August 2025 (Updated May 2026)

Austin Lakes, WA

Needs Assessment & Net Benefit Test

Prepared for Wolfdene

locationiq.com.au

Contents

Introduction

This report presents an independent assessment of the demand, need, and net benefit for retail and commercial uses as part of Austin Lakes Estate, in the Shire of Murray Local Government Area (LGA). The proposal refers to the ‘Austin Lakes Centres’, or subject sites – which include ‘Austin Lakes Central’ and ‘Austin Lakes Village Centre’ - throughout the remainder of this report.

The report is structured and presented in **five (5) sections** as follows:

- **Section 1** details the location of Austin Lakes and discusses the context of the site within the Shire of Murray LGA. The proposed development scheme is also outlined.
- **Section 2** examines the trade area (study area) which is relevant for the existing and proposed development, including current and projected population and retail spending levels. The socio-economic profile of the trade area population is also reviewed.
- **Section 3** provides an overview of the retail structure within the surrounding region.
- **Section 4** outlines an assessment of the demand or need for retail and commercial components of the proposed Austin Lakes centres. Likely trading impacts on other activity centres throughout the surrounding region are considered, as are the employment and other consumer impacts, both positive and negative, of the proposal.
- **Section 5** summarises the key conclusions of the Needs Assessment and Net Benefit Test for the proposed Austin Lakes development.

Executive Summary

The key points to note from this report regarding the demand, need, and net benefit for retail and complementary non-retail uses as part of a proposed Structure Plan at Austin Lakes, include the following:

i. Austin Lakes Estate is a residential development located to the west of Forrest Highway and south of South Yunderup Road that has been under construction since 2011. Upon completion, the estate is expected to yield 3,230 lots – with 675 homes built to date.

ii. The Austin Cove Outline Development Plan (ODP) was approved in 2008 and provided the foundation for development in the area now referred to as Austin Lakes. The ODP identifies a planned retail and commercial centre structure intended to meet the needs of the growing community – including three defined components:

- **Local Centre**: the location of the existing Austin Lakes Central.
- **Village Centre Precinct**: a planned activity centre offering a full-line supermarket, specialty retail, cafés and restaurants, health and professional services, community uses and childcare.
- **Mixed Business Area**: a zone closer to the highway identified for uses such as service stations, showrooms and other bulky goods retail, designed to complement rather than compete with the Village Centre.

iii. The ODP notes that the location and configuration of the Village Centre and Mixed Business Area may be refined over time, provided the combined retail floorspace does not exceed 5,000 sq.m. As part of the current proposed Structure Plan, the key changes include:

- **Increase in maximum permitted floorspace at Austin Lakes Central** by an additional 1,000 – 2,000 sq.m, bringing the total potential GLA to around 4,000 sq.m. Most of this is to be allocated to non-retail floorspace.
- **Consolidation of the Village Centre and Mixed Business Precinct into a single site** with capacity for up to 7,000 sq.m (GLA). Referred to as the Austin Lakes Village Centre, this would include a full-line supermarket, as well as complementary retail and non-retail uses – which would necessitate a land parcel of 2.5 – 3.0 hectares over the forecast period and up to 5.0 hectares over the longer term in order to allow sufficient capacity for convenience, wayfinding, access and amenities.

  The first full year of trading for the development is assumed to be 2035/36, however, the timing of actual delivery would be demand driven and would most likely be staged in accordance with other drivers.

iv. The proposed amendments reflect a refinement rather than a departure from the 2008 ODP and are considered appropriate given contemporary demand profiles and the growth trajectory of the local catchment.

v. The defined main trade area for the proposed Austin Lakes Village Centre includes one primary sector and three secondary sectors and is consistent with most full-line supermarkets in similar urban fringe and rural locations across Australia, acknowledging overlapping catchments are typical in any retail hierarchy. The trade area is an appropriate study area for the purposes of needs assessment.

vi. The main trade area population is currently estimated at 15,114 in 2025, including 4,959 persons in the primary sector. The main trade area population is projected to increase at an average rate of 3.9% (897 persons) per annum to 33,955 by 2046, including 12,810 persons in the primary sector. Importantly, however, there will still be substantial additional capacity for new residents – with potential for an estimated 30,500 lots (85,000 persons) beyond 2046 across key investigation areas and long-term projects.

vii. The proposed expansions at Austin Lakes Central and the new Austin Lakes Village Centre respond directly to strong population growth and a current shortfall in local supermarket and retail supply.

viii. Even with new supermarkets at Ravenswood and Pinjarra Road, demand will continue to exceed supply, with a projected supermarket shortfall of -3,728 sq.m by 2046. Total retail demand is forecast to grow from 19,500 sq.m in 2025 to nearly 44,000 sq.m by 2046 - an average increase of over 1,150 sq.m per year. Despite approved developments, an undersupply of more than -10,572 sq.m is expected by 2046, excluding non-retail uses such as medical and community services, which are increasingly co-located within retail centres.

ix. The proposed Structure Plan delivers a timely and appropriate response to the long-term demand profile. It enables the delivery of additional supermarket, retail, and non-retail floorspace in well-located, strategically planned centres that are embedded in the activity centre hierarchy.

x. As outlined in SPP 4.2 Implementation Guidelines, a critical output from the modelling process is an estimate of the impact of the proposal on existing and planned activity centres and the level of service to the community. The analysis of impacts provided in this report shows the projected impacts on other centres from the proposed development would not threaten the viability or continued operation of any centre. Further, there would be no depletion or dilution in the range of services which are available to residents.

xi. The proposed Austin Lakes Centres are forecast to record net sales of +$55.2 million in 2035/36, including net supermarket sales of +$36.5 million from the full-line supermarket anchor.

xii. Impacts are primarily concentrated on the most proximate and comparable centres, particularly other full-line supermarket locations. Projected impacts remain within acceptable thresholds:

- **Mandurah Strategic Activity Centre:** -$12 million (-1.25%).
- **Pinjarra Secondary Activity Centre**: -$19.6 million (-7.5%).
- **Ravenswood District Activity Centre**: -$7.9 million (-12.5%)
- **Greenfields**: -$4.8 million (-2.25%).
- **Furnissdale**: -$2.2 million (-5.0%).
- **Other Centres:** remaining impacts on other detailed centres are minor given there would be limited replication. Impacts across the six remaining, represented centres total impact less than -$0.1 million (-0.5%).

xiii. Impacts totalling -$4.9 million in combination (9% of the net sales) are projected to fall on a range of centres beyond the main trade area – given the fringe urban/rural location and regional accessibility. An additional $3.7 million in retail spending is estimated to be generated through supply-induced growth – that is, incremental spending uplift associated with the delivery of new retail facilities.

xiv. The highest impacts are on Austin Lakes Central (-15%) and Ravenswood (-12.5%), though these are expected to be short term. Strong underlying growth – including average annual population growth of 3.9% (+897 persons), supermarket spending growth of $5.7 million (4.4%), and total retail growth of $23.1 million (4.7%) – will quickly ameliorate these impacts within less than four years.

xv. Retail turnover impacts below -10% are generally acceptable, while those exceeding -10% should be considered in context. In this case, rapid growth ensures any higher initial impacts will diminish to negligible in the short term.

xvi. Importantly, the Austin Lakes Village Centre will introduce retail and commercial tenancies that complement rather than replicate the offer in surrounding centres. Residents will continue to access higher-order services in other locations, preserving the role of nearby centres within the activity centre network.

xvii. In conclusion, the forecast impacts of the Austin Lakes centre changes are within acceptable planning limits and do not threaten the viability or function of any existing or proposed centres. When considered in context of strong local growth and the proposal's contribution to improved service provision, the developments represent a net community benefit and supports the long-term sustainability of the activity centre hierarchy.

xviii. It is the conclusion of this report that a substantial net community benefit would result from the proposed Austin Lakes centres. Offsetting the trading impacts on some existing retailers, there are very substantial positive impacts including the following (with reference to SPP 4.2 *Implementation Guidelines A.24*):

Strategic Alignment, **Infrastructure & Services**

- **Optimal Site:** Austin Lakes Central is already functioning as a localised retail node, benefiting from existing infrastructure and visitation. The Austin Lakes Village Centre site builds on this, utilising land already earmarked for commercial and mixed-use purposes in the heart of a rapidly expanding catchment.

- **Zoning Strategy:** both sites align with established zoning intent and support broader policy objectives to deliver a balanced mix of retail, commercial and community uses within the existing activity centre framework.

- **Preservation of Integrity:** the sites preserve the area's integrity and ensure orderly development. The Scheme's objectives include securing amenity, health, and convenience for residents, which are crucial factors in urban planning and development.

- **Liveable Neighbourhood:** the proposal contributes to the development of a cohesive, accessible and high-amenity urban environment. It supports walkable, mixed-use streetscapes and sustainable design outcomes, aligned with the broader goals of the Shire's planning strategy.

- **Enhanced Uses:** the development would provide a significant improvement in the range of retail facilities and services that would be available to existing and future residents. This includes satiating existing and future projected retail and supermarket floorspace demand generated by main trade area residents, and specifically the introduction of the full-line supermarket operator to the main trade area.

- **Strategic Expansion:** the centres will maximise community value by developing vibrant and accessible centres that respond to changing community needs. It will directly address the long-term demands of a rapidly growing population, highlighting the need for coordinated planning of retail and supermarket floorspace across the region to ensure viable, sustainable, and optimised development. This approach avoids fragmented or reactive planning responses.

- **Lack of Alternate Sites:** there are no other suitably zoned or available sites within Austin Lakes or South Yunderup that could accommodate uses of this scale or purpose – and none more optimal.
- **Out-of-Centre Development:** the centres do not constitute out-of-centre development and the Austin Lakes Village Centre site consolidates development within an allocated/defined centre, consistent with the established hierarchy and avoiding fragmentation.
- **Aligned With SPP 4.2 Objectives:** the proposed development strongly aligns with the core policy objectives, aiming to create and retain people, employment opportunities, retail, and services – within a well-connected community.
- **Aligned With SPP 4.2 Outcomes:** the development also seamlessly addresses specified outcomes, insofar as it efficiently and cohesively caters to community needs and consumer choice, while also avoiding significant disruptions to the existing activity centre hierarchy – particularly given it is a reimagination or enhanced development of an existing, as well as allocated future centre. As outlined within this sub-section and the broader assessment, the developments would be of net positive benefit to the local community.

Productivity

- **Employment**: the development will generate around 1,034 jobs – including 400 ongoing roles, 98 construction jobs and 536 indirect jobs via supply-chain and consumption effects. These ongoing roles (400) equate to around $18.7 million in annual wages.
- **Impact on Activity Centres:** the proposed developments would not threaten the viability or continued operation of any existing or planned centres in the surrounding region. All impacts remain within acceptable competitive thresholds.

  Some impacts, such as Austin Lakes Central (-15%) and Ravenswood (-12.5%), are initially high. However, the rapid growth across the main trade area means these impacts should be considered very short-term, declining swiftly to low levels.

  The main trade area population is projected to grow by an average of 897 persons per year, or 3.9%, over the forecast period to 2046. Supermarket expenditure is forecast to increase by an average of $5.7 million per year (4.4%), while total retail spend is expected to rise by $23.1 million per year (4.7%) on average during the same period. The key implication is that even the most significant impacts (-15%) are likely to be mitigated within approximately four years.

Quality of Life

- **Compatible with Surrounding Land Uses:** both sites are consistent with current and future land use intent, with prior planning support for retail development – and will operate in a similar capacity.
- **Complementary Range of Uses:** the proposed range of uses that would form part of the development are typical of many convenience-based centres throughout Western Australia, including a supermarket, retail specialty shops, as well as non-retail uses.
- **Metropolitan Transition:** the development would add significantly to the range of services, choice, price competition, and retention of escaped expenditure within the region. This will assist in the transition of Austin

Lakes and the broader Shire of Murray to a more contemporary, full-service offering that reflects its evolution from a historically rural town to a fringe (or fully-fledged) metropolitan region.

- **Aligned with Consumer Trends & Expectations:** the nature of consumer demand continues to develop and evolve, reflecting social changes within society, such as increasing time pressures on working families; population/income growth; the evolution of new retail formats/operators. The demands of retailers, as well as consumers, combine to add pressure for additional retail floorspace in existing retail precincts such as the Austin Lakes site.

  The likely design of the proposed development, including a full-line supermarket, a convenience-associated quantum of specialty floorspace, and easily accessible car parking, would be highly convenient for local families who would visit on a regular basis – and therefore help to retain some of the significant spending and visitation currently escaping the area.

- **Enhanced Amenity & Retained Vibrancy:** the proposed development would improve the offering within Austin Lakes and allow for price competition as part of this retention.

  As outlined previously, the level of retail spending (generated by main trade area residents) being retained within the main trade area is estimated at around 36% currently (once accounting for estimated inflows from beyond) - meaning that almost two-thirds ($192 million) of retail expenditure is currently escaping the trade area (and the LGA) as leakage.

- **Limited Specialty Floorspace:** the proposed development would include a convenience-level provision of specialty and other floorspace components, which would mean residents will continue to frequent other centres/shops in the surrounding area for a variety of tenants that are not likely to be provided as part of the proposed site.

Environmental Sustainability, Equity & Social Inclusion

- **Reduced Trips or Drive Distance:** the retention of spending and visitation within the main trade area and LGA would also reflect a reduction in car-based trips (drive time and distance) to retail facilities (often multiple times per week) further afield.

  The exact quantum of traffic impacts would be the subject of a specific expert assessment, however, volume changes are likely to broadly reflect net sales uplifts (at the subject site) and impacts (to other centres). This redistribution of traffic/trips, however, would include shorter travel distances (more localised shopping), as well as the ability to undertake less frequent, larger shopping (full weekly/trolley shop).

- **Localised Jobs & Services:** the provision of employment floorspace within the main trade area will help to retain job opportunities for local residents, as well as providing a large number of youth employment prospects, given retail developments generally employ many younger staff.

xix. In conclusion, this assessment demonstrates that the proposed Austin Lakes Structure Plan – and specifically the proposed centre changes - would result in substantial net community benefit, which will more than offset anticipated trading impacts for a small number of existing and proposed retail centres – all of which would remain viable.

1 Background

This section of the report reviews the regional and local context of Austin Lakes and provides an overview of the indicative development scheme.

1.1. Regional & Local Context

i. Austin Lakes Estate is a 636-hectare master planned residential estate that has been under construction since 2011 and was acquired by Wolfdene (on behalf of BMP Property Investments) from Satterley Property Group in 2020.

ii. Austin Lakes Estate is in the town of South Yunderup on the Murray River near Mandurah (refer Map 1.1). The town falls within the Shire of Murray, being the second largest town in the Local Government Area, behind Pinjarra. South Yunderup is 10 km to the west of Pinjarra, 16 km east of Mandurah, and 80 km south of the Perth Central Business District (CBD).

iii. The Shire of Murray has an expansive area of 1,710 sq.km and is part of the Peel Region of Western Australian – which extends across the Peel Inlet and the Swan Coastal Plain into the Darling Scarp, including 77,000 hectares of State forests. Timber logging and agriculture were the traditional enterprises of the district.

iv. The Peel Region encompasses the five local government areas of Boddington, Murray, Serpentine-Jarrahdale, Waroona Shires, and the City of Mandurah. The Peel region is known for its diverse physical features, unique ecosystems, and abundant waterways that provide the basis for its enviable lifestyle. The region is the smallest region geographically, but one of the state's fastest growing population centres, presenting opportunities for innovation in workforce skills, industry growth, and economic diversification.

v. The Peel Development Commission note that by 2050, Peel is expected to rival the South West as one of the most populated regions outside of Perth, with a projected population of 444,000 (Peel Development Commission).

vi. Forrest Highway is a 95 km traffic route through the Peel and South West regions that extends from the Kwinana Freeway (at Pinjarra Road in Ravenswood), south to Bunbury. Based on the latest data from Main Roads WA, the most recent traffic volumes (2021/22) indicate that 18,521 vehicles travel along the Forrest Highway (south of Pinjarra Road) on an average day. This equates to a total of more than 6.76 million vehicles each year.

vii. Chart 1.1 provides an illustration of hourly traffic volumes along Forrest Highway, indicating consistent high volumes of passing traffic between business hours.

viii. Map 1.2 illustrates the local context of the Austin Lakes Estate, with key points to note including:

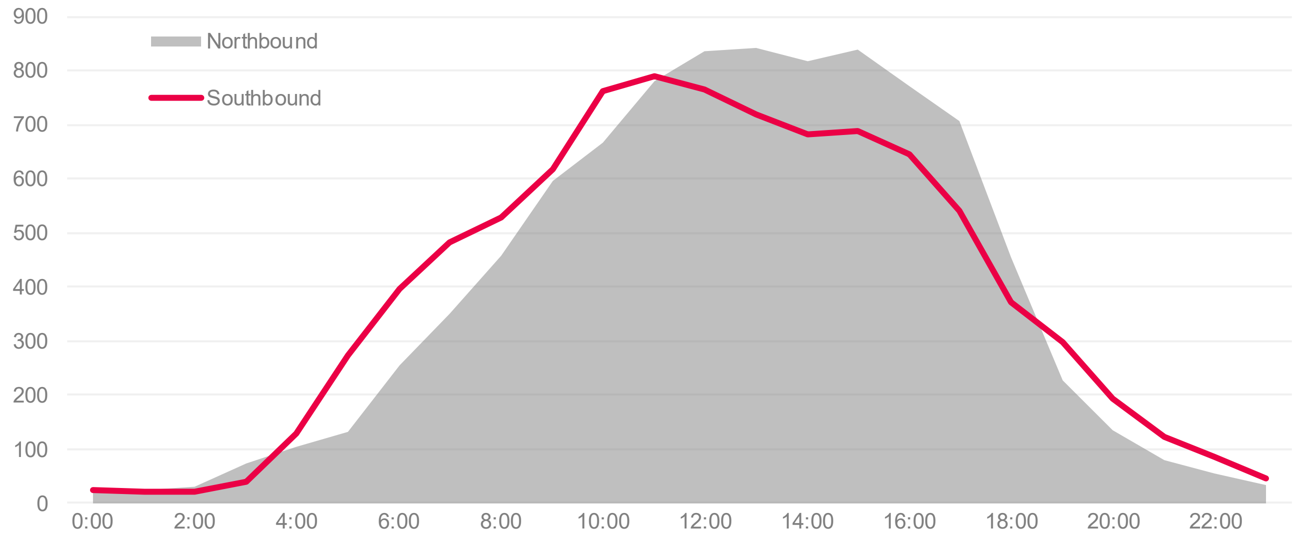
- Austin Cove Baptist College has a Kindergarten to Year Six school on the western side of Inlet Boulevard at Mogum Boulevard. The enrolled student population is around 340.

- The Austin Cove Baptist College secondary campus relocated in 2016 near to the proposed future Village Centre site, on the western side of Forrest Highway, north of Beacham Road. The secondary college has continued to expand over the last few years as student numbers increase, works are still underway at the college.

- Established and new housing to the north of the site, with the development front shifting south.
- Largely rural and semi-rural areas to the south and east.

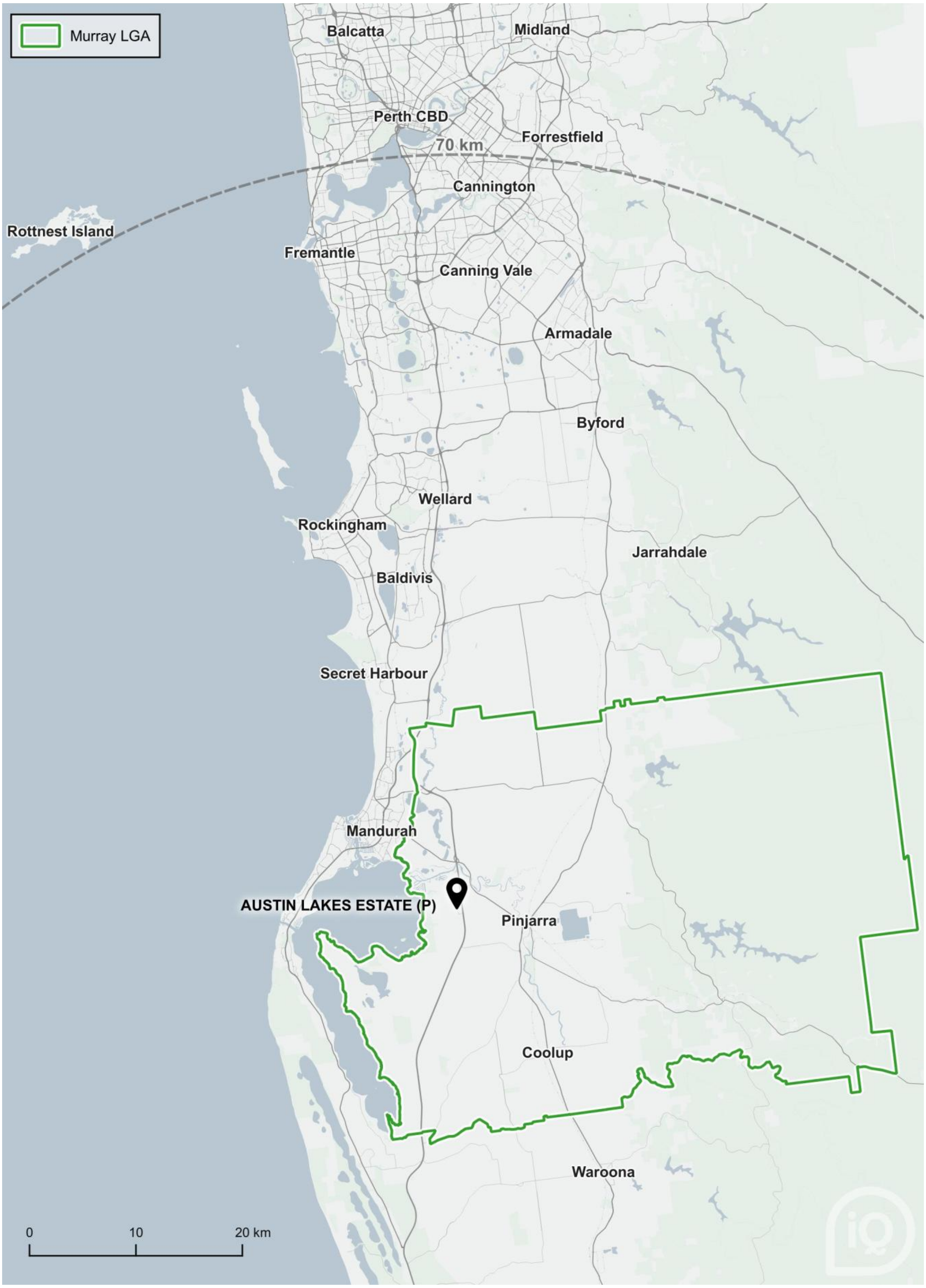
ix. Overall, the Austin Lakes Estate enjoys a high-profile location on the western side of Forrest Highway, between the Mandurah urban area and the town of Pinjarra. The site is easily accessible for the local and wider region population and is well-located to service residents and workers within the region.

CHART 1.1. HOURLY TRAFFIC VOLUMES (FORREST HIGHWAY SOUTH OF PINJARRA RD), 2021/22



Source: Main Roads WA

MAP 1.1. REGIONAL CONTEXT



MAP 1.2. LOCAL CONTEXT

1.2. Existing & Proposed Development

i. Austin Lakes Estate is a residential development located to the west of Forrest Highway and south of South Yunderup Road.

ii. Figure 1.1 displays the proposed structure plan for Austin Lakes, which has been under construction since 2011, and upon completion, is expected to yield some 3,230 lots. Around 675 homes have been built to date.

iii. Community and education facilities are an integral part of Austin Lakes Estate, including a primary school, secondary school, lake and open reserve. An additional school and recreation park are also planned as part of future stages.

iv. Austin Lakes Central is the current local centre which serves as the retail and commercial hub for local residents and a second commercial land parcel, referred to as the Austin Lakes Village Centre, is planned for the south-east portion of the Estate, along Bens Road.

v. Long term planning and this structure plan anticipate the development of an interchange at Bens Road and Forrest Highway in the future – which will improve access from neighbouring areas (both within the trade area and beyond) and enhance the overall attractiveness of the development for customers and prospective tenants alike.

vi. Austin Lakes Estate represents a significant residential development within the region, combining strategic location, comprehensive amenities, and growth potential. The integration of residential uses, natural landscapes, commercial uses, and other infrastructure positions it as an exemplary case study in regional urban planning and economic development.

vii. The remainder of this report examines the demand, need, and impacts of the proposed retail and complementary non-retail floorspace that could be delivered as part of the Austin Lakes Structure Plan.

Austin Lakes Central

- Austin Lakes Central opened in 2017 and includes a small IGA supermarket of 1,000 sq.m, a medical centre, pharmacy, liquor store, and food catering tenants across a combined floorspace of 1,800 sq.m.
- The centre is served by a provision of some 100 at-grade car bays, which equates to 5.6 bays per 100 sq.m of floorspace – which is well above typical benchmarks and highlights additional floorspace capacity.
- Additional land surrounding the centre has also been reserved for potential future expansion and complementary non-retail uses.
- The Structure Plan seeks to allow an increase in maximum GLA to accommodate an additional 1,000 – 2,000 sq.m of floorspace over the forecast period (up to 4,000 sq.m in total).

