APPENDIX 2
ATTACHMENT 1

Draft Local Commercial Strategy
Part A – Background Research, Economic Analysis and Retail Needs Assessment

City of Joondalup
2012

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Executive Summary

The report provides detailed analysis and information to inform the growth and maturation of activity centres within the City of Joondalup. The report includes a detailed review of activity centres within the City of Joondalup along with an analysis of the current distribution of retailing and the economic performance of each activity centre throughout the City of Joondalup. The findings of this report are intended to inform the subsequent Part B - ~~Local Commercial Strategy~~ Shop Retail Assessment and Part C – Bulky Goods and Commercial Office that will identify any specific amendments to the DPS to ensure that the scheme reflects the City's expectations for the long term economic growth of the City.

Statement of Planning Policy Activity Centres for Perth and Peel (SPP 4.2) was released in conjunction with Directions 2031 and Beyond in August 2010 by the WAPC. SPP 4.2 represents a new strategic direction for the Perth Metropolitan Area which aims to realise the benefits of a more consolidated city. SPP 4.2 specifies the broad planning requirements for the planning and development of new activity centres and the redevelopment and renewal of existing centres in Perth and Peel. With the ~~recent~~ release of Directions 2031 and Beyond as well as SPP 4.2, it is now an appropriate time to ~~revise the existing City of Joondalup Centres Strategy and~~ provide the City with guidance as to what changes may be considered and the implications these changes are likely to have for the City.

The challenge for the City will be to provide a sustainable and affordable place to work and live, retain overseas students and their families and to minimise the 'leakage' of investment and skills to other centres, including the Perth CBD. This will only be achieved through energetic economic development activities, incentives of project ready sites and streamlined planning approvals with a continued focus on attracting high quality tertiary and secondary education establishments and knowledge based businesses and industries. Maximum advantage must be taken of State and private investment opportunities in the short term, that is, for the next 15 years. This will enable the Joondalup CBD to mature and establish itself as a "place to do business", and to realise agglomeration economies.

The quality of its centres is central to the quality of life in the City. The activity centres provide a meeting place where the spectrum of residents congregate and are thus an essential element of community building. The increasing capacity and take-up of e-commerce, e-health and e-learning reduces the pull of activity centres and increases the need for them to be attractive and accessible. They must be more than merely a functional location for accessing goods and services – they need to be a place where people want to be.

Shop Retail Provision

The original recommended ~~maximum~~ Shop Retail floorspace provided in Table 21~~Table 22~~ of the report was derived iteratively through the development of a number of scenarios, in order to test trade impacts based on various floorspace areas. The Woodvale and Currambine Activity Centres were both modelled at 20,000m² and subsequently 12,000m² and 15,000m² respectively. The Joondalup City Centre was modelled at 100,000m² in order to test the level of growth identified in the current Local Planning Strategy and subsequently at 125,000m². A range of floor space areas was tested for the Whitfords Secondary Activity Centre during the scenario modelling.

The ~~recommended~~ Gravity Model assessment ~~scenario is~~ was based on minimising impacts on centres and achieving a logical balance of floorspace between centre hierarchy types. The Shop Retail floorspace contained within the Winton Road industrial area has been included in the 2010 floorspace figure for Joondalup City Centre. ~~The recommended maximum~~

The outcomes of the Gravity Model assessment for Shop retail floorspace ~~by centre is anticipated to be a key component of the Part B - Local Commercial Strategy~~was subsequently reviewed by RPS, on behalf of the City, in response to public submissions to the Local Commercial Strategy Part A.

The Gravity Model assessment now forms one of a number of considerations in the Local Commercial Strategy that contributes to the identification of centre-specific Shop Retail floorspace "thresholds"– floorspace levels above which a dedicated Retail Sustainability Assessment is required by the City as part of any proposal to expand. This approach is regarded as being in the spirit of SPP 4.2.

This update took into considerations feedback and analysis from public submissions on the size and scope of the current and future shortfall of Shop Retail floorspace in the City and the desire by the City for accommodative thresholds to be established to preserve and reinforce the City's role as the major Shop Retail destination in the North West Corridor.

Centres Health Check

An overall "health check" was undertaken for each centre and considers elements such as vacancy rates, turnover rates, centre reliance on retail and the general amenity and accessibility.

The results indicate that the Beldon neighbourhood centre has very poor overall health, although there are plans for refurbishment of this centre.

The centres with poor overall health include:

- Heathridge;
- Coolibah Plaza; and
- Ocean Reef.

The Joondalup City Centre was found to be an average performing centre, which is a concern. This is mainly due to the centre having a land use intensity of less than 1,800m^2 per hectare as well as a lower than average Shop Retail turnover per square metre per annum. The centre will need to rely on catchment population growth and intensification of uses if it is to achieve the required intensity and retail performance expected of a Primary Activity Centre.

Implications for Part B – ~~Local Commercial Strategy~~Shop Retail Assessment

The key implications emerging from the analysis include:

- The City of Joondalup requires a new Local Commercial Strategy to be adopted by Council ~~as a local planning policy~~ in order to be in alignment with SPP 4.2;
- The current centres hierarchy, with Joondalup as the Strategic Metropolitan Centre with potential to become a Primary Activity Centre, is the key element in the commercial strategy and overrides all other considerations. Secondary Centres therefore perform a subsidiary function;
- ~~Amongst the larger centres modelled in the Retail Needs Assessment, expansion at Whitfords should be in the non-retail or mixed use land use categories;~~
- Warwick Secondary Centre would benefit from a new structure plan. Given that the City of Joondalup owns land within the activity centre, there may be opportunity to significantly influence the outcome of any structure planning exercise;
- A number of ~~district~~ centres have been identified for growth in Shop Retail floorspace, including the Gwendoline Drive Centre (Ocean Reef Road, Beldon), which is recommended to change from a neighbourhood centre to a district centre;

- The zones contained in the District Planning Scheme~~s~~ could be simplified and the land uses allowed within each could be clarified. A review or amendment of the DPS may enable more flexible uses within zones; and
- A revision of the DPS should ensure alignment with SPP 4.2 and the Western Australian Planning Commission (WAPC) Local Planning Manual.

~~**Recommendations for Part B – Local Commercial Strategy**~~
~~To ensure that the City can adopt a new Local Commercial Strategy, the Draft LCS will need to be prepared ready for consultation in November 2011. Following consultation, the strategy can be finalised based on submissions received.~~

~~The hierarchy of centres has been articulated within the report and the Draft LCS will need to be specific regarding the Joondalup City Centre and the Secondary Centres in particular. The Shop Retail floorspace growth recommendations for the district centres should also be clearly reflected in the Draft LCS.~~

~~The Draft LCS needs to consider the centre types in alignment with SPP 4.2 and outline the typical range of uses that should be included in each centre type.~~

~~It is recommended that the Local Commercial Strategy and Local Structure Plans have a close alignment with the City of Joondalup Economic Development Plan 2012 – 2015, SPP 4.2 and Directions 2031 Economic Development and Employment Strategy for the North West Sub Region. This will be essential to support a regional approach to activity centre growth and the achievement of employment targets for the Perth North West sub region.~~

Table of Contents

Introduction

Background

The City of Joondalup is undertaking a review of the District Planning Scheme (DPS) No. 2. As part of this review, the City requires the development of a draft Local Commercial Strategy (LCS). The LCS will complement the draft Local Planning Strategy, draft Local Housing Strategy, and draft Joondalup City Centre Structure Plan.

Population growth within the North Western corridor of the Perth Metropolitan Region is projected to result in an additional 110,000 persons between 2008 and 2031. On this basis there is a strong need to review the existing planning framework guiding the nature of growth and change of those activity centres within the City of Joondalup.

Most significantly, the North Western Corridor features a lack of employment opportunity and consequently has a low employment self- sufficiency rate (45~~0~~% as at 2011~~06~~). The Directions 2031 and Beyond (WAPC, 2010) and Statement of Planning Policy Activity Centres for Perth and Peel SPP 4.2 (WAPC, 2010) together provide guidance in the form of employment self- sufficiency targets and the desired hierarchy of Activity Centres. For the North West Sub-Region, the target is 60%.

SPP 4.2 aims to enhance the level of amenity and liveability in the Perth and Peel regions through achieving a more efficient distribution of employment and activity. Resulting benefits will include the optimal use of infrastructure (such as the transport and services networks) along with fewer and shorter private trips to places of employment, access to services and shopping. The development of activity centres is therefore aims to improve access to a greater range of employment and shopping within the Perth and Peel regions by developing centres with high quality urban environments and with residential development reflecting the emerging needs of society. The form and level of retail development provides the anchor and amenity, attracting other forms of business investment resulting in employment within knowledge intensive producer and consumer service industries. Therefore, the appropriate distribution of retail development is necessary, as this is the foundation upon which future business agglomerations and synergies will establish and grow.

Of the existing and planned Strategic Metropolitan and other Regional Activity Centres within the North Western Corridor, the State and Local policy dictates that the Joondalup City Centre should function as the focal point for the attraction of investment and employment to the North West Sub-Region. On this basis, growth within the centre must occur at a rate consistent with its strategic role in relation to other activity centres within the North Western Corridor; and to a level sufficient to enable it to perform its desired role as a higher order central business district within the Perth Metropolitan Region. Furthermore, the growth of other activity centres within the City of Joondalup should also reflect this higher level objective.

Purpose

The development of the City of Joondalup LCS ~~is to be~~ was to be conducted in two stages. This first stage Part A report is intended to provide the following:

- A policy context to the LCS;
- An assessment of current and future economic growth and trends; and
- A description of the issues, challenges and implications for commercial areas within the City.

The findings of this report will inform the subsequent Part B - ~~Local Commercial Strategy~~ Shop Retail Assessment that will identify any specific amendments to the DPS to ensure that the scheme reflects the City's expectations for the long term economic growth of the City. Subsequently, Part C has been prepared to consider the implications for Bulky Goods retailing and Commercial Office accommodation.

The report provides a framework to inform decision making with respect to the growth and maturation of activity centres within the City of Joondalup. It includes a detailed review of activity centres within the City of Joondalup, including the features and benefits of each activity centre including physical amenity, accessibility and land availability along with an analysis of the current distribution of retailing and the economic performance of each activity centre throughout the City of Joondalup. In addition, the report includes an analysis of the performance of each activity centre in terms of the diversity of land use and level of development required in order to meet the diversity requirements of the Activity Centres Policy - SPP 4.2.

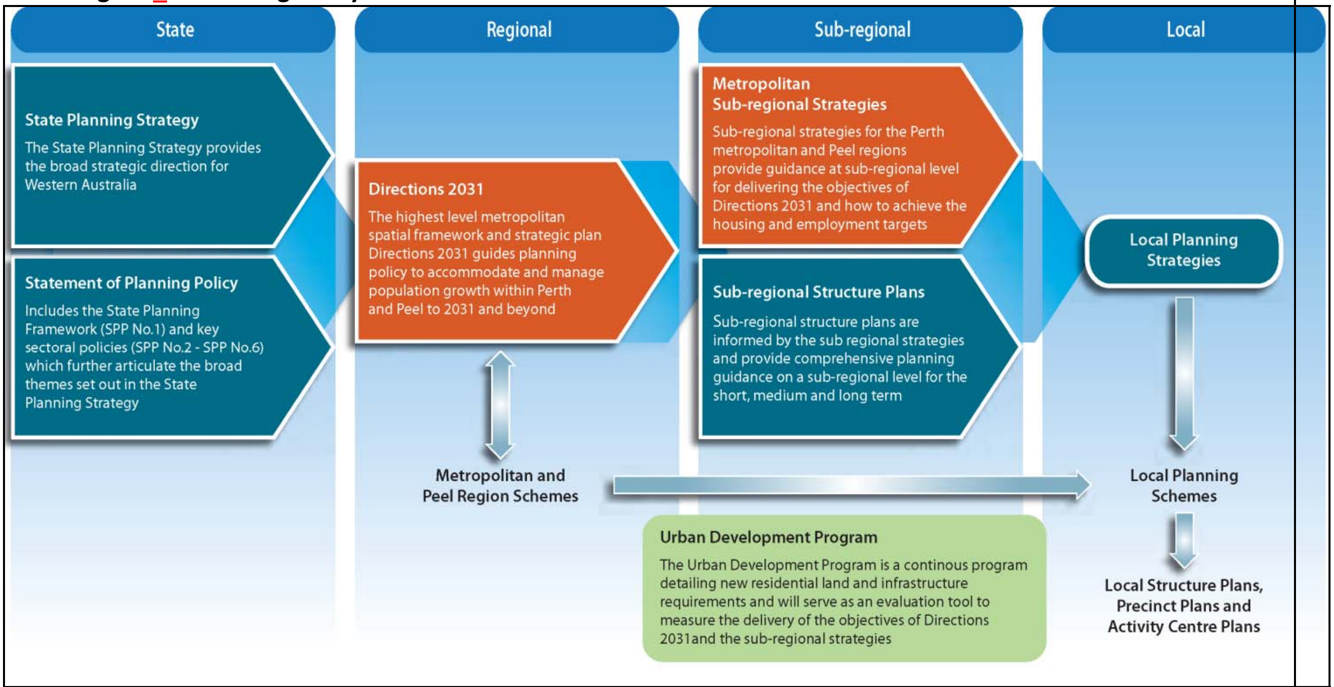
The research, analysis and recommendations of the commercial strategy will serve to implement the objectives of Directions 2031 and Beyond, while meeting the objectives and refining the outcomes sought under the Local Planning Strategy.

Part A Report

1. Policy Overview

The development of a Local Commercial Strategy (LCS) for the City of Joondalup is undertaken within the context of a planning policy framework. This framework is outlined below.

Figure 1~~1~~: Planning Policy Framework



Source: Directions 2031 and Beyond, Figure 5

In order to further inform the context of the development of the LCS for the City of Joondalup, the following sections review the relevant policies and strategies relating to the above framework.

1.1 Federal and State Government Policies

The Commonwealth Government, State of Australian Cities 2010 report refers to the ABS population forecasts which project (in the medium series of three scenarios) that the population of Australia will grow to 35.5 million by 2056 and that Perth will reach a population of 3.4 million by 2056 based on ABS medium growth series. The ABS high growth series projections (cat. 3222.0, Sept 2008) show Perth with a population of 4.16 million at 2056.

The Council of Australian Government Communiqué in December 2009 agreed that by 1 January 2012, all states will have in place capital city strategic plans that will meet the national criteria and noted that the Commonwealth will link future infrastructure funding decisions to meeting those criteria. National criteria will provide the platform to reshape cities and the criteria will ensure cities have strong, transparent and long term plans in place to manage population and economic growth, plans that address climate change, improve housing affordability and tackle urban congestion.

Directions 2031 and Beyond provides a framework to demonstrate how Western Australia will meet the national criteria.

1.1.1 Directions 2031 and Beyond (2010) and Draft Outer Metropolitan Perth and Peel Sub-Regional Strategy

Directions 2031 and Beyond: Metropolitan Planning Beyond the Horizon was published by WAPC in August 2010. The final report has been adopted by WAPC; it replaces the Network City Strategy and is a high level spatial framework and strategic plan to manage the growth of the metropolitan Perth and Peel region over the medium to long-term planning horizon to 2031 and beyond. The spatial framework outlines population growth scenarios and land use patterns for a medium to long term increase of half a million people by 2031, and prepares for a city of 3.5 million people through the adoption of a connected medium density model. Directions 2031 and B~~b~~eyond is closely aligned with SPP 4.2. Directions 2031 and Beyond has led to the establishment of sub regional strategies. The sub regional strategies for the central and five outer Metropolitan areas, including the NW sub-regional planning area, were released for comment in late 2010. The over-riding purpose of the outer sub-regional strategies is an urban expansion management program.

Overall the strategy has 2 key targets:

- 50% improvement on current infill trends, with a target of 47% or 154,000 of the required 328,000 dwellings as urban infill.
- 50% increase in the average residential density of 10 dwellings per gross urban zoned hectare, with a target of 15 dwellings per hectare in new development areas.

The draft Outer Metropolitan and Peel Sub-Regional Strategy outlines the key planning actions required in the north-west subregion. For the City of Joondalup, the key actions include:

- Develop an economic development and employment strategy for the north-west sub-region; and
- Finalise structure plan for the north-west sub-region, informed by the outer metropolitan and Peel subregional strategy final report.

Economic development and employment growth is regarded as essential in all local planning strategies and other local planning policies.

Analysis suggests that Directions 2031 and Beyond is based on low historic migration rates (average 120,000 per annum) and that a substantially higher population could be anticipated if ABS high, medium or low growth scenarios were adopted which assume a much higher migration rate (140,000 to 220,000 persons per annum). The strategies for outer metropolitan regions contain a range of population growth assumptions and make provision for 25 years undeveloped land in order to maintain a sufficient supply for future growth. The rate of urban growth will be monitored annually by the urban land monitor (Office of Land and Housing Supply) and the strategies will be reviewed every 5 years. In the NW corridor the key growth areas are identified as:

- Alkimos-Eglinton; and
- Yanchep-Two Rocks.

With areas for investigation at:

- East Wanneroo; and
- South Pinjar (industry).

The City of Joondalup is expected to contribute to the growth prospects in the NW Corridor. Directions 2031 and Beyond identifies the potential dwelling supply of 167,400 dwellings in the North West sub region under a Connected City scenario, with 1,400 new dwellings in Joondalup greenfield sites (principally at Burns Beach) and 10,900 new dwellings in Joondalup infill locations including Joondalup City Centre redevelopment. (It is noted that the 1,800 dwelling redevelopment yields for Tapping and Ashby were included for the City of Joondalup figures in the Draft Outer Metropolitan Perth and Peel Sub-Regional Strategy and should have be included in the City of Wanneroo. These dwellings and have been subtracted from the data for this report). This gives a total target for Joondalup of 12,300 additional dwellings by 2031.

The development of primary centres, which contain high levels of office development and decentralise CBD type activity from the City of Perth are considered critical in metropolitan sustainability and the long term goal of reaching a population of 3.5 million people. Whilst Directions 2031 and SPP4.2 do not identify such centres at present, it is anticipated that they will emerge as the metropolitan region matures. Such centres would have:

- A catchment of 250,000 people;
- House major institutions and higher levels of employment and economic activity than other centres in the region; and
- Make a significant contribution to national and state productivity.

Directions 2031 and Beyond forecasts the need for an additional 69,000 jobs (to achieve a target employment self-sufficiency of 60%) in the North West sub-region. As a starting point along this pathway, Joondalup has revised the City Centre Structure Plan to enable greater intensity and has made a submission to the State Government to attract large scale decentralising agencies seeking office sites and accommodation.

The Perth Capital City is the highest in the centre hierarchy followed by primary centres, of which none are identified in SPP 4.2. At the next tier down from primary centres are strategic metropolitan centres, including Joondalup, which have a broad metropolitan role. In the north metropolitan area, Yanchep (an emerging strategic metropolitan centre), Morley and Stirling are similarly identified. Each will act as a focus for a consolidating urban catchment and although they will have a strong retail focus, will also have a share of metropolitan sub regional offices, state government institutions (under the decentralisation policy) and a significant level of community health and education services.

The next tier of centres are the secondary centres, which in the wider Joondalup catchment include Alkimos (future secondary centre), Clarkson, Karrinyup, Two Rocks north (future), Wanneroo, Warwick and Whitfords.

Below the secondary centres are a multitude of district, neighbourhood and local centres. The strategy also identifies metropolitan attractors such as Hillarys Boat Harbour, Yanchep National Park and the Swan Valley.

Further state level planning studies to be released or finalised which impact upon the Joondalup Local Commercial Strategy will include:

- Perth Public Transport Plan ~~(currently released for public comment)~~
- Metropolitan Freight strategy
- Perth Bicycle Network Plan
- Metropolitan Parking Strategy

- Economic Development and Employment Strategy for the North West Sub Region

1.1.2 Public Transport for Perth in 2031 ~~(Draft for Consultation)~~(yet to be finalised)

The Perth Public Transport Plan impacts on the Joondalup Local Commercial Strategy by highlighting centres that have access to heavy or light rail and high frequency bus routes. The plan outlines three stages of public transport development including Stage One to 2020, Stage Two to 2031 and the final stage namely the “Ultimate Network” for a city of 3.5 million persons.

The centres impacted by the plan are:
- Joondalup – Existing rail infrastructure at 2010. Rail extension to Yanchep before 2020.
- Warwick – Existing rail infrastructure at 2010 (although some distance from the Activity Centre) and f~~F~~uture ~~Rapid~~ Bus Rapid T~~t~~ransit post 2031 (identified in Ultimate Network)
- Whitfords – Future Bus Rapid ~~Bus~~ T~~t~~ransit post 2031 (identified in Ultimate Network)
- Hillarys - Future Bus Rapid ~~Bus~~ T~~t~~ransit post 2031 (identified in Ultimate Network)

The implications for the Joondalup City Centre are that there will be increased access to the centre for the growing population north to Yanchep. This will contribute towards the Joondalup City Centre becoming more of a destination.

The Ultimate Network map shows bus rapid transit infrastructure connecting Joondalup, Whitfords, Hillarys and Karrinyup. The implications are that significant expansion of these activity centres to the extent that they will require high frequency public transport access will not be feasible until sometime after 2031. It is therefore be preferable to promote the Joondalup City Centre as a destination and centre for employment growth over other centres.

1.1.3 Statement of Planning Policy Activity Centres for Perth and Peel SPP 4.2 (2010)

Statement of Planning Policy Activity Centres for Perth and Peel (SPP 4.2) was released in conjunction with Directions 2031 and Beyond in August 2010 by the WAPC. SPP 4.2 represents a new strategic direction for the Perth Metropolitan Area which aims to realise the benefits of a more consolidated city, which include:

- A reduced overall need for travel;
- Support for the use of public transport, cycling and walking for access to services, facilities and employment; and
- A more energy efficient urban form.

SPP 4.2 specifies the broad planning requirements for the planning and development of new activity centres and the redevelopment and renewal of existing centres in Perth and Peel. Activity centres are taken to be places which vary in scale, composition and character but in essence are commercial focal points which include a combination of activities such as offices, retail, higher-density housing, entertainment, civic/community, education and medical services.

The now former 2001 Joondalup Centres Strategy is a good example of a traditional commercial centres strategy prepared in compliance with the now replaced Metropolitan Centres Policy. To achieve the strategic objectives of SPP 4.2 and Directions 2031, the revised 2011 Commercial strategy (and any review of the City’s Housing strategy) will need to consider all aspects of SPP4.2, including matters previously not covered including:

- Integration with public transport;

- Employment targets outlined in Directions 2031 and Beyond;
- Residential dwelling targets set out in SPP 4.2;
- Diversity performance targets (excluding residential land uses) for strategic regional centres and finer grained centre design considerations such as movement networks and associated accessibility, the quality of the public realm, land use mix and any associated synergies or conflicts, particularly opportunities to co-locate land uses within a centre. Sufficient land should be included in the definition of the centre to support a range of uses;
- Retail sustainability assessments (RSA); the WAPC has yet to prepare relevant practice guidelines for these; and
- Physical and spatial characteristics, for example unduly elongated centres or corridors will not be supported. A place based and integrated approach rather than a segregated and zoned approach is recommended.

The ~~2011~~ Local Commercial Strategy will also need to consider the significant economic activities undertaken outside the City's commercial/retail centres and ~~should~~ will be ~~aligned with~~ complemented by ~~both the~~ the new City of Joondalup Economic Development Strategy~~Plan~~ ~~2012 – 2015~~ and the Directions 2031 Economic Development and Employment Strategy for the North West Sub Region. The City has a range of strategic employment centres including Joondalup, Whitfords and Warwick, which will be important in achieving the employment target of an additional 69,000 additional jobs required in the North West Sub-Region set out in Directions 2031 and Beyond.

Of significance to Joondalup is the designation as a strategic metropolitan centre (along with 9 others) which underscores the important role that the Centre will play as a high intensity central city area. In the draft version of SPP 4.2 Joondalup was regarded as a Primary Centre, along with Rockingham. Whilst this category remains in the final version of SPP 4.2, no centres are named, but it is recognised that some strategic centres have the ability to develop to the primary centre level. Joondalup does not contain any specialised centres focussing beyond regional economic or institutional needs but may do so in future. This could potentially include a State Government agency focussed on Perth or State service delivery needs for example.

The centres within the City will require centre plans which will need to be consistent with the Model Centre Framework (MCF – Appendix 2 of SPP 4.2), the WAPC ~~guide for the preparation of activity centre structure plans~~ Structure Plan Preparation Guidelines. The plans may be prepared by local government or the private sector (land owners, developers). ~~Revised WAPC Guidelines for structure plan preparation are underway.~~ Plans should be prepared within 3 years of the finalisation of SPP 4.2 and structure plans should be endorsed prior to major development being approved. In the absence of a structure plan major developments would need to satisfy the MCF (section 1.1 of SPP 4.2). Retail Sustainability Assessments (RSA) will also be required where proposals would result in the total shop retail floorspace of a neighbourhood centre exceeding 6,000m^2 or proposals seeking expansion of a neighbourhood centre by more than 3,000m^2. Major development is defined to exclude non-retail uses. An RSA is also required where a proposal seeks to significantly increase the shop retail floorspace beyond the indicative floorspace contained in an endorsed local commercial strategy, where the indicative floorspace has been derived from a retail needs assessment.

A retail needs assessment should be included in the local planning strategy in order to provide the projected retail needs of the communities in the local government areas and its surrounds. A retail needs assessment forms a major part of this report.

The City of Joondalup and the ~~proposed~~ D~~d~~evelopment A~~a~~ssessment P~~p~~anels will be responsible for most forms of development within Activity Centres. The ~~Western Australian Planning Commission (~~WAPC~~)~~ is responsible for developments that may have significant regional implications. The WAPC will also be responsible for development proposals in the specialised centres such as major university and hospital precincts.

SPP 4.2 outlines the activity centre types that require an activity centre structure plan approved by the WAPC. These include strategic metropolitan centres and secondary centres and district centres if the floorspace exceeds 20,000m^2 Shop Retail.

The centres in the City of Joondalup required to have an activity centre structure plan endorsed by the Western Australian Planning Commission are:

1. Joondalup City Centre;
2. Whitfords; and
3. Warwick.

If any of the district centres in the City proposes to increase the Shop Retail floorspace beyond 20,000m^2 then this would trigger the need for the preparation of an activity centres structure plan in alignment with SPP 4.2 policy.

For all other centres an activity centre structure plan is not required, however SPP 4.2 suggests a specific area plan may be required by local government. For some centres less than 20,000m^2, the City may still recommend that a structure plan may be more appropriate.

1.1.4 Planning Bulletin 83 – Planning for Tourism (2011)

This policy ~~-~~guides decision-making by the WAPC and local government on subdivision, development and scheme amendment proposals for tourism purposes in the short term while detailed planning mechanisms are being established, including the preparation of a state planning policy. The recommendations are that local governments prepare a Local Tourism Planning Strategy which can be integrated with the Local Planning Strategy and Planning Scheme. Development proposals that impact upon potential or existing tourism sites will be referred to Tourism WA prior to WAPC or Local Government making a decision on development applications.

Tourism strategies are proposed to be incorporated into the City of Joondalup's new Economic Development Strategy.~~It would be prudent that the Local Tourism Planning Strategy be developed in alignment with the Local Commercial Strategy and Economic Development Plan 2012 – 2015.~~

1.1.5 Liveable Neighbourhoods (2007)

Liveable Neighbourhoods contains guidelines for new activity centres designed to achieve mixed use town centres and recommends a higher level of non-retail development than SPP 4.2. Desirable densities for residential land uses are also in conflict with SPP 4.2. It is implied in SPP 4.2 that Liveable Neighbourhoods will be revised to come into line with SPP4.2. ~~This also implies that SPP 4.2 takes precedence as a policy. Revised WAPC Guidelines for structure plan preparation are also underway.~~A review of Liveable Neighbourhoods is currently being undertaken by the Department of Planning.

1.1.6 DCP 1.6 – Planning to Support Transit Use and Transit Oriented Development

There are 6 railway stations in the City of Joondalup and a network of public transport bus routes servicing the local and regional transport needs of the City. The bus routes are well integrated with train services at

Joondalup, Greenwood, Whitfords and Warwick Stations and provide a high degree of accessibility to local facilities and amenities. The residential density targets for centres in SPP 4.2 are in line with those contained in development control policy 1.6. Whilst it is the aim of this policy to encourage intensity and diversity around transit nodes it is generally recognised that such uses around every station and bus stop in the area are inappropriate and unviable. It is likely that this policy and others in the suite of development control policies will be reviewed in the near future to align better with Directions 2031 and SPP 4.2.

1.1.7 Designing Out Crime Planning Guidelines (2006)

The planning and design of places, spaces and buildings can assist in reducing crime by the application of improvements to lighting, fencing, landscaping and surveillance of the area from buildings and land use. Peoples' behaviour, particularly in terms of the possibility of offending, as well as an individual's perception about their safety, can be influenced by the design of that environment. Good design can reduce opportunities for offending and improve feelings of safety. This design practice (often referred to as Crime Prevention Through Environmental Design, CPTED) is particularly important in public places associated with commercial areas such as activity centres, shopping malls and car parks. The guidelines establish performance criteria for most design conditions which are likely to emerge from the Joondalup local commercial strategy. The guidelines should be given due consideration by developers prior to submitting a development application. ~~The WAPC guidelines should be read in conjunction with the City's Community Safety and Crime prevention plan.~~ Qualified practitioners are able to conduct CPTED assessments and appraisals throughout the City in locations where redevelopment is proposed and where crime and safety issues are emerging. Development applications can be assessed in the same way.

1.1.8 Multi Unit Housing Code (WAPC Nov 2010)

The multi-unit housing code is an amendment to the WAPC ~~development control~~ State Planning P~~p~~olicy 3.1 Residential Design Codes aimed at guiding the design and development of multiple dwelling developments. The code is closely aligned to SPP 4.2 and contains specific guidance for multiple unit housing in activity centres. The code is more performance based than the existing R-Codes.

1.1.9 Retail Trading Hours Act 1987

The *Retail Trading Hours Act 1987* applies to retail shops in Western Australia south of the 26th parallel. It sets out the trading hours and rules covering various categories of retail outlets. Trading hours of restaurants, cafes and takeaway food shops are not covered by the Act.

In August 2012, new retail trading hours came into effect, allowing general retail trading on Sundays between 11am and 5pm. This was in addition to the extension to weeknight trading hours until 9pm, which was implemented by the State Government previously. ~~In October 2010, the Minister for Commerce released the *Whitegoods and other Consumer Durables* Issues *Paper* for public consultation. The Government is currently considering submissions and comments received on the paper, in order to determine the nature of any amendments required to the retail trading hours regime to allow for Sunday sales of whitegoods and other consumer durables.~~

1.1.10 Retail Trading Hours Amendment (2010)

Prior to the amended trading hours outlined above, ~~E~~expanded general retail hours ~~are~~ were available to shops in the Special Trading Precincts of Armadale, Fremantle, Joondalup, Midland and Perth. ~~Traders may choose when they open within the specified trading hours. The specific details are~~ were ~~set out in the Retail Trading Hours (Special Trading Precincts and Holiday resorts) Regulations (No.2) 2010.~~ The City of Joondalup former Special Trading Precinct is shown in Figure 2~~Figure 2~~.

Figure 2: Joondalup Special Trading Precinct

The *Retail Trading Hours (Special Trading Precincts) Order (No. 2) 2010* has now been repealed. ~~sets the closing hours for general retail shops in the Joondalup special trading precinct as outlined below.~~

~~Table 1: Special Trading Precincts Closing Hours~~

~~Days~~	~~Hours closed~~
~~Sunday~~	~~until 11 a.m. and from and after 5 p.m.~~
~~Monday, Tuesday, Wednesday, Thursday, Friday~~	~~until 8 a.m. and from and after 9 p.m.~~
~~Saturday~~	~~until 8 a.m. and from and after 5 p.m.~~

~~*Source: Retail Trading Hours (Special Trading Precincts) Order (No. 2) 2010*~~

~~In addition to the above closing times, general retail shops in the Joondalup special trading precinct are required to be closed all day on ANZAC Day, Good Friday and Christmas Day.~~

~~The Joondalup special trading precinct therefore has had an advantage over other centres in the City in terms of being allowed to provide activity for a significantly greater proportion of time each week,. however, this advantage has now been 'normalised', with all other centres enjoying the same retail hours. This impacts on the types of activities that could locate in the City and the proportion of household and tourism expenditure that may be attracted to the centre.~~

1.2 City of Joondalup Strategies and Policies

1.2.1 Draft Local Planning Strategy

The draft Local Planning Strategy (LPS) predates the final version of Directions 2031 and Beyond and SPP 4.2 but still sets a relevant vision for the City. The purpose of the draft Strategy is to enable Council and the community to determine the vision and strategic planning direction for the City of Joondalup for the next 15 to 20 years. The key points for consideration in the preparation of the revised Commercial strategy are:

- Joondalup City Centre is regarded as a primary anchor in the NW corridor with substantial commercial development of suitable and substantial height and bulk in the CBD. The City has notable strengths in the retail, education, health and community services sectors which collectively provide almost half the City's jobs;
- More diverse uses are to occur in other commercial centres;
- Urban design principles are to guide redevelopment of commercial centres outside the City Centre;
- Opportunities to define the character of the local area within and around commercial centres are to be identified; and
- Built form outcomes for the coastal nodes needs special consideration.

