special nature the goods of these activities separate them from the Shop/Retail category (for example car sales yard or carpet showroom).
OFF – Office/Business	Administrative, clerical, professional and medical offices are activities which do not necessarily require the land area/floor space or exposure of other land uses. Although offices require building and parking facilities, these needs are quite distinct from those of commercial uses and service industries.
HEL – Health/Welfare/Community Services	Government, government-subsidised and non-government activities that provide the community with a specific service, including hospitals, schools, personal services and religious activities.
ENT – Entertainment/Recreation/Cultural	Activities which provide entertainment, recreation and culture for the community and which occur in buildings and/or on land, such as passive and active sports venues, museums, amusements and gambling services.
RES – Residential	Includes all types of residential land use ranging from single housing to nursing homes for the aged, residential hotels, motels, other holiday housing, institutions and religious housing.
MAN – Manufacturing/Processing/Fabrication	This category includes land use activities involving the manufacture, processing and fabrication of all general goods. Both the scale and associated environmental impact of these activities separate them from other land use categories.
STO – Storage/Distribution	Any land use activity which involves the storage, warehousing or wholesaling of goods usually conducted from large structures, or involving large bulk goods, but does not include activities that attract the general retail trade activities.
SER – Service Industry	This category includes service industries offering a range of services. The scale and environmental impact of such activities require their separation from other land uses. These services include film processing, cleaning, motor vehicle and other repair services, and other servicing activities, including some construction activities.
UTE – Utilities/Communications	All forms of local, state, national and international communication, transportation and other utilities (for example, electricity, gas, water, sewerage, roads, parking and other transport or communications related activities) covering the public and private sectors.
PRI – Primary-Rural	Land use activities which usually involve the use of large areas of land, including mining, agriculture, fishing and nature conservation. The function of many of these activities is to make use of, or extract from, the land in its natural state. Since such activities are the first step in the production process, they are quite distinct from the other categories.

19 Appendix 10

Activity Centre Hierarchy 2014

The following maps presents the City of Kwinana Activity Centre Hierarchy from the LCACS 2014.

Figure 74. Activity Centre Hierarchy 2014



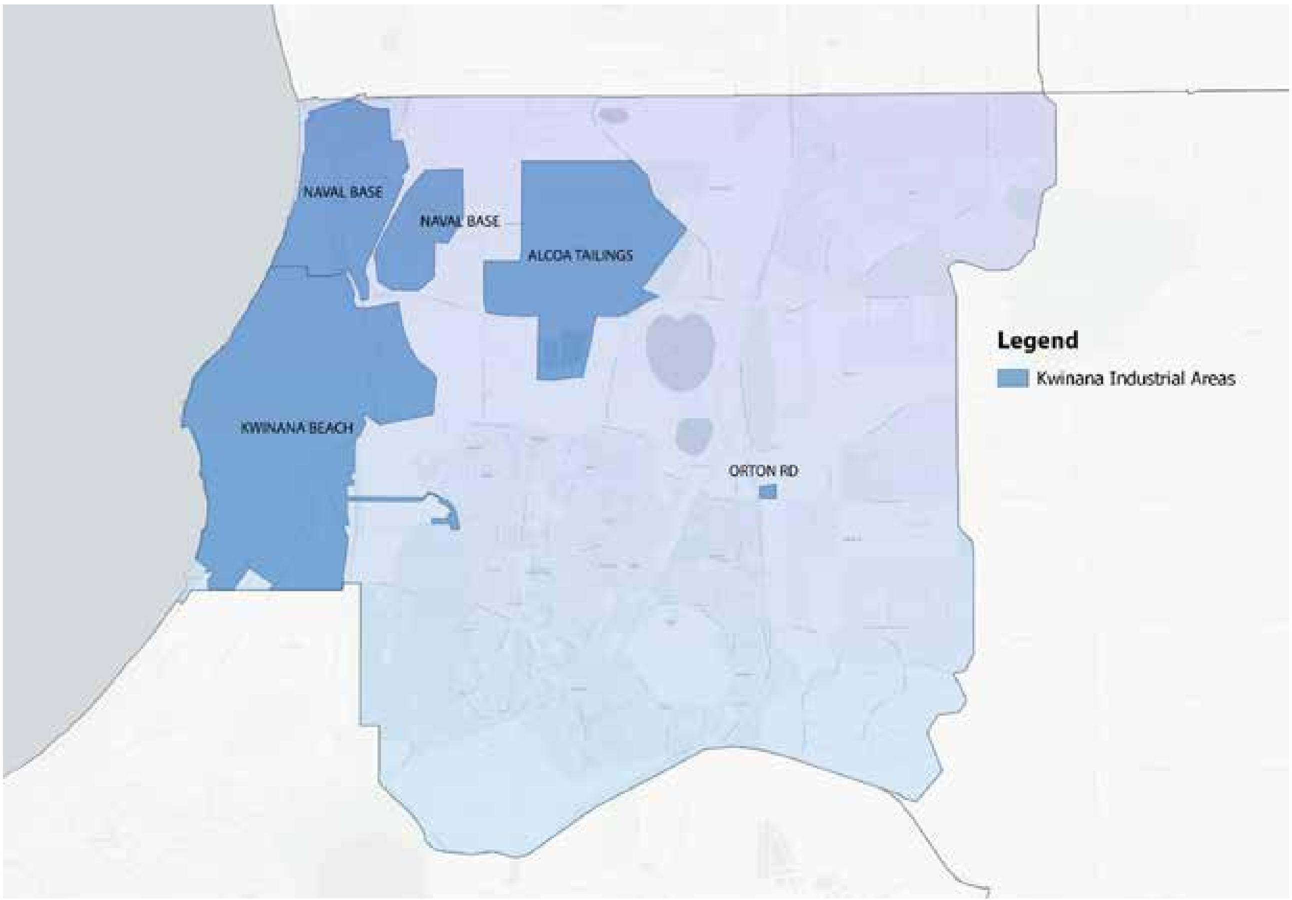
Source: City of Kwinana 2014

20 Appendix 11

Industrial Land

The following map identifies Industrial Areas as per the DPLH Land Use and Employment Survey.

Figure 75. LUES Industrial Areas



Source: DPLH 2016, QGIS 2022

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