Austin Lakes Village Centre

- Austin Lakes Village Centre will be the higher-order local or neighbourhood centre for the area and is proposed to include retail and complementary floorspace of up to 7,000 sq.m over the forecast period (medium-long term) but could support more beyond this time.
- Based on market potential assessment, the development would be assumed to reflect a typical contemporary neighbourhood convenience centre, indicatively comprising the following uses:
  - A full-line supermarket (3,800 sq.m)
  - Retail specialty shops (1,500 sq.m).
  - Complementary non-retail and commercial uses (1,700 sq.m).
- Car parking would likely be facilitated via a large at-grade car park with a sufficient provision to deliver the requested ratios (4.0 - 5.0 per 100 sq.m of floorspace) and associated convenience.
- The above would necessitate a land parcel of 2.5 – 3.0 hectares over the forecast period and up to 5.0 hectares over the longer term to allow sufficient space/capacity for convenience, wayfinding, access and amenities.

viii. The Austin Lakes Village Centre would deliver a modern convenience retail centre, anchored by a full-line supermarket, and a complementary provision of specialty shops and non-retail uses. A full-line supermarket at the site would significantly increase the provision of services for the local population and sufficient future planning and land allocation would maximise amenity, and in turn allow for excellent, modern design.

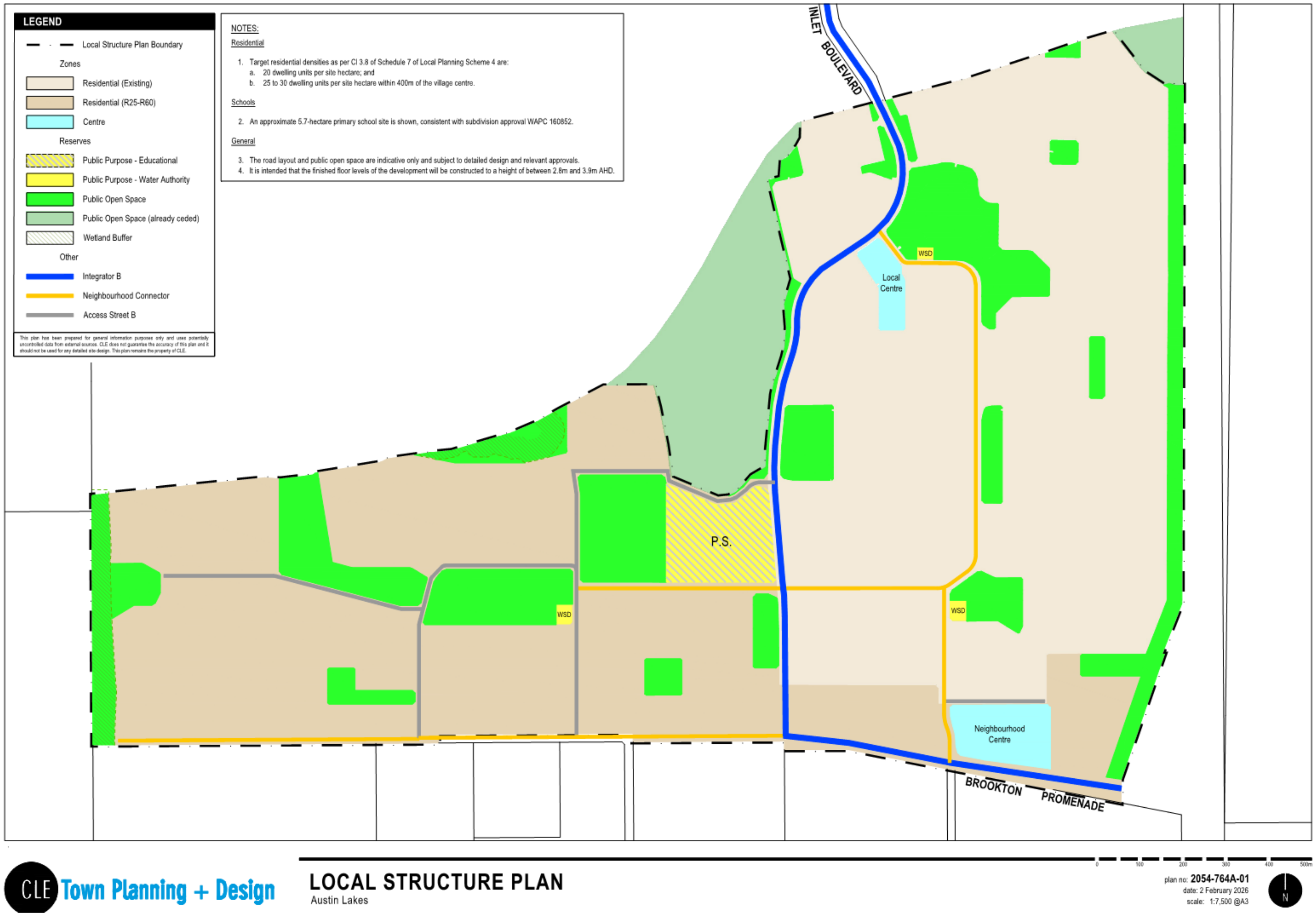
ix. The first full year of trading for the development is assumed to be 2035/36, however, the timing of actual delivery would be demand driven (based on anchor tenant supportability) and would most likely be staged in accordance with other demand drivers.

x. Based on demand and future population growth (a lot of which is subject to future urban investigation and rezoning) – there will be additional demand and capacity for the Austin Lakes Village site beyond the forecast period (post 2046).

Gross Lettable Area (GLA) vs Net Lettable Area (NLA)

In the shopping centre industry, only Gross Lettable Area (GLA) is typically reported and considered. Both the Property Council of Australian and the Australian Property Institute support this unit of measurement and a range of industry benchmarks that allow comparison are also based on GLA (i.e. the Urbis Retail Averages). This Assessment adopts GLA in accordance with this standard.

FIGURE 1.1. AUSTIN LAKES LOCAL STRUCTURE PLAN



1.3. Planning & Land Zoning

i. The Western Australia planning system is underpinned by a framework of strategic and statutory instruments established under the Planning and Development Act 2005. These instruments ensure coordinated development outcomes and guide land use across the State.

ii. Within the Shire of Murray, the planning framework comprises a suite of local strategies, structure plans and statutory schemes that collectively guide growth and development.

iii. One such document is the Austin Cove Outline Development Plan (ODP), approved in 2015, which provides the foundation for development in the area now referred to as Austin Lakes. The ODP identifies a planned retail and commercial centre structure intended to meet the needs of the growing community. This structure includes three defined components (see Figure 1.2):

- **Local Centre:** the location of the existing Austin Lakes Central development.
- **Village Centre Precinct**: a planned activity centre offering a full-line supermarket, specialty retail, cafés and restaurants, health and professional services, community uses and childcare. The ODP provides for up to 5,000 sq.m of retail floorspace across this precinct.
- **Mixed Business Area**: a zone closer to the highway identified for uses such as service stations, showrooms and other bulky goods retail, designed to complement rather than compete with the Village Centre.

iv. The ODP notes that the location and configuration of the Village Centre and Mixed Business Area may be refined over time, provided the combined retail floorspace does not exceed 5,000 sq.m.

v. As part of the current proposed Structure Plan, several changes are proposed:

Village Centre and Mixed Business Area Consolidation

- The Village Centre and Mixed Business Area will be consolidated into a single site at the location of the original Mixed Business Area. This site had already been contemplated for mixed commercial uses and is now proposed to operate as the new Austin Lakes Village Centre.
- While the combined retail floorspace provision is expected to remain broadly consistent with the intended 5,000 sq.m (indicatively comprising a full-line supermarket of around 3,800 sq.m and approximately 1,500 sq.m of specialty retail), the consolidation allows for a more integrated design outcome and supports a wider range of complementary non-retail uses.
- In recognition of contemporary tenancy needs and the blurred distinction between retail and non-retail activities (e.g. suites, medical, wellness, and other services), the Structure Plan proposes a more flexible approach with a maximum development floorspace of 7,000 sq.m across both retail and commercial uses.

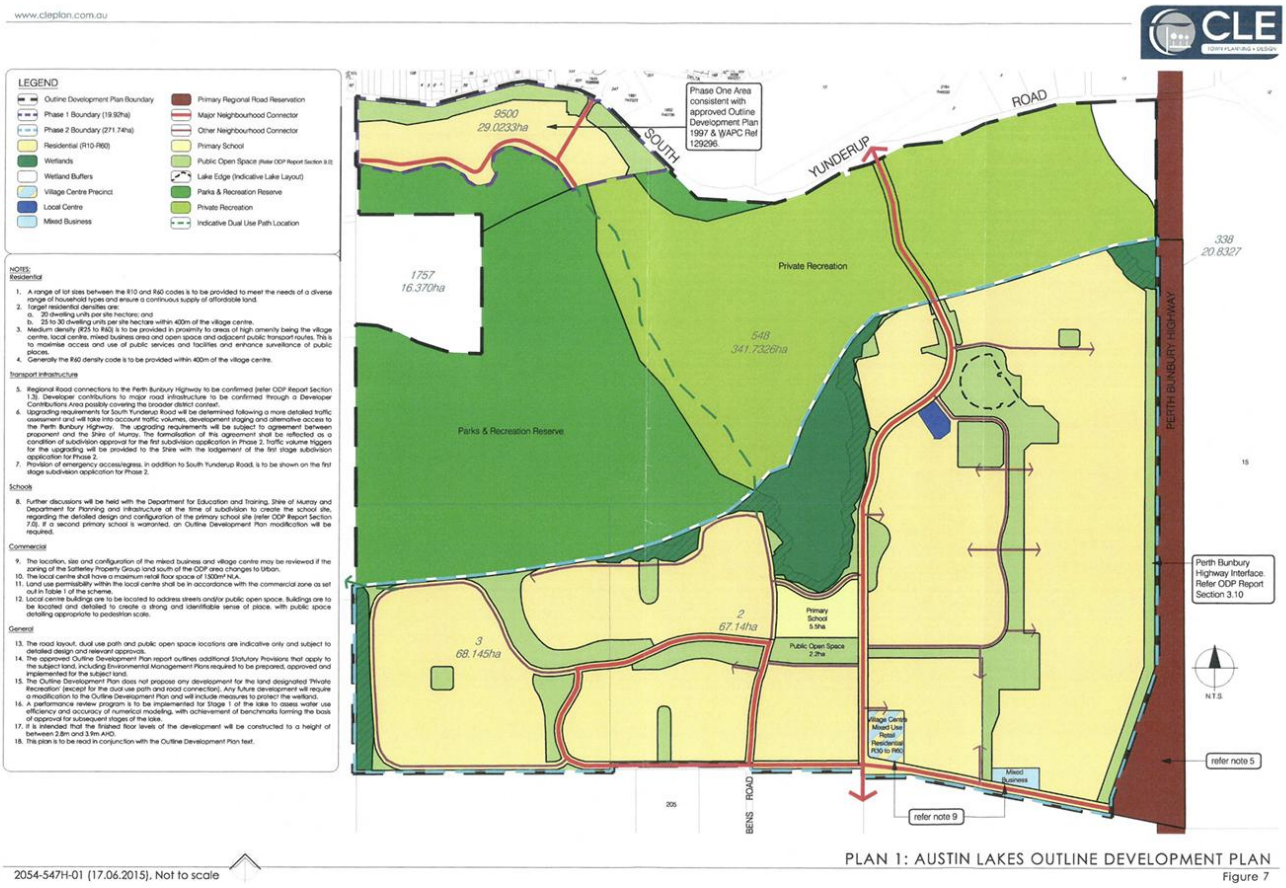
Austin Lakes Central (Local Centre) Increase

- Austin Lakes Central is operating at capacity and is proposed to have the maximum permitted floorspace increased by an additional 1,000 – 2,000 sq.m, bringing the total potential GLA to around 4,000 sq.m.
- Most of this uplift is expected to be allocated to non-retail or quasi-retail activities.

vi. The proposed amendments reflect a refinement rather than a departure from the 2015 ODP. The key changes include consolidation of the Village Centre and Mixed Business Precinct into a single, flexible site with capacity for up to 7,000 sq.m (GLA); and increased capacity for Austin Lakes Central to accommodate growth in demand for predominantly non-retail uses.

vii. These adjustments are considered appropriate given contemporary demand profiles and the growth trajectory of the local catchment.

FIGURE 1.2. AUSTIN LAKES (AUSTIN COVE) OUTLINE DEVELOPMENT PLAN, 2015



1.4. State Planning Policy 4.2 Activity Centres (2023)

1.4.1. Background

i. The Activity Centres Policy is a state planning policy for the planning and development of activity centres throughout Western Australia.

> *Activity centres are a significant focus for economic development and future growth. They are thriving community hubs that provide a diverse range of homes, jobs close to where people live, retail and commercial opportunities and other activities easily accessible by walking, cycling and public transport.*
>
> *The main purpose of this policy is to ensure planning, development and decision making adequately consider the distribution, function, broad land use, access and urban form considerations for activity centres in Perth, Peel and Bunbury.*
>
> *Other purposes of the policy include:*
>
> *• ensuring a diversity of employment opportunities and the promotion of business clustering*
>
> *• providing for a choice of housing within and adjacent activity centres*
>
> *• designing activity centres to be more walkable and better integrated with public transport*

ii. The Western Australian Planning Commission engaged extensively with stakeholders to review *State Planning Policy 4.2 Activity Centres (2023),* and the policy has been gazetted and become operational since 3 July 2023.

iii. Of relevance to this assessment, key changes to the policy (from *SPP 4.2 Activity Centres for Perth and Peel 2010*) include the additional implementation guidelines for *Needs Assessment*, as well as the shift from *Retail Sustainability Assessments* to *Net Benefit Test*, as follows:

> ***7.2 Needs Assessment***
>
> *a) A needs assessment provides an information base to support decision-making by including an assessment of projected land use needs of communities in a local government area. The needs assessment should consider and assess the demand for all activity centre uses and is to be prepared as part of a local planning strategy to guide future development.*
>
> *b) Where a local planning strategy does not have a Needs Assessment, or the Needs Assessment has not been updated for more than five years, a new Needs Assessment may be prepared in support of a:*
>
> *• local planning scheme/scheme amendment*
>
> *• precinct structure plan*
>
> *• standard structure plan at the district or local level.*
>
> *Note: Needs Assessments should not be prepared for development applications. In circumstances where the relevant strategy or structure plan does not include a Needs Assessment, development applications should be accompanied by a Net Benefit Test.*
>
> *c) Once proposed floorspace and/or land requirements are identified, this information should be shown spatially within the planning document being prepared and include an indicative range of activity centre use floorspace per activity centre.*
>
> *d) Guidance on the appropriate approach and methodology for a Needs Assessment is provided within the Implementation Guidelines (Appendix G1).*

...

7.8 Net Benefit Test (NB Test)

a) Major development proposals within activity centres and out-of-centre developments can have an adverse effect on the extent and adequacy of facilities and services available to a local community, and the ability to access them in an efficient and equitable manner by walking, cycling and public transport.

b) It is therefore important to ensure that development of activity centre uses within an area generally complies with the floorspace need identified for specific activity centres in local planning strategies or structure plans (a Needs Assessment, refer section 7.2) and where a proposal exceeds that floorspace need, the proposal is to demonstrate a net benefit to the community of any impacted centres.

c) The purpose of the Net Benefit (NB) Test is to ensure that development applications and planning instruments align with the objectives of this policy.

d) A net benefit occurs when the benefits (pros) to the community arising from a proposal out weigh any identified impacts (cons) to the community arising from a proposal.

e) Where an endorsed local planning strategy or structure plan includes an indicative amount of activity centre use floorspace for the activity centre derived from a Needs Assessment, a NB Test is only required where this indicative activity centre use floorspace is proposed to be exceeded.

The NB Test is to demonstrate that the proposal will:

• not have an unreasonable and detrimental impact on the activity centre hierarchy or the existing or planned functions of activity centres

• not have an unreasonable and detrimental impact upon existing, committed and planned public and private investment in activity centres

• deliver net benefit to the community and not reduce the level of access to services by the community.

i) A NB Test is to be prepared by the proponent in accordance with the methodology provided within the Implementation Guidelines (section 5) and is to be submitted with the relevant planning instrument or development application.

iv. Out-of-centre development refers to proposals for activity centre uses outside designated activity centres or above floorspace thresholds. There is a general reluctance to approve such developments due to potential impacts on nearby activity centres and the overall activity centre hierarchy. Out-of-centre developments must adhere to policy guidelines, including undergoing a Net Benefit Test.

v. Both major developments within activity centres and out-of-centre developments can impact local facilities and services, and therefore the Policy upholds the significance of activity centres and ensures that out-of-centre development aligns with this hierarchy (does not undermine).

vi. Based on the nature of the Structure Plan – involving the consolidation and moderate expansion of already planned and allocated commercial centres – neither Austin Lakes Central nor Austin Lakes Village Centre would be considered out-of-centre development.

1.4.2. Implementation Guidelines

i. The *Implementation Guidelines* provide explanatory detail to assist in the implementation of *State Planning Policy 4.2 Activity Centres* (SPP 4.2) and other relevant Western Australian Planning Commission (WAPC) policies and guidelines.

ii. The Guidelines explain the intent and interpretation of SPP 4.2 and can be used in the preparation, review and assessment of planning instruments and development applications. Key extracts pertaining to this assessment are as follows:

> ***5 Net Benefit Test***
>
> ***5.1 Requirements***
>
> *The Net Benefit (NB) Test shall assess the potential impacts and benefits to the community of a proposal on existing and planned activity centres in the locality, considering:*
>
> *• the supportable retail/commercial floorspace for an appropriate service population*
>
> *• the implications for and optimal use of public and private infrastructure and services provided or planned in the locality*
>
> *• the overall costs and benefits of the proposal to the community, considering the objectives, outcomes and measures of SPP 4.2.*
>
> *b) The potential loss and/or gain of services and any associated detriment/benefit to the community caused by a proposal shall be assessed. The assessment must consider impacts and benefits in relation to all activity centres that may be affected, which are not necessarily just those closest to the proposal and may be in neighbouring local government areas. The extent of activity centres considered should be proportionate to the development.*
>
> ***5.2 Assumptions***
>
> *a) The detail provided in the NB Test should be appropriate to the scale and context of the proposal, drawing on existing information where possible. Applicants and local and State planning authorities should seek to agree the scope, key impacts/benefits for assessment, and level of detail required in advance of applications being submitted.*
>
> *b) The methodology, assumptions and data used in the NB Test must be specified and be appropriate, transparent and verifiable. A template methodology is provided at Appendix G2 as a guide to assist proponents and decision-makers in the preparation and assessment of a NB Test.*
>
> *c) The assumptions and findings of a NB Test may be validated through an independent peer review. This independent peer review should be overseen by the responsible authority, with costs to be shared equally between the proponent and the responsible authority.*
>
> ***5.3 Assessment***
>
> *The following key considerations should be used to guide the assessment:*
>
> *• Is there a demand for additional floorspace, and how does the proposal meet this demand?*
>
> *• How will the proposed development impact on the role of the activity centre and/or the viability and vibrancy of other activity centres in the hierarchy?*
>
> *• What is the anticipated loss and/or gain of services to the community?*
>
> *• What is the anticipated impact on access (distance, time, mode of travel) to services by the community?*
>
> *• Will the proposal contribute to a net increase in employment?*
>
> *• Does the proposal align with the objectives and outcomes of this policy and the planning framework?*

• Are any potential impacts reduced over the longer term?

b) A judgement as to whether the likely impacts/benefits are significant can only be reached considering local circumstances (such as the role, offering and performance of an activity centre and the level of service to the community).

c) Competition between businesses in and of itself is not considered a relevant planning consideration. In this regard, the NB Test is not to be used in a way purely to prevent competition between businesses.

5.4 Implementing Net Benefit

a) Where items or components of a development (refer s2.8.1 of SPP 7.2 Precinct Design Guidelines) are proposed to demonstrate net benefit being achieved, they are to be genuinely over and above what would normally be required to address the requirements of the planning framework.

For example, undertaking road upgrades to cater for increased traffic from the development is not to be included as a benefit as the development cannot occur without the upgrade.

b) The responsible authority may impose reasonable conditions on development approvals to ensure that such items/development components are delivered. Similarly, where such items are proposed as part of a scheme amendment or structure plan process, it is reasonable to include these items as scheme or structure plan requirements to be satisfied by subsequent development.

c) As a general principle, such items or development components should not burden the responsible authority or other landowners without their agreement.

d) There should be a demonstrated need for such items or development component, which are best articulated in a local planning strategy or through the local government's Strategic Community Plan/ Corporate Business Plan.

iii. Figures 1.4 – 1.7 summarise Appendices G1 & G2 of the Guidelines, which provide an example of the scope and methodology for Needs Assessment and Net Benefit Test.

iv. The remainder of this document assesses the Need and Net Benefits for the expanded Austin Lakes Central and proposed Austin Lakes Village Centre development, as set out within SPP 4.2, and with reference to this documentation, where relevant.

FIGURE 1.3. SPP 4.2 GUIDELINES – APPENDIX G1 – SCOPE & METHODOLOGY FOR NEEDS ASSESSMENT

APPENDIX G1 – SCOPE AND METHODOLOGY FOR NEEDS ASSESSMENT

A1.1 SCOPE

The need for **activity centre uses** refers to the scale and mix of non-residential uses likely to be needed within a catchment area over the plan period (10 years for precinct and standard structure plans, 15 years for local planning strategies and scheme amendments). The assessment should measure demand for the area and identify the scale of supply necessary to appropriately accommodate this demand in square metres **net lettable area (NLA)**.

The scale and detail of the assessment should be commensurate with the planning process or proposal being considered. Only future scenarios that could be reasonably expected to occur should be considered.

The assessment of need must be based on facts and unbiased evidence. The methodology used must be transparent and verifiable.

The WAPC's *Land Use and Employment Survey* Planning Land Use Categories (PLUC) system may be used in lieu of scheme land use terms (refer definition of **activity centre uses** for relevant PLUC codes).

A1.2 INPUTS

Verifiable data sources must be provided with preference given to publicly available and transparent data sets (e.g. Australian Bureau of Statistics, *Land Use and Employment Survey, WA Tomorrow*). Data sources used must be justified.

The Needs Assessment should include an estimate of current supply of **activity centre uses** and historical and forecast population.

A1.3 METHODOLOGY

The following table provides a guide on what should be included in a Needs Assessment:

1. **Purpose and objectives**
2. **Study parameters:**
   a) Define study area
   b) Identify study period (10 years for a precinct structure plan or standard structure plan; 15 years for a local planning strategy or scheme amendment)
   c) Define **activity centre uses** to be assessed by study
3. **Review drivers of floorspace, including:**
   a) Historical and forecast population growth and its socio-economic characteristics
   b) Employment growth
   c) Visitor growth
   d) Existing infrastructure
   e) Infrastructure investment
   f) Government policy – including centre policy and **hierarchy**
   g) Changing expenditure patterns
   h) Technological influences impacting floorspace demand
   i) New product and services growth
4. **Property market profile:**
   a) Rents – current and rental growth
   b) Sale prices – current and price growth
   c) Vacancy – current and historical
   d) Yields – current and historical
5. **Floorspace supply for the relevant study area and not just the immediate local government area – current, in development, and planned in terms of:**
   a) Scale – land area, gross floor area
   b) Location
   c) Type – zoning, lot size
   d) Occupancy – proportion vacant vs occupied
6. **Floorspace demand for the relevant region:**
   a) Historical consumption rates – site area, NLA
   b) Employment projections by industry sector with particular focus on relevant activity centre-based sectors
7. **Net demand assessment:**
   a) Overall LGA net floorspace demand by 5-year intervals
   b) Activity centre/market net floorspace demand
   c) Identification of risk factors, issues and opportunities
8. **Land use development options:**
   a) Base case (business as usual)
   b) High growth scenario
   c) Low growth scenario

FIGURE 1.4. SPP 4.2 GUIDELINES – APPENDIX G2 – SCOPE & METHODOLOGY FOR NET BENEFIT TEST

APPENDIX G2 – SCOPE AND METHODOLOGY FOR NET BENEFIT TEST

A2.1 APPROACH

Verifiable and current data sources must be provided with preference given to publicly available and transparent data sets (e.g. Australian Bureau of Statistics, *Land Use and Employment Survey, WA Tomorrow*). Data sources used must be justified.

The **Net Benefit (NB)** Test must provide a short description of the model and methodology used. All assumptions are to be clearly articulated.

The assessment:

- only evaluates the external costs and benefits to the community of the proposal
- only includes costs and benefits that have a net impact on community welfare impacts that simply transfer benefits and costs between individuals and businesses in the community are not included
- quantifies impacts and benefits where possible.

A2.2 IMPACTS

A critical output from the modelling process is an estimate of the impact of the proposal on existing and planned activity centres and the level of service to the community.