While the North West corridor population overall is expected to continue to grow rapidly, the LPS is set in a context of limited local growth, as Joondalup's population is not expected to increase dramatically over the next 20 years. The key areas for new development at Burns Beach and Iluka are underway. The focus of corridor population growth is in the City of Wanneroo. This will have some effect on the centres in Joondalup that service the wider corridor, in particular Joondalup City Centre. Moreover a number of population dynamics are set to influence the Local Commercial Strategy including an aging population, a trend towards smaller households and a demand for greater housing diversity. A demand for more non retail space to cater for local population health, community service and education needs may also occur along with greater uptake of internet/online shopping.

The economic impact for Joondalup of population growth in Wanneroo is expected to be only in the short to medium term until centres such as Yanchep and Alkimos start to develop and mature. From an industrial land perspective no further provision is made in Joondalup and the main focus is likely to be Neerabup in the City of Wanneroo. The LPS highlights that in future the major challenge for the City is to ensure there is a suitable level of employment land and commercial floor space in order to generate the required level of economic activity.

The LPS envisages that future employment opportunities will arise through the development of the Ocean Reef Marina site, the train station precincts and through the redevelopment of existing Commercial Centres in established suburbs. The LPS recognises that redevelopment opportunities (predominantly residential) may exist in the suburbs built in the 70s and 80s such as Marmion, Sorrento, Kallaroo, Mullaloo, Ocean Reef , parts of Hillarys and the suburbs of Padbury, Craigie, Beldon and Heathridge and commercial and mixed use intensity (additional height and density) may occur in the Joondalup City Centre.

One of the actions contained in the draft Local Planning Strategy is to review the provisions of the District Planning Scheme No. 2 to allow more diverse uses to occur in Commercial Centres.

1.2.2 Local Housing Strategy

The final version of the draft Local Housing Strategy was endorsed by Council at its April 2013 meeting and on 12 November 2013, the WAPC resolved to support the LHS. ~~The draft Local Housing Strategy has been reviewed following a public consultation period. Council considered the public submissions received, and at its meeting held on Tuesday 15 February 2011, resolved to adopt the strategy and forward it to the Western Australian Planning Commission (via the Department of Planning) for endorsement.~~

~~If the strategy is endorsed by the WAPC, t~~The Local Housing Strategy's recommendations, including any density increases, will now be implemented through a scheme amendment, ~~a new~~ the Local Planning Scheme and a range of supporting local planning policies.

It is anticipated that the ~~endorsement of the strategy by the WAPC and the~~ inclusion of ~~its~~ the LHS recommendations in the ~~City's new~~ Local Planning Scheme will be finalised in the next two to five years. This includes a public consultation period during the ~~development~~ implementation of the Strategy's recommendations in ~~of~~ the ~~new~~ Local Planning Scheme.

The draft Local Housing Strategy has identified 10 areas in the City as being suitable for higher residential densities and these are shown in Figure 3~~Figure 3~~. The housing opportunity areas are:

- Within easy reach of commercial centres;
- Accessible to main public transport services; and
- Have good community facilities and parks.

The strategy identifies Burns Beach and Iluka as the two key locations with substantial land releases in the pipeline (~~2,130~~ 1,014 dwellings), and some greenfield development potential at Currambine (~~132~~ 231 dwellings), ~~Edgewater (23 dwellings),~~ Harbour Rise (~~24~~ 101 dwellings) and the development of the former ~~primary~~ school sites at East Greenwood (71 dwellings), ~~and~~ Craigie Heights (56 dwellings) and Craigie (high school) (177 dwellings).~~and for a~~Apartments in Joondalup City Centre could be in the order of ~~(~~1,500 dwellings~~)~~. In the longer term, the development of the Ocean Reef Marina may produce around 825 dwellings.

Elsewhere in the City, the total available infill is estimated to be a maximum of approximately ~~2,671~~2,605 dwellings (table 13 of the draft strategy) this is mostly at the density coding R20. It is perhaps unrealistic to expect all these infill lots to be fully developed by 2031 and the strategy assumes that ~~only~~ approximately ~~35~~85% of these will be developed (i.e. ~~935~~ 2,214dwellings).

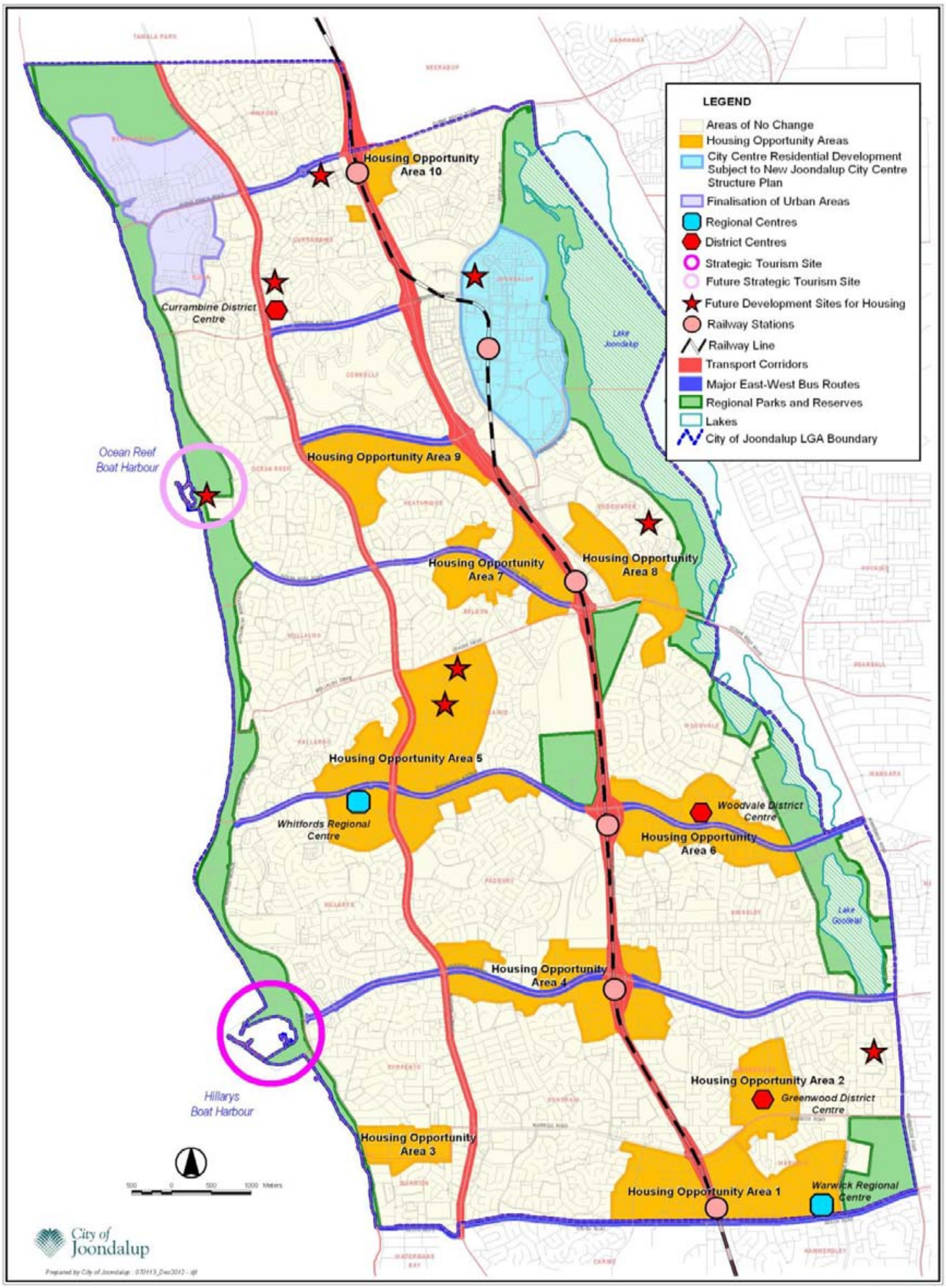
Opportunities for other future housing sites have been identified in the draft Housing Strategy referred to as 10 Housing Opportunity Areas (HOAs) as shown in Figure 3~~Figure 3~~ extracted from the strategy. Some of the HOAs will have greater infill opportunities if codes are above R20. It is also contended that infill could "spin off" around the HOAs at the existing R20 zoning in some locations. It is worth noting that significant infill is now starting to be achieved in some of the inner and middle suburbs, such as Glendalough and Mt Hawthorn, when zoning is increased from the former R10/15/20 to around R60. The implication for Joondalup is that further infill may become possible, but allowable densities would need to be increased substantially beyond R80.

~~In addition, initial planning studies prepared since the strategy was published suggest that sites at Ocean Reef (824 dwellings) and the former Craigie High School site (175 dwellings+ subject to structure plan details) could contribute a further 1,000 dwellings.~~

This would bring the total number of dwellings developable by 2031 to approximately ~~9,600~~ 25,145 at a take-up rate of 85%. It is noted that the WAPC Delivering Directions 2031 Annual Report Card 2012 indicates a housing target of 12,110 for the City of Joondalup. The potential dwelling numbers under the draft Local Housing Strategy are well above this target, however, the actual delivery of these dwellings will depend on the eventual take-up rate when the new codings are implemented. ~~Clearly if the take up rate or conversion rate of the infill sites was greater than 35% (35% was initially suggested by the Department of Planning to inform the draft Local Housing Strategy) the number of net additional dwellings could be greater. At the top of the range (100% take up/conversion rate) a figure of 18,400 could be possible from all identified greenfield and infill opportunities.~~

~~The Local Housing Strategy dwelling estimates of approximately 9,600 additional dwellings fall short by about 500 dwellings of the Directions 2031 Business as Usual scenario and fall short by approximately 2,600 dwellings of the Connected City scenario. Achieving the Connected City scenario dwelling targets could be achieved by increasing the assumed take-up rate in the HOAs to 55% or increasing the number of additional dwellings in the City Centre from 1,500 to around 4,100 or a combination of these. For example, increasing the take up rate in the HOAs to 47% and increasing the number of dwellings in the City Centre to 2,540 would also achieve the Connected City dwelling target scenario.~~

Figure ~~3~~3: Housing Opportunity Areas, Joondalup Draft Local Housing Strategy ~~2010~~2013



~~The additional dwellings likely to be located in the City of Joondalup based on the draft Local Housing Strategy as well as known additional development sites such as the former Craigie Senior High School site are detailed below. Other potential scenarios are also shown to illustrate how the Directions 2031 and Beyond "Connected City" targets might be achieved.~~

~~Table 2: Housing Opportunity Areas and Other Known Development Sites Dwellings Projections~~

~~Housing Opportunity Area~~	~~Description~~	~~Draft LHS Additional Dwellings – 35% Take-Up~~	~~Potential Additional Dwellings at 55% Take-Up~~	~~Potential Additional Dwellings 35% Take-Up plus Additional City Centre~~	~~Potential Additional Dwellings 47% Take-Up plus Additional City Centre~~
~~1~~	~~Davallia Rd to Warwick Centre~~	~~601~~	~~939~~	~~601~~	~~807~~
~~2~~	~~Greenwood Village~~	~~152~~	~~237~~	~~152~~	~~204~~
~~3~~	~~Sorrento laneway~~	~~162~~	~~253~~	~~162~~	~~217~~
~~4~~	~~Marmion Ave to Greenwood Station~~	~~491~~	~~767~~	~~491~~	~~659~~
~~5~~	~~Whitfords Centre to Whitfords Station~~	~~995~~	~~1,556~~	~~995~~	~~1,337~~
~~6~~	~~Whitfords Station to Goollelal Drive~~	~~337~~	~~526~~	~~337~~	~~452~~
~~7~~	~~Belridge Centre to Edgewater Station~~	~~291~~	~~455~~	~~291~~	~~391~~
~~8~~	~~Edgewater Station to Trappers Drive~~	~~269~~	~~421~~	~~269~~	~~361~~
~~9~~	~~Heathridge~~	~~349~~	~~545~~	~~349~~	~~468~~
~~10~~	~~East Currambine Station~~	~~136~~	~~212~~	~~136~~	~~182~~
-	~~Burns Beach/Iluka~~	~~2,130~~	~~2,130~~	~~2,130~~	~~2,130~~
-	~~City Centre~~	~~1,500~~	~~1,500~~	~~4,155~~	~~2,538~~
-	~~Other Known Sites~~	~~300~~	~~300~~	~~300~~	~~300~~
-	~~Outside HOAS~~	~~935~~	~~1,461~~	~~935~~	~~1,255~~
-	~~Craigie SHS site~~	~~175~~	~~175~~	~~175~~	~~175~~
-	~~Ocean Reef~~	~~824~~	~~824~~	~~824~~	~~824~~
-	**~~Total Potential Additional Dwellings~~**	**~~9,645~~**	**~~12,300~~**	**~~12,300~~**	**~~12,300~~**

~~Source: Draft City of Joondalup Local Housing Strategy, City of Joondalup Consultation, Directions 2031 and Beyond (12,300 dwelling target)~~

1.2.3 Draft Joondalup City Centre Structure Plan

The draft Joondalup City Centre Structure Plan is intended to facilitate the growth of a city that demonstrates an intense mix of opportunities to live, work, play and learn with convenient transport links to the surrounding region. The draft Joondalup City Centre Structure Plan is required to be endorsed by the Western Australian Planning Commission prior to its finalisation and implementation. In addition, Amendment No. ~~42~~64 to DPS2 ~~(District Planning Scheme)~~ is required to be approved by the Minister for Planning prior to the amendments coming into effect.

Under the proposed Structure Plan provisions, there will be an emphasis in the Central Core ~~Zone~~ district on specialty shops, cinemas, personal service establishments, restaurants, alfresco dining and offices on the ground floor. The retail component of the Central Core will focus on a range of comparison, convenience and specialty retailing. The objectives of the Central Core ~~Zone~~ district include allowing a broad range of appropriate land uses to encourage day and night activity. This includes encouraging tourism through the provision of accommodation and entertainment uses.

The Central Core ~~Zone~~ district includes the Lakeside ~~Special Control Area~~Precinct which adds objectives to ensure that development:

- Integrates with the urban and social fabric;
- Encourages new pedestrian connections; and
- Achieves the benefits of transit oriented development.

There are two building height categories, one with a minimum building height of 5 storeys, the other with no minimum height, within the Lakeside Special Control Area. There is no maximum building height and no minimum or maximum residential density in the Central Core.

The City Fringe ~~Zone~~ district is intended to accommodate a mix of land uses that support and reinforce the existing educational and medical uses within the ~~zone~~ district with a minimum building height of 2 storeys and a maximum building height of 5-8 storeys.

The Mixed Use Corridor ~~Zone~~ district is intended to accommodate a mix of residential development integrated with commercial, retail and dining land uses. The ~~Zone~~ district will have a strong residential focus and may attract smaller commercial footprints which are compatible with residential developments.

The Business Boulevard ~~Zone~~ district is intended to accommodate a range of retail and commercial uses that may have a lesser need for pedestrian exposure and attracts people for specific consumer needs such as banks, professional services and specialty bulky goods stores with a minimum building height of 2 storeys and a maximum of 8 storeys.

The Business Support ~~Zone~~ district (maximum height of 3 storeys) is intended to accommodate a wide range of business, warehouse, showroom, light and service industrial uses in a business park style setting with attractive buildings and well maintained landscaping. It will accommodate a mix of land uses that do not rely heavily on pedestrian traffic.

The Inner City Residential ~~Zone~~ district is intended to provide dwelling types ranging from lower density detached houses to multi-storey apartment buildings and terrace housing. ~~In addition the plan proposes a central park zone and a recreation zone around the Arena.~~

The Residential Design Codes do not apply to the Central Core ~~Zone~~, City Fringe ~~Zone~~, Mixed Use Corridor ~~Zone~~ or Business Boulevard districts and accordingly provisions for residential development are contained within the draft Joondalup City Centre Structure Plan.

1.2.4 Economic Development ~~Plan 2007 – 2011~~Strategy

A new Economic Development Strategy is currently being developed and is proposed to replace t~~T~~he City's Economic Development Plan 2007–2011. The Economic Development Strategy will consider the issues and challenges that face the City in realising its potential and aspiration of becoming 'A Global City: bold, creative and prosperous', as set out in the City of Joondalup Strategic Community Plan 2012-2022 'Joondalup 2022', with an emphasis on delivering and supporting the following key themes of 'Joondalup 2022':

- Economic Prosperity, Vibrancy and Growth;
- Quality Urban Environment;
- Community Wellbeing;
- Financial Sustainability.

The Economic Development Strategy will follow on from the findings and recommendations of the Local Commercial Strategy and provide targeted responses to key areas within the economy that are consistent with the City's ambitions of establishing itself as the first Primary Centre within the Perth Metropolitan Area. ~~provides a framework for a range of activities designed to encourage greater commercial activity and build capacity for future local economic growth. A revised~~ new ~~economic development plan is currently being developed. The City is home to more than 13,400 registered businesses with strong health, education, tourism, retail, finance and professional service sectors. These businesses service a growing regional population of approximately 294,000 which is expected to increase to over 400,000 by 2031.~~

~~The Economic Vision is that the City will continue to grow as the Strategic Regional Centre providing a knowledge and service hub for the North-West Corridor. The strategic priorities of the Plan are:~~

- ~~to maximise local industry employment;~~
- ~~maximise local jobs for local people;~~
- ~~to ensure infrastructure, land and property accommodate and support the aim to maximise growth; and~~
- ~~to promote collaboration of all relevant stakeholders in order to achieve this goal.~~

~~This recognises the agglomeration and scale economies that are only available with the concentration of higher order economic activity in a very small number of main locations in a relatively low density and sprawling environment such as the North West corridor.~~

~~Directions 2031 and Beyond forecasts the need for an additional 69,000 jobs (to achieve a target employment self-sufficiency of 60%) in the North West sub-region based on an additional 65,000 dwellings within the region.~~

~~The 2001 data contained in the Economic Development Plan showed that Joondalup has relatively low levels of jobs in the Finance and Business and Government and Defence sectors compared to retail and health and targets should be established for attracting a large number of jobs in these professional sectors over the next 20 years. More recent data is detailed in section 2 of this report.~~

1.2.5 ~~Community Development Strategy 2006 – 2011~~Joondalup 2022 – Strategic Community Plan 2012-2022

~~The Community Development Strategy and Policy provides a reference document for the achievement of the City's community vision. The Community Development Strategy responds to the social needs and aspirations of the community, summarises the key issues facing the community, and puts in place strategies to address the identified needs and contribute to community wellbeing.~~

~~One of the major objectives of the Strategy is to strengthen community life and connections, and to provide a mechanism for focusing discussion, promoting research and developing organisational capacity through policies, processes, programs and partnerships in order to address the diverse social requirements of the City. The imperatives for the City contained in the Community Development Strategy relate to the development of a LCS including:~~

- ~~Planning for and facilitation of provision for age appropriate services, facilities and opportunities, including planning for a growing retired population who may have insufficient retirement funds at their disposal;~~
- ~~Planning the development of recreational, intellectual and part-time employment or volunteering opportunities for a growing retired population;~~

- ~~Provision of a high standard of infrastructure to cater for community demands for leisure, community services and cultural development opportunities;~~
- ~~Establishment of a policy position related to ability to pay for services and facilities;~~
- ~~Establishment of a policy position of co-location of services and facilities;~~
- ~~Support systems for those less able to provide entirely for themselves;~~
- ~~Recognition of the needs of a relatively stable population which may have limited family or cultural networks within the City and its environs;~~
- ~~Support systems for an upwardly mobile population with relatively high educational aspirations;~~
- ~~Development of economic opportunities within the City; and~~
- ~~Planning for a youth 'bulge' and concomitant services.~~

~~Delivery of the above imperatives will have implications for the provision of community related floorspace within the City.~~
Joondalup 2022 is the City's long-term strategic planning document that outlines the commitment to achieving the vision and aspirations of its community and regional stakeholders. The draft Local Commercial Strategy will support a range of objectives within Joondalup 2022 including but not limited to:

- Quality built outcomes – For the City's commercial and residential areas to be filled with quality buildings and appealing streetscapes.
- City centre development – To have quality and diverse buildings within the Joondalup City Centre that enhance the vitality and vibrancy of the urban space.
- Primary Centre Status – For the Joondalup City Centre to be the first Strategic Metropolitan Centre in Western Australia to achieve Primary Centre Status.
- Activity Centre development – To have revitalised Activity Centres that are multi-purpose and provide for housing diversity and enhanced liveability.

1.2.6 ~~Policy 3.3 –~~ Centres Strategy Policy (2001)

In order for the City of Joondalup to plan in alignment with Directions 2031 and Beyond and SPP 4.2, which replaces the previous Metropolitan Centres Policy, there ~~is~~ was a need to replace the ~~City of Joondalup Policy 3.3~~ City's Centres Strategy. It ~~is~~ was ~~therefore~~ intended that ~~Policy 3.3~~the Centres Strategy ~~will~~ be replaced by the Local Commercial Strategy when finalised. However, following a section 76 order by the Minister for Planning under the Planning and Development 2005, Amendment No. 66 to DPS2 was implemented to better align the scheme with SPP4.2. Among other changes, the maximum retail floorspace caps for centres identified within DPS2 were removed. On this basis it was considered appropriate to rescind the Centres Policy to ensure the City's policy did not conflict with SPP4.2.

The purpose of the rescinded 2001 Centres Strategy ~~is~~ was to interpret, apply and implement the ~~draft~~ 1999 Metropolitan Centres Policy. The specific objective of the policy ~~is~~ was to promote retail and incremental expansion of existing centres throughout the City of Joondalup. This included~~s~~ the promotion throughout the suburbs the continuing evolution, development and expansion of small town and village centres, each a microcosm of the city centre, to become the meeting places for people, the economic and social focus, in harmony with the local communities in which they are situated.

The strategy also ~~makes~~made specific recommendations regarding the roles and functions of specific centres for the period of the strategy (to 2006). These are outlined below for the major centres.

City Centre:

- The policy of actively promoting Joondalup City Centre in favour of competing centres should be continued, but should be reviewed after that time (2006).
- In the long term, the Joondalup City Centre should continue to develop in accordance with approved structure plan towards a net lettable area (NLA) of approximately 100,000m^2 although this figure should not be restrictive.
- There should be a sustained effort (including active lobbying by the Council) to attract tertiary sector (office) employment generating land uses.
- The employment target of 45,000 jobs, while optimistic on current trends, should be retained.

Warwick Centre

- The Council consider any proposals for expansion of the centre or the establishment of mixed business in peripheral areas in the context of an approved structure plan based on 'main street' principles.

Whitford Centre

- Expansion to Whitford Centre is restricted to 50,000m^2.
- Expansion should be in accordance with regional guidelines, in the context of intensification of surrounding land use (conversion of adjoining houses to non-retail mixed use), diversification of land use within the site, and an agreed structure plan

The strategy concludedd~~s~~ that at the time of developing the strategy (2001) the City of Joondalup was under-supplied with retail and commercial floor area, relative to its population, when compared with the metropolitan region as a whole, or the more mature urban areas immediately to the south of the City, in the City of Stirling. The strategy also lists the maximum Shop Retail net lettable area (NLA) for each centre but it should be noted that these figures in some cases differed to the maximum NLA contained in the DPS2 ~~(2006) No.2~~.

1.2.7 District Planning Scheme No. 2 (DPS~~-~~2) Overview

DPS~~-~~2 was adopted for final approval by the C~~c~~ity of Joondalup in September 2000. ~~and has 50 amendments.~~ The scheme contains 12 zones, some of which have the potential to overlap, such as business, commercial, mixed use and centre.

The Model Scheme Text (1999 WAPC) is under review and in the interim advice regarding the development of Planning Schemes is contained in the Local Planning Manual developed by the WAPC in 2010. The Planning Manual suggests a more simplified system of zones for common use in Schemes which aligns to the State Planning Policy 2.4 activity centres.

DPS~~-~~2 includes provisions for development requirements or standards which are generally applied on a zone wide basis. ~~and in the case of commercial centres are applicable to the centres identified in Schedule 3 of the Scheme.~~ A review of ~~the~~ DPS2 should consider the potential for closer alignment with WAPC policies relating to Activity C~~c~~entres and Transit Oriented Development and opportunities for providing incentives to generate greater intensity and intensity of employment development in Joondalup City Centre and selected district centres. Additional comment is provided on these points in section 5.6.1~~5.6.1~~ of this report.

1.3 Summary Implications for the City of Joondalup

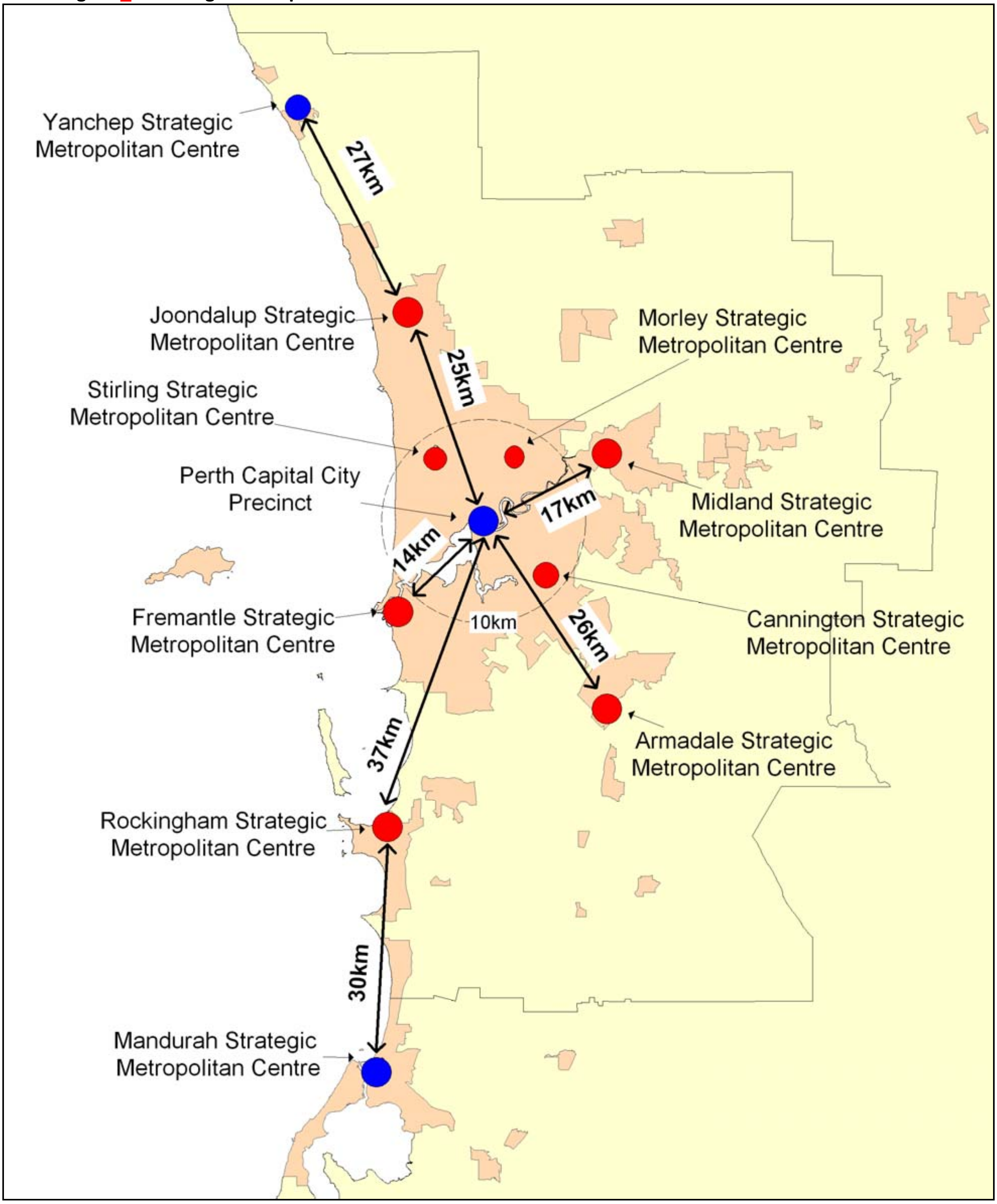
The ~~City of~~ Joondalup City Centre was originally intended to be the primary ~~city~~ centre within the NW Corridor and was created via an Act of State Parliament in 1977. It is approximately 25 kilometres from the City of Perth via the Mitchell freeway and passenger rail. It is regarded as a strategic regional centre in

Directions 2031 and Beyond and has attracted the West Coast Institute of Training, Edith Cowan University, Police Training Academy, a Business Park, a major Hospital and major shopping centre in the last 20 years. The City faces a challenge over the next 20-30 years as the North West corridor development stretches its boundaries to the north, with a secondary centre proposed at Alkimos 15 kilometres north and a further proposed strategic regional centre at Yanchep 30 kilometres north of Joondalup.

The City of Wanneroo, in which these new centres are located, is planned to accommodate rapid population and economic growth over the next 20 years (61% growth forecast by 2031) and will be a main focus of Perth Metropolitan activity. The Yanchep centre has a major economic development program (IDEA) which aims to attract high technology and knowledge base enterprise to Yanchep. Some companies are already 'signed up' and others are in the pipeline. The centre is likely to attract events arena, sport stadium, business parks, university, hospital and other facilities associated with a larger regional catchment. As the biggest greenfield development in the history of Perth it has sufficient land to attract major investment and institutional development. It is early days for Yanchep and the centre will not emerge for another 10 years and will not reach a level of maturity for perhaps 30-40 years. However the marketing is well underway.

It is therefore likely, that in the longer term, the North West corridor will be served by two main centres, namely Joondalup City Centre and Yanchep, each of approximately the same scale. The following map shows their relative location.

Figure 44: Strategic Metropolitan Centre Locations



The challenge for the City will be to provide a sustainable and affordable place to work and live, retain overseas students and their families and to minimise the 'leakage' of investment and skills to other centres, including the Perth CBD. This will only be achieved through energetic economic development activities, incentives of project ready sites and streamlined planning approvals with a continued focus on attracting high quality tertiary and secondary education establishments and knowledge based businesses and industries. Maximum advantage must be taken of State and private investment opportunities in the short term, that is, for the next 15 years. This will enable the Joondalup City Centre to mature and establish itself as a "place to do business", and to realise agglomeration economies.

Within the boundaries of the City there are also challenges to sustain the CBD as the primary centre for shopping, entertainment and business as the secondary centres of Warwick and Whitford attract investment and redevelopment opportunities. The opportunity exists for the City through a future review of the draft Local Housing Strategy and the new Economic Development ~~Plan~~ Strategy to be more assertive in its policies to intensify and diversify land uses around the Joondalup City Centre and to maintain pro-active planning policies which seek to maximise the amount of residential infill available within all centre catchments.

In this way the secondary centres of Whitford and Warwick will be able to absorb sufficient trade from the growing population without jeopardising the future growth and consolidation of the Joondalup City Centre. The Joondalup City Centre must continue to focus on its core strengths of health, education, community services and retail, where potential for employment self-sufficiency and self-containment is relatively high compared to other employment types. It is unlikely that the City will achieve higher job numbers in manufacturing as there is limited land availability in the City. Wanneroo, Neerabup and Yanchep-Two Rocks are likely to be the main location for this type of employment.

The ~~existing~~ former Centres Strategy has enabled the Whitfords centre to expand Shop Retail floorspace to around the 50,000m^2 ~~maximum~~ level indicated in SPP 4.2 as well as allowing for ~~significant~~ expansion at Joondalup to around 75,000m^2, which is short of the ~~maximum~~ indicative level of 100,000m^2 recognised under the ~~current~~ former City of Joondalup strategy. This implies that the existing strategy has worked to the extent that it has enabled the promotion of the Joondalup in favour of competing centres and allowed for expansion of employment in industries other than retail. With the ~~recent~~ release of Directions 2031 and Beyond as well as SPP 4.2, it is now an appropriate time to ~~revise the existing City of Joondalup Centres Strategy and~~ provide the City with guidance as to what changes may be considered and the implications these changes are likely to have for the City.

2. Economic Assessment

2.1 Background Catchment Demographics Analysis

There has been a significant amount of analysis already done on the demographics in the City of Joondalup with the draft Local Housing Strategy containing a comprehensive profile of the region. There is also a great deal of information available on the City of Joondalup economy on the Economy ID website. The economic assessment in this report focuses on the issues regarding population projections, analysis of employment provision, land supply implications and infrastructure implications of growth in employment floorspace. These are the specific economic elements that impact on the development of the LCS. Information from Economy ID is also included in the discussion to provide the latest available information.

2.1.1 Population and Dwelling Projections

The Perth North Metropolitan Area includes the City of Joondalup, the City of Wanneroo and the City of Stirling. The population of this area is projected to grow substantially over the next twenty years. It is important to consider the potential population growth in these LGAs in developing the commercial strategy for the City of Joondalup, as there is a high degree of interaction between the areas. This is particularly so in the case of the main Joondalup City Centre commercial area, as this centre is likely to function as a primary centre for the entire corridor for the foreseeable future. Joondalup's importance to the region is only likely to be rivalled once work progresses on large scale developments at Yanchep and this may take between 30 and 50 years.

The primary source of population projections for planning purposes has been the WA Tomorrow publication which is based on 2001 census data. The current version of this document was released in 2005, with an update due be published in the near future. In the period since the initial publication, Australia in general and Western Australia in particular have experienced high levels of population growth as a result of high levels of net international migration and an increase in fertility rates. In 2008, the ABS made available a set of Statistical Local Area (SLA) based population projections that had been developed for the Department of Health and Ageing (DoHA). This dataset is based on the 2006 Census and includes more recent trends in migration and fertility. However, it should be noted that the projections are not official ABS data and have been produced primarily to meet the needs the DoHA.

Additionally, projections have been developed as part of Directions 2031 and Beyond process at the corridor level but these projections do not easily translate to local government area level. Generally under Directions 2031, the population for the outer areas is planned to be lower than other forecasts due to the anticipated take up of infill in the inner areas, resulting in higher population projections for inner areas such as the City of Stirling and lower projections for the City of Wanneroo to 2031.

The following table shows the population projections for the Perth North Metropolitan area according to WA Tomorrow (2005).

Table ~~1~~2: Projected Population Growth – WA Tomorrow

WA Tomorrow	2009	2011	2016	2021	2027	Change 2009-2027
Joondalup	153,717	152,919	154,074	157,365	160,190	6,473
Stirling	185,192	187,514	196,368	201,267	211,459	26,267
Wanneroo	134,985	146,840	170,984	201,154	232,300	97,315
Total North Metropolitan	**473,894**	**487,273**	**521,426**	**559,786**	**603,949**	**130,055**

Source: WA Tomorrow (WAPC, 2005)

The data indicates that the region will experience population growth of 130,000 between 2009 and 2027 with a total population of over 600,000 persons at 2027.

The following table shows the population projections for the Perth North Metropolitan area according to unofficial ABS Department of Health and Ageing population projections.

Table ~~2~~3: ABS Population Projections for the Department of Health and Ageing

ABS DoHA Projections	2009	2011	2016	2021	2027	Change 2009-2027
Joondalup	158,164	159,347	162,168	164,618	166,678	8,514
Stirling	195,853	201,502	215,652	229,790	246,382	50,529
Wanneroo	143,903	162,464	210,583	260,757	322,867	178,964
Total North Metropolitan	**497,920**	**523,313**	**588,403**	**655,165**	**735,927**	**238,007**

Source: ABS Department of Health and Ageing Population Projections Unofficial (2008)

In contrast to the WA Tomorrow population projections for the region, the ABS projections show an additional 238,000 persons between 2009 and 2027 with a total population of almost 736,000 at 2026. The differences in these projections are very significant and present a challenge in terms of modelling the amount of retail and other commercial floorspace that will be required to service the needs of the region. More recent ABS Estimated Resident Population data (March 2011) suggests that the preliminary population estimate of the City of Joondalup is about 164,500 persons at June 2010, which is similar to the ABS unofficial projection for 2021.

This compares with estimated resident population data for Wanneroo and Stirling with populations of 150,106 and 202,014 respectively at June 2010, which are more in line with unofficial projections. The Census of 2011 will provide more accurate population figures for the region and enable projected population growth models to be reviewed using 2011 base line data.

Furthermore, Directions 2031 and Beyond adds other growth scenarios which also need to be considered given that it is now the guiding framework for regional planning in the Perth and Peel region.

Through discussions with the Department of Planning ~~(Steve Ryan 25/2/2011 and Tom Mulholland 18/3/2011)~~ and assessing the available data for dwelling projections for small areas (Main Roads Transport Zones) it has been decided to use a modified dwellings growth scenario to model the retail demand within the City of Joondalup. The projections utilised accommodate and account for potential infill yields identified within the current Local Housing Strategy. Retail development within the City of Joondalup will need to meet demand arising from approximately 242, 435 dwellings by 2026 in the wider catchment. This broadly assumes a greater amount of infill in the City of Stirling and City of Joondalup. This strategy makes recommendations limited to a 15 year timeframe to 2026, given the higher uncertainty associated with projections extending over a longer timeframe.

To model the indicative maximum amount of retail floorspace required in City of Joondalup complexes, dwelling projections contained in the latest Metropolitan Land Use Forecasting System (MLUFS) with an additional adjustment upward to account for higher ABS population projections for the corridor overall to project potential higher retail demand in the City of Joondalup by 2031[1]. Note that the MLUFS shows maximum dwelling capacity for each MRTZ and these capacities are not exceeded in the model. The Local Housing Strategy development and infill yields are also taken into account. This approach has been discussed and agreed with the Department of Planning (Tom Mulholland 18/3/2011). The dwellings projections used are summarised below.

Table 3~~4~~: Maximum Dwelling Projections for Retail Demand Modelling

Dwellings Projections	2006	2011	2016	2021	2026	2031
Joondalup	57,937	63,440	68,059	71,980	75,805	79,443
Wanneroo	43,127	56,191	71,131	89,208	107,949	118,669
Stirling (north west part only)	40,974	45,283	49,776	53,823	58,681	67,004

Source: Department of Planning Metropolitan Land Use Forecasting System, ABS Population Projections, MGA Planning Modelling

Note that the total dwellings for Joondalup and Wanneroo at 2031 are approximately 198,000 compared with 172,000 in Directions 2031. This is around 15% higher to reflect the higher ABS population projections for the Perth metropolitan area and to arrive at a maximum dwelling estimate for 2031.

The rationale is to provide the City with a robust set of floorspace demand figures in the form of a Shop Retail floorspace ~~maximum~~ threshold ~~(Shop Retail)~~ for each commercial complex based on estimated maximum number of dwellings. Proposals seeking ~~the maximum~~ the threshold Shop Retail floorspace or above would need to demonstrate ~~that the dwellings growth in the wider catchment will be achieved~~the sustainability of such expansion, potentially by highlighting that higher dwelling growth in the wider catchment, than currently estimated, will be achieved. The retail needs methodology is discussed further in section 6~~6~~.

2.2 Employment Provision Analysis

The City of Joondalup has over 83~~1~~,000 employed persons in the labour force living within the City. These employees work in various locations, including the City of Joondalup, other local government areas in the Perth metropolitan area and in regional locations. Employment within the City of Joondalup totals ~~almos~~t 38,561~~4,000~~ persons (ABS Census 2011), with these employees coming from various locations in the Perth metropolitan area. This is detailed in the table below.

[1] Note that maximum additional retail demand is based on historical expenditure patterns and assumes that these patterns will remain relatively stable to 2026 and 2031. Other influences impacting on retail sales, such as internet sales, serve to reinforce that any maximum retail floorspace recommendations are definite maximums.

Table 4~~5~~: City of Joondalup Employment Self Sufficiency

Employment Self Sufficiency	2001	2011~~06~~	Change
City of Joondalup Resident Employed Labour Force	75,297	83,033~~1,37~~	7,736~~6,080~~
City of Joondalup Local Workforce (employed in City)	28,638	385612~~2,78~~	9,923~~4,149~~
City of Joondalup Employment Self-Sufficiency	38.0%	40.3%	2.26%

Source: ABS Basic Community Profile and Worker Population Profile, 2001 and 2006

Since the 2001 census, the City of Joondalup has experienced growth in the resident labour force as well as significant growth in local jobs that has resulted in an improvement in the employment self-sufficiency from 38.0% to 46~~0~~.4~~3~~%. However, some industries have higher employment self-sufficiency than others with the employment "gap" indicated in the table below.

Table 5~~6~~: City of Joondalup Employment Self Sufficiency by Industry Type (2006)

Employment Self Sufficiency by Industry	Resident Workforce	Local Workforce (Worker Population)	% Self Sufficiency by Industry	Employment "Gap"	Rank
Construction	8,874	2,220	25.0%	6,654	1
Manufacturing	6,504	913	14.0%	5,591	2
Professional, scientific & technical services	5,894	1,528	25.9%	4,366	3
Health care & social assistance	8,768	4,861	55.4%	3,907	4
Public administration & safety	5,311	1,649	31.0%	3,662	5
Retail trade	9,807	6,407	65.3%	3,400	6
Wholesale trade	3,261	575	17.6%	2,686	7
Financial & insurance services	3,481	973	28.0%	2,508	8
Mining	2,411	70	2.9%	2,341	9
Education & training	6,869	4,965	72.3%	1,904	10
Other services	3,254	1,440	44.3%	1,814	11
Transport, postal & warehousing	2,398	619	25.8%	1,779	12
Inadequately described/Not stated	1,901	349	18.4%	1,552	13
Administrative & support services	2,767	1,286	46.5%	1,481	14
Accommodation & food services	4,458	2,996	67.2%	1,462	15
Information media & telecommunications	1,440	322	22.4%	1,118	16
Electricity, gas, water & waste services	887	58	6.5%	829	17
Rental, hiring & real estate services	1,629	963	59.1%	666	18
Arts & recreation services	1,099	543	49.4%	556	19
Agriculture, forestry & fishing	364	50	13.7%	314	20
Total	**81,377**	**32,787**	**40.3%**	**48,590**	

Source: ABS Basic Community Profile, 2006 and ABS Worker Population Profile, 2006

The Employment Gap is the shortfall in local jobs (workforce population) to match the resident workforce to achieve 100% employment self-sufficiency.

It is likely that there have been some shifts since the 2006 census and the comparisons above should be monitored at inter-census periods. Some industry types, such as construction and mining, are unlikely to be influenced through economic development within the City. Other industry types may be more easily influenced than others and should be the target of a structured economic development program. Generally, those industry types with higher employment self-sufficiency and large employment gaps (such as Health Care and Social Assistance, Retail Trade and Education and Training) could be priority target industries since the local workforce show a willingness to work locally and there is opportunity to fill the employment gap.

The top 5 employment gap industry types for Joondalup, Wanneroo and Stirling are shown in the following table.

Table 6~~7~~: Employment Self Sufficiency Gap Summary, Cities of Joondalup, Stirling and Wanneroo (2006)

Rank	Joondalup	Gap	Wanneroo	Gap	Stirling	Gap
1	Construction	6,655	Construction	3,469	Professional, scientific & technical services	4,064
2	Manufacturing	5,586	Health care & social assistance	3,460	Health care & social assistance	3,870
3	Professional, scientific & technical services	4,364	Retail trade	2,756	Public administration & safety	3,268
4	Health care & social assistance	3,910	Public administration & safety	2,050	Mining	2,325
5	Public administration & safety	3,664	Manufacturing	1,879	Construction	2,004

Source: ABS Basic Community Profile, 2006 and ABS Worker Population Profile, 2006

There are a significant number of construction workers living within the North West corridor working in other locations. Other significant industries with employment gaps across all three local government areas include Healthcare and Social Assistance and Public Administration and Safety. Professional, Scientific and Technical services also have a large gap (ranked 6th in Wanneroo). These results should further inform potential target industry types to locate or expand into the City.

2.3 Employment Self Sufficiency Target and Employment Self - Containment

The current employment self-sufficiency for the City of Joondalup is 46~~0~~.4~~3~~% and the employment self-containment is 26.7~~5~~%.

The~~ ABS Basic Community Profile shows that the~~re are 83,033~~1,377~~ persons living in the City of Joondalup who are employed and ~~the ABS 2006 worker population profile data shows that there are~~ 38,561~~2,787~~ (46~~0~~.4~~3~~% of 83,033~~1,377~~) persons employed within the City of Joondalup (ABS Census 2011). Of these, approximately 22,191~~0,700~~ persons (26.7~~5~~% of 83,033~~1,377~~) live in the City (ABS Census 2011)~~ (economy.id)~~. This implies that jobs provided locally in the City have a high take up rate among residents. Furthermore, of the persons employed in the City of Joondalup, around 5,500 lived in Wanneroo and 3,150 in Stirling in 2006.

Therefore, the majority of employees working in the City of Joondalup live in either the City of Joondalup or an adjacent local government area. This implies that increasing the job supply in the City (increased self-sufficiency) may result in an increased employment self-containment as well.

In order to achieve the target 60% employment self-sufficiency target set in Directions 2031 and Beyond, the North West corridor will need to expand its current employment base by 69,000 jobs. In terms of planning for this expansion, there will need to be sufficient land identified in existing and for future activity centres and industrial areas. The Joondalup City Centre provides the most viable location to target priority employment growth in order to achieve the 60% employment self-sufficiency target.

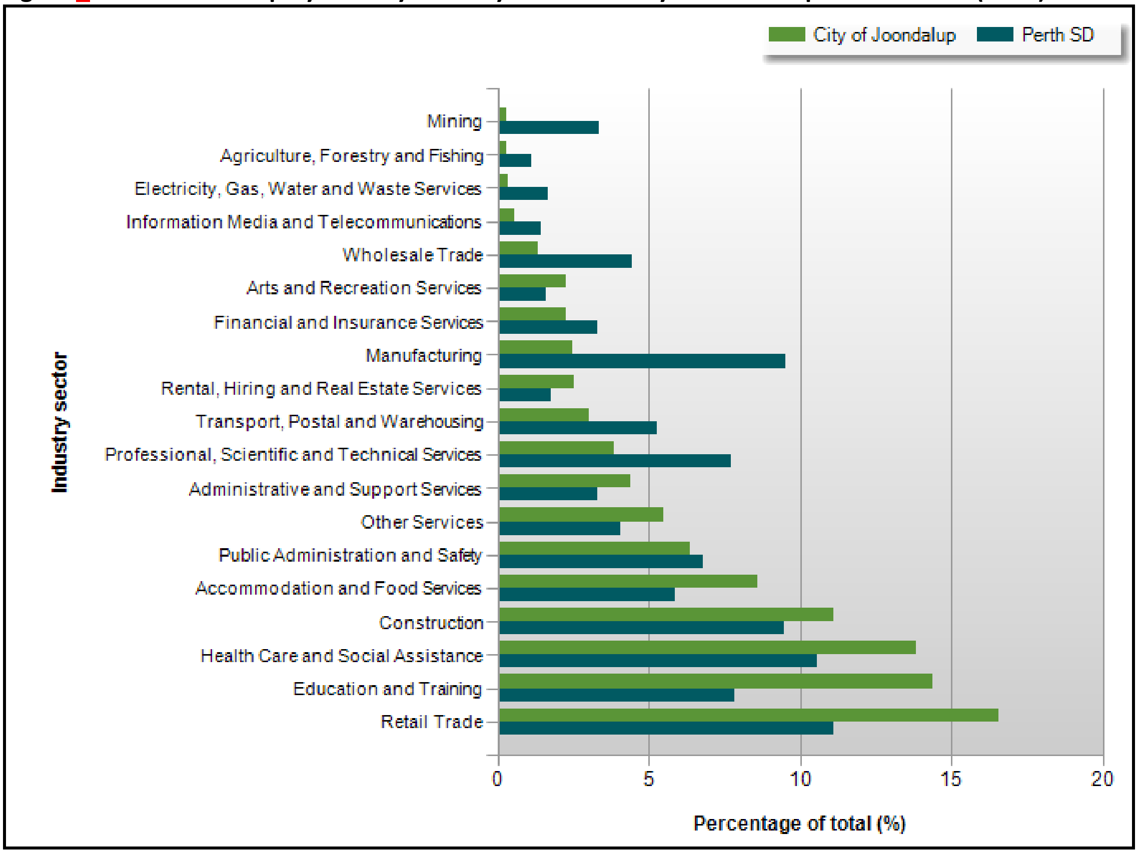
2.4 Economy ID Data

The following section contains recent data from the City of Joondalup Economy ID website which will inform the ~~revised~~ new economic development ~~plan~~ strategy for the City. The data includes estimates based on National Institute of Economic and Industry Research (NIEIR) modelling from a number of sources and should not be directly compared to the employment numbers contained in ABS Census data such as worker population profiles.

2.4.1 Industry and Productivity Growth

Employment by industry measures the contribution that each industry sector makes to employment in the local economy. The total number of jobs in the City of Joondalup in 2010 was estimated at 44,117. The major contributors to employment are Retail Trade (16.6%), Education and Training (14.4%), and Health Care and Social Assistance (13.8%).

Figure 5~~5~~: Estimated Employment by Industry Sector for City of Joondalup and Perth SD (2010)



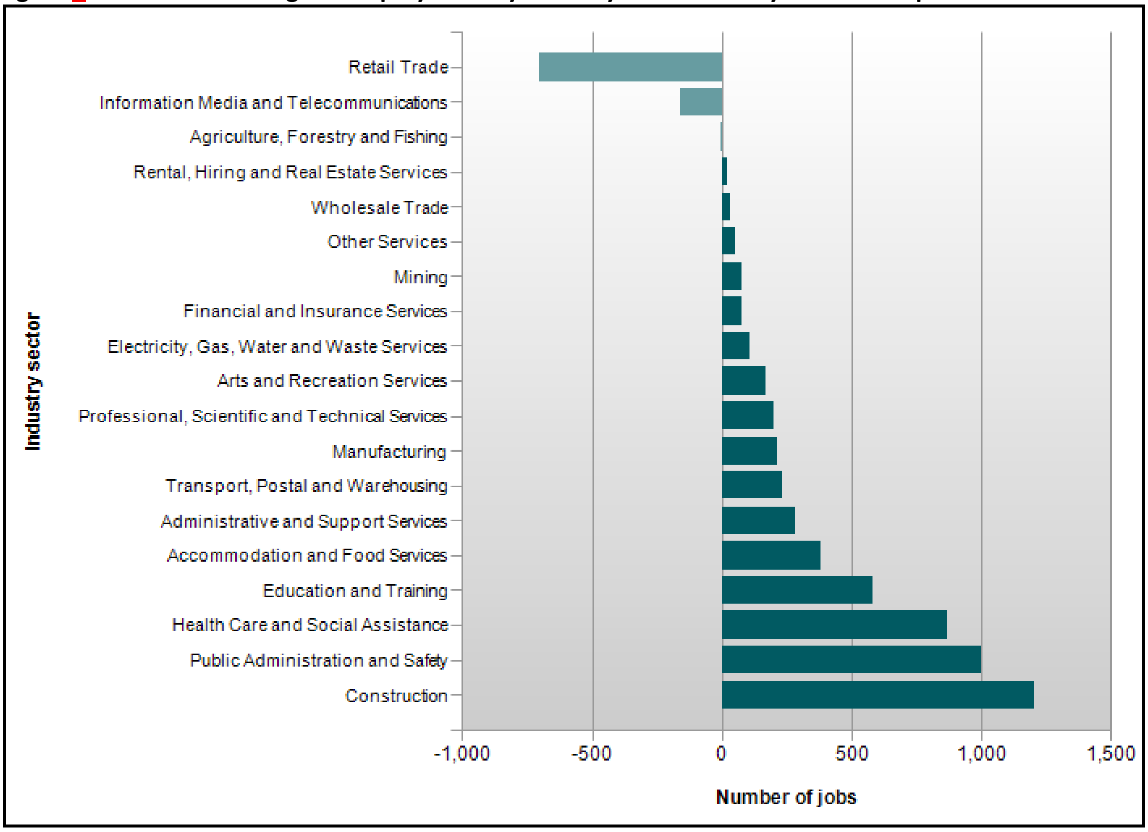
Source: National Institute of Economic and Industry Research (NIEIR) ©2011. Please note that NIEIR modelled estimates are subject to change and review for the most recent two financial years.

In the period 2001–2010, major employment growth has occurred in Health Care and Social Assistance, Public Administration and Safety, Construction and Education and Training Industry sectors. Employment in the Retail Sector has declined from 20.8% of the total number of jobs in 2001 to an estimated 16.6% of the total number of jobs in 2010.

Australian Bureau of Statistics data shows that employment in the retail industry grew relatively strongly in the decade to 2005, but has since plateaued. Retail jobs are now equally shared between full-time and part-time employment. Around 40% of the retail workforce is also employed on a casual basis.

After a decade of relative stability, the retail industry's share of total employment in the Australian economy has fallen from a peak of 11.8% in 2005 to 10.8% in 2010. Historically, the retail trade has been a significant source of part-time employment for females wanting to balance work with other commitments such as child caring, and for young people continuing their education. However, the retail industry's share of total part-time employment in the Australian economy has fallen from a peak of 19.5% in 1996 to 17.8% in 2010, mainly due to the stronger growth in part time employment in other industries.

Figure 6~~6~~: Estimated Change in Employment by Industry Sector for City of Joondalup 2001–2010

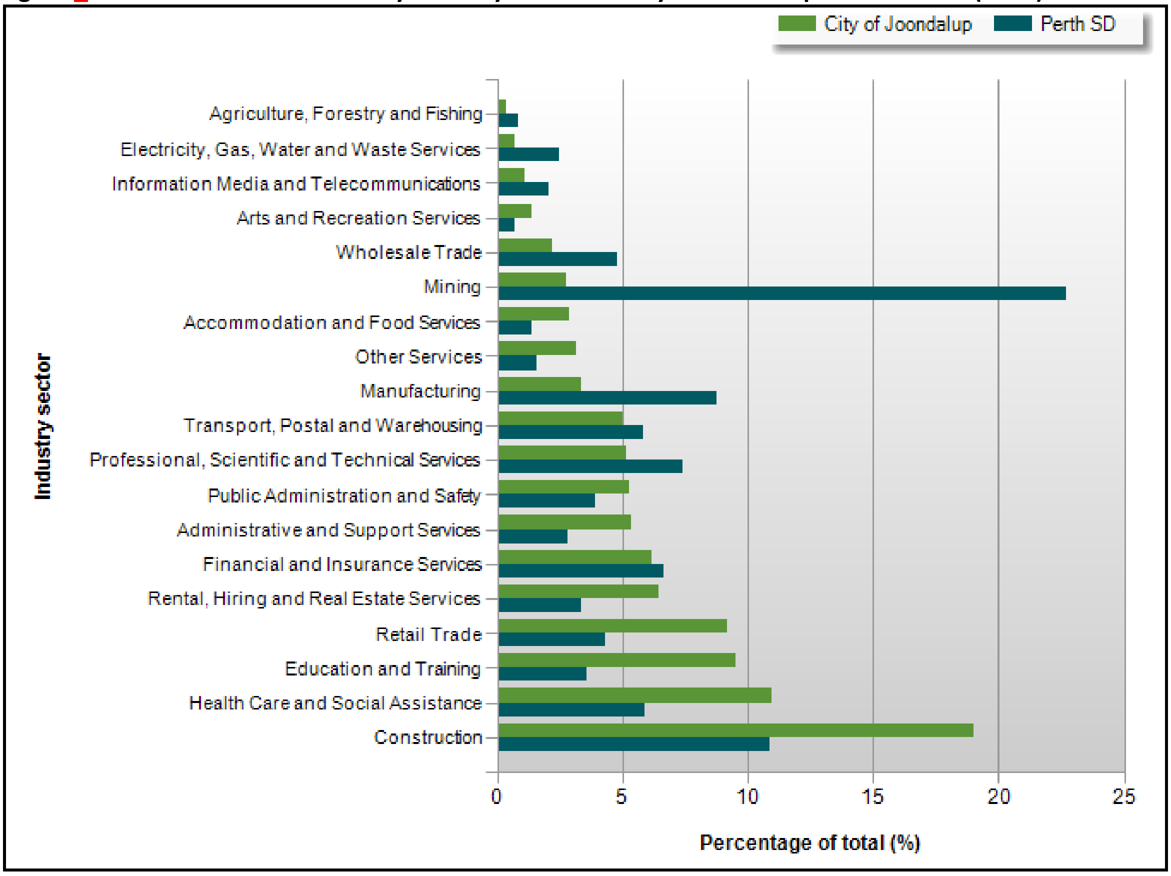


Source: National Institute of Economic and Industry Research (NIEIR) ©2011. Please note that NIEIR modelled estimates are subject to change and review for the most recent two financial years.

While local employment is important to the economic self-sufficiency of a region, it is also important that the types of jobs in a region are those that add value to the economy, match the skills of the resident population and provide a diverse range of all types of employment.

Value Added by Industry is an indicator of business productivity in the City of Joondalup and shows how productive each industry sector is at increasing the value of its inputs. In 2010, Construction was the most productive sector of the local economy, followed by Health Care and Social Assistance, Education and Training and Retail. The Construction and Health Care and Social Assistance sectors are also the sectors that have shown the largest growth in Value Added in the last 10 years.

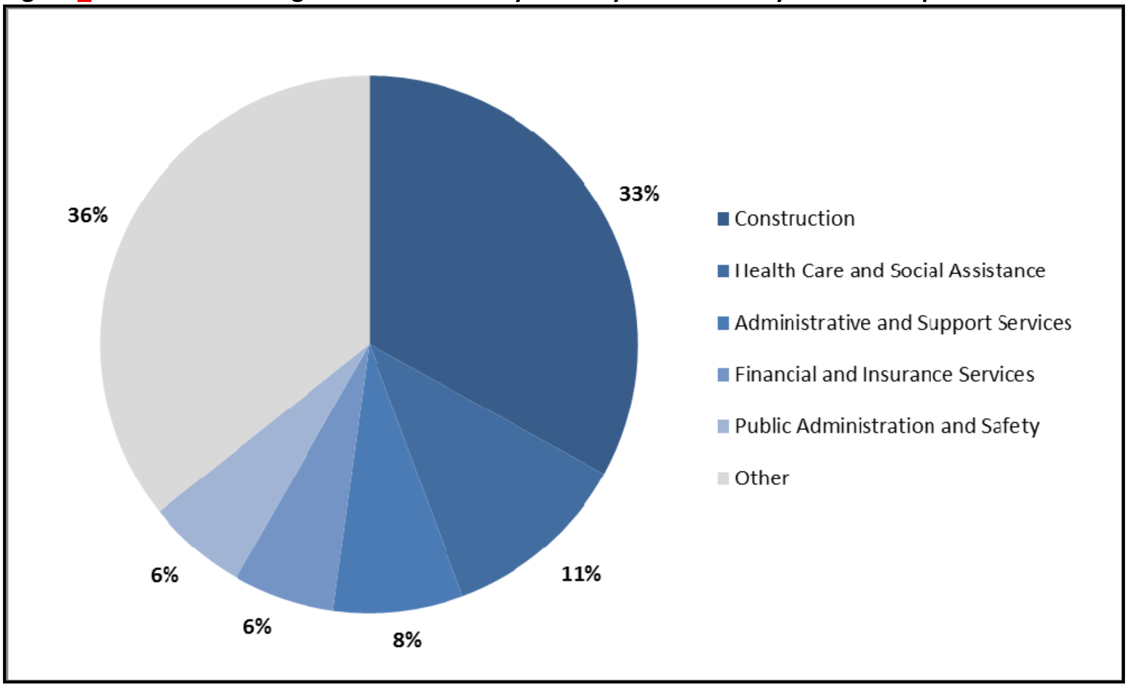
Figure 7~~7~~: Estimated Value Added by Industry Sector for City of Joondalup and Perth SD (2010)



Source: National Institute of Economic and Industry Research (NIEIR) ©2011. Please note that NIEIR modelled estimates are subject to change and review for the most recent two financial years.

Over the 10 year period 2001 to 2010, the industry sectors exhibiting the largest growth in productivity were Construction, Health Care and Social Assistance, Administrative and Support Services, Public Administration and Safety and Financial and Insurance Services.

Figure ~~8~~8: Estimated Change in Value Added by Industry Sector for City of Joondalup 2001–2010



Source: National Institute of Economic and Industry Research (NIEIR) ©2011. Please note that NIEIR modelled estimates are subject to change and review for the most recent two financial years.

A trend analysis of the Joondalup economy over the last 10 years of both Employment by Industry Sector and Value Added by Industry Sector indicates that the economy is moving towards a more diverse range of jobs.

A focus on the core strengths of health, education, training, public administration and community services and attracting and growing the office-based professional service industries of government administration, property, business and financial services will lead to a more robust and diverse economy.

2.5 Regional Governance and Economic Development

The draft Outer Metropolitan and Peel Sub-Regional Strategy outlines the key planning actions required in the north-west subregion. For the City of Joondalup, the key actions include:

- Develop an economic development and employment strategy for the north-west sub-region; and
- Finalise structure plan for the north-west sub-region, informed by the outer metropolitan and Peel subregional strategy final report.

To achieve the above actions will require a number of stakeholders to collaborate including the City of Joondalup, the City of Wanneroo, the Department of Planning, landowners/developers and other State agencies and service providers.

The Cities of Wanneroo and Joondalup support a regional governance framework for the North West Metropolitan Region to coordinate and adopt strategic economic development and infrastructure planning in the North West region. Collaboration is sought to follow the broad principles of:

I. An effective, transparent and co-ordinated implementation mechanism to strategically respond to the needs of the region;
II. A reporting mechanism to State and Federal Government;
III. Engagement and commitment from key stakeholders;
IV. A high level of consensus of direction in infrastructure priorities;
V. Mechanisms and planning strategies to generate timely key employment land supply; and
VI. Integrated infrastructure planning to activate economic development in a timely manner.

A Memorandum of Understanding for the purpose of commitment to collaboration on strategic regional and economic development matters in the North West Region has been endorsed ~~is under development~~ between the Cities of Joondalup and Wanneroo.

Recent draft work commissioned by the Department of Planning[2] on employment targets for commercial centres in the North West sub region identifies one scenario to bridge the employment gap to achieve the desired 60% self-sufficiency in the North Wet Sub-Region from 2006 to 2031. The jobs targets under this scenario are shown for specific activity centres within the City of Joondalup are shown below.

Table 7~~8~~: Draft Activity Centre Employment Gap

Draft Employment Gap	
Commercial Centre	**2006 - 2031**
Joondalup City	13,902
Warwick Grove	1,443
Whitfords City	2,597
Greenwood Village	138
Sorrento Quay	909
Currambine Market Place	465
Woodvale Park	238
Total Employment Gap	**19,692**

Source: Department of Planning North West Sub Region Employment Allocation (Jan 2011)

The figures show that in order to meet the employment self-sufficiency targets contained in Directions 2031, a total additional 20,000 jobs will need to be generated within commercial activity centres in the City of Joondalup. These draft targets are proposed to inform the future economic development strategy for the region. Assuming a ratio of between 25m^2 and 30m^2 of floorspace per employee, this implies the need for 500,000m^2 to 600,000m^2 of additional floorspace.

It should be noted that the above targets are only one potential scenario with other scenarios possible that have not yet been identified by the Department of Planning. One such possibility with a stronger strategic rationale is to increase the target for the Joondalup City Centre which would enable greater agglomeration economies to be realised and thus have a greater chance of success in actually achieving the employment targets and in particular the requirement for higher order jobs. This would allow the other centres to remain at smaller scale thus requiring less infrastructure investment on public transport and roads. Concentrating employment growth effort within the Joondalup City Centre is consistent with previous target contained in

[2] Department of Planning North West Sub Region Employment Allocation (Pracsys, Jan 2011)

the former 2001 City of Joondalup Centres Strategy ~~(Policy 3.3)~~ of 45,000 jobs. ~~Any future review of the Economic Development Plan should consider the economic benefits of various expansion scenarios.~~

2.6 Future Land Demand and Supply

The draft employment targets for the corridor show a need for up to 20,000 of the 69,000 total additional North West Sub-Region jobs target to be located at existing activity centres within the City of Joondalup. In terms of the amount of floorspace required to house the additional employment, this will depend on the activities present and the intensity of use. It is likely that the floorspace per capita required will average between 25m^2 and 30m^2 per employee. This implies an additional floorspace requirement of between 500,000m^2 and 600,000m^2 to be provided at commercial centres within the City to 2031.

The additional floorspace recorded at Joondalup City Centre, Whitfords and Warwick between 2002 and 2008 (WAPC Land Use Surveys) totals approximately 138,000m^2 (174,000m^2 for all commercial centres), with about 118,000m^2 of the additional floorspace being located in the Joondalup City Centre. This is an average of 20,000m^2 per annum for the Joondalup City Centre and 29,000m^2 per annum at all centres. This implies that to achieve an additional 500,000m^2 to 600,000m^2 would take between 17 and 21 years and is therefore achievable by 2031 based on the historical floorspace increase rate within the existing commercial centres.

It is likely that the trend for a large proportion of the additional floorspace to be located at the Joondalup City Centre will continue. This proportion may need to be considerably more than in previous years. Whilst there is ample land available within the Joondalup City Centre, achieving the targets will likely also require more intense use of land. The draft Joondalup City Centre Structure Plan aims to achieve the required land use intensity.