A.2.2.1 Non-retail proposals

For proposals without shop/retail or other retail, no impact modelling is required.

A2.2.2 Retail proposals

For retail proposals, the **NB Test** should include the supply of shop/retail (PLUC:5-SHP) and/or Other Retail (PLUC:6-RET) floorspace (present period and over a defined future time period – minimum five years) within relevant **activity centres** and the retail turnover estimates for each **activity centre** for the base year and NB test year/s. An estimate of the retail turnover for each relevant **activity centre** should be identified for the following scenarios:

- base case - without the planning proposal/ development and
- with the new planning proposal/ development.

The differences between the scenarios is the turnover impact for each **activity centre**.

When estimating impacts, the assessment should include the following detail:

Location of proposed development

Provide a contextual description of the proposal and location with supporting maps, identifying if out-of-centre, within-centre or new activity centre

Size of the proposal

Detail the change in net lettable area (NLA) of the shop/ retail (PLUC:5-SHP) and/or other retail (PLUC:6:RET) floor space

Describe the following for the existing situation

- Definition of trade area (including primary trade area and any secondary and tertiary trade areas)
- Estimated current and historical population of the trade area
- Overview of trade area resident attributes and implications for floorspace need and spending estimates
- Estimated historical expenditure of the trade area using latest ABS Household Expenditure Survey or other reliable source

Detail the following for the proposed situation

- Definition of trade area (same as existing situation)
- Estimated forecast population of the trade area
- Estimated forecast expenditure of the trade area

Estimate the average annual sales turnover (aggregate and per m²) for the proposed development and/or activity centre pre-and post-development proposal.

The following impact percentage and risk level for retail turnover is provided as a general guide and should not be used as the only indicator of acceptability of a proposal:

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

Where the short-term impact is initially high before falling to a medium or low level in the long term, consideration should be given to how the development can be staged or if there needs to be any additional short-term benefits to ensure that level of service is always maintained.

A2.3 BENEFITS

When estimating benefits to the community, the assessment should consider:

What benefit will occur and how important the benefit will be?

- Detail what benefit will occur due to the proposed development
- Wherever possible use existing data and standards to measure the size of the benefit and how important it will be to the community.

Who in the community are expected to experience the benefit?

- Identify those in the community who will be likely to experience the benefit – customers and employees, the local community, different socio-economic groups
- Define the geographic boundary where the benefit is experienced – the site, the surrounding area, the local government.

How much benefit is expected?

- Estimate how many individuals are expected to experience the benefit
- Describe the degree of change expected due to the benefit
- Determine the expected duration for which stakeholders are expected to experience the benefit.

The following assessment template should be used to evaluate the net benefit to the community of a proposal. The criteria should be examined when assessing the merits of the planning/development proposal against the base case or current situation.

FIGURE 1.5. SPP 4.2 GUIDELINES – APPENDIX G2.4 – SCOPE & METHODOLOGY FOR NET BENEFIT TEST (1/2)

A2.4 NET BENEFIT ASSESSMENT TEMPLATE

CRITERIA	COMMUNITY COSTS AND BENEFITS – NET BENEFIT			
	BASE CASE – CURRENT SITUATION For the subject centre and nearby centres/trade area	PLANNING/DEVELOPMENT PROPOSAL For the subject centre and nearby centres/trade area	QUANTITATIVE COST/BENEFIT Is there a quantified cost or benefit that the proposal will bring to the community? What is it? Where a cost or benefit cannot be quantified, state NIL.	QUALITATIVE COST/ BENEFIT Outline the qualitative benefits to the community of the proposal. Can a non-quantifiable benefit or impact be described?
STRATEGIC ALIGNMENT				
Is the proposal consistent with the strategic planning for the area? Is it aligned with the relevant regional strategy and approved local planning strategy?	Describe how the current situation (zoning, land uses, development, built form) is aligned or otherwise with the strategic planning for the area.	Describe how the proposal will enable development that is compatible with and achieves the objectives of the strategic planning for the area.		
Is the proposal consistent with the objectives and outcomes of SPP 4.2?	Describe how the existing situation is/is not consistent with the objectives and outcomes of SPP 4.2.	Describe how the proposal achieves the objectives and meets the outcomes of SPP 4.2.		
What are the potential impacts on the activity centre hierarchy? Is the size and scale of the proposal consistent with the level of the hierarchy?	Describe how the existing situation aligns with the activity centre hierarchy and detail the size and scale in net lettable area (NLA) of existing and planned development.	Describe how the proposal may impact on the existing and planned activity centre hierarchy. Detail the size and scale (NLA) of the proposal.		
PRODUCTIVITY				
Does the proposal provide new jobs in addition to any that may be lost elsewhere – net additional jobs?	Outline the estimated existing employment located on site and in the surrounding area.	Provide an estimation of the expected additional employment to be provided on site and in the local area as a direct result of the proposal.		
Does the proposal contribute to diversifying local jobs – creating more strategic employment versus population-driven employment?	Describe the existing employment mix and the ratio of strategic vs population-driven employment on site and in the surrounding area.	Provide details of the changes to the employment mix that the proposal will bring on site and in the surrounding area.		

CRITERIA	COMMUNITY COSTS AND BENEFITS – NET BENEFIT			
	BASE CASE – CURRENT SITUATION For the subject centre and nearby centres/trade area	PLANNING/DEVELOPMENT PROPOSAL For the subject centre and nearby centres/trade area	QUANTITATIVE COST/BENEFIT Is there a quantified cost or benefit that the proposal will bring to the community? What is it? Where a cost or benefit cannot be quantified, state NIL.	QUALITATIVE COST/ BENEFIT Outline the qualitative benefits to the community of the proposal. Can a non-quantifiable benefit or impact be described?
For retail proposals, how is the proposal expected to impact upon the current and expected turnover and role of relevant activity centres?	***See Scope and Methodology for Impacts above***	***See Scope and Methodology for Impacts above***		
Will the proposal increase the choice and availability of goods and services in the area?	Describe the range of choice and the availability of goods and services in the area for the existing situation.	Describe how the proposal will enable a greater range of choice and improve the availability of goods and services in the area.		
QUALITY OF LIFE				
Is the proposal compatible with surrounding land uses? Will there be an improvement in the level of amenity and vibrancy that benefits the wider community?	Describe the existing land uses, built form and public realm. Detail the character and level of amenity provided by the existing situation.	Describe how the proposal will/ will not be compatible with the surrounding land uses and contribute to improvements in the amenity provided by the built form and public realm.		
Does the proposal include land uses such as healthcare, education and community facilities?	Describe the existing level of healthcare, education and community facilities in the area.	Detail any additional or potential loss of healthcare, education and community facilities in the area as a result of the proposal.		
ENVIRONMENTAL SUSTAINABILITY				
Would the proposal have an impact on overall vehicle trips? Would car-based net trips (by distance) increase or reduce as a result of the proposal?	Describe the existing vehicle trips for the existing situation within the trade area.	Calculate the potential increase or decrease in vehicle trips within the trade area as a result of the proposal.		

FIGURE 1.6. SPP 4.2 GUIDELINES – APPENDIX G2.4 – SCOPE & METHODOLOGY FOR NET BENEFIT TEST (2/2)

CRITERIA	COMMUNITY COSTS AND BENEFITS – NET BENEFIT			
	BASE CASE – CURRENT SITUATION For the subject centre and nearby centres/trade area	PLANNING/DEVELOPMENT PROPOSAL For the subject centre and nearby centres/trade area	QUANTITATIVE COST/BENEFIT Is there a quantified cost or benefit that the proposal will bring to the community? What is it? Where a cost or benefit cannot be quantified, state NIL.	QUALITATIVE COST/ BENEFIT Outline the qualitative benefits to the community of the proposal. Can a non-quantifiable benefit or impact be described?
Does the proposal contribute to improved air and water quality – such as incorporating water sensitive urban design (WSUD), or walking and cycling infrastructure that reduces emissions from vehicles?	Describe the existing situation for the area in relation to WSUD and the provision of walking and cycling infrastructure.	Describe how the proposal will improve air and water quality through incorporation of WSUD, the provision of new and/or enhancement of existing walking and cycling infrastructure, or other measures.		
Does the proposal protect or enhance remnant vegetation or contribute to improving the urban tree canopy?	Describe the existing levels and quality of vegetation on site and the extent of urban tree canopy.	Provide details of how the proposal will protect and/or enhance vegetation on site and improve the urban tree canopy in the area, over and above any requirements of the planning framework.		
Does the proposal help reduce energy consumption and emissions – for example through sustainable construction methods and/or incorporating renewable energy systems?	Describe the current situation with regards to how energy is produced and consumed on site.	Describe how the proposal will help reduce emissions and incorporate renewable energy on site.		
INFRASTRUCTURE AND SERVICES				
Is there significant government investment in services, infrastructure or development in the area or nearby centres that may be affected by the proposal? Will the proposal impact patronage/viability of the investment and what is the expected impact?	Describe the government services (Federal, State and local) that already exist in the area or nearby centres. Describe government investments in infrastructure or government-led (re) development in the area or nearby centres.	Detail how the proposal may impact upon or benefit the provision of government services in the area or nearby centres. Detail how the proposal may or may not undermine government investment in infrastructure or (re)development in the area or nearby centres.		

CRITERIA	COMMUNITY COSTS AND BENEFITS – NET BENEFIT			
	BASE CASE – CURRENT SITUATION For the subject centre and nearby centres/trade area	PLANNING/DEVELOPMENT PROPOSAL For the subject centre and nearby centres/trade area	QUANTITATIVE COST/BENEFIT Is there a quantified cost or benefit that the proposal will bring to the community? What is it? Where a cost or benefit cannot be quantified, state NIL.	QUALITATIVE COST/ BENEFIT Outline the qualitative benefits to the community of the proposal. Can a non-quantifiable benefit or impact be described?
Does the proposal include new, or improvements to existing transport infrastructure, particularly walking, cycling and public transport, that increases access and helps manage congestion?	Describe the transport infrastructure in the area and the current estimated mode split.	Detail how the proposal will improve transport infrastructure in the area with a focus on walking, cycling and public transport, over and above any requirements of the planning framework.		
Does the proposal include enhancements to utilities that benefit the local area?	Describe the existing provision of utilities.	Provide detail on any improvements to utilities that the proposal will bring.		
EQUITY AND SOCIAL INCLUSION				
Does the proposal have the potential to improve access to economic opportunity for minority and vulnerable groups?	Describe the existing services and employment opportunities.	Detail how the proposal will improve access to economic opportunity.		

A2.5 CONCLUSIONS

An executive summary should provide a comparison of the impact and benefit of the proposal to determine acceptability of the proposal in accordance with the requirements of SPP 4.2 and these Guidelines.

2 Trade Area Analysis (Study Area)

This section of the report outlines the trade area likely to be served by the proposed retail and commercial facilities at Austin Lakes, including current and projected population and retail spending levels. The trade area is an appropriate ‘study area’ for the purposes of needs assessment. The socio-economic profile of the trade area population is also reviewed.

2.1. Trade Area Definition

i. The trade area for the proposed supermarket-based shopping centre has been defined considering the following:

- The scale and composition of the existing and proposed development, including a small IGA supermarket as well as potential full-line supermarket.
- The provision of existing and proposed retail facilities throughout the region.
- Regional and local accessibility.
- The pattern of urban development.
- Existing visitation patterns to Austin Lakes Central which is based on an IGA supermarket and shops, using mobile ping data.
- Significant physical barriers such as major roads.

ii. The trade area defined for the proposed development is also based on the experience of Location iQ, which has been established and refined over many years across many similar assessments. Location iQ has also been provided with a range of other data (customer, transaction, mobile phone and the like), which assists in the refinement and cross-checking of trade area boundaries for existing networks - and can then be utilised for future scenarios.

iii. The trade area defined for the proposed development is based on Australian Bureau of Statistics (ABS) SA1 statistical areas, which is common convention for trade area definitions - given SA1’s are the smallest unit area released in Census data (that also include socio-economic and spending datasets). SA1s typically have a population of between 200 and 800 persons, and an average population size of approximately 400 persons.

iv. Slight adjustments (or overlays) have been made to SA1’s with large land areas to reflect realistic visitation patterns for retail and commercial facilities at Austin Lakes, as well as Estate and greenfield boundaries.

v. Maps 2.1 and 2.2 illustrate the defined trade area to be served by Austin Lakes Estate Village Centre, which includes one primary sector and three secondary sectors, as follows:

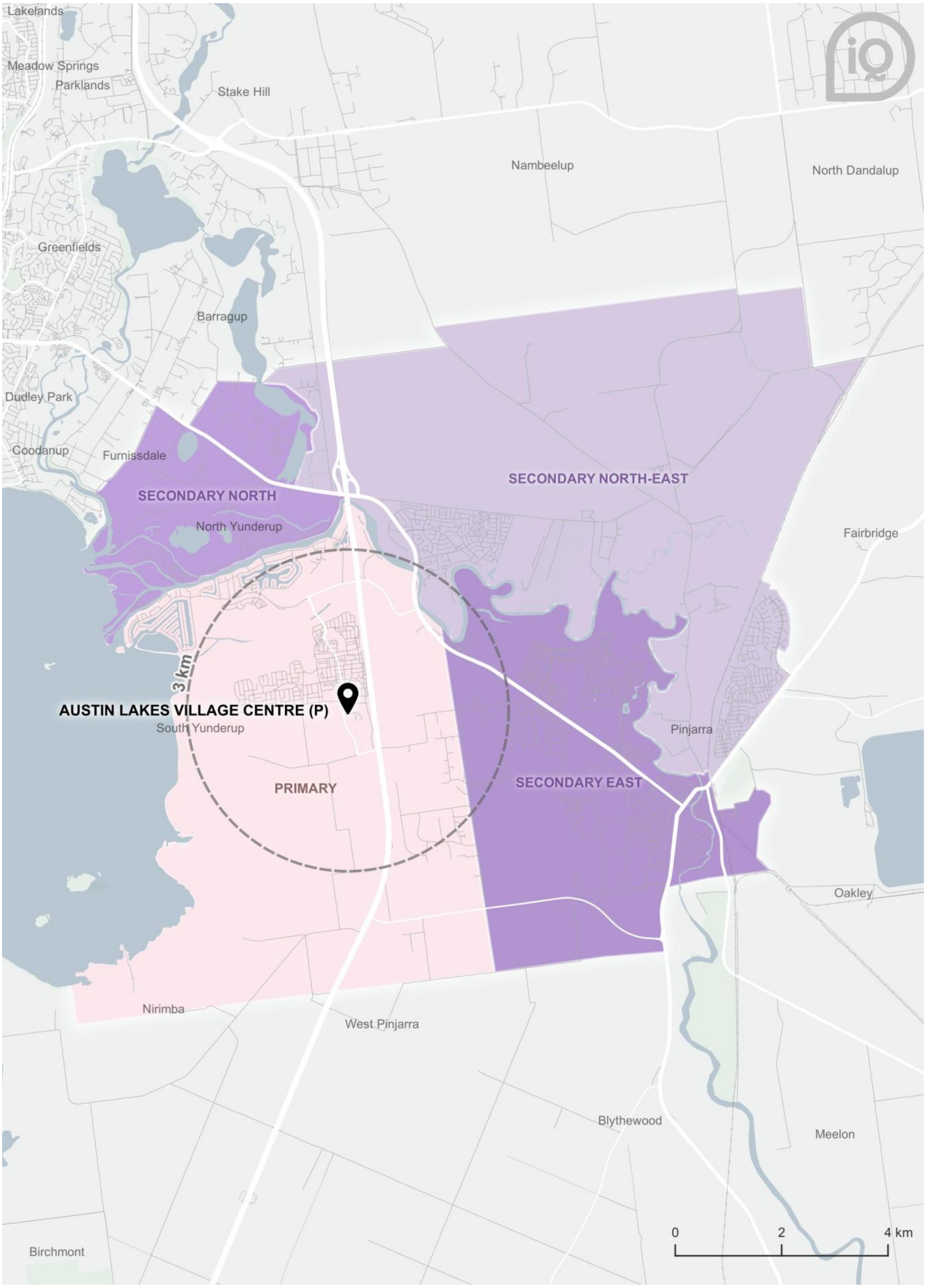
- The **primary sector** predominantly includes the suburb of South Yunderup, bounded by the Peel Inlet in the west, the canals in the north, Curtis Lane in the east, and Greenlands Road in the south.
- The **secondary north sector** extends around 2 km north of the canals to incorporate North Yunderup and parts of Furnissdale.
- The **secondary north-east** sector is provided on the northern side of the Murray River and aligns closely with the suburb boundary of Ravenswood.
- The **secondary east** sector is based around Pinjarra, south of the Murray River. The alignment of the sector follows that of Pinjarra Road.

vi. The combination of the primary and secondary sectors is referred to as the main trade area throughout the remainder of this report. The primary sector would be the core catchment area for neighbourhood shopping centre facilities at the site, reflecting a 2 – 4 km radius around the site which is typical of a full-line supermarket.

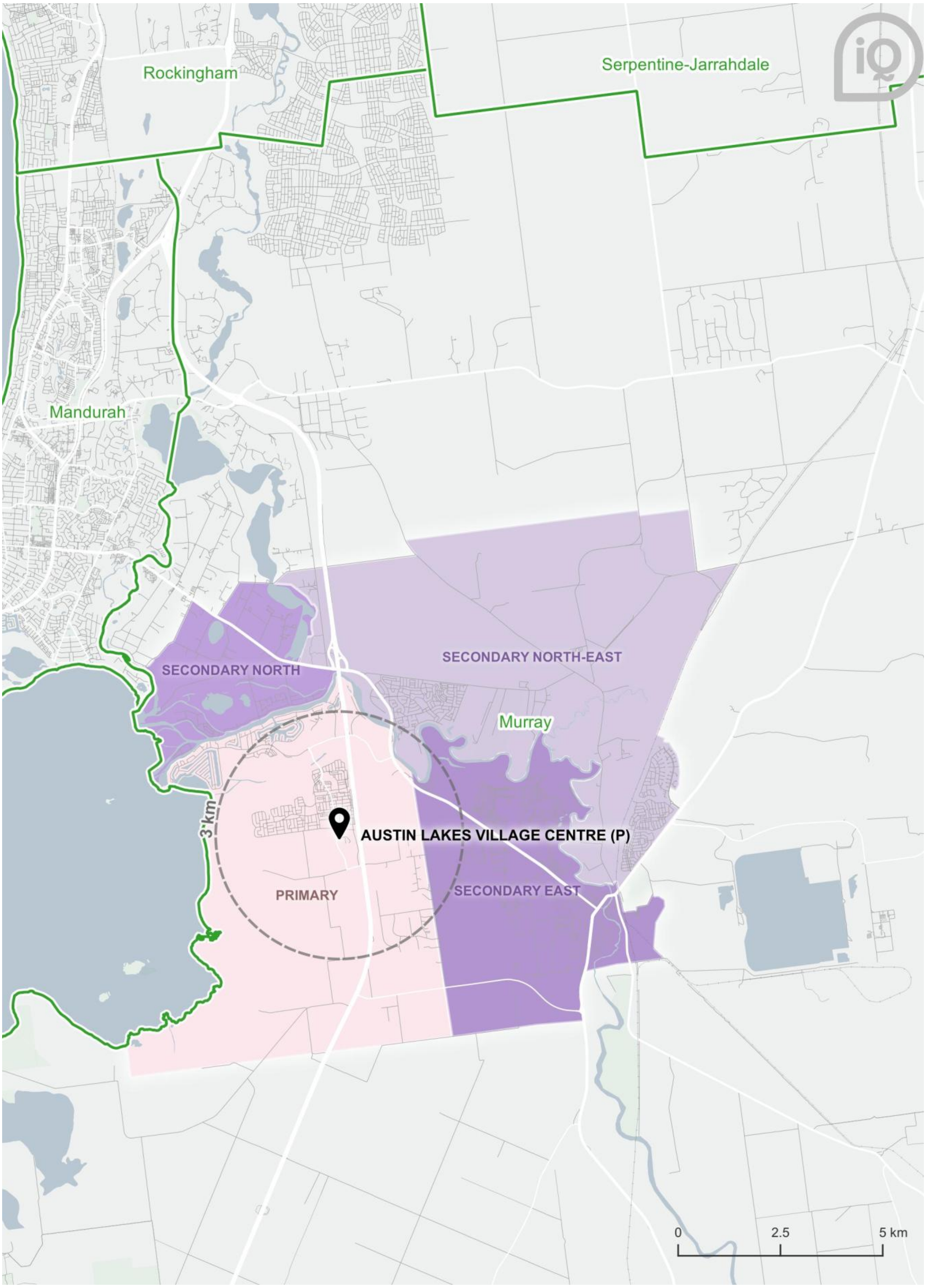
vii. The defined main trade area is consistent with most full-line supermarkets in similar urban fringe and rural locations across Australia, acknowledging overlapping catchments are typical in any retail hierarchy.

viii. It is observed in any established population area that residents/customers move freely between different shopping facilities depending on choice, offer, complementary trip purposes, place of work, place of education, place of recreation and the like. It is not unreasonable to expect consumers to make choices about their shopping patterns based on these types of criteria and conversely, it is highly unlikely that residents would just undertake shopping at their closest facility all the time.

MAP 2.1. AUSTIN LAKES VILLAGE CENTRE MAIN TRADE AREA & SUBURBS



MAP 2.2. AUSTIN LAKES VILLAGE CENTRE MAIN TRADE AREA & SURROUNDING LOCAL GOVERNMENT AREAS



2.2. Main Trade Area Population

i. Table 2.1 details the current and projected population levels for the main trade area, based on the following:

- The 2011, 2016, and 2021 Census of Population and Housing undertaken by the Australian Bureau of Statistics (ABS), at both an SA1 and Mesh Block level.

- New dwelling approval statistics sourced from the ABS over the period from 2011/12 – 2023/24 (refer Charts 2.1 – 2.2), averaging 63 dwellings per year in the primary sector, and 69 dwellings per year across the combined secondary sectors (totalling 132 dwellings across the main trade area).

- WA Tomorrow forecasts prepared by the Western Australian Planning Commission at an SA2 level, released in February 2025.

- The latest population projections prepared at an SA1 level by the National Forecasting Program by .id – informed decisions.

- Perth and Peel Urban Land development outlook provided by the Western Australian Government (Department of Planning, Lands and Heritage), 2020/21.

- Investigations by this office in relation to residential development within the main trade area.

ii. The main trade area population increased from 10,106 as at the 2011 Census to 13,374 persons as at the 2021 Census – reflecting average annual growth of 327 persons (2.9%).

iii. The main trade area population is currently estimated at 15,114 in 2025, including 4,959 persons in the primary sector. The main trade area population is projected to increase at an average rate of 3.9% (897 persons) per annum to 33,955 by 2046, including 12,810 persons in the primary sector. This is considered a conservative projection figure, given the significant amount of growth planned within the region, as well as the substantial capacity.

iv. Future population growth throughout the main trade area will be driven by ongoing urban sprawl, including several greenfield estates and other land releases (refer Map 2.3). These developments and related assumptions are detailed in Table 2.2 and described as follows:

Primary Sector

- Austin Lakes Estate has been under construction since 2011, and upon completion, is projected to yield some 3,230 lots. To date, approximately 675 homes have been built, with the remainder expected to reach completion by 2046 – at an average rate of 120 dwellings per year.

  Stage 19 has reached practical completion with titles imminent, while ongoing construction works across Stages 20 – 22 and 27 support the delivery of lots through 2026 – noting dwelling construction and completion follows a typical lag behind lot delivery.

- South Yunderup will comprise a total of 1,600 dwellings upon completion, with approximately 70 lots remaining to be developed.

- The Greenlands Road Structure Plan highlights a potential yield of a combined 201 lots – including the current developments Kingston Fields (34 lots) and Greenlands Meadows (35 lots).
- Additional Urban Investigation Areas to the south and east of Austin could yield up to an estimated 14,860 lots if rezoning were to occur. However, for the purposes of this assessment, this is assumed to be beyond the forecast period (2046) and is therefore not modelled.

Secondary East Sector

- Murray River Country Estate has an ultimate yield of 3,112 residential dwellings, of which some 2,662 remain. Based on the scale and recent development rate – this is assumed to occur at around 25 – 50 lots per year until well beyond the forecast period.
- Hampton Park Estate has delivered more than half of the expected 57 total homes since 2024 and is expected to be completed in the short term.
- Other approved structure plans within the sector will deliver a combined 714 dwellings, which are expected over the 2027 - 2044 period.