2.7 Implications for Infrastructure Provision

The development of additional floorspace of up to 600,000m^2 within the City of Joondalup is likely to result in flow on infrastructure and servicing liabilities to public authorities. This includes additional capacity for roads and public transport and utilities. SPP 4.2 is clear regarding the location of centres and expansion of centres to optimise the use of existing infrastructure. The Activity Centre Hierarchy exists to enable the preparation of long-term capital investment programs and to promote more private investment, particularly at strategic metropolitan centres. Additional infrastructure provision for activity centres should therefore be prioritised based on the hierarchy designation as well as determined need. In the City of Joondalup, most of this infrastructure already exists and the task is to make best use of existing infrastructure.

The major implication of this for the City of Joondalup is that the Joondalup City Centre, as the only strategic metropolitan centre in the City and the best served by public transport, should be promoted and supported as the preferred location for major employment in order to optimise the use of the significant investment in public transport and other infrastructure already in place. This implies that any significant expansion of other centres that trigger the need for major additional public infrastructure provision should be discouraged.

3. Joondalup City Centre Analysis

Directions 2031 and Beyond identifies the role of a primary centre as follows:

> *Primary centres are critical to achieving long-term sub-regional employment objectives. They should house major institutions and become the preferred location for investment in high order public and employment generating infrastructure outside the central metropolitan sub-region.*
>
> *While there are currently no centres that perform a primary centre function, this classification is retained as an aspirational target. As the population grows towards a city of 3.5 million, existing major centres will clearly emerge to perform this role at some point in the future. To achieve this, existing centres must build on their existing assets and invest in the attributes that influence the locational decisions of these businesses, including accessibility, land availability, local amenity, communications and technology and the availability of skilled labour.*

The Joondalup City Centre is classified as a Strategic Metropolitan Centre but is well positioned to take on the role of a P~~p~~rimary C~~c~~entre for the North West Corridor and needs to build on its existing assets to achieve the scale that will enable it to become a primary centre of the north.

The strategy must build on its strengths and opportunities and be cognisant of weaknesses and threats. Economically, the Perth metropolitan area is dominated by the Perth central economic zone, centred around the Perth CBD but including adjacent areas such as Subiaco and parts of Victoria Park that are economically integrated to the extent that companies and institutions can regard various location choices in that area as economically and functionally approximately equivalent. Locations outside of this area do not have the same scale and diversity to provide the rich mix of business synergies that give central primary areas their strength and attraction to organisations that have a state-wide, national or international orientation.

For Joondalup to meet its employment self-sufficiency targets it must attract economic activity that goes beyond the region. This requires scale and diversity to achieve the agglomeration economies that flow from the vertical and horizontal integration that is possible in a larger, more diverse centre. The city centre environment provides a setting for effective informal information transfer and the regional transport connections that allow efficient labour access and business to business interaction.

The Joondalup City Centre is the only centre in the City of Joondalup that has these characteristics and the only one that can develop to a scale that can attract significant extra-regional economic activity. This is not easy to achieve and each element of the strategy must be coordinated to give the highest chance of success. It implies a strategy of favouring concentrating regional growth in the centre and building each of its aspects:

- Encouraging a wide variety of commercial uses;
- Encouraging and maximising the retail offering;
- Encouraging growth in the education and health services functions; and
- Encouraging and maximising inner city residential development.

3.1 The Joondalup ~~Special Trading Precinct~~City Centre area

The Joondalup ~~Special Trading Precinct~~City Centre includes the central city core and the large area surrounding it, including commercial areas to the east and south. The land area of commercial complexes located in the Joondalup ~~Special Trading Precinct~~ City Centre area totals 434 hectares. This compares with the land area of the Perth CBD complexes which total 483 hectares as shown below.

Figure 9: Joondalup ~~Special Trading Precinct~~ City Centre Area*

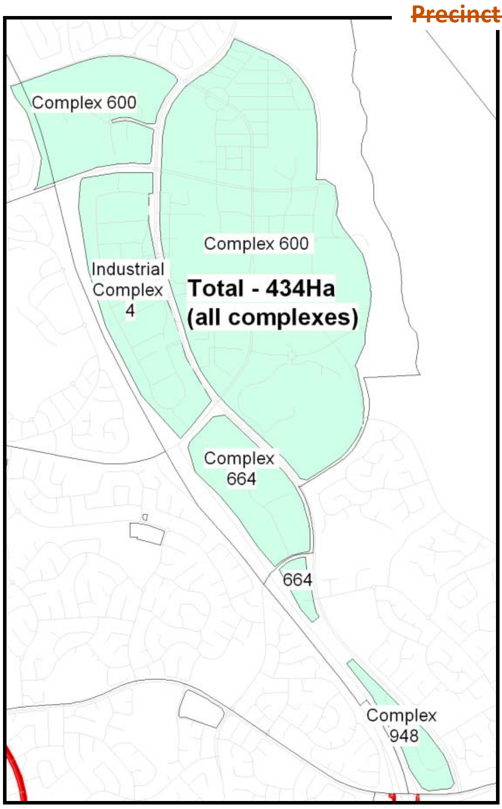
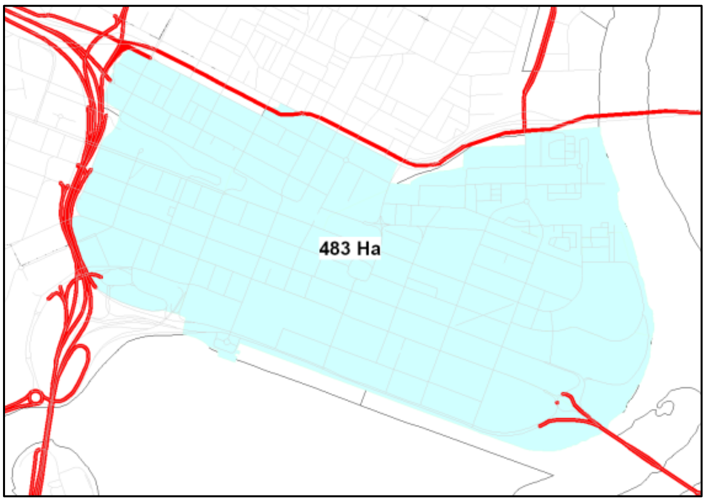


Figure 10: Perth CBD Area



**Includes WAPC Commercial and Industrial Land Use Survey Complex numbers*

The Joondalup ~~Special Trading Precinct~~ City Centre includes the following floorspace.

Table 8~~9~~: Joondalup ~~Special Trading Precinct~~City Centre Floorspace

Complex Type	Commercial	Commercial	Commercial	Industrial	
Complex Number*	**600**	**948**	**664**	**4**	
Complex Name	**Joondalup City**	**Joondalup Drive**	**Joondalup South**	**Joondalup**	**TOTAL**
	Floorspace (m²)	Floorspace (m²)	Floorspace (m²)	Floorspace (m²)	Floorspace (m²)
Primary/Rural	0	0	100	0	**295**
Manufacturing/ Processing/Fabrication	364	110	0	16,000	**17,334**
Storage/Distribution	1,557	420	343	18,502	**19,265**
Service Industry	4,327	0	340	16,315	**19,408**
Shop/Retail	73,038	8,534	12,443	19,859	**115,491**
Other Retail	7,040	19,102	2,300	24,791	**53,796**
Office/Business	61,670	0	1,463	10,380	**59,720**
Health/Welfare/ Community Services	106,971	0	410	1,960	**116,308**
Entertainment/ Recreation/Culture	52,229	0	0	23,158	**80,856**
Residential	7,059	0	0	0	**8,314**
Utilities/ Communications	6,054	8	0	660	**7,208**
Vacant Floor Area	8,081	4,180	0	8,864	**20,757**
TOTAL	**328,390**	**32,354**	**17,399**	**140,489**	**518,752**

Source: WAPC Land Use Survey 2008

**See Figure 9~~Figure 9~~ for complex locations*

The table shows a total floorspace of almost 520,000m^2 within the whole of the Joondalup ~~Special Trading Precinct~~City Centre. Shop Retail accounts for 22.3% of the total floorspace in the Special Trading precinct which reflects the scale and diversity of other uses in the centre. Health/Welfare and Community Services uses account for a further 22.4% of land uses in the centre due to the location of the University, West Coast Institute of Training, Police Academy and Joondalup Health Campus all within the precinct.

This compares with 3,030,000m^2 of commercial floorspace in the Perth CBD (excluding West Perth) at 2008, with around 257,000m^2 of Shop Retail floorspace representing 8.5% of the total. Overall, the Perth CBD has a development intensity of about 6,300m^2 of commercial floorspace per hectare compared with the Joondalup Special Trading Precinct at around 1,200m^2 of commercial floorspace per hectare.

Therefore the Joondalup ~~Special Trading Precinct~~City Centre is currently around 20% of the scale of the Perth CBD in terms of total floorspace. Considering that all floorspace in Joondalup has been constructed since 1977, this implies an average floorspace increase per annum of around 17,000m^2 to 2008. Recent extensions to the Joondalup Health Campus and plans for the development of 34 hectares in the Joondalup South precinct indicate that this trend may continue for some time.

There is capacity in the land in the Joondalup City Centre to accommodate significantly more floorspace and expansion is only constrained by demand and any existing planning controls. The draft Joondalup City Centre

Structure Plan allows for considerable expansion ~~and considers the entire Joondalup Special Trading Precinct~~, with minimum building heights in most areas as well as no limit on building height in the Central Core areas.

The Joondalup ~~Special Trading Precinct~~ City Centre comprises four separate commercial and industrial complexes compared with the Perth CBD area which is divided into 13 separate complexes. It is likely that the Joondalup complexes will continue to be measured on this separate basis with potential future changes being the shift of the industrial area at Winton Road from an industrial complex toward a more commercial complex.

In terms of scale, the Joondalup City Centre has the capacity to develop into a P~~p~~rimary A~~a~~ctivity C~~c~~entre with a similar land area to the Perth CBD and with the equivalent of more than one sixth of the Perth CBD floorspace. Given that Joondalup City Centre has developed to its current scale in little more than 30 years, it is possible that the next 15 years will see it emerge as a major centre providing significant employment and activity for the Perth North West metropolitan region.

3.2 Joondalup City Centre Development Scenarios

If the Joondalup City Centre continues to average an additional 17,000m^2 of floorspace per annum, it could potentially reach a total floorspace of 860,000m^2 in around 20 years. This implies a commercial floorspace density of approximately 2,000m^2 per hectare, which is around one third of the commercial floorspace density currently achieved in the Perth CBD. However, to achieve this it requires a development strategy that builds on the strategic strengths of the centre to make it a primary metropolitan centre.

The draft Joondalup City Centre Structure Plan seeks to encourage this level of activity, but it will be predominantly demand driven and up to the private market to deliver the majority of floorspace in the Joondalup Centre. The exceptions to this would be the additions to the hospital and any government office accommodation that may be located to the Centre.

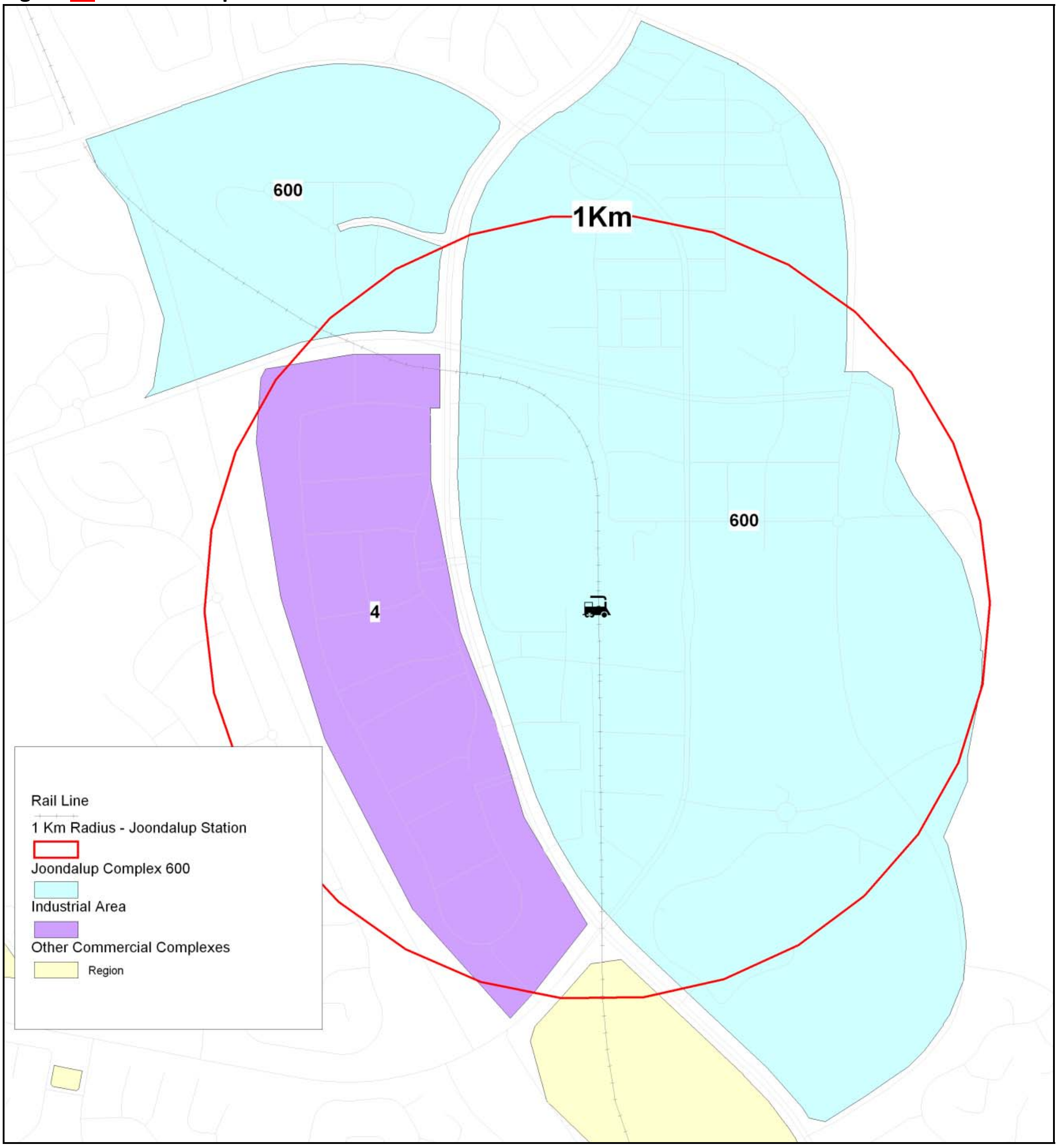
In terms of shop retail floorspace, the centre is already quite large with around 75,000m^2 in the central retail core area and another 40,000m^2 of larger format retail in other areas such as the industrial and Joondalup Drive precincts. In order to promote the City Centre as a Primary Activity Centre, it is likely that the Shop Retail floorspace will need to increase to a scale that will enable a full range of specialty shops and department stores to locate in the city centre. A floorspace of approximately 125,000m^2 may be required in the retail core to enable this provision. This is tested in the retail needs assessment in section 6~~6~~.

The Joondalup City Centre has been the focus of significant investment in public infrastructure including the rail station, hospital, university and West Coast Institute of Training. The location of the station within the centre provides a basis for promoting further activity to enable workers and consumers to use public transport rather than cars. The draft Joondalup City Centre Structure Plan aligns with the principles of efficient use of infrastructure and forms a sound framework for managing and promoting future development.

3.3 The City Central Core

The City Core is a subset of the Joondalup ~~Special Trading Precinct~~City Centre and includes all the land that is serviced by the Joondalup railway station, roughly all that within an 800m to 1,000 m radius of the station, taking in all of complex 600 and complex 4 as shown in Figure 11~~Figure 11~~. This encompasses the main retail and administrative areas, the health campus and the education areas as shown in the following map.

Figure ~~11~~11: Joondalup Rail Station - One Kilometre Radius



It is useful to separately identify this, as it contains the areas of particular strength and opportunity for expanding the employment self-sufficiency of the City and the focus for its long term prosperity and vitality.

The Joondalup City Centre is planned as the primary Central Business District and service hub for the northern metropolitan region of Perth. This is a consistent theme in all relevant State Government and City of Joondalup policies. It therefore is intended to house the greatest range and highest level of retail, service and business activities.

It already is a substantial centre, with almost 520,000m^2 of commercial floorspace within the whole of the Joondalup Special Trading Precinct and of this around 470,000m^2 is in the City core areas, housing around 10,000 employees in commercial accommodation. These areas also contain substantial education and health activity: Edith Cowan University, the WA Police Academy and the West Coast ~~TAFE~~ Institute of Technology (collectively recognized as the Joondalup Learning Precinct), and the Joondalup Health Campus. This grouping of organizations provides significant employment for the City with estimated 2-3,000 employees. A measure of this significance can be seen by comparing these employment numbers with total employment of approximately 15,000 people in Joondalup North SLA at the time of the 2006 census, indicating the Learning and Health Precincts accounted for 15-20% of employment in the centre. The health campus is undergoing substantial expansion and the education functions in the centre continue to grow.

However, the city centre has a very low residential population, with a total at the 2006 Census of 3,160, of whom more than two-thirds live in the established low and medium density areas in Joondalup North and east of Lakeside Drive.

The Joondalup City Centre plays a crucial role in achieving higher consistent levels of regional employment self-sufficiency. It is the only centre in the corridor that currently has the elements of comparative advantage to provide substantial expansion in high-skill and knowledge-based economic activity. These elements are principally the agglomeration economies that flow from the vertical and horizontal integration possible in a larger, more diverse centre and the city centre environment that provides a setting for effective informal information transfer. The latter is important in the formation of an environment that fosters learning, research and innovation.

The university and health campus are key components of the city centre and their co-location with a substantial town centre is unusual in WA. This informs a development strategy for the city centre that utilises its strengths.

Earlier planning visions for the City of Joondalup were heavily embedded in the ideals of a campus town where pockets of health, education and commercial development were located in a dispersed manner. As the City Centre begins to mature there are numerous opportunities to create a better interface between these pockets of development, moving from campus model towards a university town model with high levels of physical integration between the disparate elements and much higher expectations of residential accommodation linked to the activities of the university and of health campus.

Key new elements would be:

- Moving from a campus town to an integrated university town model, with greater integration between the university campus and health campus and the other elements of the city centre, with specific attention given to non-vehicular movement systems between them and to common meeting spaces;
- Higher levels of city centre residential accommodation, particularly targeted at health workers, academics and students; and
- Integrated economic development strategies that promote not only the city overall, but also its key components.

This would have clear advantages not only for the City, but also for its key components, particularly the University as an institution.

There is substantial capacity for further development of the city centre for all classes of accommodation. Development opportunities identified in the draft Joondalup City Centre Structure Plan might have capacity for over 600,000m^2 of additional floorspace in the central city ~~zones~~ district(i.e. those areas that are serviced by the Joondalup rail station) at full build-out. This might allow for, for example, around 3,500 residential apartments and an additional 250,000m^2 to 300,000m^2 of commercial floorspace accommodating 10,000 to 12,000 additional employees. This would give a total working population in the city centre core area of around 22,000 and a residential population of around 10,000. Given the mix of activities underpinning these figures, this would make it a vibrant and attractive centre, with the scale to attract enterprises from beyond the immediate regional catchment area.

The additional residential population would support around 7,000m^2 to 10,000m^2 of retail floorspace in the centre, further underpinning its viability, not only as the major centre for the corridor, but as a primary metropolitan centre.

4. Whitfords and Warwick Secondary Centres Analysis

The Warwick and Whitfords Centres are defined as Secondary Centres in Directions 2031 and Beyond and SPP 4.2. The Whitfords Regional Centre comprises approximately 25 hectares of land located on the corner of Marmion Avenue and Whitfords Avenue in Hillarys. The Warwick Regional Centre has a land area of 16.5 hectares and is located at the corner of Erindale Road and Beach Road in Warwick. Note that additional sites are currently not included in Department of Planning boundaries for Whitfords such as Whitfords Medical Centre (corner of Dampier Avenue and Whitfords Avenue) and other health related services on the south side of Banks Avenue. There is also a dentist on the south side of Beach Road adjacent to the Warwick centre.

Figure 12: Whitfords Regional Centre Area

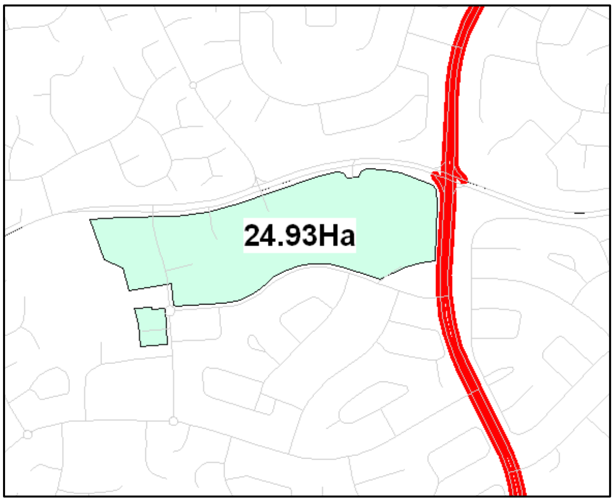


Figure 13: Warwick Regional Centre Area

4.1 Regional Context and Role

4.1.1 Whitfords Context and Role

The Whitfords centre is classified as a secondary centre in SPP 4.2 and is fulfilling its role in the hierarchy by providing essential services for the catchment. The centre is consistent with the typical characteristics described in SPP 4.2 for a secondary centre, with the exception of not having a department store such as Myer or David Jones. The centre did have an Aherns department store for some time during its history. Other potential additions to the centre to align better with SPP 4.2 would include the addition of major offices. However, with a current land use intensity of over 3000m^2 per hectare, this may be challenging depending on parking demand requirements and public transport provision. It is also not as well located as the Joondalup City Centre for large scale establishment of major offices.

The potential future scenarios for the Whitfords centre include expansion, subject to the needs assessment, or to remain at its current floorspace level. This is investigated further in section 6~~6~~.

It should be noted that any major expansion of the Whitfords floorspace will have flow on impacts in terms of traffic and transport as well as other infrastructure and servicing requirements.

4.1.2 Warwick Context and Role

The Warwick centre is currently satisfying the role of a secondary centre and may have some capacity for expansion subject to the needs analysis. The centre does not currently contain a department store and this may or may not be viable in the medium term and is highly dependent on the land owners' intentions. This is problematic for the centre due to multiple ownership of the land.

The short term role of a secondary centre is likely to continue over the short to medium term unless a centre structure plan can be implemented over the site. If this eventuates, it may be possible to incorporate some residential development within the activity centre site.

Any major expansion of the Warwick centre will have flow on impacts in terms of traffic and transport as well as other infrastructure and servicing requirements. There is a substantial amount of vacant land at the Warwick centre and a Structure Plan would identify some alternative uses for it, including higher density residential development (including aged accommodation).

4.2 Centre Floorspace Assessment

4.2.1 Whitfords Floorspace

The Whitfords City commercial complex contained a total of almost 71,000m^2 of floorspace (all uses) at the 2008 Commercial Land Use Survey, including 43,770m^2 of Shop Retail floorspace. However, more recent data from the City of Joondalup shows that the Shop Retail floorspace at July 2010 totalled 49,924m^2 with a total gross leasable area (GLA) of 68,198m^2 (Note that City of Joondalup figure do not include the land to the west of the shopping centre that accommodates Bunnings and other businesses which does form part of the overall commercial complex).

The Shop Retail floorspace of 49,925m^2 is significantly greater than the 2008 land use survey indicated for the whole complex, and with no new major development in the centre, it is possible that some Shop Retail floorspace for Whitfords City has been omitted from the survey. Initial investigation into this indicates that one of the discount department stores may have been omitted in the land use survey.

Overall, it appears that the Shop Retail floorspace in the Whitfords City shopping centre is approximately 50,000m^2. However, the complex also includes property to the west of Endeavour Road that houses Bunnings, Supercheap Auto and other large floorspace users. It is estimated that the total floorspace of the complex is between 77,000m^2 and 78,700m^2 based on a combination of City of Joondalup and WAPC Land Use Survey data. This has implications for the complex in terms of alignment with SPP 4.2 diversity targets. These targets are as follows:

Table 9~~10~~: SPP 4.2 Land Use Mix Targets

Centre Size - Shop Retail Floorspace Component	Mix of Land Uses as a Proportion of the Centres Total* Floorspace
Above 100,000m^2	50%
Above 50,000m^2	40%
Above 20,000m^2	30%
Above 10,000m^2	20%
less than 10,000m^2	N/A

*Source: SPP 4.2 Activity Centres for Perth and Peel Table 3 Diversity performance target. *Total floorspace defined as Shop Retail plus Mixed Use*

Mixed land uses as defined in SPP 4.2 include Office/Business, Health/Welfare/Community, Entertainment/Recreation/Culture and Other Retail only. Other uses such as residential or short stay accommodation are therefore not a factor in achieving the targets.

The following table shows three scenarios for the Whitfords City centre based on the original land use survey data, the discount department store floor area and the shopping centre Shop Retail figures as provided by the City of Joondalup at July 2010.

Table 10~~11~~: Whitfords Existing Floorspace Scenarios

Complex Type	Commercial		Commercial		Commercial	
Complex Number	**602**		**602**		**602**	
Complex Name	**Whitfords City**		**Whitfords City**		**Whitfords City**	
	(Original 2008 Survey)		**(Original plus DDS)**		**(Using Joondalup Shop Retail data)**	
	Floorspace (m^2)	%	Floorspace (m^2)	%	Floorspace (m^2)	%
Primary/Rural	0		0	0.00%	0	
Manufacturing/ Processing/ Fabrication	0		0	0.00%	0	
Storage/Distribution	7		7	0.00%	7	
Service Industry	150		150	0.20%	150	
Shop/Retail	43,770	**62.07%**	51,599	**65.86%**	**49,924**	**65.11%**
Other Retail	8,503	12.06%	8,503	10.85%	8,503	11.09%
Office/Business	5,976	8.47%	5,976	7.63%	5,976	7.79%
Health/Welfare/ Community Services	2,785	3.95%	2,785	3.55%	2,785	3.63%
Entertainment/ Recreation/Culture	9,487	13.45%	9,487	12.11%	9,487	12.37%
Residential	0		0	0.00%	0	
Utilities/Communications	0		0	0.00%	0	
Vacant Floor Area	190		190		190	
Total for Mixed use Calculation*	**70,521**	**100%**	**78,350**	**100%**	**76,675**	**100%**
TOTAL	**70,868**		**78,697**		**77,022**	

**Total floorspace defined as Shop Retail plus Mixed Use*

The three scenarios shown in the table above have differing consequences in terms of SPP 4.2. The original data from the 2008 survey shows Shop Retail below 50,000m^2 and representing 62% of total floorspace. SPP 4.2 has a performance target of 30% other uses (Office/Business, Health/Welfare/Community, Entertainment/Recreation/Culture and Other Retail only) for centres with a Shop Retail floorspace component of between 20,000m^2 and 50,000m^2. Using the original survey data, the Whitfords City complex aligns with this SPP 4.2 target.

If we assume that a discount department store has been omitted from the original survey and add in 7,829m^2 of Shop Retail floorspace, the outcome is quite different. The Shop Retail component is now above 50,000m^2 and represents almost 66% of the total. SPP 4.2 sets a target of 40% for other uses where Shop Retail is over 50,000m^2. The SPP 4.2 diversity target is not achieved in this scenario.

If we use Shop Retail floorspace data of 49,924m^2 as provided by the City of Joondalup at July 2010, the 30% target is met but there is no room for Shop Retail expansion without increasing the target for other uses to 40%. The implications of expansion of Whitfords City centre above 50,000m^2 of Shop Retail floorspace are outlined in the following table.

Table ~~1112~~: Whitfords City SPP 4.2 Expansion of Shop Retail above 50,000m^2 – Mixed Use Implications

Other Uses Implications	Floorspace (m^2)	% Uses	Floorspace (m^2)	% Uses
Shop/Retail	49,999	70.0%	50,001	60.0%
Mixed Uses Required for Diversity Target*	21,427	30.0%	33,400	40.0%
Remaining Uses (Ser, Sto, Man etc)	197		197	
Total Floor Area for Calculation	71,426	100.0%	83,401	100.00%
Existing Mixed Uses*	26,751	37.5%	26,751	34.9%
Additional Mixed Uses Required	**0**		**6,714**	

**Office/Business, Health/Welfare/Community, Entertainment/Recreation/Culture and Other Retail only as per SPP 4.2*

Therefore, if the centre should expand to 50,001m^2, mixed uses would represent 34.9% so there would be a shortfall of other uses floorspace of approximately 6,700m^2 to meet a 40% target. For every proposed 100m^2 of Shop Retail floorspace thereafter, there would need to be an additional 67m^2 minimum of Mixed Uses floorspace in the proposal in order to be in alignment with the 40% other uses SPP 4.2 diversity target for centres with over 50,000m^2 Shop Retail floorspace.

SPP 4.2 allows for local planning strategies, schemes and district and local structure plans to identify the indicative boundaries of activity centres in both established and new urban areas. This would have implications for the Whitfords centre if the boundary were to expand to include the St Marks school site. The additional floorspace at St Marks would add to the Mixed Use category and effectively allow for expansion beyond 50,000m^2 of Shop Retail while meeting the mixed use target of 40% total floorspace. Note that schools are included in SPP 4.2 under the definition of mix of land uses under Health/Welfare/Community services.

However, this would need to be carefully considered in the context of a comprehensive retail needs assessment for the City. That is, the impact of significant shop retail at Whitfords may or may not have a detrimental impact on other centres and scenarios for expansion at Whitfords will need to determine impacts on other centres. The inclusion of the school site in the activity centre boundary would result in no significant additional office or other commercial uses being required for the Whitfords Centre under SPP 4.2 and any expansion plans could possibly only result in the addition of retail jobs.

Assuming a total floorspace of around 77,000m^2 and a land area of 24.93 hectares, the Whitfords centre has a land use intensity of 3,088m^2 per hectare.

4.2.2 Warwick Floorspace

The Warwick Grove centre accommodates over 25,000m^2 of shop retail and good mix of other uses to have a total commercial floorspace of almost 54,000m^2. The floorspace by land use is detailed below.

Table ~~13~~12: Warwick Grove Floorspace

Complex Type	Commercial	% Uses
Complex Number	**601**	
Complex Name	**Warwick**	
	Floorspace (m^2)	
Primary/Rural	0	
Manufacturing/Processing/Fabrication	154	
Storage/Distribution	7,094	
Service Industry	890	
Shop/Retail	25,614	58.3%
Other Retail	100	0.2%
Office/Business	6,095	13.9%
Health/Welfare/Community Services	2,712	6.2%
Entertainment/Recreation/Culture	9,380	21.4%
Residential	0	
Utilities/Communications	160	
Vacant Floor Area	1,688	
TOTAL	**53,887**	

Source: WAPC Land Use Survey

With a floorspace totalling around 54,000m^2 and a land area of 16.48 hectares, the Warwick centre has an intensity of about 3,300m^2 per hectare. It currently achieves a Mixed Use ratio of 41.7%, which is well above the 30% target for centres with between 20,000m^2 and 50,000m^2 of Shop Retail floorspace.

5. Activity and Commercial Centres Assessment

The Joondalup, Warwick and Whitfords centres have been outlined separately in previous sections. This section provides an assessment of all centres within the City of Joondalup in terms of current and future potential changes to be tested in the retail needs assessment.

5.1 SPP 4.2 Diversity Targets by Commercial Centre – Joondalup, Warwick and Whitfords

The diversity targets outlined previously in Table 9~~Table 10~~ indicate that only centres with a Shop Retail floorspace over 10,000m^2 are required to achieve the target mixed use proportions. The only City of Joondalup centres currently impacted by these targets are Joondalup City, Whitfords and Warwick centres. The current performance against diversity targets of each centre is outlined in the following tables.

Table 13~~14~~: Joondalup City Mix of Uses Performance

Joondalup City Mix of Uses	40% Diversity	
Uses	Floorspace (m^2)	% Uses
Shop/Retail	74,655	22.7%
Mixed Uses	227,116	69.1%
Remaining Uses (Ser, Sto, Man, Res etc)	26,739	8.1%
Total Floor Area	**328,510**	**100.0%**

The Joondalup City Centre currently achieves well in excess of the 40% diversity target and any significant expansion of Shop retail floorspace would be negligible in terms of achieving the 40% target. For example, if the Shop Retail component was increased to 100,000m^2, the mixed uses proportion would be 64% and at 120,000m^2 Shop Retail the Mixed Use proportion would be 61%.

Table 14~~15~~: Whitfords Mix of Uses Performance

Whitfords Mix of Uses	**30% Diversity**	
Uses	Floorspace (m^2)	% Uses
Shop/Retail	49,924	64.7%
Mixed Uses	26,751	34.7%
Remaining Uses (Ser, Sto, Man, Res etc)	490	0.6%
Total Floor Area	**77,165**	**100.0%**

The Whitfords centre currently achieves the required 30% Mixed Use proportion for centres with a Shop Retail floorspace of between 20,000m^2 and 50,000m^2. However, as discussed in section 4.2.1~~4.2.1~~, any increase in Shop Retail would require the centre to achieve a 40% Mixed Use proportion and would require significant expansion of Mixed Use activity in order to achieve the desired targets in SPP 4.2.