Secondary North East Sector

- Ravenswood Waters is being developed by Origin Projects and is located between Old Mandurah Road and Nancarrow Way. The development will yield a total of 950 dwellings upon completion (projected by 2040), with some 360 lots completed to date.
- Ravenswood Green is a small-scale development that will include a total of 273 lots, with some 123 completed to date.
- Ravenswood Central is situated at the intersection of Old Mandurah Road and Pinjarra Road. The estate is planned to comprise 310 lots, with construction expected to commence by 2028 and progress at a rate of around 25 homes per year.
- Everleigh Estate will deliver the first of a total 234 dwellings in 2025 and is modelled to progress at a rate of 25 homes per year.
- Wisteria Park Estate is provided off the South Western Highway and planned to include 690 homes upon completion. To date, Wisteria Park has progressed at a slower rate than other projects within the region (400 homes currently) and is expected to continue at a steady rate to completion by 2046.
- Other structure plan areas comprise a combined 1,810 lots of which some 640 dwellings are expected to be completed over the forecast period to 2046.
- Investigation areas around Pinjarra and Ravenswood could yield an estimated 12,804 additional lots over the longer-term, with development assumed to commence post-2046 and not accounted for within this assessment.

v. Several noted urban expansion and investigation areas have also been assumed to proceed beyond 2046. In combination, these longer-term development areas will have the capacity to support more than 30,500 dwellings (around 85,000 persons) – which is a major planning consideration.

vi. Charts 2.3 – 2.4 provide a comparison between official population projection sources and those presented in this assessment (based on key geographic overlap assumptions). As a guide, the Location iQ projected average annual population growth rate of 4.3% (785 persons) across the main trade area over the 2021 – 2036 period falls between the central and upper bands for both the corresponding SA2 geographies (up to 4.3%) and Murray LGA (up to 4.0%).

vii. Overall, the main trade area population of 15,114 persons is expected to more than double by 2046 (+18,841 persons in 21 years). Importantly, however, there will still be substantial additional capacity for new residents – with potential for an estimated 30,500 lots (85,000 persons) beyond 2046 across key investigation areas and long-term projects.

viii. The Location iQ projections are based on historical and future development rates for residential estates and land releases throughout the main trade area (assumptions demonstrated in Table 2.2) and could be considered conservative, given the significant amount of growth planned within the region. This includes various potential land releases and investigation areas that could proceed (but have not been assumed) within the forecast period (come online sooner).

ix. It is important to note that the population projections in this report are based on current market conditions and the latest available information that has been sourced by this office. If market conditions change, this would impact population and sales projections outlined in this assessment.

TABLE 2.1. MAIN TRADE AREA POPULATION, 2011 – 2046

Population	Actual			Forecast						*Change*
	2011	**2016**	**2021**	**2025**	**2026**	**2031**	**2036**	**2041**	**2046**	***2025-46***
Primary Sector	2,475	3,456	4,259	4,959	5,351	7,266	9,223	11,155	12,810	7,851
Secondary Sectors										
• East	3,701	4,210	4,251	4,551	4,649	5,301	6,701	8,101	9,132	4,581
• North	1,351	1,364	1,334	1,374	1,384	1,434	1,484	1,534	1,584	210
• North-east	2,579	3,130	3,530	4,230	4,499	6,182	7,747	9,077	10,429	6,199
Total Secondary	7,631	8,704	9,115	10,155	10,532	12,917	15,932	18,712	21,145	10,990
Main Trade Area	**10,106**	**12,160**	**13,374**	**15,114**	**15,883**	**20,183**	**25,156**	**29,868**	**33,955**	**18,841**

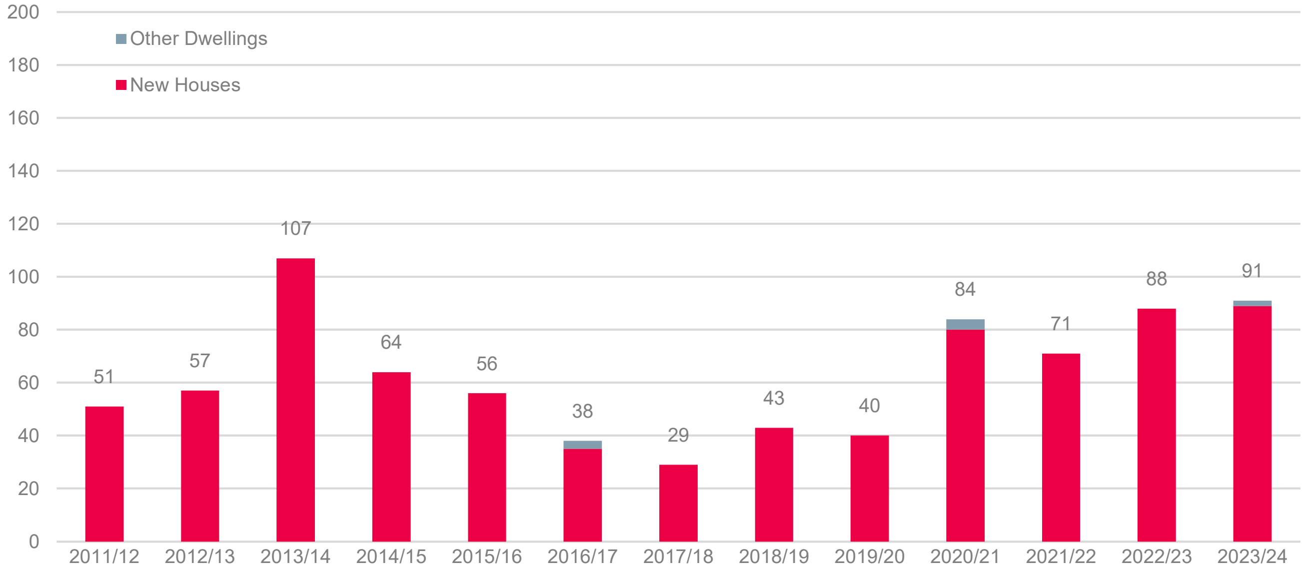
Average Annual Change (No.)	Actual		Forecast						*Change*
	2011-16	**2016-21**	**2021-25**	**2025-26**	**2026-31**	**2031-36**	**2036-41**	**2041-46**	***2025-46***
Primary Sector	196	161	175	392	383	391	386	331	*374*
Secondary Sectors									
• East	102	8	75	98	130	280	280	206	*218*
• North	3	-6	10	10	10	10	10	10	*10*
• North-east	110	80	175	269	337	313	266	270	*295*
Total Secondary	215	82	260	377	477	603	556	487	*523*
Main Trade Area	**411**	**243**	**435**	**769**	**860**	**994**	**942**	**818**	***897***

Average Annual Change (%)	Actual		Forecast						*Change*
	2011-16	**2016-21**	**2021-25**	**2025-26**	**2026-31**	**2031-36**	**2036-41**	**2041-46**	***2025-46***
Primary Sector	6.9%	4.3%	3.9%	7.9%	6.3%	4.9%	3.9%	2.8%	*4.6%*
Secondary Sectors									
• East	2.6%	0.2%	1.7%	2.2%	2.7%	4.8%	3.9%	2.4%	*3.4%*
• North	0.2%	-0.4%	0.7%	0.7%	0.7%	0.7%	0.7%	0.6%	*0.7%*
• North-east	3.9%	2.4%	4.6%	6.4%	6.6%	4.6%	3.2%	2.8%	*4.4%*
Total Secondary	2.7%	0.9%	2.7%	3.7%	4.2%	4.3%	3.3%	2.5%	*3.6%*
Main Trade Area	**3.8%**	**1.9%**	**3.1%**	**5.1%**	**4.9%**	**4.5%**	**3.5%**	**2.6%**	***3.9%***
Greater Perth	*1.9%*	*1.2%*	*2.0%*	*1.5%*	*1.1%*	*0.9%*	*0.7%*	*0.6%*	*0.9%*
Australian Average	*1.6%*	*1.2%*	*2.1%*	*1.8%*	*1.6%*	*1.3%*	*1.2%*	*1.1%*	*1.4%*

All figures as at June and based on 2021 SA1 boundary definition.

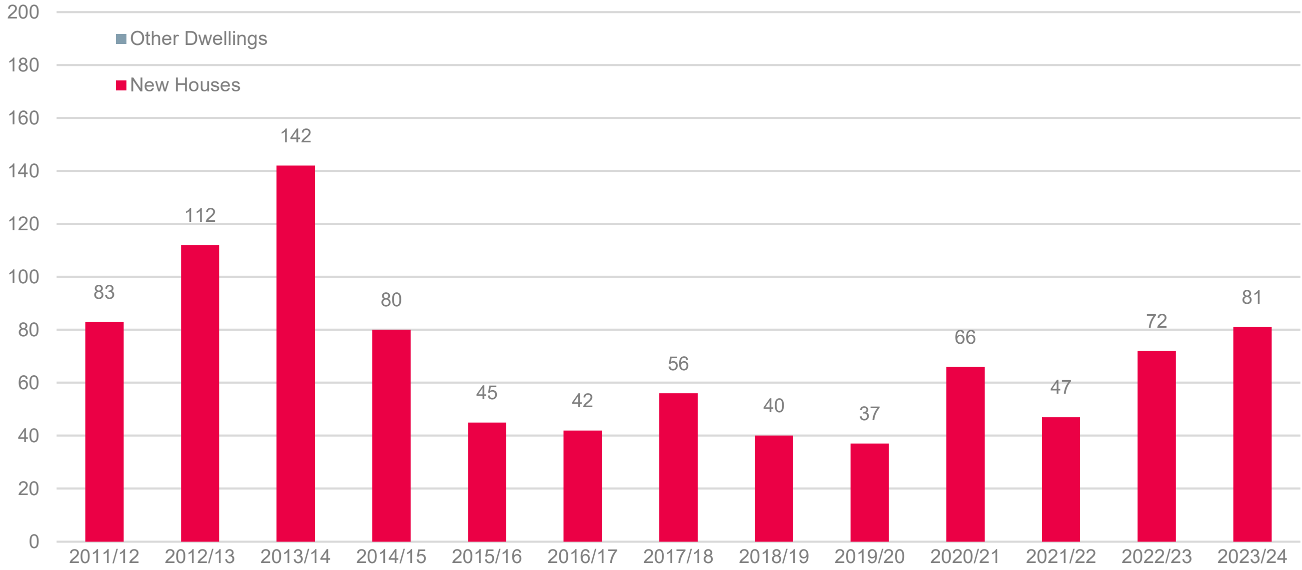
Sources : Location iQ Databases, ABS, National Forecasting Program by .id – informed decisions, WA Tomorrow

CHART 2.1. PRIMARY SECTOR NEW DWELLING APPROVALS, 2011/12 – 2024/25



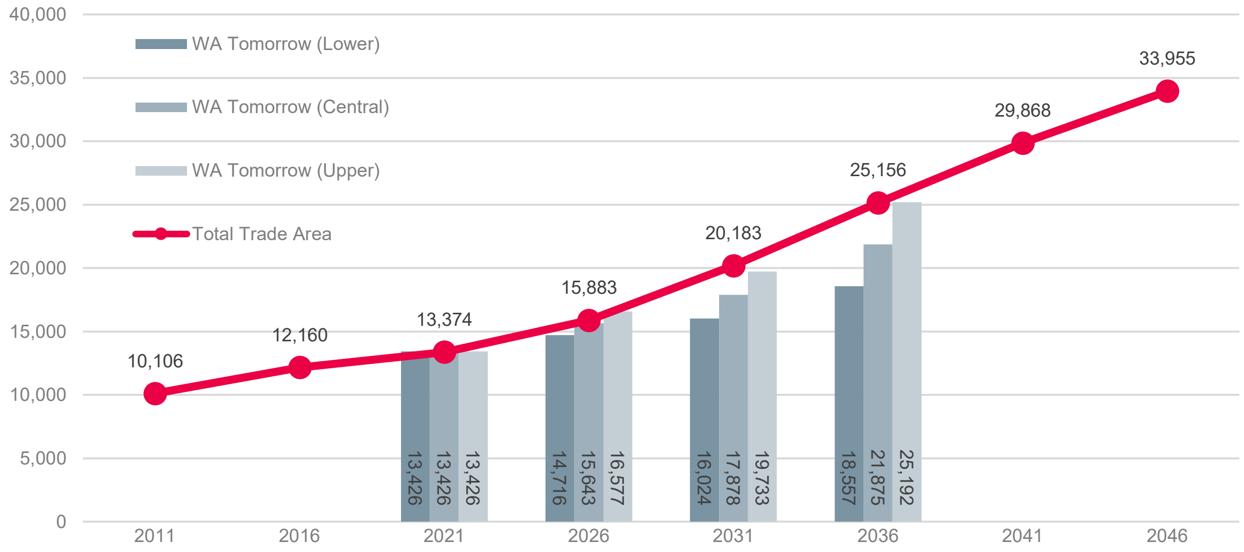
Source: ABS

CHART 2.2. COMBINED SECONDARY SECTORS NEW DWELLING APPROVALS, 2011/12 – 2024/25



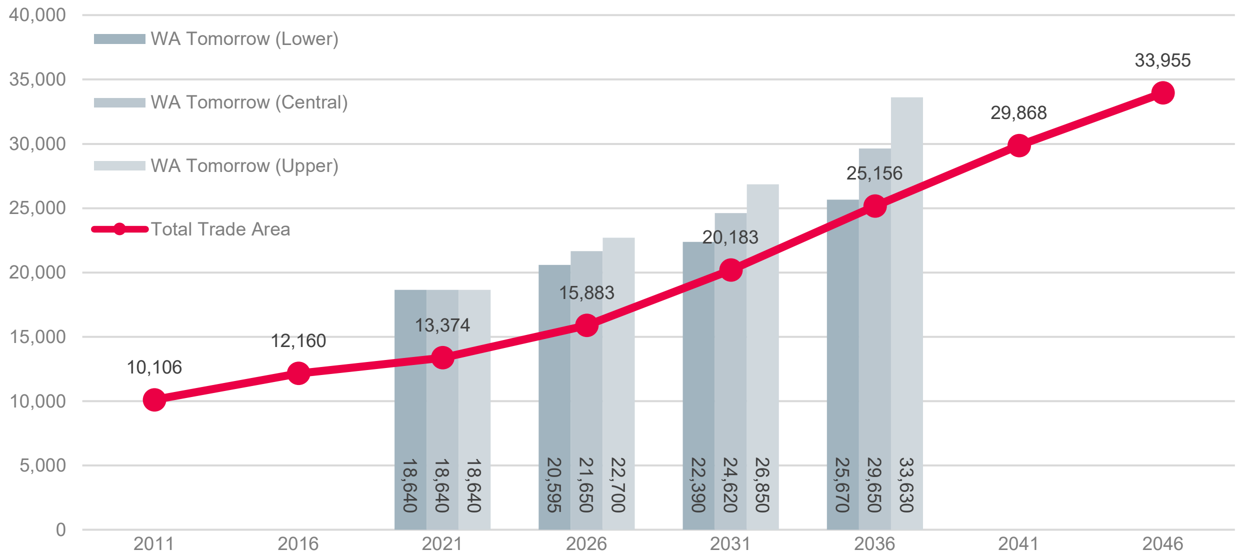
Source: ABS

CHART 2.3. POP. FORECAST COMPARISON, WA TOMORROW SA2 (85% PINJARRA | 65% MANDURAH -EAST)



Source: WA Tomorrow SA2 Forecasts

CHART 2.4. POP. FORECAST COMPARISON, WA TOMORROW LGA (MURRAY)

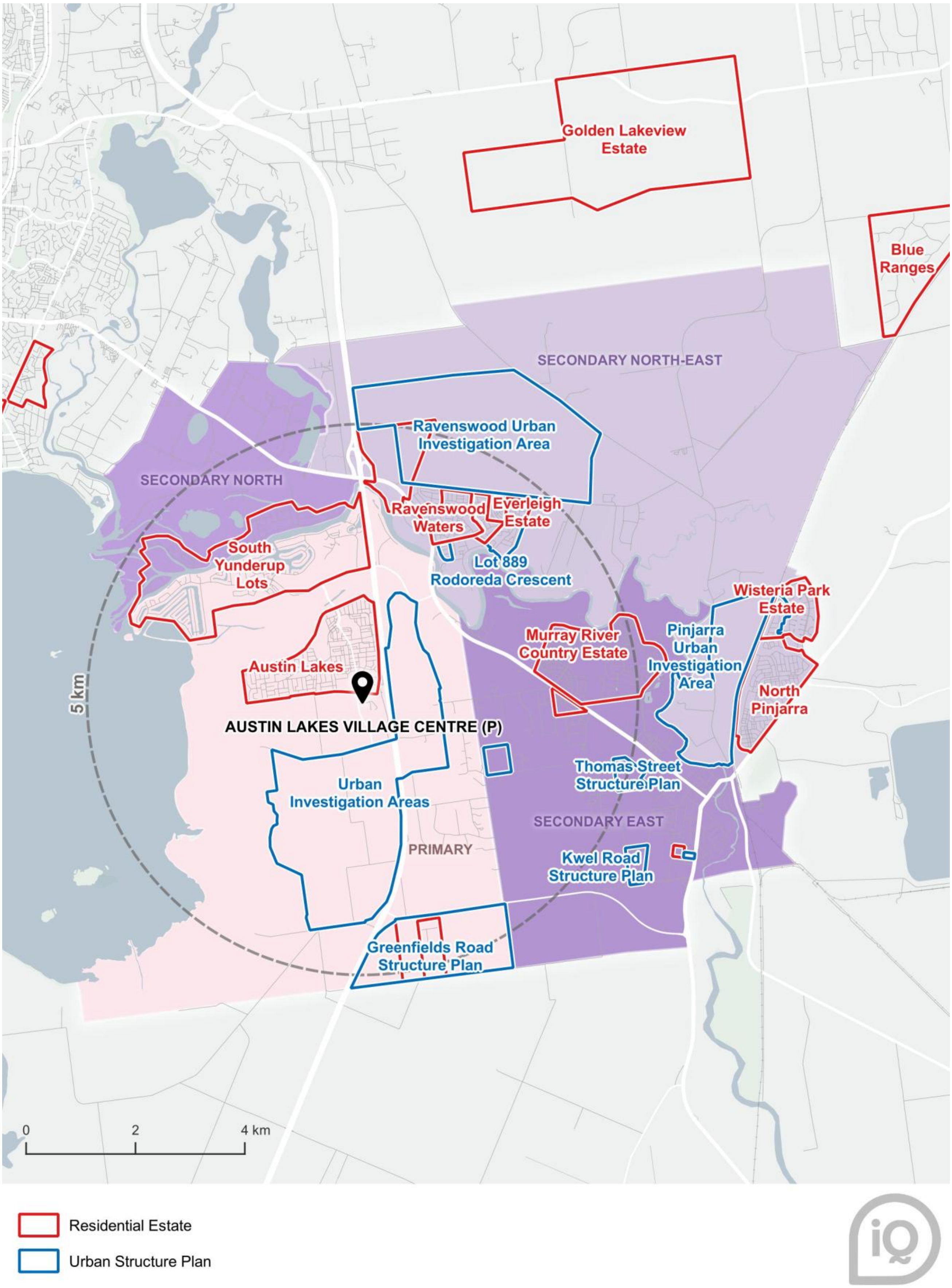


Source: WA Tomorrow SA2 Forecasts

TABLE 2.2. MAIN TRADE AREA DEVELOPMENT ASSUMPTIONS (DWELLING COMPLETIONS)

Estate/Development	Persons Per Dwelling	Total Yield (no.)	First Homes (year)	To 2024/25 (no.)	Remaining (no.)	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042	2043	2044	2045	2046	*Post 2046*
Dwellings																											
Primary Sector					**17,664**	**140**	**140**	**139**	**135**	**135**	**135**	**139**	**140**	**140**	**140**	**140**	**140**	**140**	**140**	**135**	**135**	**135**	**135**	**132**	**130**	**59**	**14,860**
Austin Lakes Estate	2.8	3,230	2012	676	2,554	125	125	125	125	125	125	125	125	125	125	125	125	125	125	125	125	125	125	125	125	54	
South Yunderup Lots	2.8	1,600	n.a.	1,530	70	5	5	5	5	5	5	5	5	5	5	5	5	5	5								
Kingston Fields	2.8	34	2022	20	14	5	5	4																			
Greenlands Meadows	2.8	35	2025	1	34	5	5	5	5	5	5	4															
Balance of Greenlands Road Structure Plan	2.8	132	2032	0	132							5	10	10	10	10	10	10	10	10	10	10	10	7	5	5	
Urban Investigation Areas	2.8	14,860	Post-2046	0	14,860																						**14,860**
Secondary East					**3,398**	**35**	**45**	**37**	**41**	**35**	**75**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**68**	**50**	**50**	**1,762**
Murray River Country Estate	2.8	3,112	n.a.	450	2,662	25	25	25	25	25	25	50	50	50	50	50	50	50	50	50	50	50	50	50	50	50	**1,762**
Hampton Park Estate	2.8	57	2024	35	22	10	10	2																			
Lot 442 Moores Road, West Pinjarra Structure Plan	2.8	11	2029	0	11				6	5																	
Thomas Street Structure Plan	2.8	328	2031	0	328						25	25	25	25	25	25	25	25	25	25	25	25	25	3			
Kwel Road Structure Plan	2.8	340	2031	0	340						25	25	25	25	25	25	25	25	25	25	25	25	25	15			
McLarty Rd Structure Plan	2.8	35	2027	0	35		10	10	10	5																	
Secondary North East					**16,093**	**96**	**96**	**120**	**120**	**120**	**145**	**120**	**120**	**120**	**104**	**95**	**95**	**95**	**95**	**80**	**110**	**105**	**100**	**100**	**100**	**78**	**13,879**
Ravenswood Waters	2.8	950	2008	360	590	30	30	30	30	30	30	30	30	30	30	30	30	30	30	30	30	30	25	25	25	5	
Ravenswood Green	2.8	273	2021	123	150	25	25	25	25	25	25																
Ravenswood Central	2.8	310	2028	0	310			25	25	25	25	25	25	25	25	25	25	25	25	10							
Everleigh Estate	2.8	234	2025	0	234	25	25	25	25	25	25	25	25	25	9												
Wisteria Park Estate	2.8	690	n.a.	400	290	15	15	15	15	15	15	15	15	15	15	15	15	15	15	15	15	10	10	10	10	10	
Lot 9500 Wisteria Cres & Lot 304 Redgum Road	2.8	100	2031	0	100						10	10	10	10	10	10	10	10	10	10							
Lot 889 Rodoredad Crescent	2.8	238	2031	0	238						15	15	15	15	15	15	15	15	15	15	15	15	15	15	15	13	
Lot 9001 Lloyd Avenue Ravenswood Structure Plan	2.8	97	2011	95	2	1	1																				
North Pinjarra Structure Plan	2.8	1,375	2041	0	1,375																50	50	50	50	50	50	**1,075**
Pinjarra Urban Investigation Areas	2.8	3,504	Post-2046	0	3,504																						**3,504**
Ravenswood Urban Investigation Areas	2.8	9,300	Post-2046	0	9,300																						**9,300**

MAP 2.3. RESIDENTIAL ESTATES AND INVESTIGATION AREAS



2.3. Socio-economic Profile

i. Table 2.3 summarises the socio-economic characteristics of the main trade area population by sector, compared with the Greater Perth and Australian benchmarks. This information is based on the latest 2021 Census of Population and Housing.

ii. Demographic profiles differ significantly between the main trade area sectors, with key characteristics including:

- The average age of main trade area residents (43.1 years) is older than the benchmarks - most notable due to the higher representation of persons aged 60 years and older (31.8%).
- The main trade area is predominantly Australian born (82.0%), a figure which has also been increasing.
- The main trade area has lower average per capita and average household income levels, however, the primary sector is the most affluent.
- The average household size across the main trade area (2.5 persons) is comparable with the benchmark.
- Reflecting this, traditional families (couples with dependent children) are the most common family type (37.0%), however, the proportion of couples without children exceed also exceeds the benchmark across all sectors.
- There is a higher proportion of home ownership (75.6%) across the main trade area, including the primary sector (78.5%). Further, houses are the dominant dwelling type (96.4%).
- Car ownership levels are high, with only 2.7% of households not owning a vehicle (or 1.3% in the primary sector).

iii. Charts 2.5 - 2.10 highlight the key socio-economic changes across the main trade area between the 2011 and 2021 Census periods. Ongoing population growth and greenfield residential development have contributed to a shift in the area's profile, particularly within the primary sector, towards a younger, Australian-born, family-oriented population with high rates of home ownership.

iv. While earlier development around Pinjarra (2011–2021) tended to attract older downsizers and retirees, more recent estates at Austin Lakes and Ravenswood are increasingly popular with young families and first home buyers. This trend aligns with broader patterns observed across greenfield growth areas in Perth and other Australian cities.