Table ~~16~~15: Warwick Mix of Uses Performance

Warwick Mix of Uses	30% Diversity	
Uses	Floorspace (m^2)	% Uses
Shop/Retail	32,652	60.6%
Mixed Uses	18,217	33.8%
Remaining Uses (Ser, Sto, Man, Res etc)	3,018	5.6%
Total Floor Area	**53,887**	**100.0%**

The Warwick Centre is currently achieving the required Mixed Use target proportion of 30%. The centre would be able to expand the Shop Retail component to around 39,000m^2 before requiring additional Mixed Use floorspace to comply with SPP 4.2 targets.

5.2 Site Assessments

The project team visited all activity centre sites to determine how well the centres appear to be functioning and to assess the general look and feel of the centres. Centres were assessed on a simple scale of high, medium and low based on the amenity of the centre and how well the centre appeared to be fulfilling its role in terms of the retail hierarchy.

Each centre was also assessed on whether there appeared to be potential for expansion or refurbishment (or both). These assessments were purely qualitative and form a part of the overall health check of the centres. Additional elements to inform the health check of the centres include proportion of vacant floorspace and estimated Shop Retail turnover per square metre per annum.

The details on each centre are provided in section 10.1~~10.1~~ Appendix 1 - Activity Centres Data~~Appendix 1 – Activity Centres Data~~.

5.3 "Health Check" by Centre – All Centres

The following section details the overall health check by centre for a range of measures. Thresholds are set for the various measures to determine whether a “red flag” is required. These include:

1. Floorspace intensity less than 1,800m^2 per Hectare;
2. Vacant Floorspace proportion greater than 8%;
3. Shop Retail proportion greater than 80%;
4. Estimated Shop Retail turnover per square metre per annum less than average for all centres;
5. Amenity/Function – Low; and
6. Access/ Parking/ Public Transport “Poor” or “Very Poor”.

Measures 1 to 4 are quantitative and therefore simple to calculate. The fifth measure, amenity/function, is based on site visits and observations made on each centre and are therefore a qualitative measure which could be subject to variation. The observations made at each of the centres considered the general condition and appearance of the centre, streetscape and frontage as well as how busy the centre appeared. The access/parking/public transport measure consists of four separate measures being:

- Parking provision to total floorspace ratio;
- Bus route to centre;
- Rail station within 800m; and
- Centre located on a main road.

This enables an overall rating for access to the centre and forms a key measure in terms of the overall health of a centre.

The table below details the results.

Table 16~~17~~: Activity Centre Health Check

Complex Number	Complex Name	Floorspace Intensity (m^2/Ha)	Vacant Floorspace %	Shop Retail %	Est. Shop Retail Turnover - % difference from Average	Amenity/ Function	Access/ Parking	Refurbish/ Expansion potential	Overall Centre Health
600	JOONDALUP CITY	1,059	2.5%	22.2%	-21.4%	H	good	-	Average
601	WARWICK GROVE	3,306	3.1%	47.8%	6.2%	L	average	Refurb/ Expand	Good
602	WHITFORDS CITY	3,182	0.2%	63.0%	-5.4%	H	average	-	Good
605	SORRENTO	2,331	1.4%	44.0%	-10.5%	L	average	Refurb	Average
606	FORREST PLAZA	1,862	9.5%	30.6%	-12.0%	M	average	-	Average
607	SPRINGFIELD	1,818	7.3%	92.7%	-21.7%	M	average	-	Average
609	GREENWOOD VILLAGE	2,522	2.1%	40.9%	20.9%	H	good	Expand	Excellent
610	DUNCRAIG	1,821	0.0%	76.4%	16.6%	M	poor	Refurb	Good
611	SHEPPARD WAY	1,823	5.4%	60.6%	-4.0%	M	poor	-	Average
612	GLENGARRY	1,994	6.6%	37.2%	3.3%	M	good	-	Excellent
613	COOLIBAH PLAZA	1,190	0.0%	80.8%	0.7%	L	average	Refurb	Poor
614	CARINE GLADES	2,609	13.2%	48.7%	-8.3%	M	good	Refurb	Average
615	CRAIGIE PLAZA	2,092	7.7%	42.8%	-19.7%	L	average	Refurb	Average
616	KINGSLEY	3,232	6.5%	42.8%	-1.3%	H	poor	Refurb	Average
617	PADBURY	2,171	5.6%	64.6%	3.6%	M	average	-	Excellent
618	BELDON	2,842	10.4%	81.9%	-1.3%	L	good	Refurb	Very Poor
619	MULLALOO	2,309	1.7%	28.8%	-14.9%	M	poor	Refurb	Average
620	HEATHRIDGE	1,586	1.9%	69.0%	-17.7%	L	average	Refurb	Poor
621	EDGEWATER	1,989	0.0%	65.3%	18.0%	M	average	-	Excellent
622	OCEAN REEF	1,595	2.7%	43.3%	-5.9%	L	average	Refurb	Poor
623	MULLALOO TAVERN	11,972	0.0%	38.3%	-24.7%	H	average	-	Good
624	WOODVALE	3,301	3.1%	42.7%	5.0%	M	average	-	Excellent
625	MOOLANDA NORTH	3,379	14.4%	18.5%	1.2%	M	poor	-	Average
627	CONNOLLY	2,935	0.0%	76.9%	-9.2%	M	poor	-	Average
628	HARMAN ROAD	1,936	0.0%	75.1%	2.7%	M	poor	-	Good
629	MOOLANDA SOUTH	2,280	0.0%	68.1%	9.3%	M	poor	-	Good

Complex Number	Complex Name	Floorspace Intensity (m^2/Ha)	Vacant Floorspace %	Shop Retail %	Est. Shop Retail Turnover - % difference from Average	Amenity/ Function	Access/ Parking	Refurbish/ Expansion potential	Overall Centre Health
651	WALDECKS	249	0.0%	21.3%	15.8%	H	good	-	Good
661	LILBURNE ROAD	2,039	34.8%	65.2%	16.4%	M	average	-	Good
664	JOONDALUP SOUTH	429	0.0%	71.5%	-26.8%	M	average	-	Average
665	HILLARYS	2,431	2.4%	59.9%	-11.6%	H	average	-	Good
668	HEPBURN AVENUE	2,427	0.0%	74.0%	22.9%	M	average	-	Excellent
669	GWENDOLINE DRIVE	2,174	4.2%	66.8%	9.7%	H	good	Expand	Excellent
671	KINROSS (Includes Kinross A & B)	3,097	1.4%	83.5%	10.4%	H	poor	-	Average
676	SORRENTO QUAY	699	4.7%	31.7%	-32.9%	H	good	-	Average
946	CURRAMBINE MARKET PLACE	613	0.3%	71.0%	24.6%	H	good	Expand	Good
948	JOONDALUP DRIVE	2,251	12.9%	26.4%	0.1%	H	excellent	-	Good
951	DUNCRAIG VILLAGE	891	0.0%	65.8%	13.3%	M	good	-	Good
8732	WOODVALE PARK	2,167	0.0%	72.9%	32.1%	H	good	Expand	Excellent
8733	BEAUMARIS CITY	2,222	0.4%	46.0%	-9.1%	H	average	-	Good
8734	CANDLEWOOD	1,953	4.3%	70.8%	12.2%	M	average	-	Excellent
4	JOONDALUP	2,086	6.3%	14.1%	-21.4%	H	good	-	Good
27	CANHAM WAY (includes Greenwood Plaza)	2,301	15.4%	14.4%	28.4%	L	average	Refurb	Average

Each centre is assessed based on the number of "red flags" to arrive at an overall health assessment on the following scale:

- 0 red flags – Excellent
- 1 red flag – Good
- 2 red flags – Average
- 3 red flags – Poor
- 4 red flags – Very Poor

The results indicate that the centre with very poor overall health is:
- Beldon.

It should be noted that although the centre has three red flags, it has only just achieved each of these. For example, the turnover is only 1.3% below average and the Shop Retail floorspace proportion is only marginally over 80%.

The centres with poor overall health include:
- Heathridge;
- Coolibah Plaza; and
- Ocean Reef.

Most of the identified centres are local or neighbourhood type centres and it is not surprising to see comparatively poor performance amongst these centre types.

The inclusion of the Joondalup City Centre as an average performing centre is a concern. This is mainly due to the land use intensity of less than 1,800m^2 per hectare as well as a lower than average Shop Retail turnover per square metre per annum. The centre will need to rely on catchment population growth and intensification of uses if it is to achieve the required intensity and retail performance expected of a Primary Activity Centre.

It should be noted that the health check is a comparative tool to enable centres to be prioritised for refurbishment or redevelopment and therefore to mainly identify poorly performing centres. This does not remove the need to adequately plan for improving those centres that have average or good performance and specific issues such as low amenity. Those centres that have an excellent performance may also be looked to as expansion opportunities.

Each centre is described individually in more detail in the appendices.

5.4 Current Hierarchy and Floorspace Allocations Assessment

The City of Joondalup had an estimated resident population at 2008 of 160,412 persons (ABS Estimated Resident Population by LGA, March 2011) and approximately 261,000m^2 of Shop retail floorspace located at commercial activity centres within the City. This implies a Shop Retail floorspace ratio of around 1.63m^2 per capita. Whilst SPP 4.2 does not set guidelines for the per capita provision of Shop retail, it is worth noting that previous guidelines for Shop Retail floorspace per capita based on the average for the Perth metropolitan area set 1.6m^2 per capita for regional, district and local/neighbourhood Shop Retail floorspace. This implies that residents living in the City of Joondalup currently have an adequate, and perhaps slightly over the average supply of Shop Retail floorspace in commercial areas based on historical floorspace per capita ratios.

The supply of Shop Retail floorspace in the City of Joondalup appears to be sufficient to meet demand. However, there is a high proportion of Strategic Metropolitan and Secondary Centre floorspace as well as Local/Neighbourhood floorspace. The proportion of district level floorspace is relatively low at around 9.7% of total Shop Retail floorspace. Considering that this includes Sorrento Quay as a district centre, which does not include a supermarket and serves a role more as a tourism oriented activity centre, it is cause for some concern. The Local Commercial Strategy should therefore seek to optimise existing district centre floorspace in developing Shop Retail floorspace growth scenarios. Consideration should also be given to change Gwendoline Drive (Belridge) from a neighbourhood centre to a district centre to assist in facilitating this shift. The resulting spatial distribution of district centres including the Gwendoline Drive centre is shown on the following map.

Figure ~~14~~14: Existing District Centres and Proposed Gwendoline Drive District Centre

Figure 14~~Figure 14~~ shows that the resulting spatial distribution of District Centres in the City of Joondalup including Gwendoline Drive is realistic, with the proposed Gwendoline Drive centre being more than four kilometres from any other district centre. The Shop Retail floorspace at Gwendoline Drive at 2006 was 6,148m^2 which is significantly more than the floorspace that would be expected in a Neighbourhood Centre. The centre also includes 1,328m^2 of office uses and almost 600m^2 of health uses. The implication of this is that the centre is already trading much like a District Centre and is providing a wide range of daily and weekly needs that other District Centres in the City of Joondalup also provide.

The centre is located within a City of Joondalup Housing Opportunity area and can reasonably expect a moderate increase in daily and weekly retail shopping demand within the catchment over time. This will place pressure on the centre to expand beyond its current floorspace. It is located adjacent to Belridge Senior High School which generates a high number of bus trips from the surrounding area and Edgewater Rail Station.

The future impact of internet retail sales is likely to continue to emerge over the coming years and is expected to lessen the demand for retail floorspace. This is likely to not only include the floorspace demand lost to interstate and overseas retailers but as local retailers take up offering online sales as part of their retail strategy, the requirement to store stock on-site will diminish proportionately. Warehousing requirements may experience proportionate increased demand as a result. Retailers, and commercial property owners, are expected to continuously plan to increase profits and will need to use marketing strategies and create experiences for their customers in order to attract business. This may require a shift in what products and services are offered in activity centres with categories such as entertainment and food and beverage having the potential to increase.

The precise impact of online retailers on City of Joondalup future retail floorspace demand is difficult to estimate at this stage but should serve to emphasise that ~~maximum~~ Shop Retail floorspace threshold recommendations ~~resulting from~~ from this Strategy ~~this study~~ should be maintained unless it can be demonstrated that there is minimal impact on the sustainability of the retail hierarchy ~~not be exceeded and that the retail hierarchy should be maintained~~. Whilst Shop Retail floorspace demand may be impacted, it is recommended that proposals to redevelop or add development such as residential to existing centres should result in no net loss of commercial floorspace by centre at 2007/08 levels, except where it can be demonstrated that the community will not be adversely impacted through loss of local shopping and service provision.

5.5 Development Intentions Analysis

Current known development plans exist for several centres according to the Western Australian Property Directory (Property Council, 2010). These include:

- Beldon;
- Mullaloo;
- Ocean Reef; and
- Carine Glades.

The property Council report provides no detail on the plans to develop the centres. The development intentions appear to align well with some of the centres currently with poor to average “health check” results.

There is also a proposal, in the form of a structure plan, for expansion to the Whitfords Centre to include a department store (possibly David Jones). Given the current “good” rating for the Whitfords centre, ~~caution is required to ensure that any expansion would not have an unacceptable negative impact on other centres~~

~~within the City.~~ ~~RPS~~it is recommended~~s~~ that any expansion of Shop Retail in the Centre be considered within the context of the need for a diversity of uses to be supported in the Centre and for the broader sustainability of the retail hierarchy to be supported.

~~There are other known development applications pending including the Lendlease Lakeside development application. This DA is likely to include a major refurbishment and extension to the existing Lakeside Shopping Centre. The development application should be assessed in terms of its alignment with the hierarchy and the principles outlined in this report. The impact of retail expansion at Joondalup City Centre is assessed in section 6.~~

5.6 Implications for Activity Centre Hierarchy and Expansion Opportunities

Based on the health check earlier in this section of the report and known developer intentions, it is likely that any considerable changes to the hierarchy will not be required. Expansion of district centre floorspace should be encouraged to raise the proportion of available district level floorspace in the City. The changing of Gwendoline Drive (Belridge) from a neighbourhood centre to a district centre is recommended.

Current expansion of the Currambine Marketplace is consistent with these findings; however, there may be capacity for expansion of the other district centres at Woodvale Park and Greenwood Plaza. The potential for expansion of centres is tested in the following retail needs assessment section.

5.6.1 Potential Impediments to Redevelopment and Revitalisation

The City of Joondalup District Planning Scheme No. 2 (DPS) currently provides the most guidance regarding development within activity centres in the City. The draft Local Planning Strategy, draft Local Housing Strategy and draft Joondalup City Centre Structure Plan also provide guidance. There are a number of elements within existing policies that are currently likely to be impeding to some degree the redevelopment or revitalisation of some centres.

1. Large number of "Zones"
   The Zoning Table (Table 1) in the DPS contains nine different zones. It is recommended to reduce the number of zones in order to simplify the approvals process and achieve greater diversity of uses. This increases flexibility and may attract new business and increase employment opportunities. The zones recommended in the WAPC Planning Manual and SPP 4.2 should be considered.

   ~~Consideration of zones and development typologies in centres should also include a review of table 1 of the Centres Strategy Policy 3.3. Policy and Scheme should be consistent in terminology.~~

2. Activity Centre R-Codes
   The R-Codes for activity centres are recommended to increase from R20 to at least R80 in the draft Local Housing Strategy. This would provide an excellent incentive for centre owners to redevelop and include residential components in the development. The parking requirements would need to be considered as there is likely to be considerable opportunity for shared parking arrangements between residents, customers and workers. It is not clear whether the R80 would be additional development applied to the centre site or whether a reduction in commercial floor area is implied if a residential component is constructed. Any significant reduction in commercial floorspace would have implications for jobs provision and is not recommended. Plot ratio bonuses and density bonuses could be provided on the

basis of a minimum residential and commercial component in mixed use and centre zones. Development standards and performance standards could be developed accordingly.

The R-AC codes could also be considered for application to City of Joondalup Activity Centres. The R-AC codes are summarised in the following table.

Table 17~~18~~: Multiple Dwellings and Activity Centre R-Codes

R-code Maximum	Maximum plot ratio	Maximum site cover (%)	Minimum primary street boundary setback (m)	Secondary Street setback (m)	Maximum height (m)			Maximum height of built to boundary walls	
					Top of external wall	Top of external wall (concealed roof)	Top of pitched roof	Max height	Average
MULTIPLE DWELLINGS IN LOW DENSITY AREAS NOT SUBJECT TO THIS CODE									
MULTIPLE DWELLINGS IN MEDIUM DENSITY AREAS									
R30	0.5	45	4	1.5	6	7	9	3.5	3
R35	0.6	45	4	1.5	6	7	9	3.5	3
R40	0.6	45	4	1.5	6	7	9	3.5	3
R50	0.6	45	2	2	9	10	12	3.5	3
R60	0.7	45	2	2	9	10	12	3.5	3
MULTIPLE DWELLINGS IN HIGH DENSITY AREA									
R80	1.0	b~~-~~	2~~4~~	2	12	13	15	7	6
R100	1.25	b~~-~~	2~~4~~	2	12	13	15	7	6
R160	2.0	b~~-~~	2~~4~~	2	15	16	18	7	6
MULTIPLE DWELLINGS WITHIN MIXED USE DEVELOPMENT AND ACTICIVTY CENTRES									
R-AC0[b]	[b]	[b]	[b]	[b]	[b]	[b]	[b]	[b]	[b]
R-AC1	3.0[c]	-[c]	2	2[c]	27[c]	28[c]	30[c]	14[c]	12[c]
R-AC2	2.5[c]	-[c]	2	2[c]	20[c]	21[c]	23[c]	10.5[c]	9[c]
R-AC3[d]	2.0[c]	-[c]	2	2[c]	18[c]	19[c]	21[c]	7[c]	6[c]
[b] Refer to adopted Structure Plan or Detailed Area Plan which sets out development requirements									
[c] Controls can be varied ~~at time~~ when R-AC is introduced into ~~planning strategies or~~ a scheme~~s~~									
[d] Residential elements of mixed use development with non ~~-~~R-coded land is to be assessed against R-AC3 provisions									

Source: ~~Multi Unit Housing Code November 2010~~Residential Design Codes 2013

Any revision of the draft Local Planning Strategy should include reference to the R-AC codes where applicable either through referring to Structure Plans and Detailed Area Plans (R-AC0) or other R-AC codes as appropriate. According to the above table, residential elements of mixed use development with non ~~-~~R-coded land would be assessed against R-AC3 provisions, therefore the City would need to be satisfied with this or determine the appropriate application of R-AC codes for activity centres without a Structure plan or Detailed Area Plan in alignment with the Local Housing Strategy.

3. Rez~~Z~~oning
   There are some opportunities to investigate the use of zoning changes to serve as a catalyst for redevelopment in some areas. For example the Canham Way area may be rezoned on the south side of Canham Way to Commercial or Business with the northern portion retained as Service Commercial. This may assist in achieving some redevelopment of the area.

4. Sub-division/Strata Title
Vertical or horizontal subdivision/strata title of commercial units is to be discouraged as this creates multiple ownership and the potential for land use and activity stagnation in the future. Amalgamation of lots is difficult and time consuming and would require considerable incentive for the private sector or the Government to purchase land and titles to be successful.

5. Some ambiguous use classes
The Zoning Table (Table 1) in the DPS contains a long list of use classes to be applied against the various zones. For example the use "supermarket" has been deleted and the use "shop" is permitted in commercial zones only. There may be unintended consequences for not permitting some of these uses in commercial areas. A review of these use classes, with a view to increasing land use flexibility within the general centre parameters described in this report, may assist in enabling some redevelopment of centres.

6. Shop Retail floorspace caps
The ~~current~~ Shop Retail floorspace caps contained in Schedule 3 of the DPS ~~are now ten years old and need to be reviewed~~have been removed. This report will provide a new set of ~~recommended~~ Shop Retail floorspace ~~maximums~~ thresholds for each of the identified centres acknowledging the removal of caps under SPP 4.2. ~~While some centres may benefit from an increased allowance for Shop Retail floorspace, it is likely that other factors that would be greater impediments to redevelopment.~~

7. Parking requirements
Current parking requirement~~s~~ for most centres ~~are~~ is one bay per 30m^2. Where there is sufficient public transport access, such as within 800m of a rail station, a parking requirement of around 1 bay per 80m^2 for activity centres should be considered. The draft Joondalup City Structure Plan provides some incentive for buildings to be two storeys and over by only applying the 1 per 30m^2 parking standard to the first storey. A review of parking standards for other centres may enable similar incentives for redevelopment. The WAPC Development Control Policy 1.6 encourages the use of discretion to vary parking standards in circumstances where there is ample public transport, such as Joondalup.

8. Frontage requirements for shops in Business and Mixed Use zones
Although "shops" are listed as not permitted in Business and Mixed Use zones, they can be approved under certain conditions. The shop must not exceed 200m^2 and the direct street frontage of any lot containing a shop must be at least 20 metres in width. In the Business and Mixed use zones, a parcel of land housing a shop must be on a separate green title lot of not less than 1,000m^2. The requirement for 20m lot frontages and a maximum of 200m floorspace may be a hindrance to some business specialties that require a combination of shop, storage and manufacturing uses and would limit the retail expansion potential of these business types. If the rationale for this element is to ensure adequate parking, then alternate measures may be more appropriate.

In terms of strategies to achieve economic growth and development in the City of Joondalup, the City planning policies and schemes are limited to helping:

- Attract new businesses;
- Retain existing businesses; and
- Expand existing businesses.

These principles of attraction, retention and expansion of business need to be considered in any review of local planning strategies, policies and schemes.

~~5.7~~

6. Retail Needs Assessment

The Retail Needs Assessment (RNA) was undertaken by MGA Town Planners. The Activity Centres Policy SPP 4.2 stipulates that local planning strategies should provide the estimated retail need and indicative distribution of floor space for activity centres in a local government area, consistent with the activity centre hierarchy. SPP 4.2 states that RNAs should be prepared based on the following:

- *the projected population and its socio-economic characteristics;*
- *household expenditure and required retail floorspace;*
- *changing shopping patterns and trends; and*
- *the needs of different retail sectors.*

6.1 Background

A range of retail models and similar assessment tools have been developed to inform shopping centre owners and regulatory authorities with respect to the potential future retail floor space of shopping centres and aid in the assessment of trade impacts. However, retail modelling is subject to limitations. For example, accurately incorporating matters including ease of access and traffic circulation and perceptions of physical amenity are not factors generally accounted for, although these factors can affect the distribution of shopping trips made by residents.

The gravity model utilises various inputs, as follows:

- The number and size of competing activity centres;

- The ease of use and accessibility of each activity centre via the road network (this is an important factor impacting on the attractiveness of a centre);

- The number of households within each origin zone included in the study area;

- The gravity model forecasts consumer choice with respect to each activity centre, resulting from the distribution of retail floor space and the nature of the transport network linking population origin zones to activity centres; and

- The retail gravity model is based on the model developed by H. L. Huff and assumes that the number of shoppers attracted from a given origin zone to any shopping centre, is proportional to a size measure of the centre and inversely proportional to a measure of distance or time between residential zones and the centre (Huff 1964).

6.2 Limitations of Gravity Models

Public submissions on the draft Local Commercial Strategy Part A, assessed and reviewed by RPS on behalf of the City, universally raised concerns regarding suitability and appropriateness of using a Gravity Model to assess Shop Retail need and provide an indicative distribution of floorspace in the City. Primary concerns raised included:

- The age of the methodology (1960's) and whether it continued to be appropriate within the modern context;

- The focus of Gravity Models primarily on centre size and accessibility indicators as the determining factors of floorspace distribution;

- That the size of potential Shop Retail floorspace increases under the Gravity Model assessment does not necessarily consider the commercial feasibility of such expansions. This is particularly the case for Centre's where only minor expansions are identified under the Gravity Model Assessment; and

- The lack of transparency that is often associated with Gravity Models, particularly in relation to the weightings between variables and other core assumptions.

For this reason, the results of the Gravity Model assessment represents one of a number of factors that has contributed to the identification of appropriate Shop Retail floorsapce thresholds for the Local Commercial Strategy.

~~6.2~~6.3 Retail Gravity Model and Calibration

The modelling undertaken utilised the following equation (1); where O*i* = the number of trips from origin zone *i;* and S*ij* = the number of observed/estimated trips from origin zone *i* to centre *j*. The negative exponential function generally provides a good fit to urban travel patterns, particularly by automobile.

$$S_{ij} = O_i \frac{A_j \left(\exp^{-\beta Tij}\right)}{\sum_j A_j \left(\exp^{-\beta Tij}\right)} \qquad (1)$$

- To determine 'β' through the utilisation of equation (1), the model is constrained as it relates to average trip time. This constraint results in the incorporation of an assumption that shoppers are more likely to shop closer to home.

- The methodology utilised, incorporating the use of equation (1), meets the requirements of SPP 4.2 in providing a Retail Needs Assessment (RNA) to inform planning at a higher strategic level.

- Where future development proposals or centre plans aim to exceed the floor space levels recommended under this strategy, Retail Sustainability Assessments (RSA) informed by shopper surveys will be required in order to provide more definitive analysis in terms of trade areas and trade impacts, consistent with the policy.

In summary, the modelling of the study area and competing centres through the use of the retail gravity model is influenced by:

- The level of accessibility and travel time to each activity centre from population origin zones;

- The size of competing activity centres; and

- The distribution of existing and future residential development and household expenditure throughout the study area.

The modelling estimates trade impacts that provide a guide to decision makers in respect of retail needs in light of the hierarchy of activity centres. The retail modelling and the resulting recommendations are based on a fifteen year horizon, to 2026.

~~6.3~~6.4 Study Area

A trade area can be defined as a geographically delineated region, containing potential customers for whom there exists a probability greater than zero of their purchasing a given class of products or services offered for sale by a particular firm, or agglomeration of firms (H.L. Huff, 1964).

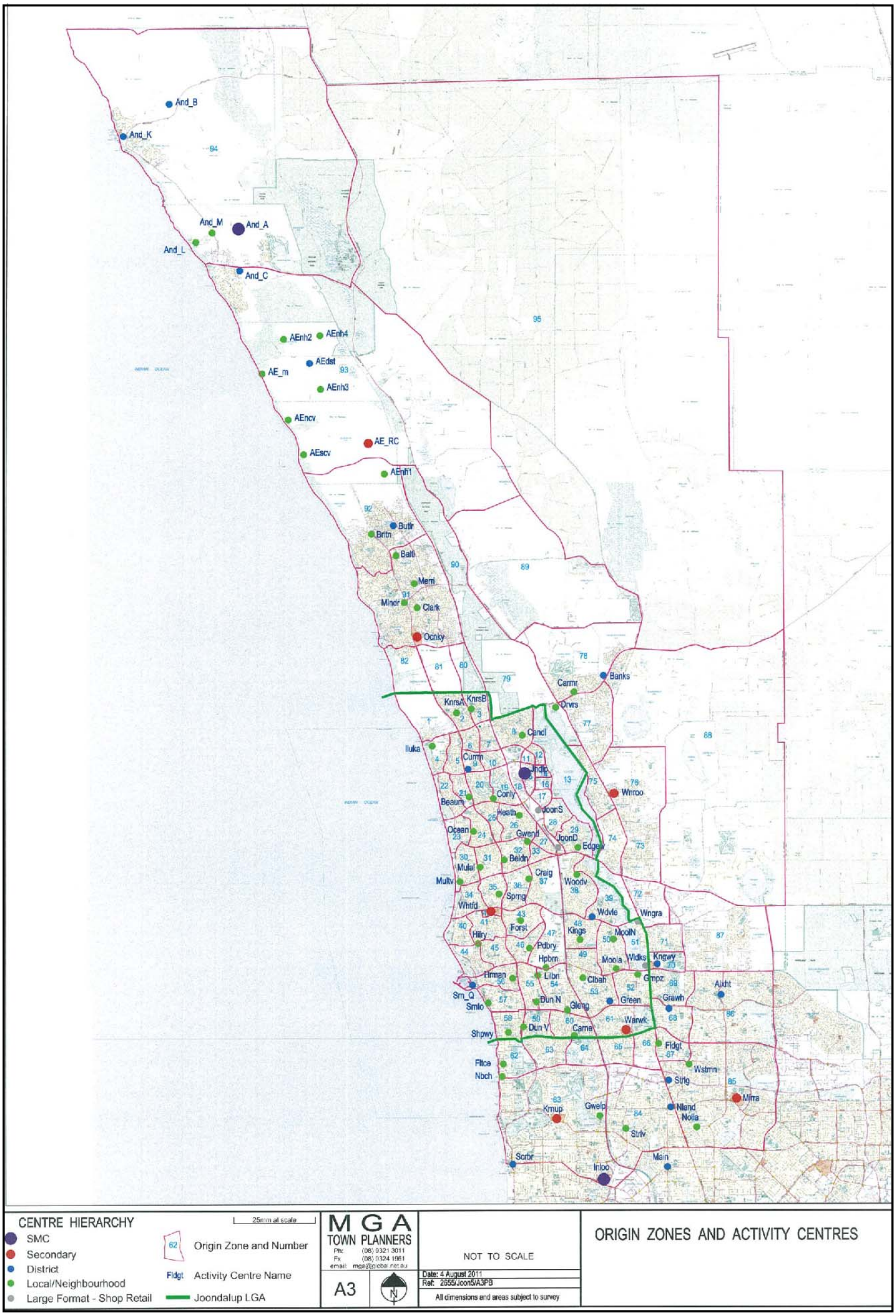
The defined study area therefore acknowledges the prevailing pattern of urban development including competing centres, the road network and regional connectivity affecting trade for activity centres in the City of Joondalup. The model determines trade areas based on the probability of visitation from origin zones within the study area.

The study area extends from Two Rocks at the northern edge of the Perth Metropolitan Region, east to the localities of Carabooda and Nowergup in Wanneroo and down to Banksia Grove and Alexander Heights. The study area terminates at its southern extent in the areas of Scarborough, Osborne Park and extends east to Mirrabooka. All coastal suburbs extending from Scarborough Beach north to Two Rocks are incorporated. The scale of the study area is deemed appropriate, as both the Joondalup and Whitfords activity centres draw trade from throughout the North West Sub-Region. The modelling therefore provides a clear indication of development potential, taking the future development of relevant competing centres into consideration.

The boundaries of the study area were based largely on the distribution of external competing centres in the City of Stirling and City of Wanneroo, having the potential to impact on the level of visitation to activity centres within the City of Joondalup. Of particular relevance, the Stirling Strategic Metropolitan Centre, Karrinyup Secondary Centre, Mirrabooka Secondary Centre, Kingsway District Centre, Yanchep Strategic Metropolitan Centre, Alkimos Eglinton Secondary Centre and the Wanneroo Secondary Centre are identified as activity centres likely to significantly impact on shopping trips made by residents within the City of Joondalup. Similarly, the level of development envisaged under this strategy, particularly for the Whitfords Secondary Centre and Joondalup Strategic Metropolitan Centre, will impact on the shopping behaviour of those residents in the City of Wanneroo and consumers in the City of Stirling.

The study area and activity centres included in the modelling are shown in the following map. An A3 sized version is included at Appendix 2 – Study Area A3~~Appendix 2 – Study Area A3~~.

Figure 15: Study Area and Activity Centres



~~6.4~~6.5 Modelling Population Data

~~6.4.1~~6.5.1 Data Preparation

Base data was gathered comprising of population projections called Metropolitan Land Use Forecasts (MLUFs), prepared by the Department of Planning (DoP). These projections are utilised in order to enable the DoP to undertake regional transport modelling exercises based on Main Roads Transport Zones (MRTZ). The MLUF projections were modified at a rate sufficient to reflect the additional level of population growth projected by the Australian Bureau of Statistics for the years 2021, 2026 and 2031. Modifications to the population projections were undertaken by MGA Town Planners. New totals were verified at LGA level by the Department of Planning's Research and Modelling team, prior to retail modelling exercises taking place.

Table 18~~19~~: Dwelling Projections by LGA

Dwellings Projections	2006	2011	2016	2021	2026	2031
Joondalup	57,937	63,440	68,059	71,980	75,805	79,443
Wanneroo	43,127	56,191	71,131	89,208	107,949	118,669
Stirling (north west portion only)	40,974	45,283	49,776	53,823	58,681	67,004

Source: Department of Planning Metropolitan Land Use Forecasting System, ABS Population Projections, MGA Planning Modelling

It may be necessary for future planning proposals for District and Secondary Activity Centres seeking the maximum level of retail floor space provided for under this strategy, to demonstrate that this level of dwelling growth will be achieved.