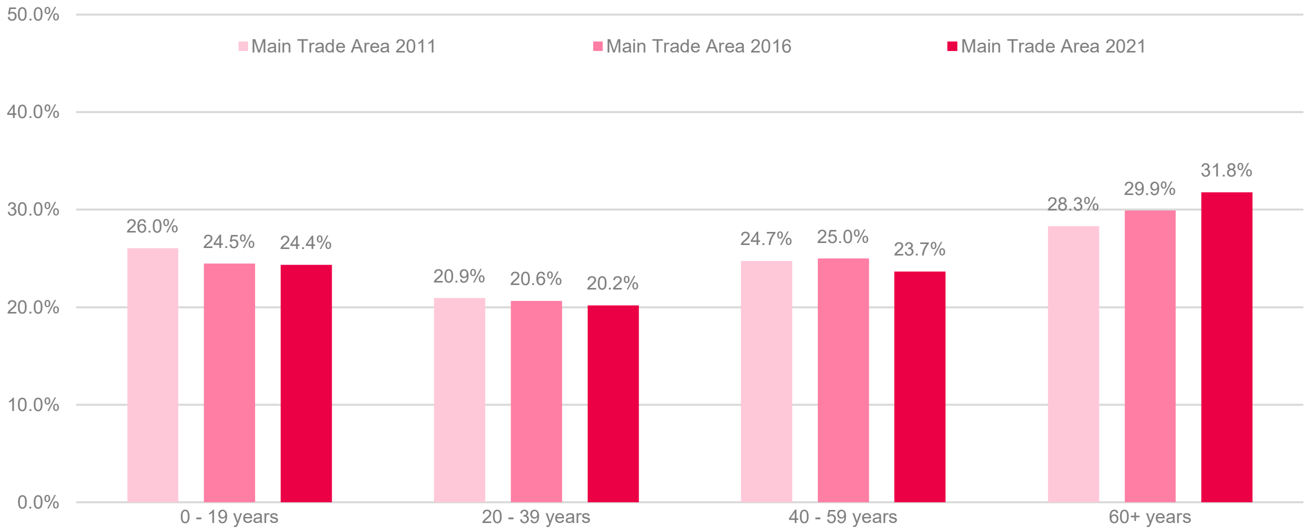
v. These newer residents require convenient access to everyday retail services close to home. Residents are likely to respond positively to the introduction of additional supermarket options and improved access to retail and commercial facilities within the local area.

TABLE 2.3. MAIN TRADE AREA SOCIO-ECONOMIC PROFILE, 2021 CENSUS

Characteristic	Primary Sector	Secondary Sectors			Main TA	Greater Perth Average
		East	North	North-east		
People						
Age Distribution (% of Pop'n)						
Aged 0-14	17.5%	18.7%	14.0%	21.0%	**18.4%**	18.8%
Aged 15-19	5.7%	7.0%	5.2%	5.2%	**5.9%**	5.8%
Aged 20-29	9.6%	8.6%	9.7%	10.9%	**9.6%**	13.1%
Aged 30-39	10.5%	10.1%	8.1%	12.0%	**10.6%**	15.3%
Aged 40-49	12.1%	11.2%	12.3%	10.1%	**11.3%**	13.4%
Aged 50-59	12.9%	12.1%	14.2%	11.3%	**12.4%**	12.4%
Aged 60+	31.7%	32.3%	36.4%	29.6%	**31.8%**	21.1%
Average Age	43.2	43.2	46.5	41.6	**43.1**	38.6
Birthplace (% of Pop'n)						
Australian	82.2%	82.4%	84.0%	80.7%	**82.0%**	63.4%
Overseas	17.8%	17.6%	16.0%	19.3%	**18.0%**	36.6%
• Asia	1.1%	1.9%	0.6%	1.5%	**1.4%**	12.5%
• Europe	10.8%	9.7%	11.4%	11.9%	**10.8%**	13.1%
• Other	6.0%	6.0%	4.0%	5.9%	**5.8%**	11.1%
Family						
Average Household Size	2.5	2.5	2.4	2.4	**2.5**	2.5
Family Type (% of Pop'n)						
Couple with dep't children	36.9%	37.6%	32.4%	38.0%	**37.0%**	46.4%
Couple with non-dep't child.	6.8%	7.8%	10.2%	6.1%	**7.3%**	7.3%
Couple without children	33.3%	26.6%	31.7%	28.2%	**29.8%**	22.8%
Single with dep't child.	9.6%	10.9%	7.6%	10.8%	**10.1%**	8.4%
Single with non-dep't child.	3.2%	4.9%	5.7%	4.0%	**4.2%**	3.5%
Other family	0.8%	0.6%	0.8%	1.0%	**0.8%**	1.0%
Lone person	9.4%	11.5%	11.6%	11.9%	**10.9%**	10.5%
Employment						
Income Levels						
Average Per Capita Income	$54,795	$45,209	$50,673	$46,100	**$49,297**	$58,917
Per Capita Income Variation	-7.0%	-23.3%	-14.0%	-21.8%	**-16.3%**	n.a.
Average Household Income	$103,002	$86,222	$98,023	$83,090	**$92,119**	$114,361
Household Income Variation	-9.9%	-24.6%	-14.3%	-27.3%	**-19.4%**	n.a.
Labour Force (% of Pop'n)						
% White Collar Occupations	54.6%	50.3%	47.0%	47.4%	**50.8%**	69.2%
% Blue Collar Occupations	45.4%	49.7%	53.0%	52.6%	**49.2%**	30.8%
Housing						
Tenure Type (% of Dwellings)						
Owned	78.5%	70.7%	84.0%	74.0%	**75.6%**	71.7%
Rented	20.5%	25.5%	14.5%	15.7%	**20.0%**	26.7%
Other Tenure Type	1.0%	3.8%	1.5%	10.4%	**4.4%**	1.6%
Dwelling Type (% of Dwellings)						
House	96.4%	85.6%	96.5%	94.1%	**92.7%**	77.9%
Semi-detached	1.7%	11.7%	3.5%	3.3%	**5.2%**	14.2%
Apartment	0.3%	0.3%	0.0%	0.0%	**0.2%**	7.6%
Other Dwelling Type	1.5%	2.4%	0.0%	2.6%	**1.9%**	0.3%
Car Ownership (% of H'holds)						
% 0 Cars	1.3%	4.2%	1.9%	3.0%	**2.7%**	4.9%
% 1 Car	31.9%	37.0%	30.1%	40.8%	**35.7%**	35.1%
% 2 Cars	42.2%	35.0%	32.7%	35.0%	**37.2%**	39.9%
% 3 Cars	15.1%	14.6%	20.0%	13.7%	**15.1%**	13.0%
% 4 Cars	9.5%	9.2%	15.3%	7.4%	**9.4%**	7.1%

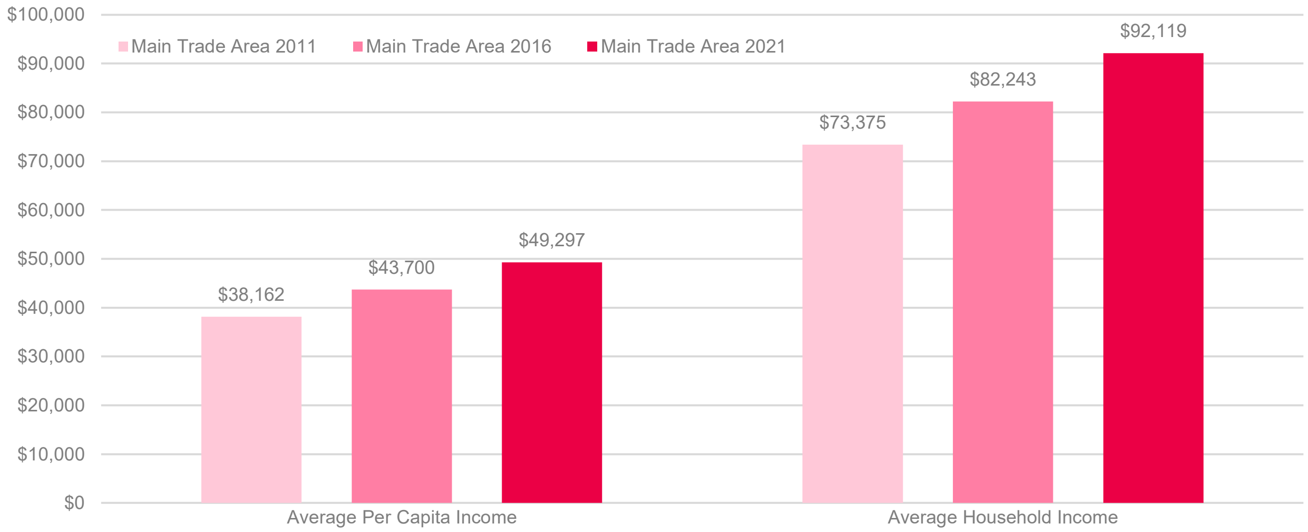
Sources: ABS Census of Population and Housing 2021

CHART 2.5. MAIN TRADE AREA AGE DISTRIBUTION (%), 2011 – 2021



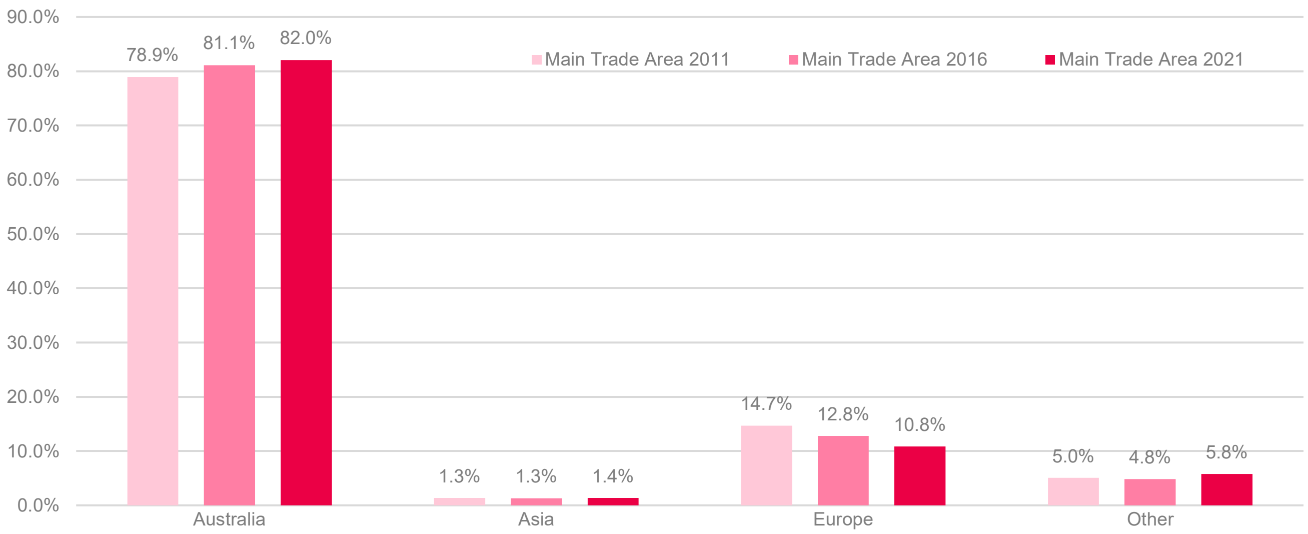
Source: ABS

CHART 2.6. MAIN TRADE AREA INCOME LEVELS, 2011 – 2021



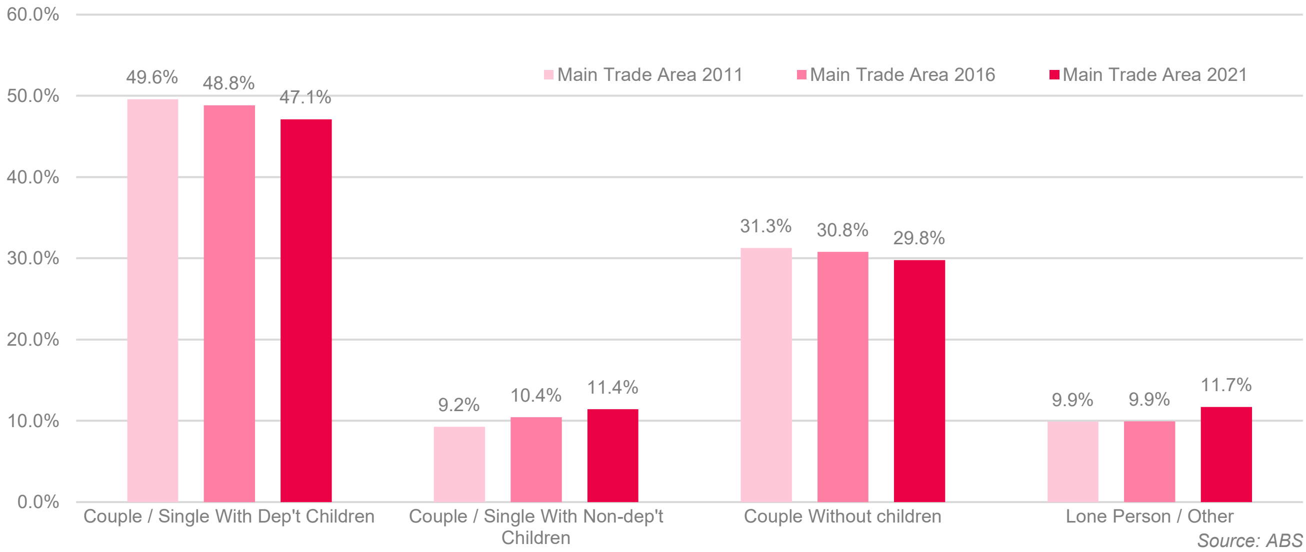
Source: ABS

CHART 2.7. MAIN TRADE AREA PLACE OF BIRTH, 2011 – 2021



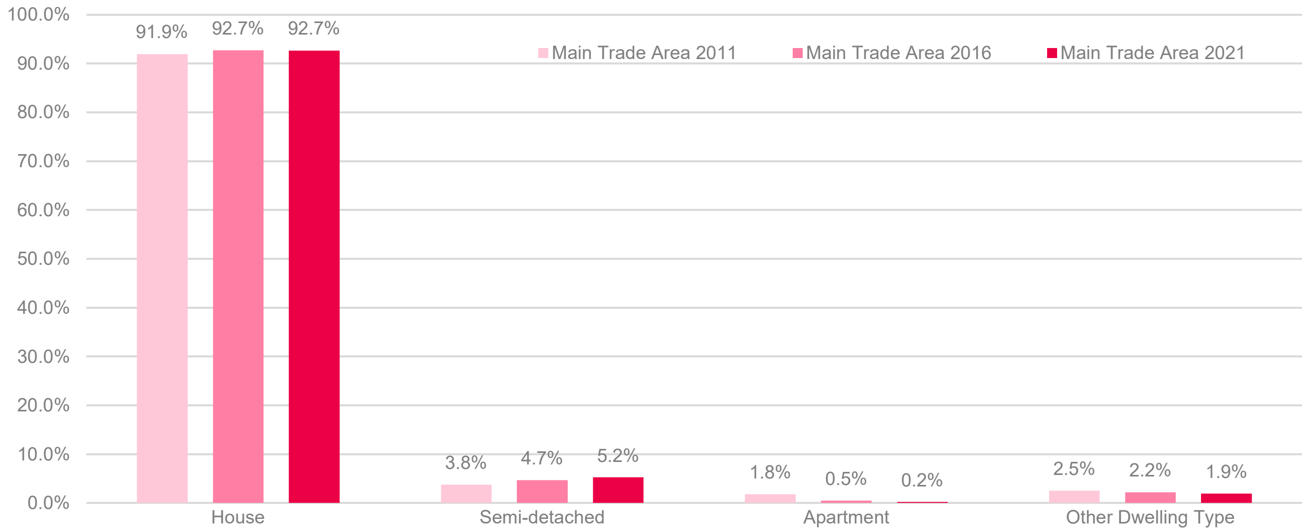
Source: ABS

CHART 2.8. MAIN TRADE AREA HOUSEHOLD STRUCTURE, 2011 – 2021



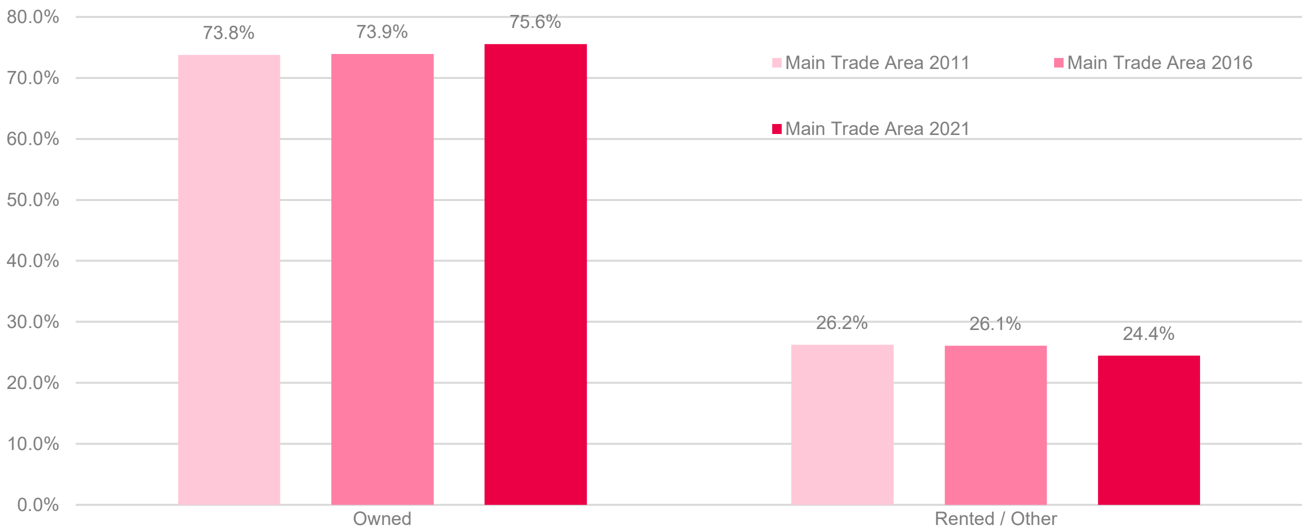
Source: ABS

CHART 2.9. MAIN TRADE AREA DWELLING TYPE, 2011 – 2021



Source: ABS

CHART 2.10. MAIN TRADE AREA HOUSING TENURE TYPE, 2011 – 2021



Source: ABS

2.4. Main Trade Area Retail Expenditure

i. The estimated retail expenditure capacity of the main trade area population is based on information sourced from CommBank iQ Retail Spend Insights.

CommBank iQ Retail Spend Insights is a new dataset that was first released in April 2023 (Calendar Year 2022) and is to be released for each Financial Year and Calendar Year going forward (i.e. released every six months). The dataset was initially adopted by the three leading economic property consultants in Australia, including Location iQ. The dataset has now been more widely adopted and has become industry standard. Retail Spend Insights is a modelled view of retail spend per capita across Australia. It is provided at the SA1 level allowing for the creation of bespoke catchments to facilitate a view on resident spend by category for the area.

The dataset is based on de-identified, privacy treated retail banking transactions, normalised to be representative of the Australian population. Transactions may include purchases and refunds from credit card, debit card, EFTPOS cards, BPay and direct debit. CommBank iQ Retail Spend Insights excludes cash and buy now pay later services (CBNPL). The data provides the average annual spend (for FY2024) across 82 categories for people aged 18 years and older. The data is also split out by instore and online transactions. Location iQ has adjusted the raw data for the population aged under 15 years as well as allowing for the inclusion of CBNPL.

ii. Charts 2.11 – 2.13 illustrate retail spending levels per person across the main trade area, as compared with the Greater Perth averages in 2024/25.

iii. Despite income levels being lower than the benchmark, per capita retail expenditure is higher than the Greater Perth average across both the main trade area and the primary sector.

iv. Notably, supermarket spending is substantially higher (+17.8% across the main trade area and +23.7% across the primary sector), along with discount department stores, food and liquor, household goods, and general retail.

v. Table 2.4 outlines the total retail expenditure levels generated by the main trade area population. The total retail expenditure level is currently estimated at $299.8 million and is projected to increase at an average rate of 4.6%, to $785.1 million by 2046. All figures presented in this report are in constant 2024/25 dollars and include GST. The projected growth rate of the main trade area retail spending market considers the following:

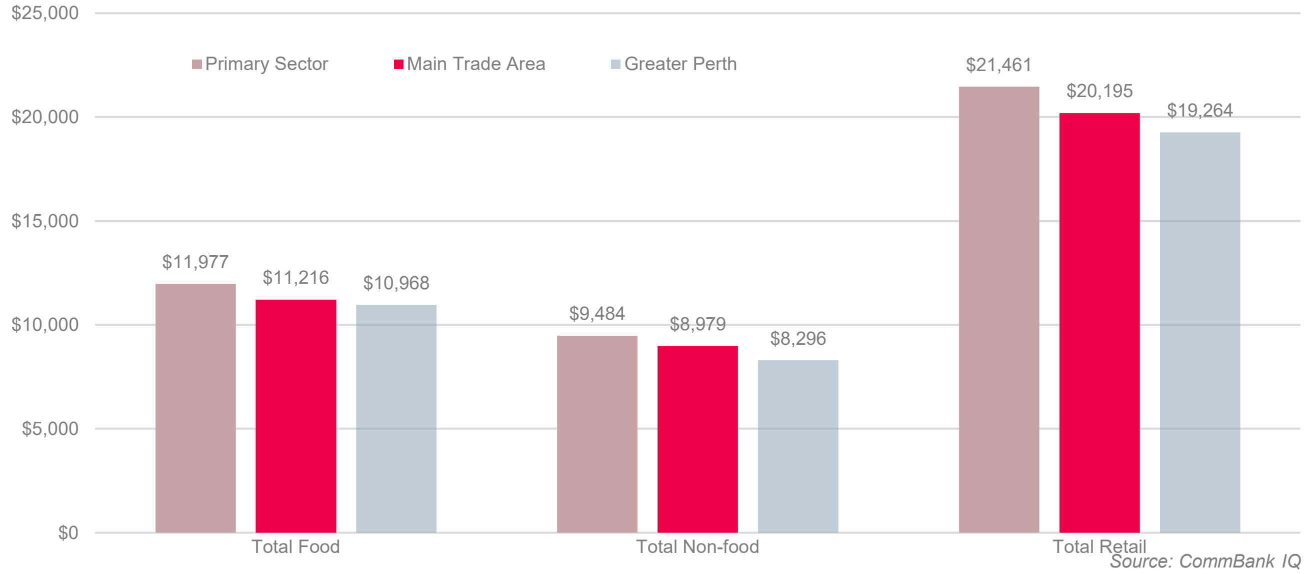
- **Inflation or RPI** is held at 0.0% across the forecast period to 2046 (constant 2024/25 dollars).

- **Real growth** in retail spending per capita of 0.0% is assumed over the period to 2026/27, reflecting post-pandemic impacts and inflationary pressures on wages and the economy. From 2027/28 real growth per capita is assumed at 0.5% annually for food retail, and 1.0% for non-food retail over the period to 2045/46.

- **Population Growth** across the main trade area, which is projected at around 3.9% per annum.

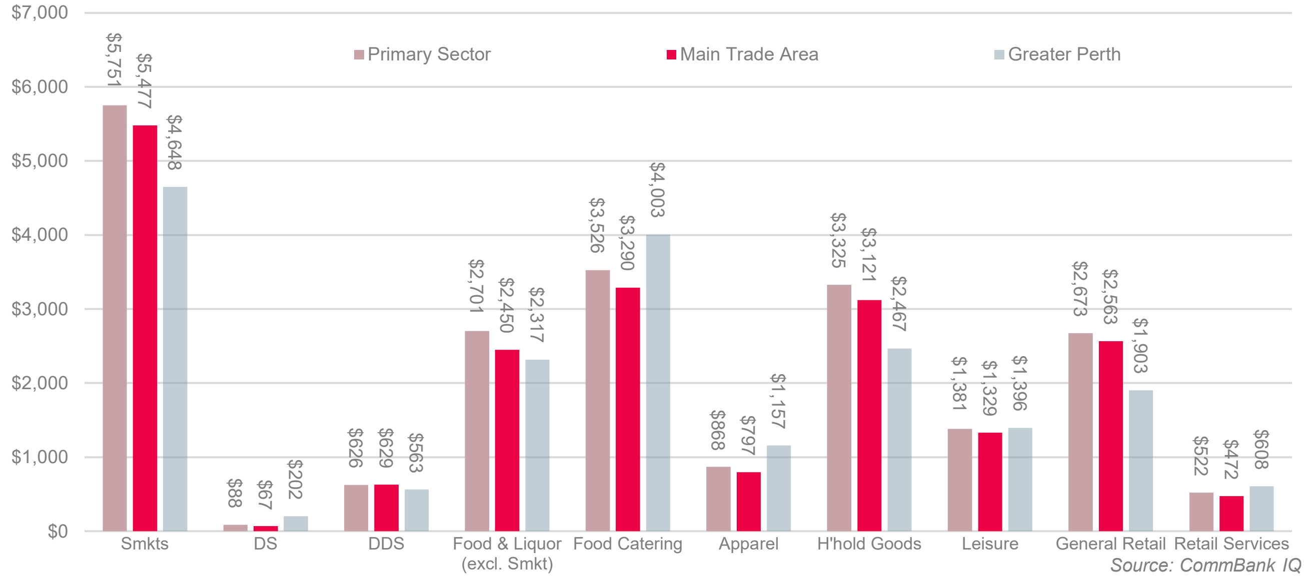
vi. Table 2.5 presents a breakdown of retail spending by key commodity group, indicating the largest spending market is supermarkets, at $81.4 million (27.1% of total retail spend) – and this category is projected to reach $201.6 million by 2046 (average annual growth rate of 4.4%). This is a relevant consideration for the potential sales and performance of supermarket sites at Austin Lakes.