~~6.5~~6.6 Floorspace Data

The Department of Planning produces data sets detailing the level of floorspace and employment within all commercial, industrial and public purpose complexes within the Perth Metropolitan Region. Shop/retail floorspace and employment data is collected through the Department of Planning Land Use and Employment Survey, the most recent of which was undertaken during 2007-2008. Floorspace and employment data is categorised under the Western Australian Planning Land Use Codes (PLUC) and the modelling incorporates floorspace categorised as PLUC 5 - shop/retail identified under the Land Use and Employment Survey.

For those centres included within the City of Stirling, the PLUC 5 shop/retail floorspace area of each centre was extracted from the DoP Land Use and Employment Survey (2008). In order to acknowledge the future growth of centres within the City of Stirling, the projected size of relevant activity centres was sourced from the draft City of Stirling Commercial Centres Strategy (not endorsed by the WAPC), which provides projected floor space levels as at 2026. Given the City of Stirling is currently reviewing its draft Local Commercial Strategy, alternative future floor space sizes were identified for the Stirling Strategic Metropolitan Centre and the Mirrabooka Secondary Centre, as studies have recently been undertaken by Macroplan identifying the growth potential of these two activity centres. The DoP advised that the modelling should assume growth potential of 70,000m² for the Stirling Metropolitan City Centre, although this is subject to review.

For those centres within the City of Wanneroo, the existing floor space areas were sourced from the DoP Land Use and Employment Survey (2008). Future floor space sizes were taken from endorsed District and Local Structure Plans, Centre Plans and the City of Wanneroo Town Planning Scheme No. 2. A report prepared by Macroplan provides indicative floor space sizes for those coastal and inland activity centres in the Alkimos Eglinton locality. With respect to the St. Andrews District Structure Plan (DSP) area, future floor space area for all Local, District and higher order centres were calculated based on reference to the staging program identified under the St. Andrews DSP and the projected dwelling numbers under the Department of Planning MLUF projections.

~~6.6~~6.7 Travel Times

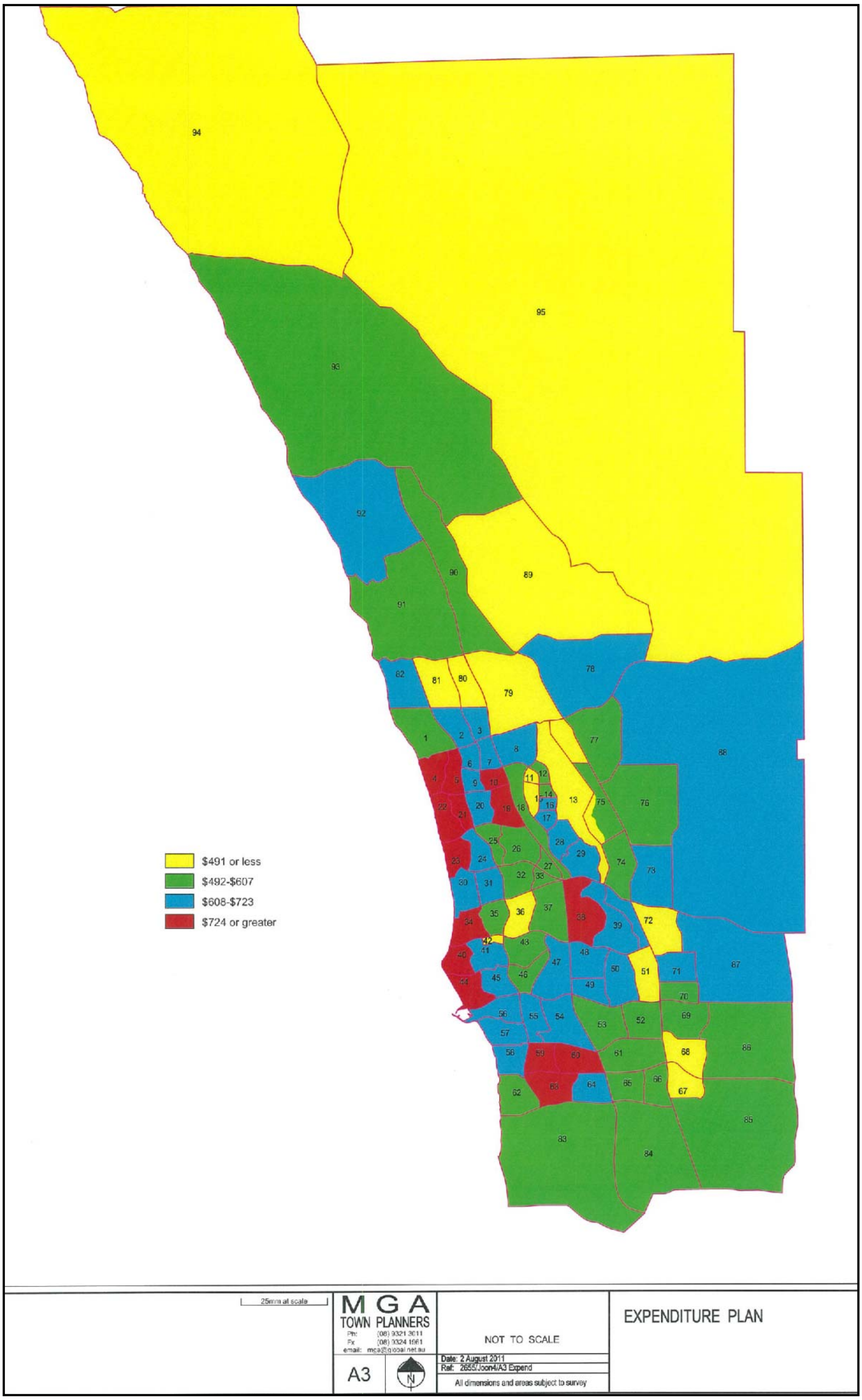
Travel times were identified utilising an online mapping tool, providing travel time measurements from the centre of each population origin zone to the entry point of each destination zone (activity centre). Travel time measurements to and from each activity centres and origin zone were averaged.

~~6.7~~6.8 Household Expenditure Modelling

Household expenditure data was estimated through a micro-simulation model developed by MDS Market Data Systems. MDS utilise base data from the ABS Household Expenditure Survey 2003-04 (Cat. 6530.0) and changes in spending behaviour are accounted for through the analysis of Australian National Accounts and Taxation Statistics. Expenditure is also estimated based on various socio-economic characteristics evident within separate Census Collector Districts (CCD). Household expenditure data prepared included expenditure on all food and non-food goods identified as being classified under PLUC 5 shop/retail, with reference to the associated Western Australian Standard Land Use Codes (WASLUC) definitions.

MDS provided household expenditure data for each CCD in the study area for the year 2010. This data was then aggregated to provide an estimate for each origin zone, given that CCD boundaries correlate with that of the larger MRTZ's, which form the basis of the origin zones within the retail model. The estimated Shop Retail expenditure per week by MRTZ is shown thematically in the following map.

Figure 16: Shop Retail Expenditure 2010



The thematic expenditure map illustrates that households in the suburbs closer to the coast generally have greater weekly Shop Retail expenditure than households in those suburbs east of Marmion Avenue. It is expected that this trend will continue.

~~6.8~~6.9 Proposed New Centres, Large Format Retail Centres and Service Industrial Areas

~~6.8.1~~6.9.1 New Centres

There are plans for the inclusion of around 8,000m^2 of retail in the proposed Ocean Reef development. This retail is likely to be predominantly tourist based retail and would only account for a small proportion of local expenditure since the catchment draw would be similar to that of Sorrento Quay. Sorrento Quay was modelled in the retail needs assessment and although it is technically a district centre, the modelled retail turnover result only reflects a proportion of the expected revenue turnover. This is likely to be the same for any retail located at Ocean Reef.

The proposed Iluka neighbourhood centre may include up to 3,300m^2 of shop retail uses and has been included in the modelling. The modelling shows that the centre will trade well at 2026. Should the Iluka centre not be constructed to include the entire 3,5~~3~~00m^2 as proposed, consideration could be given to increase the Currambine centre recommended maximum Shop Retail by the amount of Shop Retail floorspace not constructed at Iluka.

~~6.8.2~~6.9.2 Large Format Retail Centres

According to the DPS 2, the objectives of the Business Zone are to:

a. Provide for retail and commercial businesses which require large areas such as bulky goods and category/theme based retail outlets as well as complementary business services;
b. Ensure that development within this zone creates an attractive façade to the street for the visual amenity of the surrounding areas.

These objectives apply to the ~~Business Zone~~ Gateway district within the draft Joondalup City Centre Structure Plan area.

- Joondalup Drive (Complex 948) - Edgewater

The Joondalup Drive complex is located in the draft Joondalup City Centre Structure Plan ~~Business Zone~~ Gateway district and includes some large format retailers such as Getaway Outdoors (formerly Ranger Outdoors), ~~Classique Furniture~~ and Barbeques Galore. These businesses are included in the Shop Retail PLUC category but have large floorspace requirements. There is also a Bunnings store which contributes towards the 19,000m^2 of Other Retail floorspace within the complex. The location of these business types in the complex is consistent with the objectives of the Business Zone (DPS 2).

- Joondalup South (Complex 664) - Edgewater

The Joondalup South complex is located in the draft Joondalup City Centre Structure Plan ~~Business Support Zone~~ Gateway district and currently includes businesses such as Anaconda, Spotlight, ~~Rick Hart~~ Harvey Norman and The Good Guys. These are all classed as Shop Retail as included in the WAPC Land Use Survey, but range in floorspace from 1,900m^2 to 4,500m^2. There is also a significant proportion of Other Retail type floorspace. This is consistent with a bulky goods retail format and is also consistent with the objectives of Business ~~Support~~ Zone as outlined in DPS2.~~the draft Joondalup City Centre Structure Plan~~.

The Joondalup South complex, known as the Quadrangle, is continuing to be subdivided by LandCorp, with significant building development underway, including Masters, Bunnings and a range of bulky goods and other commercial development. ~~includes a significant amount of vacant land that is currently under development by LandCorp. This development is called The Quadrangle.~~ Consistent with the objectives contained in the draft Joondalup City Centre Structure Plan, t~~T~~he Quadrangle should aim to accommodate a wide range of business, warehouse, showroom, light and service industrial uses.

The retail businesses located in these areas generally do not compete with centre based retailers and have a very wide catchment of customers. These areas provide an opportunity for those retailers requiring significant floorspace and cannot viably be located in centres within the activity centres shopping hierarchy. Any future expansion should ensure through the DPS that these areas do not become de-facto shopping centres. It is recommended that retail within these areas is predominantly non-food.

Large format and Bulky Goods retail floorspace are to be the subject of Part C of the Local Commercial Strategy.

~~6.8.3~~6.9.3 Service Industrial Areas

According to the DPS 2, the objectives of the Service Industrial Zone are to:

a. Accommodate a range of light industries, showrooms and warehouses, entertainment and recreational activities, and complementary business services which, by their nature, would not detrimentally affect the amenity of the surrounding areas;
b. Ensure that development within this zone creates an attractive façade to the street for the visual amenity of the surrounding areas.

- Canham Way Industrial Complex

The Canham Way industrial area includes mostly service industry and storage and distribution, but also includes shop retail and other retail uses. There is a significant proportion of vacant floorspace. Overall, the area provides approximately 250 jobs and provides an opportunity for smaller and possibly start-up businesses to viably locate in the City. Although the complex is designated as a~~n~~ service industrial area, the Greenwood Plaza centre is within the complex and includes a super deli, video hire and butcher. Other large Shop Retail businesses within the complex include the Salvation Army store, which interestingly has another store in the Winton Road industrial area.

The Canham Way complex is located adjacent to a residential area. Consideration should be given to rezoning the southern area of the complex to commercial/business in order to provide a buffer between the service commercial and the residential area. This may also provide a catalyst to revitalise the area. The City of Joondalup may wish to investigate the potential of this further through a separate study.

- Joondalup Service Industrial Area

The Joondalup service industrial complex includes a variety of manufacturing, storage and distribution and service type businesses that would be expected in a light industrial area. However, its location adjacent to the Joondalup City Centre has created demand for a significant amount of Shop Retail activities. These range in size from around 200m^2 to larger format retailers such as furniture retail and Toys R Us. The complex provides an opportunity for those retailers that would be unlikely to viably locate within a shopping centre format. The draft Joondalup City Centre Structure Plan includes the Joondalup Service Industrial Area and provides for a Business Boulevard ~~Zone~~ district on the east side of the area and Business Support ~~Zone~~ district on the west side. The majority of the industrial area is located within the Business Support ~~Zone~~district.

The objectives of the Business Boulevard and Business Support ~~Zones~~distrcits, as outlined in the draft Joondalup City Centre Structure Plan, align better with the uses currently located in the Joondalup Drive industrial area and the Joondalup South complex. The provisions applying to the Business Support and Business Boulevard ~~Zones~~ districts contained in the draft Joondalup City Centre Structure Plan provide the necessary guidance for future development within the industrial area.

~~6.9~~6.10 State Planning Policy, Activity Centres for Perth and Peel (SPP 4.2)

The purpose of SPP 4.2 is to specify broad planning requirements for the planning and development of new and existing centres in the Perth and Peel regions. This includes the objective of providing a higher level of integration between land use and transport. The policy also provides a mechanism to ensure that activity centres contain a range of activities, in order to promote the efficient use of infrastructure, economic benefits such as business clusters, greater levels of convenience and access and reduced reliance on private transport.

Centre plans are to be prepared consistent with the Model Centre Framework under SPP 4.2. Retail Sustainability Assessments (RSA) are also required where proposals would result in total shop retail floorspace within a neighbourhood centre exceeding 6,000m^2, or where proposals seek an expansion to a neighbourhood centre by more than 3,000m^2. An RSA is also required where a proposal seeks to significantly increase the level of shop/retail floorspace beyond the indicative levels contained in an endorsed local commercial strategy, where floorspace has been derived from a Retail Needs Assessment (RNA).

SPP 4.2 identifies the function and characteristics of activity centres throughout the hierarchy of centres, as per Table 19~~Table 20~~ below sourced from Table 3 of SPP 4.2.

Table 19~~20~~: Activity Centre Functions and Typical Characteristics (SPP 4.2)

Typical Characteristics	Perth Capital City	Strategic Metropolitan Centres	Secondary Centres	District Centres	Neighbourhood Centres
Main role / function	Perth Capital City is the largest of the activity centres, providing the most intensely concentrated development in the region. It has the greatest range of high order services and jobs and the largest commercial component of any activity centre.	Strategic metropolitan centres are the main regional activity centres. They are multipurpose centres that provide a diversity of uses. These centres provide the full range of economic and community services necessary for the communities in their catchments.	Secondary centres share similar characteristics with strategic metropolitan centres but serve smaller catchments and offer a more limited range of services, facilities and employment opportunities. They perform an important role in the city's economy, and provide essential services to their catchments.	District centres have a greater focus on servicing the daily and weekly needs of residents. Their relatively smaller scale catchment enables them to have a greater local community focus and provide services, facilities and job opportunities that reflect the particular needs of their catchments.	Neighbourhood centres provide for daily and weekly household shopping needs, community facilities and a small range of other convenience services.
Transport connectivity and accessibility	Focus of regional road and rail infrastructure as well as radial bus network.	Important focus for passenger rail and high frequency bus networks.	Important focus for passenger rail and / or high frequency bus network.	Focal point for bus network.	Stopping / transfer point for bus network.
Typical retail types	As per strategic metropolitan centres	- Department store/s - Discount department stores - Supermarkets - Full range of speciality shops	- Department store/s - Discount department store/s - Supermarkets - Speciality shops	- Discount department stores - Supermarkets - Convenience goods - Small scale comparison shopping - Personal services - Some specialty shops	- Supermarket/s - Personal services - Convenience shops
Future indicative service population (trade) area	Greater metropolitan region	- 150,000 – 300,000 persons	- Up to 150,000 persons	- 20,000 – 50,000 persons	- 2000–15,000 persons - (about 1 km radius)

Source: SPP 4.2 Table 3

The following table summarises PLUC 5 shop/retail and other retail floorspace within Strategic Metropolitan and Secondary Centres within the Perth Metropolitan Region.

Table 20~~21~~: Strategic Metropolitan and Secondary Centres Floorspace

Centre	Type	Shop Retail (m^2)	Other (m^2)	Total (m^2)
Rockingham	Strategic Metropolitan	59,351	116,227	175,578
Armadale	Strategic Metropolitan	52,826	33,817	86,643
Morley	Strategic Metropolitan	94,886	142,766	237,652
Fremantle	Strategic Metropolitan	71,905	265,303	337,208
Joondalup	Strategic Metropolitan	73,296	255,214	328,510
Midland	Strategic Metropolitan	68,825	122,770	191,595
Cannington	Strategic Metropolitan	92,057	129,590	221,647
Stirling	Strategic Metropolitan	59,193	212,363	271,556
Belmont	Secondary	47,169	19,091	66,260
Booragoon	Secondary	58,103	35,790	93,893
Victoria Park	Secondary	21,566	175,883	197,449
Claremont	Secondary	23,121	21,184	44,305
Cockburn	Secondary	33,617	11,056	44,673
Karrinyup	Secondary	50,988	7,957	58,945
Kwinana	Secondary	20,517	27,062	47,579
Leederville	Secondary	11,686	58,926	70,612
Maddington	Secondary	29,761	34,236	63,997
Mirrabooka	Secondary	39,189	73,514	112,703
Subiaco	Secondary	48,192	157,859	206,051
Wanneroo	Secondary	9,290	26,459	35,749
Warwick	Secondary	25,883	28,296	54,179
Whitfords	Secondary	41,490	29,378	70,868
Clarkson	Secondary	28,373	39,071	67,444

Source: WAPC Land Use Survey 2008

It is noted that the level of shop/retail floorspace within the Whitfords Secondary Centre is underestimated in the above data sourced from WAPC and should include approximately 8,000m^2 of additional shop/retail floorspace that is likely to have been inadvertently omitted from the survey. Consequently, the retail modelling exercises undertaken were based on 49,924m^2 of Shop Retail floorspace being present within the Whitfords Secondary Centre as at 2010, based on floorspace data provided by the City of Joondalup.

The floorspace areas in the above table show that currently, there are no Strategic or Secondary centres having Shop Retail floorspace exceeding 95,000m^2. Of the Secondary activity centres, Booragoon currently has the highest provision of shop/retail floorspace, at approximately 58,000m^2.

~~6.10~~6.11 Retail Gravity Model Scenarios & Assessment Results

The retail modelling undertaken included preparation of a scenario for the year 2010, in order to determine the base turnover against which to make comparisons of trade impact associated with floorspace expansions. The results of this analysis are included in Appendix 3 – Estimated Shop Retail Turnover 2010~~Appendix 3 – Estimated Shop Retail Turnover 2010~~.

~~6.10.1 Strategy Floorspace Recommendations~~

~~The strategy outcome~~The Gravity Model assessment results provided in Table 21~~Table 22~~ below ~~was~~ were derived iteratively through a development of a number of scenarios, in order to test trade impacts based on floorspace areas identified under various policy settings. The current City of Joondalup draft Local Planning Strategy provides indicative floor space levels, along with those incorporated in the City of Joondalup District Planning Scheme No. 2. In addition, SPP 4.2 identifies that District Activity Centres may be developed to accommodate up to 20,000m² of PLUC 5 Shop Retail floor space without approval from the WAPC.

The Woodvale and Currambine Activity Centres were both modelled at 20,000m² and subsequently 12,000m² and 15,000m² respectively. The Joondalup City Centre was modelled at 100,000m² in order to test the level of growth identified in the current Local Planning Strategy and subsequently at 125,000m². A range of floor space areas were tested for the Whitfords Secondary Activity Centre during the scenario modelling, ranging between 50,000m² and 95,000m².

The following table outlines the ~~recommended~~ results of the Gravity Model assessment for Shop ~~r~~Retail floorspace needs by activity centre to 2026. The ~~recommended scenario~~ results ~~is~~ are based on minimising impacts on centres and achieving a logical balance of floorspace between centre hierarchy types. It should be noted that the Shop Retail floorspace contained within the Winton Road service industrial area has been included in the 2010 floorspace figure for Joondalup City Centre. The results are shown by centre hierarchy type in order of trade impact at 2026 based on expansion to ~~recommended~~ 2026 ~~maximum~~ Shop Retail floorspace levels.

Table 21~~22~~: ~~Retail Strategy 2026 Recommended~~ Gravity Model Assessment Results – Shop Retail Floorspace 2026~~Maximum Shop Retail Floorspace~~Scenario

WAPC Ref.	WAPC Hierarchy Position	Activity Centre	Floorspace 2010 (m2)	~~Indicative Maximum~~Gravity Model Floorspace 2026 (m²)	Trade Impact
600/I-4	Strategic Metropolitan	Joondalup City Centre (incl Winton Rd)	92,990	No Limit	24.76%
602	Secondary	Whitfords City	49,924	50,000	0.09%
601	Secondary	Warwick Grove	25,614	38,000	-3.99%
669	District*	Gwendoline Drive (Belridge)	6,148	10,000	7.33%
676	District	Sorrento Quay	7,261	9,000	2.04%
946	District	Currambine Market Place	6,549	15,000	0.51%
609	District	Greenwood Village	4,976	10000	-4.08%
8732	District	Woodvale Park	7,460	12,000	-4.47%
615	Neighbourhood	Craigie Plaza	2,337	3,500	19.79%
620	Neighbourhood	Heathridge	2,324	3,500	17.85%

WAPC Ref.	WAPC Hierarchy Position	Activity Centre	Floorspace 2010 (m2)	~~Indicative Maximum~~Gravity Model Floorspace 2026 (m^2)	Trade Impact
627	Neighbourhood	Connolly	3,005	3,500	15.77%
622	Neighbourhood	Ocean Reef	1,957	4,000	10.33%
621	Neighbourhood	Edgewater	1,236	2,000	9.02%
618	Neighbourhood	Beldon	3,768	4,000	8.13%
8733	Neighbourhood	Beaumaris City	2,459	3,000	7.87%
624	Neighbourhood	Woodvale	3,064	3,200	7.49%
619	Neighbourhood	Mullaloo	1,822	3,000	4.65%
616	Neighbourhood	Kingsley	3,983	4,000	3.22%
8734	Neighbourhood	Candlewood	1,662	2,000	1.01%
671	Neighbourhood	Kinross	4,300	5,000	-0.76%
614	Neighbourhood	Carine Glades	3,991	4,500	-2.60%
612	Neighbourhood	Glengarry	2,890	3,000	-3.50%
617	Neighbourhood	Padbury	2,064	2,064	-7.38%
668	Neighbourhood	Hepburn Ave	1,971	2,000	-9.41%
665	Neighbourhood	Hillarys	2,992	3,000	-9.91%
611	Neighbourhood	Marmion Village Sheppard Way	1,789	1,789	-13.29%
610	Neighbourhood	Duncraig	2,388	2,400	-13.84%
NA	Neighbourhood	Iluka	0	3,300	100.00%
607	Local	Springfield	728	1,000	10.36%
623	Local	Mullaloo Tavern	700	1,500	8.23%
606	Local	Forrest Plaza	548	1,000	5.23%
613	Local	Coolibah Plaza	808	1,500	-1.14%
671	Local	Kinross	500	700	-1.93%
625	Local	Moolanda North	206	300	-3.26%
629	Local	Moolanda South	678	1,000	-6.09%
605	Local	Sorrento	1,278	1,300	-9.73%
661	Local	Lilburne Road	450	450	-12.45%
951	Local	Duncraig Village	885	885	-12.67%
628	Local	Seacrest Village Harman Rd	724	724	-14.17%
I - 27	Local	Greenwood Plaza	1,000	1,000	-14.89%
NA	Local	Harbour Rise	0	800	100.00%
664	Large Format Retail	Joondalup South	12,443	12,443	30.81%
948	Large Format Retail	Joondalup Drive	8,534	8,534	12.76%
651	Large Format Retail	Waldecks	80	80	-4.83%

**Recommend changing from Neighbourhood Centre to District Centre*

~~The strategy recommendations will be further refined into a strategy spatial plan (map) in Part B of the draft Local Commercial Strategy.~~

~~6.11~~6.12 Impact Analysis ~~Analysis and Interpretation~~

~~6.11.1~~6.12.1 Joondalup ~~Analysis~~Centres

Based on the level of ~~future maximum~~ floorspace growth modelled throughout the network of Local and Neighbourhood Activity Centres in the City of Joondalup, significant trade impacts are expected to affect six of the Local and Neighbourhood centres in the City of Joondalup. These include Duncraig Village, Marmion Village, Duncraig (Marri Road), Seacrest Village, Greenwood Plaza and the local centre on Lilburne Road.

Of these six centres, only the Greenwood Plaza, Duncraig Centre (Marri Road) and Marmion Village (Sheppard Way) are supermarket based centres. The trade impacts identified are likely to be tolerable given that the daily convenience function of these centres will remain intact. Also, the other non-supermarket based centres identified complement rather than compete with the offering of higher order centres and the impacts identified are therefore likely to be overstated.

Although having a greater level of regional accessibility, it is apparent that the Joondalup City Centre features a lower level of local accessibility than the Whitfords Secondary Centre, given a significant proportion of local residents must cross the freeway travelling east in order to access the centre and given that the centre is also bound to the east by Lake Joondalup. This affects its function in providing for daily convenience needs.

The Whitfords Secondary Centre features a higher level of accessibility by road, being located at the corner of two major distributor roads, being Marmion Avenue and Whitfords Avenue. In distributing additional Shop Retail floorspace growth potential to both the Whitfords Secondary Centre and Joondalup Strategic Metropolitan Centre during preparation of the modelling scenarios, higher trade impacts were noted to affect the network of Local and Neighbourhood Centres where some growth was assigned to Whitfords than where growth was applied to the Joondalup City Centre alone. However, similar to the above analysis, these impacts were found only to limit the growth potential of various Local and Neighbourhood Centres or otherwise predominantly affect those having a complementary function to higher order centres.

~~The results indicate however, that significant expansion of both the Whitfords Secondary Centre and Joondalup City Centre up to an additional 50,000m² each would result in trade impacts affecting a much larger range of activity centres, including other Local and Neighbourhood Centres and District Activity Centres within the City of Stirling and City of Wanneroo.~~

~~6.11.2~~6.12.2 External Centres ~~Analysis~~

The modelling has given significant consideration to planned centres in adjoining local government. Some significant trade impacts identified for these external centres are discussed as follows:

1. A trade impact of approximately 35% was identified for the District Centre of Alexander Heights in the City of Stirling. However, this centre lies at the edge of the identified study area and therefore the modelling only takes a limited population base and expenditure into consideration.

2. The Local / Neighbourhood Centres of Brighton, Mindarie and Clarkson in the City of Wanneroo feature trade impacts of 24% to 35%. In addition, the Ocean Keys Secondary Centre features a trade impact of

approximately 15%, as did the Merriwa Neighbourhood Centre. The impacts however, have predominantly resulted through the inclusion of planned retail floor space within the model associated with the establishment of new activity centres in Butler, Alkimos and Yanchep, all within the City of Wanneroo. Timing and staging of these centres may therefore need further consideration and investigation by the City of Wanneroo in order to prevent significant turnover impacts on specific centres.

The impacts of expansion on centres within the City of Wanneroo and the City of Stirling are shown at Appendix 5 – Shop Retail Gravity Model Results, City of Wanneroo and City of Stirling Centres Impacts ~~Appendix 5 – Shop Retail Gravity Model Results, City of Wanneroo and City of Stirling Centres Impacts~~.

~~6.12~~6.13 Hierarchy, Role, Catchment and Retail Type

An expansion of the Whitfords Secondary Centre or Joondalup City Centre is likely to predominantly involve the establishment of a department store or other anchors, adding to the overall level of attraction for these centres. However, this would not be expected to impact significantly on the nature of goods and services sought at local and neighbourhood centres for daily conveniences purchases.

The Department of Planning has indicated that the strategy must support growth at the local level, as it is likely that a future increase in the cost of transport and future infill redevelopment will tend to generate additional demand throughout the network of Local and Neighbourhood centres. The ~~retail~~ Gravity ~~modelling~~ Modelling undertaken incorporates an assumption that consumers are more inclined to shop at centres closer to home, satisfying this premise and the ~~recommended 2026 strategy maximum~~ floorspace results supports growth in a number of Local and Neighbourhood centres.

It is clear the role of the Joondalup City Centre as a focal point for shopping and employment will continue to become more relevant given its higher level of regional accessibility for residents to the north of the City of Joondalup. On this basis, the growth potential for the Joondalup City Centre under the strategy should reflect this desired outcome under SPP 4.2. This is important in terms of determining the extent of future development that may be considered orderly for the Whitfords Secondary Centre.

In terms of the nature of future retailing among competing centres, ~~it is known that a~~ the development ~~application for the establishment~~ of a Myer Department Store at the Joondalup City Centre is underway. ~~has been approved in the past although not yet implemented given a change in ownership and a subsequent review of planning for the centre by the new owner.~~

No significant trade impact on higher order centres was identified as a result of the retail modelling undertaken and certainly not in respect of the Joondalup City Centre. Regardless, there are other matters to consider in determining an orderly distribution of retail development potential through the strategy. Generally, the Joondalup City Centre must be maintained as the most attractive proposition for the establishment of office / business development and knowledge intensive employment within the City.

The trade impacts identified are based on additional population growth ranging between 6.3% by 2016 and 15.4% by 2031, over and above the current projected levels under WA Tomorrow (2005). Should this level of population growth not be realised, the maximum development potential for activity centres identified may not be achievable.

7. Emerging Trends and Issues

The nature of retailing changes constantly and these changes are pivotal to the future of activity centres. Over the past 40 or 50 years there have been many changes, including:

- The decline of the dominance of high street retailing (including the main-street department store) and rise of the shopping mall.

- Changes in ownership structure of both retail operators and retail outlets and centres, with the almost total de-coupling of retail operation and retail outlet property ownership, the entry of new international competitors and of private equity in retail and of Australian retailers and centre owners with an international presence.

- The growth of big box retailing. Following trends in the United States and Europe, the Australian retailing landscape since the 1980s has also seen growth in big box or megastore retailing. Such stores typically occupy large floor space and base their business model on high turnover, low prices and low costs. They have generally been housed in large single storey buildings providing large amounts of parking. This type of store has been used to sell hardware, whitegoods, home wares, electrical goods and liquor. The format has proved successful in Australia and is expected to grow further with the recent arrival of the United States grocery retailer Costco (selling grocery lines in a warehouse format) and the entry of the Woolworths-Lowes joint venture into hardware. The WAPC held the Large Format Retail Forum held in 2005 which ultimately led to the inclusion of section 5.6.1 “Bulky goods retailing and mixed business” in SPP 4.2. T~~t~~his section of SPP 4.2 provides the appropriate level of information on how to manage large format retail and the local commercial strategy will need to respond to this, particularly for the Joondalup City Centre and surrounding areas including The Quadrangle. Large Format Retail is specifically examined as part of Part C of the Local Commercial Strategy.

- A resurgence of the high street. There has been something of a renaissance in high street shopping in inner city areas since the 1990s. This has coincided with inner area upgrading and redevelopment. Retail outlets such as cafes, restaurants, niche bookshops and boutique household goods suppliers are now part of the attraction of inner city living and is a sought-after environment for many new developments. These precincts are often associated with Transit-Oriented Design principles.

- The growth of franchising. Franchising is also now firmly part of the Australian retail landscape. Modern franchising originated in the United States in the 1950s with the emergence of fast food chains and began to appear in Australia in the late 1960s and early 1970s. Although there are limited data collected on franchising in Australia, surveys of Australian franchising indicate that around 28 per cent of franchises are in the retail industry (Parliamentary Joint Committee on Corporations and Financial Services 2008) across a wide spread of retail sectors.

- Vertical integration of brands. The traditional functions of retailing have evolved over the years, including the separation between manufacturer, wholesaler and retailer no longer being necessarily distinct. Some retailers (such as Apple, Zara and other luxury apparel retailers, for example) have chosen to own and control more stages of the production and distribution process for a more seamless delivery of their goods. More generally there has been a trend toward the use of 'house' brands by retailers, including supermarkets, as a mechanism for increasing profit margins.3

The retail industry is characterised by having low levels of labour productivity but in recent years productivity has been improving. In 2000, a Productivity Commission Paper examined the productivity performance of the wholesale and retail trade sectors in light of their significant contribution to Australia's record productivity performance in the 1990s.[4]

At that time, key developments within retailing consistent with Australia's improved performance included:

- The increasing attention given to meeting the needs of income-rich but time-poor consumers through extended trading hours and locational convenience that increased competition across the retail industry. This affected the retail product mix, with for example, a growth in pre-prepared and take-away foods.

- The emergence of megastores (or 'category killers'), often located in fringe areas to take advantage of low cost land for extended floor plans and parking, that tended to have a lower labour intensity than the stores from where much trade was being taken

- A trend away from individual boutique stores towards speciality chains that could take advantage of economies of scale in the supply chain and better store management systems. For example, some specialist clothing chain stores operated with low labour but high technology inputs, such as automatic re-ordering at the point of sale. These are often franchised operations.