CHART 2.11. RETAIL EXPENDITURE PER CAPITA, 2024/25



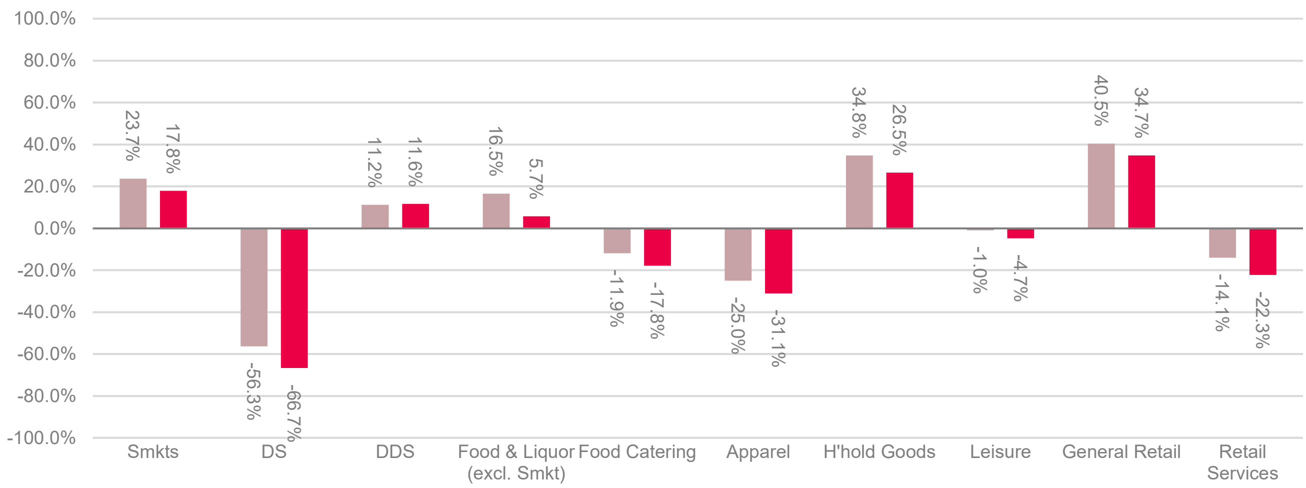
Source: CommBank IQ

CHART 2.12. RETAIL EXPENDITURE PER CAPITA BY CATEGORY, 2024/25



Source: CommBank IQ

CHART 2.13. RETAIL EXPENDITURE BY CATEGORY PER CAPITA VARIATION FROM PERTH AVE. 2024/25



Source: CommBank IQ

TABLE 2.4. MAIN TRADE AREA RETAIL EXPENDITURE, 2025 – 2046

Y/E June	Primary Sector	Secondary Sectors East	Secondary Sectors North	Secondary Sectors North-east	Main TA
2025	104.4	83.5	30.4	81.4	299.8
2026	110.6	85.2	30.6	85.9	312.2
2027	118.4	87.2	30.8	91.5	327.9
2028	126.9	90.2	31.3	98.2	346.6
2029	135.9	93.3	31.8	105.5	366.6
2030	145.6	96.6	32.3	113.3	387.8
2031	156.1	99.9	32.7	121.7	410.4
2032	166.1	104.4	33.2	129.5	433.3
2033	175.6	110.3	33.7	136.6	456.2
2034	185.6	116.5	34.2	144.0	480.4
2035	196.2	123.1	34.7	151.9	505.9
2036	207.4	130.0	35.3	160.2	532.9
2037	218.2	136.7	35.8	167.8	558.5
2038	228.5	143.1	36.3	174.6	582.4
2039	239.2	149.8	36.8	181.6	607.5
2040	250.5	156.8	37.4	189.0	633.6
2041	262.3	164.1	37.9	196.6	660.9
2042	273.2	170.6	38.5	204.2	686.5
2043	283.1	176.1	39.0	211.6	709.9
2044	293.3	181.8	39.6	219.3	734.1
2045	304.0	187.7	40.2	227.3	759.1
2046	315.0	193.8	40.8	235.6	785.1
Expenditure Growth					
2025-26	6.1	1.6	0.2	4.5	12.4
2026-31	45.5	14.8	2.1	35.8	98.2
2031-36	51.4	30.1	2.5	38.5	122.4
2036-41	54.8	34.2	2.7	36.4	128.1
2041-46	52.7	29.6	2.8	39.0	124.1
2025-46	210.6	110.2	10.4	154.1	485.3
Average Annual Growth Rate					
2025-26	5.9%	1.9%	0.7%	5.5%	4.1%
2026-31	7.1%	3.2%	1.4%	7.2%	5.6%
2031-36	5.9%	5.4%	1.5%	5.6%	5.4%
2036-41	4.8%	4.8%	1.5%	4.2%	4.4%
2041-46	3.7%	3.4%	1.5%	3.7%	3.5%
2025-46	5.4%	4.1%	1.4%	5.2%	4.7%

**Constant 2024/25 dollars & including GST*

Source : CommBank iQ, Location iQ

TABLE 2.5. MAIN TRADE AREA RETAIL EXPENDITURE BY KEY COMMODITY GROUP, 2025 – 2046

Y/E June	Supermarket	Department Store	Discount Dept Store	Food & Liquor	Food Catering	Apparel	H'hold Goods	Leisure	General Retail	Retail Services
2025	81.4	1.0	9.4	36.3	48.8	11.8	46.3	19.7	38.1	7.0
2026	84.7	1.0	9.7	37.8	50.9	12.3	48.3	20.5	39.6	7.3
2027	88.9	1.1	10.2	39.7	53.4	12.9	50.8	21.6	41.6	7.7
2028	93.7	1.1	10.8	41.8	56.6	13.7	53.8	22.8	44.1	8.1
2029	98.8	1.2	11.4	44.1	60.0	14.5	57.1	24.2	46.7	8.6
2030	104.1	1.3	12.0	46.6	63.6	15.4	60.5	25.7	49.5	9.1
2031	109.9	1.4	12.6	49.1	67.5	16.3	64.3	27.2	52.5	9.7
2032	115.6	1.4	13.3	51.7	71.4	17.3	68.0	28.8	55.5	10.3
2033	121.4	1.5	14.0	54.3	75.3	18.2	71.7	30.3	58.6	10.8
2034	127.5	1.6	14.7	57.0	79.5	19.2	75.7	32.0	61.8	11.4
2035	134.0	1.6	15.4	59.8	83.9	20.3	79.9	33.8	65.2	12.1
2036	140.7	1.7	16.2	62.8	88.5	21.4	84.3	35.7	68.9	12.7
2037	147.1	1.8	16.9	65.6	93.0	22.5	88.5	37.4	72.3	13.4
2038	153.0	1.9	17.6	68.2	97.2	23.5	92.4	39.1	75.6	14.0
2039	159.1	2.0	18.3	70.9	101.6	24.5	96.6	40.9	79.0	14.6
2040	165.5	2.0	19.0	73.8	106.1	25.6	100.9	42.7	82.6	15.2
2041	172.2	2.1	19.8	76.7	110.9	26.8	105.5	44.7	86.3	15.9
2042	178.3	2.2	20.5	79.4	115.5	27.9	109.8	46.5	89.9	16.6
2043	183.9	2.3	21.1	81.9	119.6	28.9	113.7	48.2	93.1	17.2
2044	189.6	2.3	21.8	84.4	124.0	29.9	117.9	49.9	96.5	17.8
2045	195.5	2.4	22.5	87.1	128.5	31.0	122.1	51.7	100.0	18.4
2046	201.6	2.5	23.2	89.8	133.1	32.1	126.6	53.6	103.6	19.1
Expenditure Growth										
2025-26	3.3	0.0	0.4	1.5	2.0	0.5	2.0	0.8	1.6	0.3
2026-31	25.2	0.3	2.9	11.3	16.6	4.0	16.0	6.7	12.8	2.4
2031-36	30.8	0.4	3.5	13.7	21.0	5.1	20.0	8.5	16.4	3.0
2036-41	31.5	0.4	3.6	13.9	22.4	5.4	21.2	9.0	17.5	3.2
2041-46	29.4	0.4	3.4	13.0	22.2	5.3	21.1	8.9	17.3	3.2
2025-46	120.2	1.5	13.8	53.5	84.3	20.3	80.2	33.8	65.5	12.1
Average Annual Growth Rate										
2025-26	4.1%	4.3%	4.1%	4.2%	4.2%	4.2%	4.2%	4.1%	4.1%	4.2%
2026-31	5.3%	5.5%	5.4%	5.4%	5.8%	5.8%	5.9%	5.8%	5.8%	5.9%
2031-36	5.1%	5.0%	5.1%	5.0%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%
2036-41	4.1%	4.1%	4.1%	4.1%	4.6%	4.6%	4.6%	4.6%	4.6%	4.6%
2041-46	3.2%	3.2%	3.2%	3.2%	3.7%	3.7%	3.7%	3.7%	3.7%	3.7%
2025-46	4.4%	4.5%	4.4%	4.4%	4.9%	4.9%	4.9%	4.9%	4.9%	4.9%

**Constant 2024/25 dollars & including GST*
Source : CommBank iQ, Location iQ

3 Retail Environment

This section of the report reviews the retail environment within which the Austin Lakes retail centres would operate, to assist with the assessment of likely trading impacts.

As outlined previously, this assessment considers the need and net benefit of retail uses as part of the Austin Lakes Village Centre development, with relevant centres illustrated in Map 3.1.

The hierarchy of shopping centres presented in this Assessment is consistent with SPP4.2, including:

- Capital City
- Secondary
- Local Centres
- Strategic
- District
- Neighbourhood
- Specialised

Information on the size, composition and performance of centres outlined (refer Table 3.1) is based on the Location iQ proprietary databases that includes information from the following sources:

- The 2015/17 Land Use and Employment Survey conducted by the Department of Planning, Lands and Heritage which contains the Shop/Retail Planning Land Use Category (PLUC);
- The PCA Database;
- Actual size information provided by retail and property owners;
- Annual reports;
- Shopping Centre News 'Guns' Publications;
- Cordell databases and development applications;
- Press releases in relation to new store openings, closures, and asset transactions;
- Site visits and floorspace surveys;
- Measurements undertaken by this office.

3.1. Within the Main Trade Area

i. The existing provision of retail facilities within the main trade area is limited, and is yet to reflect the growth that has, and will be experienced, throughout the region.

Primary Sector

- **Austin Lakes Central** opened in 2017 and is the existing local centre (retail and commercial) within the Estate and is anchored by a small IGA supermarket of 1,000 sq.m. The development is the main retail hub within the sector and is 1.4 km north of the Austin Lakes Village Centre site. The precinct also includes a medical centre, TerryWhite Chemmart, café, Cellarbrations, and food catering. Some land surrounding the centre has been set aside for possible future expansion.

- **South Yunderup** comprises a small provision of shops that includes TerryWhite Chemmart, a café, Chinese restaurant, hair and beauty services, as well as the Sandy Cove Tavern.

Secondary East Sector

- **Pinjarra Junction Shopping Centre** (11,230 sq.m) is 11.1 km to the south-east of the subject site, on the corner of Pinjarra Road and George Street, and is designated as a secondary activity centre under SPP 4.2. The centre is anchored by a full-line Coles supermarket (3,800 sq.m) and Kmart Hub (4,500 sq.m), two mini-major tenancies and around 20 specialty retail tenants that include a selection of national tenants such as BWS, Liquorland, Rivers, Subway, Dominos, Sportspower and Smokemart.

  Elsewhere throughout the **Pinjarra Town Centre** there are a range of dispersed specialty retail shops that generally follow the alignment of George Street and Murray Street. This includes Mitre 10, several food catering and apparel shops, as well as a small collection of shops at the intersection of Peel Street which includes Pinjarra Bakery.

  The town centre extends north along Pinjarra Road to the subject site (Liberty Pinjarra Roadhouse), through a range civic, administrative, health, and complementary retail shops (pharmacy, nutrition etc.).

  Further north of the Pinjarra Town Centre, the United Petroleum Service Station development at 1602 Pinjarra Road (which was constructed in 2021) hosts a mix of uses such as a restaurant, Chicken Treat, Muffin Break, gym (Anytime Fitness), and Crocs Playcentre. Nearby is a Night Owl convenience store, lunch bar, drive-thru coffee shop, Krispy Kreme, and pie shop.

Secondary North-east Sector

- At **Ravenswood** (designated as a district activity centre under the SPP 4.2), the existing retail offer is limited to a pharmacy.

Secondary North Sector

- Limited retail floorspace is provided within the secondary north sector. At the corner of Pinjarra Road and Tonkin Drive, an Ampol Foodary and battery shop provide the only shops within the sector.

3.2. Beyond the Main Trade Area

i. Beyond the main trade area, the nearest retail facilities are provided more than 10 km from the subject site, and generally form part of the Mandurah urban area:

Furnissdale & Barragup

- **Spudshed** (1,750 sq.m) is the nearest competing offer beyond the main trade area, at the intersection of Pinjarra Road and Ronlyn Road (12.1 km to the north-west of the subject site). The store is provided in a standalone warehouse format that is served by a provision of at-grade car parking.
- On the northern side of Pinjarra Road is a Shell Coles Express and Cellarbrations, within Barragup.

Mandurah & Greenfields

- **Mandurah Forum** serves as the Strategic Activity Centre for the wider Peel region. The regional shopping centre is anchored by Kmart, Big W and Target discount department stores, as well as Woolworths and Coles supermarkets - also includes nine mini-majors, and 160 specialty shops (Big Guns 2024). The centre GLA totals some 66,199 sq.m and has a reported moving annual turnover of $461.3 million (Vicinity, 2024).
- Elsewhere throughout Mandurah, supermarket offers include Woolworths (2,219 sq.m) at Mandurah Central, an IGA supermarket (850 sq.m) at The Sands Shopping Centre, and Aldi on Aldgate Street.
- **Mandurah Greenfields** (5,000 sq.m) is a convenience shopping centre anchored by Woolworths (4,358 sq.m), which is flanked by a provision of external shopfronts. Other retail within Greenfields includes Gilberts Fresh & Sons Mandurah (1,750 sq.m), a range of specialty shops, as well as the Mandurah Home City large format retail centre.

3.3. Proposed Developments

i. **Ravenswood Central** received development approval in March 2024 for a shopping centre that will be anchored by a full-line Coles supermarket (3,575 sq.m), as well as including a liquor store, three food and beverage tenancies (550 sq.m), a childcare centre (703 sq.m), medical centre, pharmacy (450 sq.m combined), and office building (420 sq.m). The development will be served by at-grade car parking comprising 325 bays. For the purposes of this assessment, the first full year of operation for Ravenswood Central is assumed 2027/28. The development is planned to occur across two stages, with a third, currently unapproved expansion of the centre planned for development "once the centre matures and demand drives the need for additional floor space".

ii. At Pinjarra (Lots 107 - 109 Pinjarra Road), a site had been approved to comprise some 4,000 sq.m of retail floorspace (**Pinjarra Road Neighbourhood Centre**), including a supermarket (1,670 sq m) and complementary shops. Woolworths (Fabcot) since acquired the site and have development approval for a full-line supermarket (3,760 sq.m) and associated retail specialty shops totalling 1,460 sq.m. In total, combined retail floorspace across the development will be 5,220 sq.m – or a net incremental addition of 1,220 sq.m over and above the existing approved level of floorspace (undeveloped).

iii. A United Service Station has been approved at **630 Pinjarra Road in Furnissdale**.

iv. An Aldi supermarket (1,543 sq.m) and McDonald's pad site is proposed at **Pinjarra** (Lot 2-4, 31 & 41 Murray Street).

v. **Beyond the main trade area**, a site at 578 – 590 Pinjarra Road (11.8 km north-west of the subject site) has development approval for a showroom development, featuring large format tenancies/showrooms, fast food, specialty retail, petrol, and a supermarket. This site was recently listed for sale, however, and the currency period for the development approval is to August 2025. Based on the approval of Ravenswood Central nearby, it is unlikely that a supermarket would form part of the project – unless the adjacent Spudshed were to relocate to the site.

TABLE 3.1. COMPETITIVE ENVIRONMENT

	Shopfront	**Dept. Store**			**Discount Department Store**			**Supermarkets**					**Distance**
Retail Floorspace	GLA	Myer	DJ	HS	Kmart / K Hub	Big W	Target	WOW	Coles	Aldi	IGA	Other	(km)
Strategic Activity Centre													
Mandurah	**118,352**												**15.7**
• Mandurah Forum	66,199	-	-	-	6,123	6,550	5,730	3,977	3,250	-	-	-	
• Mandurah Central	3,180	-	-	-	-	-	-	2,219	-	-	-	-	
• The Sands SC	2,236	-	-	-	-	-	-	-	-	-	850	-	
• Other	46,737	-	-	-	-	-	-	-	-	1,658	-	-	
Secondary Activity Centre													
Pinjarra	**19,295**												**11.1**
• Pinjarra Junction SC	11,230	-	-	-	4,500	-	-	-	3,390	-	-	-	
• Other	8,065	-	-	-	-	-	-	-	-	-	-	-	
District Activity Centre													
Ravenswood	500	-	-	-	-	-	-	-	-	-	-	-	5.8
Local, Neighbourhood & Other Centres													
Austin Lakes Central	1,800	-	-	-	-	-	-	-	-	-	1,000	-	1.3
South Yunderup	800	-	-	-	-	-	-	-	-	-	-	-	3.4
Furnissdale	1,750	-	-	-	-	-	-	-	-	-	-	1,750	12.1
Barragup	650	-	-	-	-	-	-	-	-	-	-	-	12.2
Greenfields	**25,000**												**15.6**
• Mandurah Greenfields	5,000	-	-	-	-	-	-	4,358	-	-	-	-	
• Other	20,000	-	-	-	-	-	-	-	-	-	-	1,750	
North Dandalup	350	-	-	-	-	-	-	-	-	-	-	-	26.8

Source: Location IQ Database
() indicates multiple stores

MAP 3.1. MAIN TRADE AREA & COMPETITION

Other Regional
Kmart
Big W
Target
Kmart Hub
Woolworths
Coles
Aldi
IGA
Unknown Supermarket
Independent

** White dot indicates proposed store*

4 Need & Demand Assessment

This section of the report provides an assessment of the demand or need for retail and commercial components of the proposed Austin Lakes centres. This utilises several methodologies to understand and quantify potential demand for the centres prior to specific composition arrangements (detailed development plans) being developed. Likely trading impacts on other activity centres throughout the surrounding region are considered, as are the employment and other consumer impacts, both positive and negative, of the proposal.

4.1. Floorspace Demand

i. Population growth is the primary driver of demand for retail and commercial floorspace noting that retail follows residential development, rather than leading it.

ii. The main trade area currently has an estimated population of 15,114 and this is projected to more than double to 33,955 by 2046, equating to a net increase of 18,841 residents at an average annual growth rate of 3.9%.

iii. Retail and commercial demand also originates from beyond the defined trade area. This varies depending on the function and positioning of existing and proposed centres, relative accessibility, regional draw, and local employment concentrations.

iv. In addition, demand would be captured from beyond the trade area – and a conservative figure of 30% has been applied. This level is expected to be maintained over the forecast period, supported by the introduction of Ravenswood Central, the Woolworths Pinjarra Centre, and the potential expansion of Austin Lakes Central and the proposed Austin Lakes Village Centre.

Supermarket Floorspace

Provision Benchmarks

- Supermarkets are defined as grocery stores of at least 500 sq.m, while full-line supermarkets typically exceed 3,200 sq.m GLA and support a full weekly shop with higher spend, larger basket size, and an extensive range of products (20,000+ lines).
- The current supermarket floorspace provision is 0.381 sq.m per person across Greater Perth, compared to 0.477 sq.m in regional WA and a national average of 0.347 sq.m.
- Ideally, at least 90% of supermarket demand should be met locally, reducing the need for residents to travel to Mandurah or further afield (beyond the Shire of Murray) for weekly shopping – and therefore minimising 'leakage'.

Demand

- Current demand supports supermarket floorspace of around 6,860 sq.m, increasing to 15,453 sq.m by 2046. This reflects net additional demand of +8,593 sq.m, or approximately +409 sq.m per year.
- Nationally, one full-line supermarket is typically provided per 8,000 - 10,000 residents. Based on population forecasts, up to four full-line supermarkets could be supported within the trade area, including at least one in the primary catchment.

Supply

- There is currently one full-line supermarket (Coles at Pinjarra) and a single smaller format supermarket (IGA, Austin Lakes). With approved developments at Ravenswood Central and Pinjarra Road, total supermarket supply will increase to 11,725 sq.m from 2031.
- Despite this, the level of unmet supermarket floorspace demand (or undersupply) is expected to reach -3,728 sq.m by 2046.

Retail Floorspace

Provision Benchmarks

- Retail floorspace provision in Australia has grown from 1.5 sq.m per person in 1985/86 to approximately 2.3 sq.m currently, reflecting long-term growth in retail formats and shopping centre development. In the Perth and Peel region, the 2015/17 Land Use and Employment Survey recorded an average of 2.58 sq.m per person.
- Retail floorspace demand is normally allocated across the various levels of the retail hierarchy. Relevantly for the main trade area, between 35% and 45% of this demand is typically absorbed by District and Secondary Activity Centres (15%–20%) and Local and Neighbourhood Centres (20%–25%).
- These benchmarks include supermarket floorspace but exclude non-retail uses (outlined subsequently).

Demand

- Based on population growth and demand benchmarks, total retail demand will rise from 19,534 sq.m in 2025 to 43,885 sq.m by 2046, representing annual average growth of +1,160 sq.m.

Supply

- The current retail supply is estimated at 22,395 sq.m, although this figure includes some non-retail uses.
- Approved developments at Ravenswood Central (5,698 sq.m) and Pinjarra Road (5,220 sq.m) will increase retail supply by 2031, again noting that each also includes a portion of non-retail space.
- Even without taking these non-retail components into account, retail demand is still projected to reach and undersupply of -10,572 sq.m by 2046.

Complementary Non-retail Floorspace

Provision Benchmarks

- Activity centres typically include non-retail uses such as health services, recreation, office space, entertainment, and community facilities.
- The Perth and Peel Land Use and Employment Survey (2015/17) estimated average provision at 8.73 sq.m per person across these categories.

Demand

- For this analysis a conservative local retention rate of 10% has been assumed, and current demand for non-retail uses is therefore estimated at 17,145 sq.m, growing to 38,519 sq.m by 2046 – an annual average increase of 1,018 sq.m.

Supply

- While specific supply has not been quantified, a notable proportion of existing and proposed retail centres includes non-retail uses such as gyms, childcare, medical centres, and offices.
- Urbis Averages data indicates that non-retail uses account for 12.5% of supermarket-based centres and 10.2% of sub-regional centres (i.e. including a discount department store) nationally. Further, Ravenswood Central and Pinjarra Road Centre propose non-retail components of 19.7% and 10.6% respectively.
- This implies that retail supply figures may overstate actual retail provision (overestimate supply) due to embedded non-retail space, reinforcing the need to plan for integrated, multi-use activity centres.

v. Compounding this, population increase from 15,000 to 34,000 by 2046 will continue beyond this period, with potential for up to 118,000 residents in the longer term. This longer-term growth could generate demand for an additional 110,377 sq.m of retail floorspace post-2046, including 36,600 sq.m of supermarket space.

vi. While Ravenswood Central and Pinjarra Road are expected to meet short- to medium-term demand, supply will fall short by 2036, with a significant undersupply by 2046. The current supply pipeline does not accommodate medium- to long- term population growth.

vii. To meet the evolving needs of the community, expanded retail and supermarket options are required at Austin Lakes. This will improve local access to food and grocery services and accommodate both current demand and future growth.

viii. Charts 4.1 and 4.2 illustrate projected supply and demand outcomes, assuming the proposed Austin Lakes Centres expansions are delivered by 2036.

- **Supermarket Floorspace**: Even with the addition of a full-line supermarket (3,800 sq.m) from 2036, the main trade area would still only return to equilibrium temporarily – before experience a shortfall in supermarket provision across the forecast period and beyond.
- **Retail Floorspace:** The potential expansion of Austin Lakes Central (+2,200 sq.m) and the introduction of Austin Lakes Village Centre (+7,000 sq.m) would not be sufficient to meet growing demand. A retail floorspace undersupply would remain by 2046, particularly when considering that part of the proposed

space would accommodate non-retail uses, which are not captured within the retail demand estimates. Once accounting for non-retail floorspace , the undersupply would land somewhere between the ‘with’ and ‘without’ Austin Lakes figures.

ix. In summary, population growth across the main trade area is expected to drive substantial demand for supermarket, retail, and complementary non-retail floorspace over the next two decades and beyond. While planned developments such as Ravenswood Central and the Pinjarra Road Neighbourhood Centre will assist in meeting short- to medium-term needs, they will not be sufficient to address the longer-term undersupply.

x. Even with proposed centre expansions at Austin Lakes, the area will face a significant gap in provision by 2046, particularly once non-retail components are accounted for – and this will worsen substantially beyond the forecast period.

xi. To ensure the community has convenient and equitable access to essential retail and commercial services, there is a clear and demonstrated need for additional centres – including expanded supermarket capacity – to be planned and delivered in a timely, logical, and efficient manner to service new residents.

xii. The proposed Structure Plan delivers this for Austin Lakes and the surrounding area.