- A shift of 'traditional' retail functions to consumers (for example, self-service petrol stations) and producers (for example, increased reliance on brand advertising and warranties rather than advice from shop assistants) leading to a reduction in labour input growth.

- Technological change, such as scanning and computerisation, enhanced retail productivity by reducing labour input and changing management systems. The scanner at the supermarket checkout and the single operator console at service stations are examples of labour saving technology.

- More precise and timely data on retail operations allowed firms to better assess store productivity and to examine productivity at the individual task level

- Reforms to industrial relations legislation which increased the focus on enterprise-based work conditions and better matching employment conditions (for example, a greater diversity of employment arrangements including permanent, casual and contract employees on a part time or full time basis) to firms' changing requirements.

These are now firmly embedded in the retail structure. The question is whether there a signs of forces that will either reinforce the trends of the last 10 or 20 years or take retailing into new directions.

The retail industry has traditionally provided a number of functions:

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[3] Australian Government Productivity Commission, *Economic Structure and Performance of the Australian Retail Industry*, Productivity Commission Issues Paper, March 2011

[4] Johnston, A., Porter, D., Cobbold, T. and Dolamore, R. 2000, *Productivity in Australia's Wholesale and Retail Trade*, Productivity Commission Staff Research Paper, Canberra.

- It acts as a point of convenience for consumers in allowing products to be purchased in smaller quantities than usually provided by manufacturers or wholesalers. Retailers also provide sales outlets close to the homes of consumers. To this extent it provides a service function to a local community and proximity of retailers of daily and weekly shopping items continues to be an important element in planning and is reflected in Western Australian policies such as Liveable Neighbourhoods. Until the 1950's or 60's retailers commonly supplemented their outlet sales with a routine delivery service. With the rise of the supermarket for grocery items this had virtually disappeared until the emergence of online retail.

- It has provided a market discovery mechanism by searching out and supplying new products, new models of existing products or the latest fashions in products.

- It allowed consumers to compare the prices of products by displaying them in the same retail space and provided product information to consumers prior to purchase and after sales service if difficulties arise in the operation of the product.

- It has facilitated consumer purchases of products by providing or arranging financial services.

The emergence of on-line retailing and e-commerce has radically altered interactions between consumers and retailers in the industry and provides an alternative means of delivery of each of the above functions and undermines the rationale for a retail outlet in many sectors. It is the major structural change likely to affect the industry in the longer term and its impacts are likely to be substantial.

Up to now it has been applied to a relatively small proportion of overall household expenditure and therefore has not materially affected the functioning and mix of centres. Its effect has been restricted to particular sectors, most notably music and book retailing. Early casualties have been the music cd / record store and, currently, the bookshop. That the latter are now closing rapidly arises from two trends – online purchasing and the associated very rapid adoption of e-books.

There is a range of estimates on the scale and rate of growth of on-line retail. Current estimates show that it currently accounts for around 4 - 5% of all purchases[5] and is growing rapidly.[6] When the on-line proportion reaches around 10% of all retail expenditure (by around 2015 at current growth rates) it is likely that its effect will become more noticeable in activity centres.

It already applies to a very broad spread of retail activity. A recent survey[7] shows that 82% of all respondents to the survey purchased on-line for at least some of the time and that while books and music are now largely bought or sought on-line other categories are catching up.

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[5] Southern Cross Equities (*Online Retailing—Globalisation of retail*, 27 January 2011) estimates domestic online retailers have doubled their market share to 4.0 per cent of 2010 annual sales from 2.1 per cent in 2005. In addition, overseas purchases driven by a strong dollar and falling shipping prices have risen to around $5 billion in 2010 or the equivalent of around 2 per cent of total domestic retail sales.

- Commonwealth Bank's Global Markets Research estimate $9.5 billion of online spending in 2010, which equates to 3.8 per cent of total retail spending and 5.2 per cent of discretionary spending. However, they are not. The real cause for concern among traditional retailers is that this analysis shows growth in online is growing - up 126 per cent last year in volume and 90 per cent in value over a year.

[6] Quantium Online estimates the value of Australian online purchases is rising by 26 per cent a year, with that growth being driven mainly by a 20 per cent annual increase in the number of people shopping online. The offshore proportion of Australian online shopping is estimated at around 20 per cent.

- Forrester Research studies showed that online retailing was growing at 11 per cent per annum. Some estimates for some sectors show much higher growth in on-line retail.

[7] The Australia Institute, *The rise and rise of online retail*, Technical Brief No. 8, May 2011

The response to the question "Which of the following do you buy online where you can?" showed the following results:

DVDs and music	82%
Books	78%
Electrical and electronic goods	70%
Clothes and shoes	61%
Sports and leisure goods	50%
Cosmetics and perfume	48%
Fresh food	13%

It is likely that as some of the barriers to on-line retail lower these proportions will increase.

The result is likely to be reduced average prices for goods in on-line categories as the distribution chain contracts and becomes more efficient, resulting in either increased consumption of those goods or redirection of disposable income to other areas. There will be increased impetus to vertical integration, with the ability to deal directly with the manufacturer, aided by increasing ability for customisation for many products. This requires high capital investment and favours larger suppliers. This trend is already apparent in some sectors, Apple being a standout example.

The likely consequences for activity centres are difficult to precisely predict, but are likely to include:

- ***Employment impacts***

The retail industry is a very substantial employer in Australia and in metropolitan areas of low employment self-sufficiency (for example the Perth north-west corridor) is one of the major employers. It is the largest single employment sector in the City of Joondalup employing 16.6% of the population, with Accommodation and Food Services (of which 80% of employment in this category is in employment in cafes, restaurants, pubs and taverns) being another high employer in the City, account for a further 8% of all employment (see section 2.4.1). Retail employment in the City is estimated to have declined by approximately 700 jobs in the period 2001 – 2010 (see Figure 6, Section 2.4.1). This decline is likely to continue, with an overall reduction in the sector generally.

Table 22~~Table 23~~ shows the employment proportion for each of the five retail trade industry subdivisions for Australia, indicating the scale of food retailing and 'Other store-based retailing', together accounting for 85% of all retail employment. This latter category is the one most likely to have the largest reduction from the growth of on-line retailing, with consequent growth in the proportion of 'non-store retailing'.

Table ~~2223~~: Employment in the retail trade February 2011 (Australia)

Industry	*Proportion of retail employment*
	%
Motor vehicle & motor vehicle parts retailing	7.2
Fuel retailing	2.8
Food retailing	31.9
Other store-based retailing	53.6
Non-store retailing & retail commission-based buying and/or selling[a]	1.2
Retail trade, not further defined	3.2
Total	100.0

[a] This subdivision includes the retailing of goods without the use of a physical store presence, and the sales of goods to the general public on a fee or commission basis. Internet retailing is included in this category.
Source: ABS (2011) Labour Force, Australia , Detailed, Quarterly, Feb 2011, Cat. no. 6291.0.55.003.

- ***Changes in the nature of retail strips and activity centres***

Employment changes will be accompanied by physical changes in activity centres, with an overall reduction in demand for non-food retail floorspace and a re-direction to food and beverage retailing, cafes and restaurants and non-retail personal services.

There is likely to be an overall reduction of retail as a proportion of total activity centre floorspace. This might represent an overall reduction in centre floorspace, unless retail floorspace is replaced by other activity, such as cafes and restaurants, personal services, medical services and entertainment. There may be a rise in boutique retailing and showrooms which will allow internet consumers to touch and feel the online product.

None of this is automatic. At the same time that retailing can increasingly be performed remotely, so can other function such as entertainment (e.g. home cinema) and, in the near future, a large proportion of medical and health information will be available electronically, reducing the amount of overall commercial space required for these services.

- ***Increasing importance of 'place'***

A consequence is that to draw people from their homes, the environment in an activity centre must offer more than functional access to retail and services – it must be must be convenient, accessible and attractive and provide multiple reasons not only to go there but also to stay for a length of time. With the exception of very local convenience retailing, this is likely favour larger centres, including the Joondalup city centre, which are both attractive and have range of reasons to visit, including entertainment, education, medical services and other personal services.

- ***Reduction in rent levels overall and increased diversity of demand***

The growth of on-line retailing will be accompanied by a growth of multi-channel marketing where the retail outlet is only one of a number of ways in which the seller transacts business. Associated with this will be a spreading of demand for retail space across a broader range of traditional land use types. Retailers will have a continuing demand for high visibility, high rent floorspace, but for a much reduced quantity of it as a proportion of the total business turnover, with high rent space being reserved for small amounts of product display and personal service. There is therefore likely to be and overall reduction or flattening of retail rental levels. Conversely, there is likely to be increased demand for large area, low cost floorspace for warehousing and logistics. While a proportion of this may be outside of the city, or even the country, local distribution and storage centres are likely to play an increasingly important role. This will put increasing pressure on industrial land supply in the North West sub-region. (Note that the Perth Peel Industrial Land Strategy identified the North West sub-region as requiring substantially more industrial land). This might be associated with big box and category killer outlets in industrial areas, where the same location is used both for local delivery of on-line sales and as a traditional sales outlet.

Changes are likely to be quite rapid and difficult to precisely predict (or plan for) for some time. This implies the need for flexibility in land use provision and fewer restrictions in the zoning table, with a wide mix of separately identified activities being suitable for inclusion in activity centres. Control should therefore be generally limited to only those activities which have a demonstrable and unmanageable negative (environmental) impact on surrounding uses.

This is consistent with Productivity Commission recommendations which suggest*, inter alia*:

> *"Less prescriptive land use zones, with businesses that have few adverse impacts associated with their location decisions (including retailers) to be largely co-located within broadly defined business zones. One flow-on benefit of broader zones would be less need for rezoning (with its associated uncertainties for businesses) and greater certainty around allowable uses of sites.*
>
> *Impacts on existing businesses not be a consideration when assessing proposed developments. To minimise the potential to restrict competition, it is highly desirable that the broader implications of business location on the viability of activity centres be considered at a generic level during city planning processes, rather than in the context of specific businesses during development assessment processes".*[8]

Thus the broad retail and centre size recommendations in this report are, in the first instance, maximum viable retail estimates for each centre and should not be exceeded. The estimates are derived from data that reflects current and historic expenditure behaviour and, as outlined above, this will change, with a reduced proportion applied to a physical retail location. Second, they provide the broad generic framework and scale suggested by the Productivity Commission to allow flexible responses at the individual business level.

[8] Australian Government Productivity Commission, *Economic Structure and Performance of the Australian Retail Industry*, Productivity Commission Issues Paper, March 2011

8. Shop Retail Floorspace Thresholds

RPS, on behalf of the City, reviewed a range of indicators within Part A of the Local Commercial Strategy, including:

- The analysis of the City's population and economic drivers;
- The results of the Gravity Model assessment and the Centre Health Check;
- Current retail turnover densities of Centres (retail turnover per sq.m of floorspace); and
- The outcomes of public submissions to the draft Local Commercial Strategy.

These factors collectively have contributed to the formulation of ***recommended Shop Retail Floorspace Thresholds*** for Activity Centres in the City of Joondalup.

SPP 4.2 eliminated maximum floorspace caps for Activity Centres in metropolitan Perth and Peel. The existence of caps was viewed as constraining private sector investment in shop retail, limiting employment generation and undermining Centre redevelopment and renewal. Such caps as they exist for the City of Joondalup should therefore be replaced by a series of floorspace thresholds that establish recommended floorspace levels for Centres to 2026.

These thresholds do not represent caps on Shop Retail floorspace. Instead, the thresholds establish the floorspace level above which a development proponent is required to provide the City with a comprehensive Retail Sustainability Assessment. The Retail Sustainability Assessment, in line with requirements under SPP 4.2, will need to demonstrate that the Centre expansion above the threshold has only minor and acceptable impacts on the sustainability of the shop retail floorspace hierarchy in the City.

This shift from a restrictive to an evidence and merits-based approach to planning and managing Shop Retail floorspace supply in metropolitan Perth responds appropriately to changes in the dynamics in the retail market, as outlined in Section 7. It provides the private sector with appropriate flexibility to respond to changing local and industry-wide conditions and trends, while affording the City with the ability to respond and assess development applications within the context of whole-of-hierarchy sustainability.

Recommended thresholds for each Activity Centre are outlined in the table below. This table includes the:

- Role of each centre in the WAPC Heirarchy;
- Current Shop Retail floorpsace (as of 2010);
- Current Retail Turnover Densities (retail turnover per sq.m of floorspace);
- Results of the Gravity Model Assessment; and
- Recommended Floorspace Threshold at 2026.

Table ~~23~~24: Recommended Shop Retail Floorspace Thresholds, 2026

WAPC Hierarchy	Activity Centre	Shop Retail Floorspace 2010 (sqm)	Retail Turnover Density ($/sqm)	Gravity Model Assessment	Recommended Threshold
Strategic Metropolitan	Joondalup City Centre (incl Winton Rd)	92,990	$7,421	125,000	125,000
Secondary	Whitfords City	49,924	$8,715	50,000	75,000
Secondary	Warwick Grove	25,614	$9,788	38,000	50,000
District	Gwendoline Drive (Belridge)	6,148	$10,107	10,000	10,000
District	Sorrento Quay	7,261	$6,187	9,000	8,000
District	Currambine Market Place	6,549	$11,482	15,000	15,000
District	Greenwood Village	4,976	$11,144	10,000	10,000
District	Woodvale Park	7,460	$12,170	12,000	15,000
Neighbourhood	Craigie Plaza	2,337	$7,398	3,500	2,500
Neighbourhood	Heathridge	2,324	$7,584	3,500	2,500
Neighbourhood	Connolly	3,005	$8,363	3,500	3,500
Neighbourhood	Ocean Reef	1,957	$8,674	4,000	4,000
Neighbourhood	Edgewater	1,236	$10,875	2,000	3,000
Neighbourhood	Beldon	3,768	$9,096	4,000	4,500
Neighbourhood	Beaumaris City	2,459	$8,377	3,000	3,000
Neighbourhood	Woodvale	3,064	$9,675	3,200	4,000
Neighbourhood	Mullaloo	1,822	$7,838	3,000	2,000
Neighbourhood	Kingsley	3,983	$9,094	4,000	5,000
Neighbourhood	Candlewood	1,662	$10,342	2,000	3,000
Neighbourhood	Kinross A	4,300	$10,173	5,000	6,000
Neighbourhood	Carine Glades	3,991	$8,542	4,500	4,500
Neighbourhood	Glengarry	2,890	$9,523	3,000	4,000
Neighbourhood	Padbury	2,064	$9,549	2,064	3,000
Neighbourhood	Hepburn Ave	1,971	$11,322	2,000	4,000
Neighbourhood	Hillarys	2,992	$8,141	3,000	3,000
Neighbourhood	Marmion Village Sheppard Way	1,789	$8,842	1,789	2,000
Neighbourhood	Duncraig North	2,388	$10,740	2,400	3,000
Neighbourhood	Iluka	0	$0	3,300	3,500
Local	Springfield	728	$7,216	1,000	1,000
Local	Mullaloo Tavern	700	$6,942	1,500	200
Local	Forrest Plaza	548	$8,107	1,000	1,000
Local	Coolibah Plaza	808	$9,275	1,500	1,500
Local	Kinross B	500	$9,818	700	1,000

WAPC Hierarchy	Activity Centre	Shop Retail Floorspace 2010 (sqm)	Retail Turnover Density ($/sqm)	Gravity Model Assessment	Recommended Threshold
Local	Moolanda North	206	$9,324	300	500
Local	Moolanda South	678	$10,072	1,000	1,000
Local	Sorrento	1,278	$8,250	1,300	1,500
Local	Lilburne Road	450	$10,720	450	1,000
Local	Duncraig Village	885	$10,436	885	1,500
Local	Seacrest Village Harman Rd	724	$9,461	724	1,000
Local	Greenwood Plaza	1,000	$11,831	1,000	1,500
Local	Harbour Rise	0	$0	800	1,000
Local	Burns Beach	0	$0	NA	500

Overall, the realisation of the Recommended Thresholds across all Centres would result in a total Shop Retail floorspace in 2026 above that identified in the Gravity Model assessment. This reflects the review by RPS of public submissions to the draft Local Commercial Strategy, which indicated that the total floorspace demand in the Gravity Model assessment was potentially too conservative. It also reflected a desire on the part of the City to reinforce and support Joondalup's role as a shop retail destination in the North West Corridor.

Variations to the results of the Gravity Model assessment have been made across a number of centres. In particular, the following Centre's have Thresholds that deviate significantly from the results of the Gravity Model assessment:

- Whitford Secondary Centre – While the results of the Gravity Model assessment suggested minimal capacity for Whitfords to expand, analysis of public submissions and a review of the retail turnover density of Westfield Whitford City (which exceeds $10,000 per sq.m with a lower level for the broader Activity Centre) indicates that some expansion is supported. This reflects the fact that while Whitfords is a Secondary Centre under the WAPC Heirarchy, its relationship with Hillarys Boat Harbour and strategic location into the North West Corridor creates the potential for the Centre to expand its beyond catchment trade. This expansion however, it likely to be constrained by an established and gentrified catchment and strong competition to the south (Karrinyup) and north east (Joondalup City Centre).

- Warwick Secondary Centre – SPP 4.2 provides the capacity for Secondary Centres within the hierarchy to expand to a total of 50,000 sq.m of Shop Retail floorspace while maintaining their position in the heirarchy. Given the conservative level of demand estimated in the Gravity Model assessment, Warwick Secondary Centre represents a logical location for this shortfall in demand to be provided. Providing greater capacity for Warwick to expand will provide even greater choice to consumers within the City, increase competition between major retail locations and improve accessibility of households to higher order Centres. This approach will also assist to reinforce Joondalup's premier role in the provision of Shop Retail in the North West Corridor of Perth.

- Sorrento Quay District Centre – the current retail turnover density of Sorrento Quay is below the industry average, suggesting below average market shares in the Centre's catchment. This suggests that an increase of the order identified in the Gravity Model assessment may be overstated.

- Woodvale Park District – the Woodvale Park Centre had the highest retail turnover densities of all Activity Centres in the City (over $12,000 per sq.m). This suggests that the Centre would have the capacity to expand to a greater extent than identified under the Gravity Model assessment while maintaining local Centre sustainability.

- Neighbourhood & Local Centres – incremental increases in the Thresholds were made for a number of Centres, namely to increase the commercial viability of expansion by providing for a critical mass of floorspace increase. Reductions were made primarily in response to Centres having average or below average retail turnover densities, suggesting their current size and role within the hierarchy is appropriate.

These variations are regarded as appropriate and respond directly to the commercial performance, development potential and sustainability of each Centre and the broader heirarchy. As previously stated, these Thresholds do not represent caps and expansion of Centres above these floorspace levels can be supported by the City in instances where an appropriately developed Retail Sustainability Assessment is provided to the City as part of the Development Application.

~~8.~~9. Recommendations

This report provides a detailed analysis of the City of Joondalup regarding the requirements for developing a local commercial strategy that aligns with SPP 4.2. Based on the analysis, there are a number of implications that the Local Commercial Strategy will need to consider.

~~8.1~~9.1 Implications for City of Joondalup

The key implications emerging from the analysis include:

- The City of Joondalup requires a new Local Commercial Strategy to be adopted by Council as a local planning policy in order to be in alignment with SPP 4.2;
- The current centres hierarchy, with Joondalup as the Strategic Metropolitan Centre with potential to become a Primary Activity Centre, is the key element in the commercial strategy and overrides all other considerations. Secondary Centres therefore perform a subsidiary function;
- ~~Amongst the larger centres modelled in the Retail Needs Assessment, expansion at Whitfords should be in the non-retail or mixed use land use categories;~~
- Warwick Secondary Centre would benefit from a new structure plan. Given that the City of Joondalup owns land within the activity centre, there may be opportunity to significantly influence the outcome of any structure planning exercise;
- A number of district centres have been identified for growth in Shop Retail floorspace, including the Gwendoline Drive Centre (Ocean Reef Road, Beldon), which is recommended to change from a neighbourhood centre to a district centre;
- The zones contained in the District Planning Schemes could be simplified and the land uses allowed within each could be clarified. A review or amendment of the DPS may enable more flexible uses within zones; and
- A revision of the DPS should ensure alignment with SPP 4.2 and the WAPC Planning Manual.

It is anticipated that these key implications will be largely addressed through the next phase of the project (Part B and C) which will develop a Draft Local Commercial Strategy ~~(Draft LCS)~~. ~~Some preliminary recommendations for addressing these implications are outlined below.~~

~~8.2 Recommendations for Addressing Implications~~

~~To ensure that the City can adopt a new Local Commercial Strategy, the Draft LCS will need to be prepared ready for consultation in November 2011. Following consultation, the strategy can be finalised based on submissions received.~~

~~The hierarchy of centres has been articulated within the report and the Draft LCS will need to be specific regarding the Joondalup City Centre and the Secondary Centres in particular. The Shop Retail floorspace growth recommendations for the district centres should also be clearly reflected in the Draft LCS.~~

~~The Draft LCS needs to consider the centre types in alignment with SPP 4.2 and outline the typical range of uses that should be included in each centre type.~~

~~It is recommended that the Local Commercial Strategy and Local Structure Plans have a close alignment with the City of Joondalup Economic Development Plan 2012 – 2015, SPP 4.2 and Directions 2031 Economic Development and Employment Strategy for the North West Sub Region. This will be essential to support a regional approach to activity centre growth and the achievement of employment targets for the Perth North West sub region.~~

~~8.3~~9.2 Implementation

On the basis of the ~~retail needs assessment~~Gravity Model Assessment, the recommended scenario indicates the maximum Shop Retail floorspace that could be contemplated for each activity centre within the City without unreasonable impact on other centres. The health check by centre also indicates those centres that are performing poorly and may be considered for refurbishment or rezoning if this is proposed in the future. These elements provide the necessary background information to the City for informing decisions regarding:

- Future rezoning applications;
- Future development applications;
- New centre plans; and
- Structure plans (new and amended).

A detailed decision framework is attractive, however any decision framework is likely to require some additional tasks to be performed prior to this framework being developed. These tasks and actions are shown in the following table.

Table 24~~25~~: Tasks and Actions for Decision Framework Development

Task	Action	Timeframe	Authority
Adopt revised Commercial Centre Strategy	Draft open for community consultation	Late 2011	CoJ
	Council adopt Final Strategy	Early 2012	CoJ
Review Content of District Planning Scheme which relates to Commercial development	Align with CoJ Local Planning Strategy, and Housing Strategy ~~and Commercial Centres Strategy~~, WAPC SPP4.2 and Local Planning Manual; • Zones • Use class table • Site and development standards • Definitions • Performance criteria • Developer contributions – SPP3.6	2012 -2014	CoJ

Confirm objectives and principles for development of Whitford Structure Plan in accordance with revised Commercial centre Strategy	According to Model Centre Framework SPP 4.2 section 8	2011-2012	CoJ/Private sector
	Establish CoJ protocol for assessing Retail Sustainability Assessment	2011-2012	CoJ
Prepare Structure Plan for Warwick secondary centre	According to Model Centre Framework SPP4.2 section 8	2012-2014	CoJ/WAPC/ Private Sector
Specific area plans for key district centres	Gwendoline Drive (Belridge), Currambine Market place, Greenwood Village, Woodvale Park	2014-2016	CoJ/ Private Sector

Note that Sorrento Quay is designated a district centre and although it is located within the City of Joondalup falls under the control of the WA planning Commission and already has a structure plan. It is therefore not included in the above table.

It is anticipated that a draft decision making framework will be provided to the City in the Parts B and C of the ~~D~~draft Local Commercial Strategy following consultation with the City on the above elements.

~~9.~~10. Appendices

~~9.1~~10.1 Appendix 1 - Activity Centres Data

Planning Land Use Categories

Land Use	PLUC
Primary/Rural	PRI
Manufacturing/Processing/Fabrication	MAN
Storage/Distribution	STO
Service Industry	SER
Shop/Retail	SHP
Other Retail	RET
Office/Business	OFF
Health/Welfare/Community Services	HEL
Entertainment/Recreation/Culture	ENT
Residential	RES
Utilities/Communications	UTE
Vacant Floor Area	VFA

~~9.2~~10.2 Appendix 2 – Study Area A3

~~9.3~~10.3 Appendix 3 – Estimated Shop Retail Turnover 2010

WAPC Heirarchy	Centre	LGA	2010 Retail Area	Est. Shop Retail Turnover Total 2010	2010 Shop Retail $/m^2
Strategic Metropolitan	Joondalup City (incl Winton Rd)	Joondalup	92,990	$673,357,730	$7,241
Secondary	Whitfords City	Joondalup	49,924	$435,100,175	$8,715
Secondary	Warwick Grove	Joondalup	25,614	$250,713,753	$9,788
District	Gwendoline Drive (Belridge)	Joondalup	6,148	$62,135,313	$10,107
District	Sorrento Quay	Joondalup	7,261	$44,920,467	$6,187
District	Currambine Market Place	Joondalup	6,549	$75,196,463	$11,482
District	Greenwood Village	Joondalup	4,976	$55,454,330	$11,144
District	Woodvale Park	Joondalup	7,460	$90,784,845	$12,170
Local / Neighbourhood	Iluka	Joondalup	0	$0	$0
Local / Neighbourhood	Craigie Plaza	Joondalup	2,337	$17,289,755	$7,398
Local / Neighbourhood	Heathridge	Joondalup	2,324	$17,624,619	$7,584
Local / Neighbourhood	Connolly	Joondalup	3,005	$25,130,324	$8,363
Local / Neighbourhood	Springfield	Joondalup	728	$5,253,566	$7,216
Local / Neighbourhood	Ocean Reef	Joondalup	1,957	$16,975,920	$8,674
Local / Neighbourhood	Edgewater	Joondalup	1,236	$13,441,905	$10,875
Local / Neighbourhood	Mullaloo Tavern	Joondalup	700	$4,859,335	$6,942
Local / Neighbourhood	Beldon	Joondalup	3,768	$34,273,709	$9,096
Local / Neighbourhood	Beaumaris City	Joondalup	2,459	$20,598,546	$8,377
Local / Neighbourhood	Woodvale	Joondalup	3,064	$29,644,662	$9,675
Local / Neighbourhood	Forrest Plaza	Joondalup	548	$4,442,761	$8,107
Local / Neighbourhood	Mullaloo	Joondalup	1,822	$14,281,705	$7,838
Local / Neighbourhood	Kingsley	Joondalup	3,983	$36,222,030	$9,094
Local / Neighbourhood	Candlewood	Joondalup	1,662	$17,188,491	$10,342
Local / Neighbourhood	Kinross A	Joondalup	4,300	$43,741,918	$10,173
Local / Neighbourhood	Coolibah Plaza	Joondalup	808	$7,494,114	$9,275
Local / Neighbourhood	Kinross B	Joondalup	500	$4,909,178	$9,818
Local / Neighbourhood	Carine Glades	Joondalup	3,991	$33,732,771	$8,452
Local / Neighbourhood	Moolanda North	Joondalup	206	$1,920,703	$9,324
Local / Neighbourhood	Glengarry	Joondalup	2,890	$27,520,120	$9,523
Local / Neighbourhood	Moolanda South	Joondalup	678	$6,828,969	$10,072
Local / Neighbourhood	Padbury	Joondalup	2,064	$19,709,338	$9,549
Local / Neighbourhood	Hepburn Ave	Joondalup	1,971	$22,315,281	$11,322
Local / Neighbourhood	Sorrento	Joondalup	1,278	$10,543,148	$8,250
Local / Neighbourhood	Hillarys	Joondalup	2,992	$24,358,761	$8,141
Local / Neighbourhood	Lilburne Road	Joondalup	450	$4,827,207	$10,727
Local / Neighbourhood	Duncraig Village	Joondalup	885	$9,236,287	$10,436
Local / Neighbourhood	Sheppard Way	Joondalup	1,789	$15,819,042	$8,842
Local / Neighbourhood	Duncraig North	Joondalup	2,388	$25,647,635	$10,740
Local / Neighbourhood	Harman Rd	Joondalup	724	$6,849,867	$9,461
Local / Neighbourhood	Greenwood Plaza	Joondalup	1,000	$11,830,672	$11,831
Large Format Retail	Joondalup South	Joondalup	12,443	$83,965,697	$6,748
Large Format Retail	Joondalup Drive	Joondalup	8,534	$78,695,977	$9,221
Large Format Retail	Waldecks	Joondalup	80	$853,714	$10,671

Source: MGA Modelling, MDS Market Data Systems

WAPC Heirarchy	Centre	LGA	2010 Retail Area	Est. Shop retail Turnover Total 2010	2010 Shop Retail $/m^2
Strategic Metropolitan	Innaloo	Stirling	57,843	$164,580,938	$2,845
Secondary	Karrinyup	Stirling	51,085	$370,996,687	$7,262
Secondary	Mirrabooka	Stirling	39,129	$280,955,479	$7,180
District	Main Street	Stirling	6,755	$35,156,530	$5,205
District	Scarborough	Stirling	9,508	$35,424,080	$3,726
District	Northlands	Stirling	9,761	$95,813,057	$9,816
District	Stirling Central	Stirling	13,588	$145,394,898	$10,700
Local / Neighbourhood	Gwelup	Stirling	4,772	$36,523,330	$7,654
Local / Neighbourhood	Fieldgate	Stirling	901	$7,451,425	$8,270
Local / Neighbourhood	Nollamara	Stirling	3,912	$29,357,311	$7,504
Local / Neighbourhood	Westminster	Stirling	2,870	$25,138,355	$8,759
Local / Neighbourhood	North Beach	Stirling	4,566	$34,316,136	$7,516
Local / Neighbourhood	Flora Terrace	Stirling	1,197	$8,327,729	$6,957
Local / Neighbourhood	Stirling Village	Stirling	1,168	$12,178,162	$10,427
Strategic Metropolitan	St Andrews A	Wanneroo	0	$0	$0
Secondary	AE_RC	Wanneroo	0	$0	$0
Secondary	Wanneroo	Wanneroo	9,290	$114,444,221	$12,319
Secondary	Ocean Keys	Wanneroo	28,241	$377,600,068	$13,371
District	AEdst	Wanneroo	0	$0	$0
District	Banksia Grove	Wanneroo	0	$0	$0
District	Butler	Wanneroo	0	$0	$0
District	St Andrews B	Wanneroo	0	$0	$0
District	St Andrews C	Wanneroo	0	$0	$0
District	St Andrews K	Wanneroo	0	$0	$0
District	Kingsway City	Wanneroo	15,915	$144,417,569	$9,074
District	Girrawheen	Wanneroo	8,223	$91,495,101	$11,127
District	Alexander Heights	Wanneroo	5,814	$79,336,994	$13,646
Local / Neighbourhood	AE_m	Wanneroo	0	$0	$0
Local / Neighbourhood	Aencv	Wanneroo	0	$0	$0
Local / Neighbourhood	AEnh1	Wanneroo	0	$0	$0
Local / Neighbourhood	AEnh2	Wanneroo	0	$0	$0
Local / Neighbourhood	AEnh3	Wanneroo	0	$0	$0
Local / Neighbourhood	AEnh4	Wanneroo	0	$0	$0
Local / Neighbourhood	Aescv	Wanneroo	0	$0	$0
Local / Neighbourhood	St Andrews L	Wanneroo	0	$0	$0
Local / Neighbourhood	St Andrews M	Wanneroo	0	$0	$0
Local / Neighbourhood	Drovers	Wanneroo	9,291	$87,722,875	$9,442
Local / Neighbourhood	Wangara	Wanneroo	19,630	$188,864,119	$9,621
Local / Neighbourhood	Carramar	Wanneroo	5,000	$57,527,428	$11,505
Local / Neighbourhood	Baltimore	Wanneroo	540	$6,093,866	$11,285
Local / Neighbourhood	Merriwa	Wanneroo	3,304	$41,800,234	$12,651
Local / Neighbourhood	Clarkson	Wanneroo	670	$10,269,792	$15,328
Local / Neighbourhood	Brighton	Wanneroo	2,249	$43,416,189	$19,305
Local / Neighbourhood	Mindarie	Wanneroo	1,610	$36,618,736	$22,745

Source: MGA Modelling, MDS Market Data Systems

~~9.4~~10.4 Appendix 4 - ~~City of Joondalup Retail Growth Impacts – Recommended Scenario~~Shop Retail Gravity Model Assessment Results, Joondalup Centres and Impact