TABLE 4.1. MAIN TRADE AREA FLOORSPACE DEMAND

	Demand Benchmark	Allocation (%)	Year 2025	2026	2031	2036	2041	2046	Net Change 2025 - 2046
Resident Population									
Primary Sector			4,959	5,351	7,266	9,223	11,155	12,810	7,851
Secondary Sectors Total			10,155	10,532	12,917	15,932	18,712	21,145	10,990
Main Trade Area			**15,114**	**15,883**	**20,183**	**25,156**	**29,868**	**33,955**	**18,841**
Activity Centre Allocations									
District & Secondary Activity Centr	15% - 20%	17.5%	17.5%	17.5%	17.5%	17.5%	17.5%	17.5%	
Local and Neighbourhood Centres	20% - 25%	22.5%	22.5%	22.5%	22.5%	22.5%	22.5%	22.5%	
Combined (Existing / Proposed)	**35% - 45%**	**40.0%**	**40.0%**	**40.0%**	**40.0%**	**40.0%**	**40.0%**	**40.0%**	
Supermarket Floorspace Demand									
Primary Sector	0.381 sq.m per person	95%	1,795	1,937	2,630	3,338	4,038	4,637	2,842
Secondary Sectors Total	0.381 sq.m per person	90%	3,482	3,611	4,429	5,463	6,416	7,251	3,768
Main Trade Area			**5,277**	**5,548**	**7,059**	**8,802**	**10,454**	**11,887**	**6,610**
Beyond	net additional demand	30%	1,583	1,664	2,118	2,640	3,136	3,566	1,983
Total			**6,860**	**7,213**	**9,177**	**11,442**	**13,590**	**15,453**	**8,593**
Retail Floorspace Demand		.							
Primary Sector	2.58 sq.m per person	40.0%	5,127	5,533	7,513	9,536	11,534	13,245	8,118
Secondary Sectors Total	2.58 sq.m per person	40.0%	10,500	10,889	13,355	16,473	19,347	21,863	11,363
Main Trade Area			**15,627**	**16,422**	**20,868**	**26,009**	**30,881**	**35,108**	**19,481**
Beyond	net additional demand	25%	3,907	4,105	5,217	6,502	7,720	8,777	4,870
Total			**19,534**	**20,527**	**26,085**	**32,512**	**38,602**	**43,885**	**24,351**
Indicative Floorspace Demand									
Supermarket			6,860	7,213	9,177	11,442	13,590	15,453	8,593
Balance of Retail			12,674	13,315	16,908	21,070	25,011	28,431	15,758
Total Retail			**19,534**	**20,527**	**26,085**	**32,512**	**38,602**	**43,885**	**24,351**
Indicative Floorspace Supply / Demand									
Supermarket									
Supply (exsiting / approved sites only)			4,390	4,390	11,725	11,725	11,725	11,725	7,335
Demand			6,860	7,213	9,177	11,442	13,590	15,453	8,593
Over / Undersupply			**-2,470**	**-2,823**	**2,548**	**283**	**-1,865**	**-3,728**	
Total Retail									
Supply (exsiting / approved sites only)			22,395	22,395	33,313	33,313	33,313	33,313	10,918
Demand			19,534	20,527	26,085	32,512	38,602	43,885	24,351
Over / Undersupply			**2,861**	**1,868**	**7,228**	**801**	**-5,289**	**-10,572**	
Complementary Non-retail Uses* (Not Included)									
Primary Sector	*8.73 sq.m per person*	*10.0%*	*4,327*	*4,669*	*6,341*	*8,048*	*9,734*	*11,178*	*6,851*
Secondary Sectors Total	*8.73 sq.m per person*	*10.0%*	*8,861*	*9,190*	*11,272*	*13,903*	*16,328*	*18,451*	*9,590*
Main Trade Area			***13,189***	***13,859***	***17,612***	***21,951***	***26,063***	***29,630***	***16,441***
Beyond	*net additional demand*	*30%*	*3,957*	*4,158*	*5,284*	*6,585*	*7,819*	*8,889*	*4,932*
Total			***17,145***	***18,017***	***22,896***	***28,536***	***33,882***	***38,519***	***21,373***

** Includes Entertainment/Recreation/Cultural; Health/Welfare/Community Services; Office/Business*

CHART 4.1. SUPERMARKET FLOORSPACE DEMAND / SUPPLY, MAIN TRADE AREA

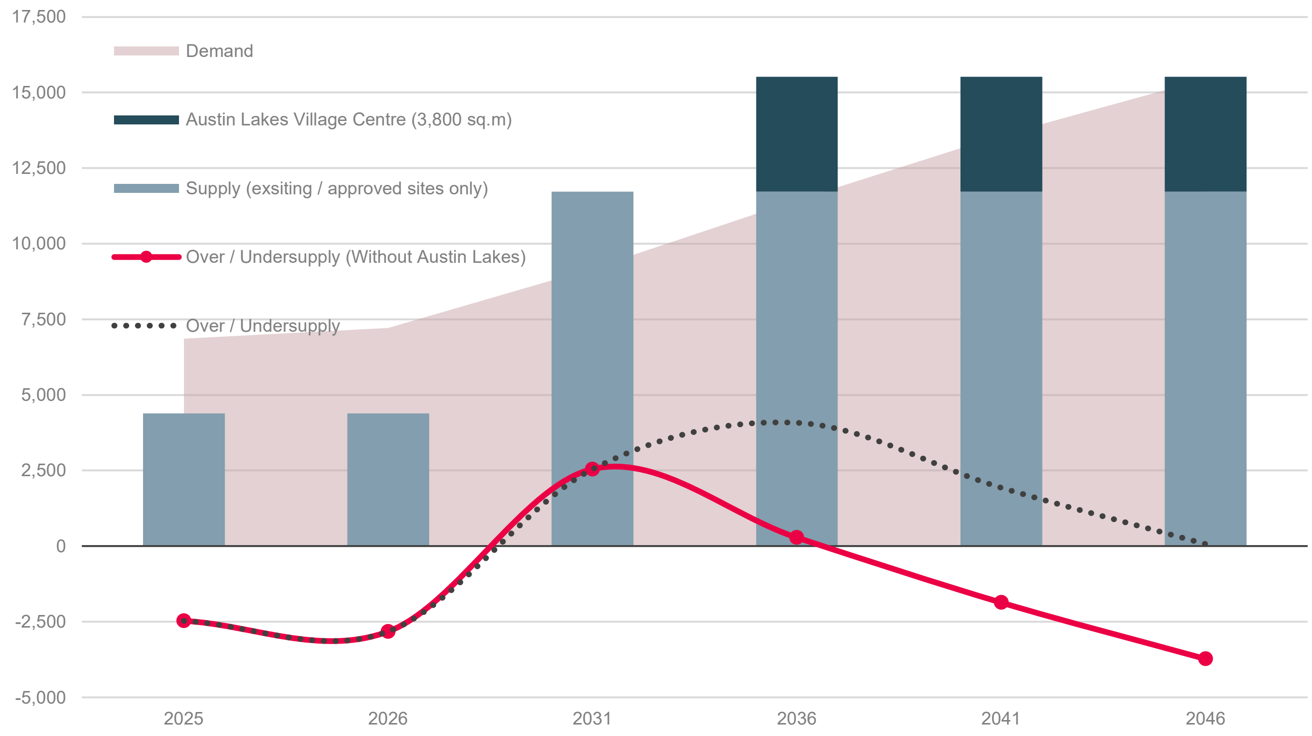
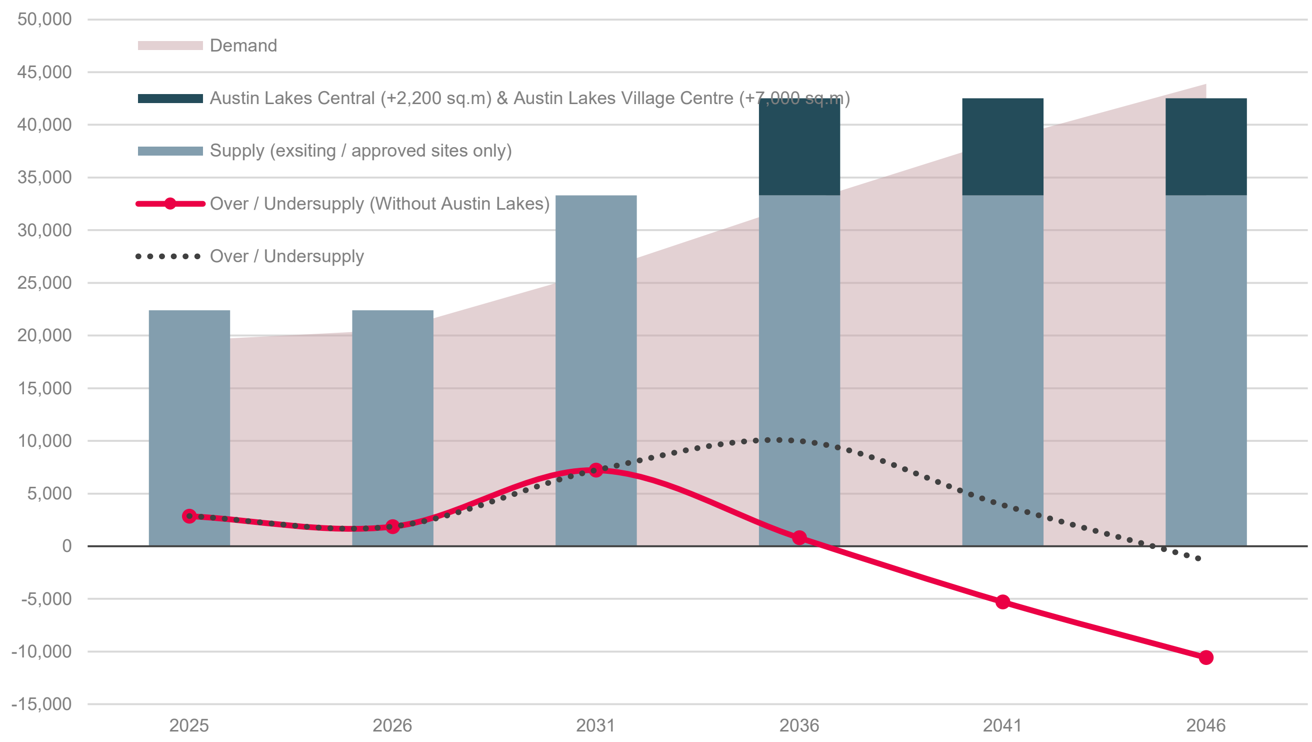


CHART 4.2. RETAIL FLOORSPACE DEMAND / SUPPLY, MAIN TRADE AREA



4.2. Retail Sales

i. To assess the potential economic benefits and impacts that may arise from the development of the proposed Austin Lakes sites, the retail sales level which the development is forecast to achieve is outlined.

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

- The composition and quality of the facility, including the major trader or traders; the specialty mix; centre layout and configuration; ease of accessibility and parking; and the overall feel of the centre.
- The size of the available catchment which the facility serves.
- The location and strength of competitive retail facilities.

iii. Assessing a proposed retail development fundamentally requires an understanding of a variety of factors and methodologies, including Retail turnover; Market shares; Retail supply, demand, and impacts.

iv. Location iQ adopt an evidence-based model that has been tested and refined over more than 15 years and across a range of clients. The model uses all available data, including the Location iQ proprietary database of supermarket and shopping centre tenant size and sales figures, as well as actual Retail Spend Insights at the SA1 granularity.

v. Location iQ has undertaken more than 100 retail need/economic impact assessments in Australia over the last decade, adopting a similar methodology as presented in this report for the high-level overview of retail demand. A range of other property consulting firms also adopt the approach outlined by Location iQ.

vi. This methodology and data sources utilised within this Assessment are verifiable and current – in accordance with SPP 4.2 *Implementation Guidelines (A2.1)*, and all assumptions have been articulated.

Existing Sales (2024/25)

- Austin Lakes Central is estimated to generate $14.4 million in sales, including $11.2 million from the supermarket. This represents approximately 5.0% of main trade area total retail spending (once accounting for sales from beyond).

Do Nothing Sales (2035/36)

- Sales are projected to increase to $21.4 million, including $16.6 million from the supermarket by 2035/36. This considers future approved developments being delivered in the interim period.
- This would represent around 4.4% of retail spending, reflecting dilution from growth in population, spending, and new competing centres (e.g. Ravenswood Central, Pinjarra Road). This share, however, does not include supply-induced growth.

Proposed Sales (2035/36)

- The proposal includes a 2,200 sq.m expansion at Austin Lakes Central, largely for non-retail uses, alongside the development of Austin Lakes Village Centre (7,000 sq.m) comprising a full-line supermarket (3,800 sq.m), retail specialty shops (1,500 sq.m), and complementary non-retail uses (1,700 sq.m).
- Austin Lakes Village Centre forecast sales are $54.2 million, including $38.9 million from supermarkets and $15.3 million from specialty shops. This would account for approximately 11.1% of main trade area retail spending at that time (allowing for beyond the main trade area – but no supply-induced growth).
- Austin Lakes Central alone is projected to achieve $22.4 million in sales - a theoretical impact of -14.3% versus the Do Nothing Scenario, but still well above current trading levels in both total and productivity terms due to strong growth.

vii. Overall, the proposed developments are expected to generate an additional $55.2 million in retail sales in 2035/36, equivalent to around 11.3% of main trade area retail spending (accounting for inflow from beyond the main trade area). Conservatively, no supply-induced growth has been assumed in this estimate.

TABLE 4.2. AUSTIN LAKES CENTRES - FORECAST SALES, 2035/36

	Composition		Sales		Beyond	MTA Spend	
Development & Component	Tenants (no.)	GLA (sq.m)	($'000)	($/sq.m)	(%)	($'000)	(%)
Existing 2024/25							
Austin Lakes Central	**4**	**1,800**	**$14,400**			**$289,442**	**5.0%**
Supermarket	1	1,000	$11,200	$11,200	8.0%	$81,362	12.7%
Specialty Shops (Retail & Non-retail)	2	400	$3,200	$8,000	8.0%	$208,080	1.4%
Non-retail	1	400	-	-	7.5%		
Do Nothing 2035/36							
Austin Lakes Central	**4**	**1,800**	**$21,368**			**$488,860**	**4.4%**
Supermarket	1	1,000	$16,620	$16,620	8.0%	$133,953	11.4%
Specialty Shops (Retail & Non-retail)	2	400	$4,748	$11,871	8.0%	$354,907	1.2%
Non-retail	1	400	-	-	7.5%		
Proposed 2035/36							
Austin Lakes Central	**19**	**4,000**	**$22,393**			**$488,860**	**4.6%**
Supermarket	1	1,000	$14,250	$14,250	8.0%	$133,953	9.8%
Specialty Shops (Retail & Non-retail)	8	800	$8,143	$10,179	8.0%	$354,907	2.1%
Non-retail	10	2,200	-	-	7.5%		
Austin Lakes Village Centre	**26**	**7,000**	**$54,178**			**$488,860**	**11.1%**
Supermarket	1	3,800	$38,910	$10,240	28.5%	$133,953	20.8%
Specialty Shops (Retail & Non-retail)	15	1,500	$15,268	$10,179	28.5%	$354,907	3.1%
Non-retail	10	1,700	-	-	22.5%		
Net Change (Austin Lakes Total)							
Austin Lakes All	**41**	**9,200**	**$55,203**			**$488,860**	**11.3%**
Supermarket	1	3,800	$36,541			$133,953	19.1%
Specialty Shops (Retail & Non-retail)	21	1,900	$18,662			$354,907	4.0%
Non-retail	19	3,500	-			-	

4.3. Retail Spending

i. As outlined in Table 2.4, total retail expenditure generated by the main trade area population is projected to grow significantly over the forecast period. Total retail spending is currently estimated at $299.8 million and is forecast to increase to $768.9 million by 2046. All figures are presented in constant 2024/25 dollars and include GST.

ii. This reflects an increase of some +$469.1 million that will be available to nearby existing and future retail facilities – and an average annual growth rate of 4.6%. The pace of this growth – even without accounting for inflation – is critical to understanding future retail demand, potential impacts, and project viability.

iii. At various stages over the forecast period, population and retail spending growth rates within the main trade area are between 2.3 and 4.2 times higher than that of Greater Perth average. This reinforces the scale and intensity of demand and opportunity in the region.

iv. As a result, the timing and supportability of retail facilities can shift rapidly. In this context, even significant impacts (which approach or even exceed traditional Greater Perth thresholds) can be absorbed far more quickly – often within five years. This is highly distinctive and reflects the unique growth dynamics of the trade area.

v. As acknowledged in the SPP 4.2 Implementation Guidelines, short-term impacts can often be initially high before falling to a medium or low level in the long term. And this fall in impact is demonstrated at Austin Lakes.

vi. Further, at present - once accounting for visitor spend from outside the trade area - the region is only capturing and retaining slightly more than one third of its total generated retail spending.

vii. With the delivery of approved and proposed retail developments – including Ravenswood Central, the Pinjarra Road Woolworths, and Austin Lakes (the subject proposal) – this retention rate is expected to rise to more than 50% by 2035/36. This reflects an increasing share of local demand being met locally.

4.4. Impacts

i. This sub-section of the report outlines the likely sales impacts on competitive retail facilities because of the opening of the retail component of the proposed Austin Lakes Village Centre development.

ii. There is no requirement for the impact on individual retailers to be specifically stated in Need Assessments and Net Benefit Tests. Key points required under the *State Planning Policy 4.2 Activity Centres Implementation Guidelines* are as follows:

> ***A2.2 Impacts***
>
> *A critical output from the modelling process is an estimate of the impact of the proposal on existing and planned activity centres and the level of service to the community.*
>
> ***A2.2.2 Retail Proposals***
>
> *For retail proposals, the NB Test should include the supply of shop/retail (PLUC:5-SHP) and/or Other Retail (PLUC:6-RET) floorspace (present period and over a defined future time period – minimum five years) within relevant activity centres and the retail turnover estimates for each activity centre for the base year and NB test year/s. An estimate of the retail turnover for each relevant activity centre should be identified for the following scenarios:*
>
> *• base case - without the planning proposal/development and*

• with the new planning proposal/ development.

iii. The following factors are typically considered when assessing the potential impacts of a new supermarket-based development on each existing facility or centre:

- The distance of the (impacted) centre, by road, from the proposed development.
- The size of the centre, in terms of total retail floorspace.
- The amount of supermarket floorspace, and brands of these supermarkets.
- The quality of offer and unique attributes including trading hours, presentation/quality, and the like.
- The role and function of the centre.
- Relative accessibility and convenience compared with the proposed retail development.
- The estimated performance of the centre (in current sales) and future performance (in the impact year), accounting for any approved developments in the region that may also impact on sales of existing centres.
- The share of available expenditure which the centre attracts from the identified main trade area of the proposed development. A centre may not be situated in the identified main trade area of the proposed development, but its main trade area may extend to include parts, or all, of the main trade area. For example, the main trade area for large regional shopping centres typically includes circa 250,000 persons. Such a trade area is likely to include (partially or completely) trade areas for surrounding smaller convenience-based centres, sub-regional centres, retail strips and stand-alone supermarkets.

iv. The following key principles are then relied on when assessing the dollar (and percentage) impacts that are likely to be absorbed by existing facilities/centres:

- The greatest impacts are typically absorbed by the closest comparable centres. For example, a new Woolworths supermarket is generally likely to impact the closest nearby Woolworths supermarket to the greatest extent, followed by impacts on other comparable supermarkets (e.g. Coles), and at the lower end of the spectrum, smaller scale supermarkets/foodstores, which serve much more limited roles.
- Impacts on smaller local supermarkets/foodstores tend to be smaller in scale, as these stores normally attract a lower market share of available main trade area expenditure and perform a different role and function within the hierarchy, often serving the local walkable catchments surrounding them, and/or serving more specialised/discerning needs (e.g. a smaller IGA).

v. Table 4.3 outlines forecast sales impacts from the proposed Austin Lakes developments on surrounding centres. The steps involved in assessing the sales and impacts on surrounding centres are presented as follows:

- **Step 1** - Estimate sales levels for existing centres in the 2024/25 financial year. Existing sales for all centres outlined are based on:
  – Expert opinions formed through qualitative consideration of factors including location, catchment, brand and infrastructure (our experience);

- Multiple visits to the area over the last 10 years, including to the subject site and nearby retail facilities several times in 2024/25;
- Local knowledge of Western Australian staff;
- Actual data that includes publicly available information and Location iQ proprietary data (acquired from various retail clients and similar).

For centres where actual data was not available, the current sales levels are conservatively estimated. Retail specialty floorspace sales productivity levels of around $7,500 per sq.m (on average) have been applied on average, which is well below those assumed for the subject development (conservative) and reported benchmark levels as follows:

- Supermarket based shopping centres: $10,055 per sq.m (*Urbis Retail Averages 2023/24*).
- Sub-regional shopping centres: $9,435 per sq.m (*Urbis Retail Averages 2023/24*).
- Mandurah Forum: $9,339 per sq.m *(Shopping Centre Big Guns 2025).*

This means that sales could well be higher at these centres, and as a result, impacts would be lower in percentage terms.

For large format retail and other non-traditional retail types, a sales productivity rate of between $2,000 - $5,000 per sq.m has been applied (limited competitive relevance). In essence, a broadbrush approach has not been applied and each activity centre has been considered.

- **Step 2** – Forecast sales are presented for existing and proposed developments in 2035/36, which is the first full year of trading for the proposed development. These projections include a conservative view of retail market growth and are presented in constant 2035/36 dollars (i.e. excluding inflation), as well as allowing for approved developments such as Ravenswood Central and Pinjarra Road Woolworths (refer Section 3.3) – which is modelled.
- **Step 3** - Outline the change in sales at each centre in 2035/36, because of the development of the proposed Austin Lakes sites. Again, all sales are expressed in constant 2024/25 dollars.
- **Step 4** - Show the impact on sales in 2035/36, both in dollar terms and as a percentage of sales for each centre.

vi. Based on the SPP 4.2 Implementation Guidelines, the following impact percentage and risk level for retail turnover is provided as a general guide:

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

Where the short-term impact is initially high before falling to a medium or low level in the long term, consideration should be given to how the development can be staged or if there needs to be any additional short-term benefits to ensure that level of service is always maintained.

vii. Other factors such as trading performance; expansions/refurbishments of centres; potential loss of services to the community; expected growth; and overall net community benefit should be considered. As outlined previously, the proposed Austin Lakes Centres are forecast to record net sales of +$55.2 million in 2035/36, including a net supermarket sales increase of +$36.5 million across the Austin Lakes Centres.

viii. Key information regarding projected impacts as outlined in the above Table 4.3 is summarised as follows:

- **Mandurah Strategic Activity Centre:** a total impact of -$12 million (-1.25%), with most of this impact falling on Mandurah Forum, by way of the existing supermarkets at the centre. This centre also includes the largest concentration of retail and non-retail shops in the region – and would remain a strong offer.
- **Pinjarra Secondary Activity Centre:** the projected impact would be -$19.6 million (-7.5%) given the Town Centre comprises a major full-line Coles supermarket, as well as an approved additional full-line Woolworths supermarket.
- **Ravenswood District Activity Centre:** impacts totalling -$7.9 million (-12.5%) on the centre which will include the new Ravenswood Central.
- **Greenfields:** an impact of -$4.8 million (-2.25%) on the full-line supermarket inclusive precinct.
- **Furnissdale:** an impact of -$2.2 million (-5.0%) on the Spudshed-anchored precinct.
- **Other Centres:** most of the remaining impacts on other detailed centres are minor given there would be limited replication. Across the six remaining, represented centres, a total impact of less than -$0.1 million (-0.5%) is projected.

ix. Impacts totalling -$4.9 million in combination (around 9% of the net sales) are projected to fall on a range of centres located beyond the main trade area and not represented in Table 4.3 – given the fringe urban/rural location and regional accessibility.

x. An additional $3.7 million in retail spending is estimated to be generated through supply-induced growth – that is, incremental spending uplift associated with the delivery of new retail facilities that better meet the needs of the local community.

xi. Overall, the proposed Austin Lakes Centre developments would not impact on the viability or continued operation of any existing or proposed centres (as per SPP 4.2) in the surrounding region, with all the impacts broadly within normal competitive ranges.

xii. Some impacts such as Austin Lakes Central (-15% as noted in Section 4.2) and Ravenswood (-12.5%) are initially high, however, it is important to note that the rate of growth across the main trade area is rapid, and that these impacts should be considered very short-term only (swiftly decreasing to low impacts):

- The main trade area population is projected to increase by an average of 897 persons per year or 3.9% over the forecast period to 2046.
- Supermarket expenditure generated by main trade residents is projected to increase by an average of $5.7 million per year over the forecast period (4.4%).
- Total retail spending is projected to increase by $23.1 million per year (on average) over the forecast period, or an average annual rate of 4.7%.

xiii. The key implication is that with retail expenditure growth across the main trade area growing by an average of 4.4% (supermarkets) to 4.7% (total retail) per year – even the most significant impacts (-15%) could be ameliorated within around four years.

xiv. Based on actual market data, it is our experience that the greatest impacts are typically absorbed by the closest comparable retailers/centres. For example, a new Woolworths supermarket is generally likely to impact the closest nearby Woolworths supermarket to the greatest extent, followed by impacts on other comparable supermarkets (e.g. Coles), and at the lower end of the spectrum, smaller scale supermarkets/foodstores, which serve much more limited roles.

xv. Residents will continue to frequent other centres/shops in the surrounding area for a variety of tenants that are not likely to be provided as part of the proposed Austin Lakes sites.

xvi. In summary, all sales impacts across the identified centres are within an acceptable range or short-term in nature, and when considered in the context of the size, performance, role and function of surrounding centres, would be highly unlikely to result in a material reduction of retail service provision.

TABLE 4.3. AUSTIN LAKES CENTRES PROJECTED IMPACTS, 2025 – 2036

	Unit	Base Case Turnover 2024	2036*		Subject Proposal 2036	Impact 2036 $M	%
Austin Lakes Centres	***$M***	***14.4***	***21.4***		***$76.6***	***$55.20***	***n.a.***
Secondary Activity Centre							
Mandurah	$M	$713.8	$963.1		$951.1	-$12.0	-1.25%
Secondary Activity Centre							
Pinjarra	$M	$125.3	$261.6	+	$242.0	-$19.6	-7.50%
District Activity Centre							
Ravenswood	$M	$1.8	$63.5	+	$55.6	-$7.9	-12.50%
Local, Neighbourhood & Other Centres							
South Yunderup	$M	$1.7	$2.8		$2.8	-$0.01	-0.50%
Furnissdale	$M	$30.0	$44.3		$42.1	-$2.22	-5.00%
Barragup	$M	$3.3	$4.5		$4.5	-$0.02	-0.50%
Greenfields	$M	$155.3	$213.8		$209.0	-$4.81	-2.25%
North Dandalup	$M	$1.3	$1.8		$1.8	-$0.01	-0.50%

Constant 2024/25 dollars & including GST
[1] Proposed centres and expansions assumed to be trading for a full year by FY2036

4.5. Other Planning Implications

i. The subject Structure Plan seeks to increase the allowable commercial floorspace across existing commercial nodes within the Austin Lakes area, in line with the strategic intent of the approved Austin Cove Outline Development Plan (ODP, 2015).

ii. The changes reflect refinements rather than departures from the original plan and are designed to support evolving community needs and contemporary development formats.

iii. The original ODP identified three core commercial components:

- **Local Centre** (now Austin Lakes Central),
- **Village Centre Precinct** (planned for retail, services, and community uses), and
- **Mixed Business Area** (intended for showroom and complementary commercial uses).

iv. The Village Centre and Mixed Business Area were subject to a shared retail floorspace cap of 5,000 sq.m.

v. The amended Structure Plan proposes consolidating the Village Centre and Mixed Business Area into a single integrated precinct, located on the site of the original Mixed Business Area. This refinement provides a more cohesive and viable development outcome, better aligned with commercial demand and delivery feasibility.

vi. The consolidated Village Centre will retain a core retail component broadly consistent with the original 5,000 sq.m cap, while enabling up to 7,000 sq.m of total development to allow for a broader mix of non-retail and service-based tenancies. This reflects the shift in modern tenancy formats and supports the delivery of a full-service local centre.

vii. Austin Lakes Central, the existing Local Centre, is currently at capacity. A modest uplift of 1,000 - 2,000 sq.m is proposed, increasing the maximum GLA to 4,000 sq.m. The additional space would primarily support non-retail or community-facing uses, consistent with its established role in the local hierarchy.

viii. No other suitably zoned or available land exists within Austin Lakes or South Yunderup that could accommodate a development of this scale or configuration. The nominated sites are already identified in the planning framework and remain the most appropriate locations for this form of development.

ix. The proposal aligns with the Western Australian planning system and the Shire of Murray's strategic planning framework in several key ways:

- **Orderly Development:** the refinements apply to land already flagged for commercial and mixed-use purposes and reinforce a coordinated planning outcome. The aggregation of sites and the increased capacity are also more conducive to staged development – the timing of which would be demand-led.
- **Activity Centre Hierarchy:** the proposal strengthens existing centres rather than introducing a new node, supporting the activity centre network and helping reduce pressure on higher-order centres.
- **Not Out-of-Centre:** the development is not considered out-of-centre, as it occurs on zoned land already identified for commercial activity under the ODP.

- **Community Transition:** the changes support Austin Lakes' evolution from a residential estate to a self-contained urban community, with access to retail, services, and employment.

- **Strategic Delivery:** consolidation enables more efficient delivery of infrastructure and services that align with population growth and emerging demand.

- **No Suitable Alternatives**: there are no other viable, appropriately zoned or available sites within the locality to accommodate this form of development.

x. In summary, the proposed refinements are considered a logical extension of the existing planning framework, enabling the delivery of appropriately scaled, service-oriented centres that respond to the needs of a growing community.

4.6. Employment and Consumer Impacts

i. The proposed Austin Lakes Centres would result in a range of important economic benefits which will be of direct benefit to the local community. These employment impacts are expressed in net terms (over and above the existing level of floorspace at Austin Lakes Central) and contributions are described as follows:

Ongoing Employment Generation

- Table 4.4 summarises the projected level of ongoing employment likely to be generated by the retail and complementary non-retail components of the Austin Lakes developments. The employment benchmarks (jobs per 1,000 sq.m) used to calculate the indicative total jobs generated is based on typical floorspace and employment yield benchmarks.

- The supermarket component of the developments is projected to employ around 190 persons, while the net retail specialty component of the development is projected to employ around 114 persons, as well as some 140 persons across non-retail uses.

- Allowing for a proportion (average of 10%) of the total increase to be as a result of reduced employment at existing facilities throughout the region and beyond, net additional jobs are estimated at 400.

- Based on *Average Weekly Earnings* data released by the ABS in February 2025 (Cat. 6302.0 - ordinary time earnings, retail trade), the net additional permanent employees would earn annual combined salary/wages of some $18.7 million.

- This reflects salary/wages for the local economy, as a direct result of the supermarket, retail and non-retail component of the proposed development alone.

Construction

- Demolition works and construction of the entire development is estimated to incur total capital costs of approximately $35 million, generating significant employment within the construction and associated industries during the development of the project.

- By using the appropriate ABS Input/Output Multipliers that were last produced in 1996/97 and a deflated estimated total capital cost of construction of $14 million (i.e. in 1996/97 dollars), it is estimated that the construction period of the proposed retail component (in isolation) would directly create 98 full-time, part time and temporary jobs over the development timeline (refer Table 4.5).

Multiplier Effect

- Overall, the total centre is estimated to directly generate 498 jobs, including (refer Table 4.6):
  - **Ongoing Employment from Planned Floorspace**: 400 net additional jobs.
  - **Construction Phase:** 98 jobs
- In addition to this direct employment, multiplier effects will flow through the local economy and indirectly generate additional employment opportunities through ancillary businesses/suppliers that support the development and services, as well as additional consumption expenditure by workers employed within the precinct (spending wages).
- Again, by using the appropriate ABS Input/Output Multipliers that were last produced in 1996/97 and adjusting for inflationary and other changes to present, it is estimated that an additional 536 jobs will be created indirectly.

ii. Overall, approximately 1,034 jobs are likely to be created both directly and indirectly because of the subject developments (including ongoing employment, construction, and multiplier effects).

TABLE 4.4. ONGOING EMPLOYMENT GENERATING FLOORSPACE

Component	Total Floorspace (sq.m)	Employment Potential		
		Employm. per 1,000 sq.m	Indic. Total Jobs	Net Increase[1]
Retail				
Supermarket	3,800	50.0	190	171
Retail Specialty Shops	1,900	60.0	114	103
Non-retail	3,500	40.0	140	126
Total	**9,200**		**444**	**400**

1. Indicates the estimated number of net additional ongoing jobs as a result of the proposed development
Source : Australian National Accounts: Input-Output Tables 1996-97

TABLE 4.5. CONSTRUCTION GENERATED EMPLOYMENT

Metric	Net Change (Austin Lakes) Total
Estimated Capital Costs of Construction	
Estimated Capital Costs 2024/25 ($M)*	$35.0
Estimated Capital Costs 1996/97 ($M)	$14.00
Direct Employment Generation	
Construction Jobs per $1 million (2024/25)	2.80
Total Construction Jobs[1]	**98**

Source : Australian National Accounts: Input-Output Tables 1996-97
Employment totals include both full-time and part-time work. Indicates the estimated number of jobs over the life of the construction project plus ongoing multiplier effects, for the equivalent of one year

TABLE 4.6. ESTIMATED TOTAL EMPLOYMENT GENERATED

Metric / Category	Est. Net Employment Increase[1]	Employment Multiplier Effects	Total Employment
Ongoing Employment from Planned Floorspace			
Retail	274	260	533
Complementary Non-retail	126	120	246
Total	**400**	**379**	**779**
Construction Phase			
Direct Employment Generation	98	157	255
Net Additional Employment	**498**	**536**	**1,034**

1. Net increase includes an allowance for reduced employment levels at impacted centres estimated at 10% of the total increase

5 Needs & Net Benefit Summary

The final section of this report summarises the key conclusions of the Needs Assessment and Net Benefit Test for the proposed Austin Lakes developments.

'Need' or 'Community Need' in a planning sense is a relative concept that relates to the overall wellbeing of a community. A use is needed, for example, if it would, on balance, improve the services and facilities available in a locality. The reasonable demands and expectations of a community are important, therefore, in assessing need.

Several important factors that relate to need, particularly economic need, include:

- Population and demand.
- Consumer trends and expenditure patterns.
- Location and infrastructure.
- Impacts on existing retail facilities and the retail hierarchy.
- Net community benefits.

5.1. Floorspace Demand

i. The proposed expansion of retail and commercial floorspace across Austin Lakes Central and the new Austin Lakes Village Centre is underpinned by strong population growth and a demonstrated shortfall in local supermarket and retail supply.

ii. The main trade area population is projected to grow from 15,114 residents currently to 34,000 by 2046 – an average annual increase of 3.9%. Growth is expected to continue beyond this period, with future development areas supporting a potential population of up to 118,000. This growth is the primary driver of demand for additional supermarket, retail, and non-retail floorspace.

iii. Current provision of supermarket floorspace across the trade area falls well below regional and national benchmarks – noting only one full-line supermarket currently operates (Coles, Pinjarra), with limited supplementary options (including IGA at Austin Lakes).

iv. New supermarkets are planned at Ravenswood and Pinjarra, but even once operational, supermarket demand will continue to outpace supply, with an estimated undersupply of -3,728 sq.m by 2046.

v. Broader retail demand is also expected to increase significantly – from around 19,500 sq.m in 2025 to nearly 44,000 sq.m by 2046 – reflecting an annual increase of some 1,160 sq.m. Approved developments will assist in meeting short-term needs, but by 2046, a projected undersupply of more than 10,570 sq.m is expected, even before accounting for embedded non-retail uses.

vi. Demand for complementary non-retail floorspace (such as medical, health, office and community services) is also growing, with net demand increasing by a (conservatively) estimated 1,018 sq.m per year. These uses are increasingly integrated into retail centres but are not captured in retail supply estimates, which further inflates the actual gap between demand and supply.

vii. Importantly, retail and commercial demand is not limited to the resident population. Mobile device data indicates that a large proportion of visitation comes from beyond the defined trade area, further reinforcing the need for a more robust and accessible centre network.

viii. Even with the proposed expansion of Austin Lakes Central (+2,200 sq.m) and the introduction of the Austin Lakes Village Centre (+7,000 sq.m), unmet demand will persist across all categories. These developments will therefore be essential to maintaining and improving service levels, access to food and grocery offerings, and providing for the needs of a growing and diversifying population.

ix. The proposed Structure Plan Amendment delivers a timely and appropriate response to the long-term demand profile. It enables the delivery of additional supermarket, retail, and non-retail floorspace in well-located, strategically planned centres that are embedded in the activity centre hierarchy.

5.2. Consumer & Expenditure Trends

i. Retail precincts in Australia play fundamental roles in the economies of Australia's metropolitan areas (and often a more pronounced function in rural towns), having developed around the need to meet consumer demand. The nature of consumer demand continues to develop and evolve, reflecting social changes within society, such as:

- Increasing time pressures on working families.
- Population and income growth.
- The evolution of new retail formats and traders.
- Competitive retail developments and precincts.

ii. The demands of retailers, as well as consumers, combine to add pressure for additional retail floorspace.

iii. There is a strong need for a new full-line supermarket within proximity to the homes of main trade area residents more generally, with consumers visiting supermarkets two to three times a week on average.

iv. Over the past decade, there has been an increasing trend towards convenience shopping. This trend has been largely driven by broader social trends that have resulted in consumers becoming more time poor, such as longer working hours and an increase in the number of women in the labour force.

v. Time pressures are ranked at the top of the list of issues that consumers face when undertaking their regular food and grocery shopping. As a result, there is growing demand for convenience shopping facilities to meet the needs of residents. Convenience has moved beyond the quick and easy concept, toward a simplification model, where consumers can get precisely what they need without having to think overly hard or navigate unnecessary obstacles. Convenience and quick delivery times are very important for time poor consumers.

vi. One of the key behavioural shifts in retail shopping habits during and post the pandemic was a preference for local shopping over higher-order shopping centres. There were several key drivers behind this shift, but most notably work from home trends, travel restrictions, health concerns associated with large crowds, and closure of non-essential tenants (that dominate the composition of large centres). Even post-pandemic, the home is becoming more of a central hub of work and socialising, and so retailers are having to meet consumers where they are. In this sense, centres will continue to evolve.

vii. The concept of the proposed developments, including a full-line supermarket at Austin Lakes Village Centre and easily accessible car parking - would be highly convenient for local families who would visit on a regular basis. A full-line supermarket would also help to retain some of the significant spending that is currently escaping the main trade area (and Shire of Murray LGA).

viii. As outlined previously in Section 4.3, the level of retail spending (generated by main trade area residents) being retained within the main trade area is estimated at around 36% currently (once accounting for estimated inflows from beyond) - meaning that almost two-thirds ($192 million) of retail expenditure is currently escaping the trade area (and the LGA) – a large portion of which would be directed to retail facilities within the Mandurah urban area (leakage).

ix. The subject developments at Austin Lakes in 2035/36 (as well as allowing for approved developments at Ravenswood and Pinjarra Road) is projected to see retained retail spending increase to over half (53%), reflecting a significant reduction in leakage.

x. Based on our experience, this is a conservative figure and reflects the geographic extent of the main trade area, as well as the current and future network of retail facilities.

5.3. Impacts on Existing & Proposed Centres

i. As outlined in SPP 4.2 *Implementation Guidelines*, a critical output from the modelling process is an estimate of the impact of the proposal on existing and planned activity centres and the level of service to the community.

ii. Residents of the region should be provided with a wide range of food and grocery items within proximity to their homes, and the opening of the proposed Austin Lakes Village Centre development would provide a key anchor for the area that would benefit the overall offer and range of services available - increasing the ability of the population to shop locally, while not impacting the future viability of current centres in the surrounding area.

iii. In addition, increased competition between supermarkets is beneficial to consumers and will not adversely affect the balance of the centre hierarchy.

iv. The analysis of impacts provided in the previous Section 4.4 of this report shows the projected impacts on other centres from the proposed development would not threaten the viability or continued operation of any centre. Further, there would be no depletion or dilution in the range of services which are available to residents.

v. The proposed Austin Lakes Centres are forecast to record net sales of +$55.2 million in 2035/36, including net supermarket sales of +$36.5 million from the full-line supermarket anchor.

vi. Impacts are primarily concentrated on the most proximate and comparable centres, particularly other full-line supermarket locations. Projected impacts remain within acceptable thresholds, with the following key results drawn from Table 4.3:

- **Mandurah Strategic Activity Centre:** a total impact of -$12.0 million (-1.25%), with most of this impact falling on Mandurah Forum, by way of the existing supermarkets at the centre. This centre also includes the largest concentration of retail and non-retail shops in the region – and would remain a strong offer.

- **Pinjarra Secondary Activity Centre:** the projected impact would be -$19.6 million (-7.5%) given the Town Centre comprises a major full-line Coles supermarket, as well as an approved additional supermarket.

- **Ravenswood District Activity Centre:** impacts totalling -$7.9 million (-12.5%) on the centre which will include the new Ravenswood Central.

- **Greenfields:** an impact of -$4.8 million (-2.25%) on the full-line supermarket inclusive precinct.

- **Furnissdale:** an impact of -$2.2 million (-5.0%) on the Spudshed-anchored precinct.

- **Other Centres:** most of the remaining impacts on other detailed centres are minor given there would be limited replication. Across the six remaining, represented centres, a total impact of less than -$0.1 million (-0.5%) is projected.

vii. Impacts totalling -$4.9 million in combination (around 9% of the net sales) are projected to fall on a range of centres located beyond the main trade area and not represented in Table 4.3 – given the fringe urban/rural location and regional accessibility.

viii. An additional $3.7 million in retail spending is estimated to be generated through supply-induced growth – that is, incremental spending uplift associated with the delivery of new retail facilities that better meet the needs of the local community.

ix. The greatest impact (-15%) is forecast at Austin Lakes Central (the existing IGA-based centre), followed by Ravenswood (-12.5%). However, these higher impacts are:

- Short-term in nature, given the strength of population and spending growth across the trade area.

- Ameliorated by forecast average annual population growth of 3.9% (+897 persons per year).

- Offset by projected annual growth in supermarket spending of $5.7 million (4.4%) and total retail spending of $23.1 million (4.7%).

x. Retail turnover impacts below -10% are generally acceptable, while those exceeding -10% should be considered in context. In this case, rapid growth ensures any higher initial impacts will diminish to negligible within three to four years.

xi. Importantly, the Austin Lakes Village Centre will introduce retail and commercial tenancies that complement rather than replicate the offer in surrounding centres. Residents will continue to access higher-order services in other locations, preserving the role of nearby centres within the activity centre network.

xii. In conclusion, the forecast impacts of the Austin Lakes centre changes are within acceptable planning limits and do not threaten the viability or function of any existing or proposed centres. When considered in context of strong local growth and the proposal's contribution to improved service provision, the development represents a net community benefit and supports the long-term sustainability of the activity centre hierarchy.

5.4. Net Benefits

i. It is the conclusion of this report that a substantial net community benefit would result from the proposed Austin Lakes centres. Offsetting the trading impacts on some existing retailers, there are very substantial positive impacts including the following (with reference to SPP 4.2 *Implementation Guidelines A.24*):

Strategic Alignment, **Infrastructure & Services**

- **Optimal Site:** Austin Lakes Central is already functioning as a localised retail node, benefiting from existing infrastructure and visitation. The Austin Lakes Village Centre site builds on this, utilising land already earmarked for commercial and mixed-use purposes in the heart of a rapidly expanding catchment.

- **Zoning Strategy:** both sites align with established zoning intent and support broader policy objectives to deliver a balanced mix of retail, commercial and community uses within the existing activity centre framework.

- **Preservation of Integrity:** the sites preserve the area's integrity and ensure orderly development. The Scheme's objectives include securing amenity, health, and convenience for residents, which are crucial factors in urban planning and development.

- **Liveable Neighbourhood:** the proposal contributes to the development of a cohesive, accessible and high-amenity urban environment. It supports walkable, mixed-use streetscapes and sustainable design outcomes, aligned with the broader goals of the Shire's planning strategy.

- **Enhanced Uses:** the development would provide a significant improvement in the range of retail facilities and services that would be available to existing and future residents. This includes satiating existing and future projected retail and supermarket floorspace demand generated by main trade area residents, and specifically the introduction of the full-line supermarket operator to the main trade area.

- **Strategic Expansion:** the centres will maximise community value by developing vibrant and accessible centres that respond to changing community needs. It will directly address the long-term demands of a rapidly growing population, highlighting the need for coordinated planning of retail and supermarket floorspace across the region to ensure viable, sustainable, and optimised development. This approach avoids fragmented or reactive planning responses.

- **Lack of Alternate Sites:** there are no other suitably zoned or available sites within Austin Lakes or South Yunderup that could accommodate uses of this scale or purpose – and none more optimal.

- **Out-of-Centre Development:** the centres do not constitute out-of-centre development and the Austin Lakes Village Centre site consolidates development within an allocated/defined centre, consistent with the established hierarchy and avoiding fragmentation.

- **Aligned With SPP 4.2 Objectives:** the proposed development strongly aligns with the core policy objectives, aiming to create and retain people, employment opportunities, retail, and services – within a well-connected community.

- **Aligned With SPP 4.2 Outcomes:** the development also seamlessly addresses specified outcomes, insofar as it efficiently and cohesively caters to community needs and consumer choice, while also avoiding significant disruptions to the existing activity centre hierarchy – particularly given it is a reimagination or enhanced development of an existing, as well as allocated future centre. As outlined within this sub-section and the broader assessment, the developments would be of net positive benefit to the local community.

Productivity

- **Employment:** the development will generate around 1,034 jobs – including 400 ongoing roles, 98 construction jobs and 536 indirect jobs via supply-chain and consumption effects. These ongoing roles (400) equate to around $18.7 million in annual wages.

- **Impact on Activity Centres:** as outlined previously, the proposed developments would not threaten the viability or continued operation of any existing or planned centres in the surrounding region. All impacts remain within acceptable competitive thresholds.

  Some impacts, such as Austin Lakes Central (-15%) and Ravenswood (-12.5%), are initially high. However, the rapid growth across the main trade area means these impacts should be considered very short-term, declining swiftly to low levels.

  The main trade area population is projected to grow by an average of 897 persons per year, or 3.9%, over the forecast period to 2046. Supermarket expenditure is forecast to increase by an average of $5.7 million per year (4.4%), while total retail spend is expected to rise by $23.1 million per year (4.7%) on average during the same period. The key implication is that even the most significant impacts (-15%) are likely to be mitigated within approximately four years.

Quality of Life

- **Compatible with Surrounding Land Uses:** both sites are consistent with current and future land use intent, with prior planning support for retail development – and will operate in a similar capacity.

- **Complementary Range of Uses:** the proposed range of uses that would form part of the development are typical of many convenience-based centres throughout Western Australia, including a supermarket, retail specialty shops, as well as non-retail uses.

- **Metropolitan Transition:** the development would add significantly to the range of services, choice, price competition, and retention of escaped expenditure within the region. This will assist in the transition of Austin Lakes and the broader Shire of Murray to a more contemporary, full-service offering that reflects its evolution from a historically rural town to a fringe (or fully-fledged) metropolitan region.

- **Aligned with Consumer Trends & Expectations:** the nature of consumer demand continues to develop and evolve, reflecting social changes within society, such as increasing time pressures on working families; population/income growth; the evolution of new retail formats/operators. The demands of retailers, as well as consumers, combine to add pressure for additional retail floorspace in existing retail precincts such as the Austin Lakes site.

The likely design of the proposed development, including a full-line supermarket, a convenience-associated quantum of specialty floorspace, and easily accessible car parking, would be highly convenient for local families who would visit on a regular basis – and therefore help to retain some of the significant spending and visitation currently escaping the area.

- **Enhanced Amenity & Retained Vibrancy:** the proposed development would improve the offering within Austin Lakes and allow for price competition as part of this retention.

  As outlined previously, the level of retail spending (generated by main trade area residents) being retained within the main trade area is estimated at around 36% currently (once accounting for estimated inflows from beyond) - meaning that almost two-thirds ($192 million) of retail expenditure is currently escaping the trade area (and the LGA) as leakage.

- **Limited Specialty Floorspace:** the proposed development would include a convenience-level provision of specialty and other floorspace component, which would mean residents will continue to frequent other centres/shops in the surrounding area for a variety of tenants that are not likely to be provided as part of the proposed site.

Environmental Sustainability, Equity & Social Inclusion

- **Reduced Trips or Drive Distance:** the retention of spending and visitation within the main trade area and LGA would also reflect a reduction in car-based trips (drive time and distance) to retail facilities (often multiple times per week) further afield.

  The exact quantum of traffic impacts would be the subject of a specific expert Assessment, however, volume changes are likely to broadly reflect net sales uplifts (at the subject site) and impacts (to other centres). This redistribution of traffic/trips, however, would include shorter travel distances (more localised shopping), as well as the ability to undertake less frequent, larger shopping (full weekly/trolley shop).

- **Localised Jobs & Services:** the provision of employment floorspace within the main trade area will help to retain job opportunities for local residents, as well as providing a large number of youth employment prospects, given retail developments generally employ many younger staff.

ii. In conclusion, this assessment demonstrates that proposed Austin Lakes Structure Plan – and specifically the proposed centre changes - would result in substantial net community benefit, which will more than offset anticipated trading impacts for a small number of existing and proposed retail centres – all of which would remain viable.

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