WAPC Heirarchy	Centre	LGA	2010 Retail Area	2026 Retail Area	Impact
Strategic Metropolitan	Joondalup City (incl Winton Rd)	Joondalup	92,990	125,000	24.76%
Secondary	Whitfords City	Joondalup	49,924	50,000	0.09%
Secondary	Warwick Grove	Joondalup	25,614	38,000	-3.99%
District	Gwendoline Drive (Belridge)	Joondalup	6,148	10,000	7.33%
District	Sorrento Quay	Joondalup	7,261	9,000	2.04%
District	Currambine Market Place	Joondalup	6,549	15,000	0.51%
District	Greenwood Village	Joondalup	4,976	10,000	-4.08%
District	Woodvale Park	Joondalup	7,460	12,000	-4.47%
Local / Neighbourhood	Iluka	Joondalup	0	3,300	100.00%
Local / Neighbourhood	Craigie Plaza	Joondalup	2,337	3,500	19.79%
Local / Neighbourhood	Heathridge	Joondalup	2,324	3,500	17.85%
Local / Neighbourhood	Connolly	Joondalup	3,005	3,500	15.77%
Local / Neighbourhood	Springfield	Joondalup	728	1,000	10.36%
Local / Neighbourhood	Ocean Reef	Joondalup	1,957	4,000	10.33%
Local / Neighbourhood	Edgewater	Joondalup	1,236	2,000	9.02%
Local / Neighbourhood	Mullaloo Tavern	Joondalup	700	1,500	8.23%
Local / Neighbourhood	Beldon	Joondalup	3,768	4,000	8.13%
Local / Neighbourhood	Beaumaris City	Joondalup	2,459	3,000	7.87%
Local / Neighbourhood	Woodvale	Joondalup	3,064	3,200	7.49%
Local / Neighbourhood	Forrest Plaza	Joondalup	548	1,000	5.23%
Local / Neighbourhood	Mullaloo	Joondalup	1,822	3,000	4.65%
Local / Neighbourhood	Kingsley	Joondalup	3,983	4,000	3.22%
Local / Neighbourhood	Candlewood	Joondalup	1,662	2,000	1.01%
Local / Neighbourhood	Kinross A	Joondalup	4,300	5,000	-0.76%
Local / Neighbourhood	Coolibah Plaza	Joondalup	808	1,500	-1.14%
Local / Neighbourhood	Kinross B	Joondalup	500	700	-1.93%
Local / Neighbourhood	Carine Glades	Joondalup	3,991	4,500	-2.60%
Local / Neighbourhood	Moolanda North	Joondalup	206	300	-3.26%
Local / Neighbourhood	Glengarry	Joondalup	2,890	3,000	-3.50%
Local / Neighbourhood	Moolanda South	Joondalup	678	1,000	-6.09%
Local / Neighbourhood	Padbury	Joondalup	2,064	2,064	-7.38%
Local / Neighbourhood	Hepburn Ave	Joondalup	1,971	2,000	-9.41%
Local / Neighbourhood	Sorrento	Joondalup	1,278	1,300	-9.73%
Local / Neighbourhood	Hillarys	Joondalup	2,992	3,000	-9.91%
Local / Neighbourhood	Lilburne Road	Joondalup	450	450	-12.45%
Local / Neighbourhood	Duncraig Village	Joondalup	885	885	-12.67%
Local / Neighbourhood	Sheppard Way	Joondalup	1,789	1,789	-13.29%
Local / Neighbourhood	Duncraig North	Joondalup	2,388	2,400	-13.84%
Local / Neighbourhood	Harman Rd	Joondalup	724	724	-14.17%
Local / Neighbourhood	Greenwood Plaza	Joondalup	1,000	1,000	-14.89%
Large Format Retail	Joondalup South	Joondalup	12,443	12,443	30.81%
Large Format Retail	Joondalup Drive	Joondalup	8,534	8,534	12.76%
Large Format Retail	Waldecks	Joondalup	80	80	-4.83%

~~9.5~~10.5 Appendix 5 – Shop Retail Gravity Model Results, City of Wanneroo and City of Stirling Centres ~~Retail Growth~~ Impacts ~~– Recommended Scenario~~

WAPC Heirarchy	Centre	LGA	2010 Retail Area	2026 Retail Area	Impact
Strategic Metropolitan	Innaloo	Stirling	57,843	70,000	60.29%
Secondary	Mirrabooka	Stirling	39,129	44,662	1.45%
Secondary	Karrinyup	Stirling	51,085	52,319	3.86%
District	Main Street	Stirling	6,755	8,800	23.80%
District	Scarborough	Stirling	9,508	15,000	22.27%
District	Northlands	Stirling	9,761	12,039	-7.02%
District	Stirling Central	Stirling	13,588	15,577	-7.42%
Local / Neighbourhood	Gwelup	Stirling	4,772	4,888	5.33%
Local / Neighbourhood	Fieldgate	Stirling	901	1,024	2.82%
Local / Neighbourhood	Nollamara	Stirling	3,912	5,574	-1.35%
Local / Neighbourhood	Westminster	Stirling	2,870	2,870	-3.24%
Local / Neighbourhood	North Beach	Stirling	4,566	4,861	-5.96%
Local / Neighbourhood	Flora Terrace	Stirling	1,197	1,197	-7.39%
Local / Neighbourhood	Stirling Village	Stirling	1,168	1,168	-15.77%
Strategic Metropolitan	St Andrews A	Wanneroo	0	7,000	100.00%
Secondary	AE_RC	Wanneroo	0	26,000	100.00%
Secondary	Wanneroo	Wanneroo	9,290	17,000	-7.48%
Secondary	Ocean Keys	Wanneroo	28,241	28,241	-14.82%
District	AEdst	Wanneroo	0	15,000	100.00%
District	Banksia Grove	Wanneroo	0	20,000	100.00%
District	Butler	Wanneroo	0	10,000	100.00%
District	St Andrews B	Wanneroo	0	0	100.00%
District	St Andrews C	Wanneroo	0	11,700	100.00%
District	St Andrews K	Wanneroo	0	10,900	100.00%
District	Kingsway City	Wanneroo	15,915	30,000	-4.32%
District	Girrawheen	Wanneroo	8,223	19,000	-17.31%
District	Alexander Heights	Wanneroo	5,814	12,000	-35.66%
Local / Neighbourhood	AE_m	Wanneroo	0	850	100.00%
Local / Neighbourhood	Aencv	Wanneroo	0	700	100.00%
Local / Neighbourhood	AEnh1	Wanneroo	0	0	100.00%
Local / Neighbourhood	AEnh2	Wanneroo	0	3,000	100.00%
Local / Neighbourhood	AEnh3	Wanneroo	0	0	100.00%
Local / Neighbourhood	AEnh4	Wanneroo	0	0	100.00%
Local / Neighbourhood	Aescv	Wanneroo	0	500	100.00%
Local / Neighbourhood	St Andrews L	Wanneroo	0	5,000	100.00%
Local / Neighbourhood	St Andrews M	Wanneroo	0	4,700	100.00%
Local / Neighbourhood	Drovers	Wanneroo	9,291	9,291	4.24%
Local / Neighbourhood	Wangara	Wanneroo	19,630	19,630	1.60%
Local / Neighbourhood	Carramar	Wanneroo	5,000	5,000	-12.89%
Local / Neighbourhood	Baltimore	Wanneroo	540	540	-13.51%
Local / Neighbourhood	Merriwa	Wanneroo	3,304	3,304	-15.15%
Local / Neighbourhood	Clarkson	Wanneroo	670	670	-24.65%
Local / Neighbourhood	Brighton	Wanneroo	2,249	2,249	-34.36%
Local / Neighbourhood	Mindarie	Wanneroo	1,610	1,610	-36.18%

~~9.6~~10.6 Appendix 6 – Preliminary Consultation with Department of Planning

From: Cox, Natalie <Natalie.Cox@planning.wa.gov.au>
Sent: Thursday, 24 November 2011 12:50 PM
To: Syme Marmion & Co
Subject: RE: City of Joondalup Local Commercial Strategy

I refer to our meeting of 4 November 2011 regarding the Local Commercial Strategy for the City of Joondalup currently under preparation. As discussed, I have reviewed the draft Part A - Background Research, Economic Analysis and Retail Needs Assessment and have provided some brief comments below.

- Part A seems to address the main elements of State Planning Policy 4.2 *Activity Centres for Perth and Peel* (SPP 4.2) in terms of identifying employment targets and locations, a discussion of residential density opportunities, incorporation of a retail needs assessment, recommended maximum shop retail floorspace and a discussion of potential trade impacts on other centres based on these recommended floorspace maximums. ***Response: Noted***

- I note the proposal for Gwendoline Avenue (Belridge) to grow from a neighbourhood centre to a district centre. I believe this area could use some more discussion/justification to provide a strong a case as possible for this proposed departure from SPP 4.2. ***Response: Section on Gwendoline Avenue proposal amended to include further discussion and justification.***

- In respect of the retail needs assessment in Part 6, shouldn't this section include figures as to the amount of floorspace required based on the population projections and other information provided in Part 6? Is this the intent of the recommended maximum floorspace in Part 7 (Table 22 on page 66)?

  I suggest that the outcomes of the Retail Needs Assessment (i.e. required floorspace) would be better located at the end of Part 6. Alternatively, combining Parts 6 and 7 and reformatting these sections might present the information in a more accessible and easy to follow manner. ***Response: Agreed – sections combined and re-worked.***

- The document at page 52 talks about density codings of R80 for the centres as per the City draft Housing Strategy, however, I would like to see a discussion on the potential application of RAC codes for the centres. ***Response: Discussion on R-AC codes added including table outlining the revised codes at November 2010.***

- There are references in the document to '*draft work commissioned by the Department of Planning*' (pg 30) and '*through discussions with the Department of Planning*' (pg 22) and '*this approach has been discussed and agreed with the Department of Planning'* (pg 23).

  A reference list, and footnotes would be appropriate here to indicate the source of this information. There may be other instances where this is needed- these are just the ones that caught my eye ***Response: Footnotes added where applicable.***

- The strategy would benefit from the addition of a spatial plan showing the existing hierarchy of centres and floorspace distribution within the City of Joondalup. Furthermore, it is anticipated that Part B of the Strategy will contain a strategy plan showing recommendations and proposals- proposed hierarchy and floorspace. ***Response: Figure 15 and Appendix 2 both outline the current location and hierarchy of centres. Part B will include a Strategy Plan Map.***

- Part 1 should include reference to the draft Outer Metropolitan Perth and Peel Sub-regional Strategy and a discussion of this document and implications for commercial strategy. ***Response: draft Outer Metropolitan Perth and Peel Sub-regional Strategy discussion included within the Directions 2031 and Beyond review (section 1.1.1~~1.1.1~~). This has been expanded slightly and reference to the draft Outer Metropolitan Perth and Peel Sub-regional Strategy made clearer.***

- Part 8 Implementation of SPP 4.2 seems out of context. I suggest removing this section. The information under part 8.1 could be moved to Part 1 (1.1.3) as it really just outlines the requirements under SPP 4.2. Part 8.2 could be moved to a new section titled 'Implementation' which could be located after Part 10-Recommendations. ***Response: Report amended accordingly.***

Please be aware that I have not had a lot of time to dedicate to this and I reiterate that I do not have any particular expertise in the area of retail modelling and needs assessments. As such, I have not undertaken thorough analysis of the details. Nevertheless, I hope you find the above officer level comments helpful.

Kind regards

Natalie Cox
Senior Project Planner
Schemes and Appeals Team

Response: Noted – It is anticipated that the Department of Planning will review the draft Local Commercial Strategy Part A and Part B together in more detail including review of the retail needs assessment section.

ATTACHMENT 2

Draft Local Commercial Strategy
Part B – Shop Retail Assessment

City of Joondalup
June 2013

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Table of Contents

1. Introduction

1.1. Background

The City of Joondalup Draft Local Commercial Strategy consists of ~~two~~ three parts. Part A - Background Research, Economic Analysis and Retail Needs Assessment, ~~delivers the required rigorous analysis that provides the basis for formulation of the~~ Part B ~~-~~ – Shop retail recommendations, and Part C – Bulky Goods and Commercial Office recommendations.~~Draft Local Commercial Strategy.~~

1.2. Purpose

Part B includes interpretation of the Part A results and focuses on the formulation of appropriate strategies and measures to optimise economic benefit to businesses in the City of Joondalup from the available opportunities. This includes equitable and orderly distribution of retail floorspace for community and commercial benefit as well as maximising opportunities to expand other land use types in appropriate locations. Specifically the Local Commercial Strategy will:

- Identify any specific amendments required to be made to the DPS to ensure the scheme reflects the City's expectations for the long term economic growth of the city;
- Identify measures and provisions that will be implemented through new DPS and policy statements; and
- Achieve the desired outcomes identified in the Local Planning Strategy and SPP 4.2.

1.3. Report Structure

This report is structured as follows:

- Section 2 records the key findings from Part A Background and Analysis;
- Section 3 provides the strategies for the Local Commercial Strategy;
- Section 4 contains recommendations for measures and provisions to assist in the decision making framework; and
- Section 5 describes the strategy map, proposed hierarchy and floor space of the centres within the City of Joondalup.

2. Part A Summary and Implications

This section of the report records the key findings of the background and analysis (as detailed in Part A) and establishes the foundation for the strategies and recommendations on measures and provisions. In particular this section demonstrates the analysis undertaken to assess the City of Joondalup in terms of commercial floor space and centre hierarchy in accordance with SPP 4.2 Activity Centres in Perth and Peel:

- Retail floor space;
- Hierarchy; and
- Primacy of the Joondalup City Centre.

This report updates the analysis and modelling in the Part A report to reflect currently available data, including the 2011 Census and the 2012 WA Tomorrow series.

2.1. Desktop Review

Population growth within the North West Sub-Region of the Perth Metropolitan Region (Wanneroo, Joondalup and Stirling) is projected to result in an additional 168,000 persons between 2011 and 2026 under the WA Tomorrow publication[1]. However population projections vary and are continuously under review by the State's demographers. Under Directions 2031 and Beyond, the population for the outer areas is planned to be lower than other forecasts due to the anticipated take up of infill in the inner areas, resulting in higher population projections for inner areas such as the City of Stirling and lower projections for the City of Wanneroo to 2031. According to the upper band of the 2012 WA Tomorrow population projections, the population of the region may be as high as 755,500 at 2026.

Discussions were held with the Department of Planning to determine the most appropriate assumptions and population projections to inform modelling associated with preparation of this strategy. The Department of Planning has produced population forecasts out to 2031, with forecasts in geographic units (Main Roads Transport Zones - MTZ) that form the basis for modelling exercises undertaken. The projections utilised accommodate and account for potential infill yields identified within the current Local Housing Strategy. The MTZ forecasts indicate that retail development within the City of Joondalup will need to meet demand arising from approximately 175,000 persons within the Joondalup LGA area by 2026; and a further 246,000 persons throughout both the City of Wanneroo and northern portion of the City of Stirling, who will be within catchment areas of activity centres within the Joondalup LGA area. This broadly assumes an amount of infill in the City of Stirling and Joondalup. This strategy makes recommendations limited to a 15 year timeframe from 2011 to 2026, given the higher uncertainty associated with projections beyond this timeframe.

The North West Sub-Region features a lack of employment opportunity and consequently has a low employment self-sufficiency rate (54% for the Sub-Region overall, but 45% in the combined Cities of Joondalup and Wanneroo as at 2011). The Directions 2031 and Beyond (WAPC, 2010) and Statement of Planning Policy Activity Centres for Perth and Peel SPP 4.2 (WAPC, 2010) together provide guidance in the form of employment self- sufficiency targets and the desired hierarchy of Activity Centres. For the North West Sub-Region, the target is 60%. The aim in Directions 2031 is to increase the diversity of employment opportunities outside the Perth city centre by encouraging businesses and jobs to shift to other centres in the upper levels of the hierarchy. This will encourage higher levels of employment self-sufficiency outside the capital, with significant benefits to be derived from the decentralisation of retail and employment. Benefits include reducing travel distance to work, reduced greenhouse gas production and petrol consumption, reductions in travel costs and travelling times; reducing road congestion; and increasing

[1] WAPC 2012, which is based on 2006 Census data

opportunities for non-car based commuting such as walking, cycling and public transport. The employment self-sufficiency in the City of Joondalup is discussed further in section 2.2~~2.2~~.

Of the existing and planned Strategic Metropolitan and other Regional Activity Centres within the North West Sub-Region, the State and Local policy dictates that the Joondalup City Centre should function as the focal point for the attraction of investment and employment to the North West Sub-Region. On this basis, growth within the centre must occur at a rate consistent with its strategic role in relation to other activity centres within the Region; and to a level sufficient to enable it to perform its desired role as a higher order central business district within the Perth Metropolitan Region. Furthermore, the growth of other activity centres within the City of Joondalup should also be planned to reflect this higher level objective.

2.2. Economic Assessment

The City of Joondalup has over 83,000 employed persons in the labour force living within the City[2]. These employees work in various locations, including the City of Joondalup, other local government areas in the Perth metropolitan area and in regional locations. Employment within the City of Joondalup totals around 38,500 persons, with these employees coming from various locations in the Perth metropolitan area.

Employment self-sufficiency and self-containment are defined as follows:

$$\textit{Employment Self-sufficiency ratio} = \frac{\textit{Local job stock}}{\textit{Employed local resident workforce}}$$

$$\textit{Employment Self-containment ratio} = \frac{\textit{Employed local workforce also working locally}}{\textit{Employed local resident workforce}}$$

With jobs located within the City of Joondalup (at 2011 Census) totalling 38,5~~75~~61 and a resident employed workforce of 83,0~~00~~33, the current employment self-sufficiency for the City of Joondalup is 46.5%. With 22,19~~0~~1 of the 83,0~~00~~33 persons in the employed resident workforce working locally, the employment self-containment is 2~~7~~6.7%. Some industries have higher employment self-~~sufficiency~~ containment than others with an employment "gap", such as construction and mining. These industries are unlikely to be influenced through economic development within the City. Other industry types, such as Health Care and Social Assistance, Retail Trade and Education and Training, Public Administration and Safety, Professional, Scientific and Technical services could be priority target industries since the local workforce show a willingness to work locally and there is opportunity to fill the employment gap. Significant growth in the retail sector alone, particularly outside the main Joondalup City Centre (where fewer agglomeration opportunities exist) will not be sufficient or even appropriate. ABS data shows that employment in the retail industry grew relatively strongly in the decade to 2005, but has since plateaued. Retail jobs are now equally shared between full-time and part-time employment. Around 40% of the retail workforce is also employed on a casual basis.

The City is home to more than 13,400~~2,900~~ registered businesses with strong health, education, tourism, retail, finance and professional service sectors. These businesses service a growing regional population of approximately 330,000 which is expected to increase to over 466,000 by 2026. The Joondalup 2022 Vision (Strategic Community Plan 2012 - 2022) is that the City will continue to grow as the Strategic Regional Centre providing a knowledge and service hub for the North West Sub-Region. The relevant strategic priorities of the 2012 – 2022 Plan are:

[2] ABS, Census 2011

- Quality Urban Environment:
  - Quality Built Outcomes
  - Integrated Spaces
  - Quality Open Spaces
  - City Centre Development
- Economic Prosperity, Vibrancy and Growth:
  - Primary Centre Status
  - Activity Centre Development
  - Destination City
  - Regional Collaboration
  - Business Capacity

This recognises the agglomeration and scale economies that are only available with the concentration of higher order economic activity in a very small number of main locations in a relatively low density and sprawling environment such as the North West Sub-Region.

Directions 2031 and Beyond forecasts the need for an additional 69,000 jobs (to achieve a target employment self-sufficiency of 60%) in the North West Sub-Region based on an additional 65,000 dwellings within the region. The Joondalup City Centre provides the most viable location to target priority employment growth in order to achieve the 60% employment self-sufficiency target.

Recent draft work commissioned by the Department of Planning on employment targets for commercial centres in the North West Sub-Region identifies one scenario to bridge the employment gap to achieve the desired 60% self-sufficiency in the North West Sub-Region from 2006 to 2031. The jobs targets under this scenario shown for specific activity centres within the City of Joondalup are shown in the following table.

Table 1~~1~~: Draft Activity Centre Employment Gap

Draft Employment Gap	
Commercial Centre	**2006 - 2031**
Joondalup City	13,902
Warwick Grove	1,443
Whitfords City	2,597
Greenwood Village	138
Sorrento Quay	909
Currambine Market Place	465
Woodvale Park	238
Total Employment Gap	**19,692**

Source: Department of Planning North West Sub-Region Employment Allocation (Jan 2010)

The figures show that in order to meet the employment self-sufficiency targets contained in Directions 2031 and Beyond, a total additional 20,000 jobs will need to be generated within commercial activity centres in the City of Joondalup. These draft targets are proposed to inform the future economic development strategy for the Region and the individual employment targets by centre.

It should be noted that the above targets are only one potential scenario with other scenarios possible that have not yet been identified by the Department of Planning. One such possibility with a stronger strategic rationale is to increase the target for the Joondalup City Centre which would enable greater agglomeration economies to be realised and thus have a greater chance of success in actually achieving the employment targets and in particular the requirement for higher order jobs. This would allow the other centres to remain at smaller scale thus requiring less infrastructure investment on public transport and roads.

Assuming a ratio of between 25~~m^2~~sq.m and 30~~m^2~~sq.m of floorspace per employee, the need for a total of approximately 20,000 jobs within the City of Joondalup implies the need for 500,000~~m^2~~sq.m to 600,000~~m^2~~sq.m of additional floorspace. It is likely that the majority of this floorspace is most viably located in the Joondalup City Centre area.

2.3. Retail Needs Assessment

The rationale was to provide the City with a robust set of floorspace demand figures in the form of indicative maximum levels of PLUC 5 Shop Retail floor space. These indicative maximums would be provided for each activity centre within the City and based on the extent of population growth estimated by the WAPC. Proposals seeking to exceed the maximum indicative level of PLUC 5 Shop Retail floorspace for any activity centre (excluding the Joondalup Strategic Regional Centre), should demonstrate that any additional growth is viable through the preparation of a Retail Sustainability Assessment (RSA) consistent with the requirements of SPP 4.2 – Activity Centres for Perth and Peel. Among other requirements, the RSA must identify potential impacts on each affected competing activity centre.

Base data was gathered for the retail gravity modelling comprising of population projections called Metropolitan Land Use Forecasts (MLUFs), prepared by the Department of Planning (DoP); which are summarised in Table 2 below. In addition, PLUC 5 household expenditure data was sourced from MDS Market Data Systems for incorporation into the model, along with travel time data.

Table 2~~2~~: Modelled Study Area –
WAPC Population Projections by Local government Area

LGA	2011	2021	2026
Joondalup	164,193	172,662	175,058
Wanneroo	151,199	219,407	242,827
Stirling (North Western edge only)	32,448	32,867	36,693

Source: Department of Planning Dwelling and Population Projections by MTZ September 2012 (Population in Permanent Private Dwellings), MGA Town Planners

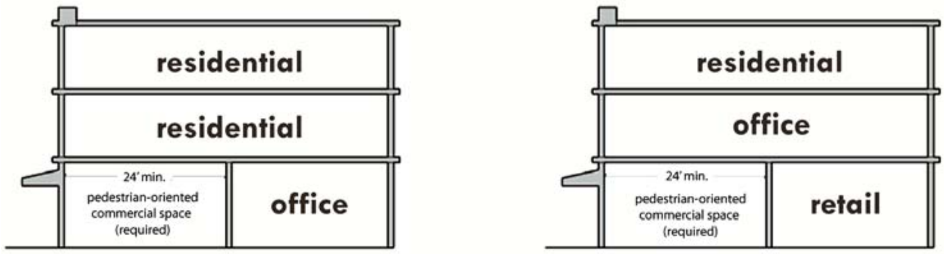
The population projections, MDS expenditure data and travel times were utilised in the retail gravity model to distribute PLUC 5 Shop Retail expenditure among competing centres throughout the study area. The model is explained in detail in Part A of the draft Local Commercial Strategy. The results of the Gravity Model assessment, as well as the Centre Health Check, Retail Turnover Density and review of public submissions to the draft Local Commercial Strategy were examined and form the basis of recommended thresholds ~~The resulting recommended indicative maximum~~ for PLUC 5 Shop Retail floorspace for each activity centre. These recommended thresholds are ~~is~~ detailed in Section 5~~5~~.

2.4. Activity and Commercial Centres Assessment

Joondalup City Centre Analysis

For Joondalup to meet its employment self-sufficiency targets it must attract economic activity that goes beyond the Region. This requires scale and diversity to achieve the agglomeration economies that flow from the physical integration of residential and commercial uses that is possible in a larger, more diverse centre. For example, vertical mixed use buildings contain a mix of residential and commercial uses. Typically, commercial uses (i.e. retail shops, restaurants, offices) are located on the ground floor, while residential units (flats or apartments) are located on upper levels. The following illustrations show some simple examples of a vertical mixed use building.

Figure 1~~1~~: Vertical Integration - Mixed Use Buildings



The city centre environment provides a setting for effective informal information transfer and the regional transport connections that allow efficient labour access and business to business interaction.

The Joondalup City Centre is the only centre in the City of Joondalup that has these characteristics and the only one that can develop to a scale that can attract significant extra-regional economic activity. This is not easy to achieve and each element of the strategy must be coordinated to give the highest chance of success. It implies a strategy of favouring concentrating regional growth in the centre and building each of its aspects:

- Encouraging a wide variety of commercial uses;
- Encouraging and maximising the retail offering;
- Encouraging growth in the education and health services functions; and
- Encouraging and maximising inner city residential development.

The draft Joondalup City Structure Plan is required to be endorsed by the Western Australian Planning Commission prior to its finalisation and implementation. Following consideration of the draft structure plan and s~~S~~cheme amendment, the City has been requested by the Department of Planning (DoP) to modify the documents to operate as in 'interim' structure plan while an Activity Centre Structure Plan is prepared. These changes ~~are~~ have been ~~currently being~~ undertaken, and endorsement by the WAPC is currently awaited. ~~Due to the nature of the modifications the draft Structure Plan and a new scheme amendment will need to be considered by Council and advertised for public comment prior to reconsideration by the Department of Planning.~~

Under the proposed Structure Plan provisions, there will be an emphasis in the Central Core ~~Area~~ district on specialty shops, cinemas, personal service establishments, restaurants, alfresco dining and offices on the ground floor. The retail component of the Central Core will focus on a range of comparison, convenience and specialty retailing. The objectives of the Central Core ~~Area~~ district include allowing a broad range of appropriate land uses to encourage day and night activity. This includes encouraging tourism through the provision of accommodation and entertainment uses.

The Central Core ~~Area~~ district includes the Lakeside Shopping Centre which adds objectives to ensure that development:

- Integrates with the urban and social fabric;
- Encourages new pedestrian connections; and
- Achieves the benefits of transit oriented development.

In terms of scale, the Joondalup City Centre has the capacity to develop into a primary activity centre. If the Joondalup City Centre continues to grow at an average an additional 17,000~~m^2~~sq.m of floorspace per annum, it could potentially reach a total floorspace of 860,000~~m^2~~sq.m in around 20 years. This implies a commercial floorspace density of approximately 2,000~~m^2~~sq.m per hectare, which is around one third of the commercial floorspace density currently achieved in the Perth CBD. However, to achieve this it requires a development strategy that builds on the strategic strengths of the centre to make it a primary metropolitan centre, a similar land area to the Perth CBD and with the equivalent of more than one sixth of the Perth CBD floorspace.

In terms of shop retail floorspace, the centre is already quite large with around 75,000~~m^2~~sq.m in the Central Core Area and another 40,000~~m^2~~sq.m of larger format retail in other areas such as the industrial and Joondalup Drive precincts. In order to promote the Joondalup City Centre as a Primary Activity Centre, it is likely that the Shop Retail floorspace will need to increase to a scale that will enable a full range of specialty shops and department stores to locate in the city centre. A floorspace of approximately 125,000~~m^2~~sq.m may be required in the retail core to enable this provision. Note that the approval of the Lakeside development will bring the total Shop Retail floorspace within the Central Core Area up to 99,464~~m^2~~sq.m of approved Shop Retail floorspace. Land ~~will soon be~~ is available in the Quadrangle to cater for expansion of Other Retail uses.

There is substantial capacity for further development of the city centre for all classes of accommodation. Development opportunities identified in the draft Joondalup City Centre Structure Plan might have capacity for over 600,000~~m^2~~sq.m of additional floorspace in the central city zones (i.e. those areas that are serviced by the Joondalup rail station) at full build-out. This might allow for, for example, around 3,500 residential apartments and an additional 250,000~~m^2~~sq.m to 300,000~~m^2~~sq.m of commercial floorspace accommodating 10,000 to 12,000 additional employees. This would give a total working population in the city centre core area of around 22,000 and a residential population of around 10,000. Given the mix of activities underpinning these figures, this would make it a vibrant and attractive centre, with the scale to attract enterprises from beyond the immediate regional catchment area. Commercial office development potential has been specifically examined in Part C of the Strategy.

The additional residential population would support around 7,000~~m^2~~sq.m to 10,000~~m^2~~sq.m of retail floorspace in the centre, further underpinning its viability, not only as the major centre for the corridor, but as a primary metropolitan centre.

Whitfords and Warwick Secondary Centres Analysis

The Whitfords ~~Regional~~ Secondary Centre comprises approximately 25 hectares of land located on the corner of Marmion Avenue and Whitfords Avenue in Hillarys. The Whitfords Centre is classified as a secondary centre in SPP 4.2 and is fulfilling its role in the hierarchy by providing essential services for the catchment. The centre is consistent with the typical characteristics described in SPP 4.2 for a secondary centre, with the exception of not having a department store such as Myer or David Jones. The Centre did have an Aherns department store for some time during its history. Other potential additions to the centre to align better with SPP 4.2 would include the addition of major offices. However, with a current land use intensity of over 3,000~~m^2~~sq.m per hectare, this may be challenging depending on parking demand requirements and public transport provision. It is also not as well located as the Joondalup City Centre for large scale establishment of major offices. Any major expansion of the Whitfords floorspace will have flow on impacts in terms of traffic and transport as well as other infrastructure and servicing requirements.

Overall, it appears that the current Shop Retail floorspace in the Whitfords City shopping centre is approximately 50,000~~m^2~~sq.m. However, the complex also includes property to the west of Endeavour Road that houses Bunnings, Supercheap Auto and other large floorspace users. It is estimated that the total floorspace of the complex is between 77,000~~m^2~~sq.m and 78,700~~m^2~~sq.m based on a combination of City of Joondalup and WAPC Land Use Survey data. The Whitfords centre has a land use intensity of 3,088~~m^2~~sq.m per hectare.

If the ~~The~~ Shop Retail component is ~~possibly~~ above, or increases to, 50,000~~m^2~~sq.m , Shop Retial uses ~~and~~ represent~~s~~ almost 66% of the total. SPP 4.2 sets a target of 40% for other uses where Shop Retail is over 50,000~~m^2~~sq.m. The SPP 4.2 diversity target is not achieved in this scenario. Alternatively, if the Shop Retail floorspace is 49,924~~m^2~~sq.m as provided by the City of Joondalup at July 2010, the 30% target is met but there is no room for Shop Retail expansion without increasing the target for other uses to 40%. If the centre should expand to 50,001~~m^2~~sq.m, mixed uses would represent 34.9% so there would be a shortfall of other uses floorspace of approximately 6,700~~m^2~~sq.m to meet a 40% target. For every proposed 100~~m^2~~sq.m of Shop Retail floorspace thereafter, there would need to be an additional 67~~m^2~~sq.m minimum of mixed Uses floorspace in the proposal in order to be in alignment with the 40% other uses SPP 4.2 diversity target for centres with over 50,000~~m^2~~sq.m Shop Retail floorspace.

~~The impact of significant shop retail at Whitfords would have a detrimental impact on other centres and any proposed scenarios for expansion at Whitfords will need to determine impacts on other centres. Draft~~ Gravity modelling undertaken as part of the development of the draft Local Commercial Strategy indicates that expansion of the Joondalup City Centre and the Whitfords Shopping Centre ~~would~~ could result in significant trade impacts on centres including Currambine, Padbury, Hillarys, Mullaloo, Kingsway and Girrawheen. The implication ~~is~~ of this assessment is that significant expansion should only occur at Joondalup City Centre.

However, public submissions to the draft Local Commercial Strategy indicated that the results of the Gravity Model assessment were potentially conservative and that the size of the current and potential future shortfall in shop retail is actually larger than originally modelled. Based on this consideration, some shop retail floorspace growth of Whitfords City Shopping Centre and the broader Activity Centre could be supported, likely in the order of 15,000 to 25,000 sq.m (taking total shop retail floorspace to the order of 65,000 to 75,000sqm). Expansion above this threshold is likely to have significant sustainability issues, not only on smaller order centres in the hierarchy, but also on Joondalup City Centre.

Details of impact of expansion of Shop Retail floorspace at the Joondalup City Centre on other centres is detailed in the draft Local Commercial Strategy Part A report. The inclusion of the St Mark's school site in the Whitfords activity centre boundary would result in no significant additional office or other commercial uses being required for the Whitfords Centre under SPP 4.2 and any expansion plans could possibly only result in the addition of retail jobs.

The Warwick ~~Regional~~ Secondary Centre has a land area of 16.5 hectares and is located at the corner of Erindale Road and Beach Road in Warwick. ~~The Warwick centre is currently satisfying the role of a secondary centre.~~ There is a substantial amount of vacant land at the Warwick centre and the centre may have some capacity for expansion. The Warwick Grove centre accommodates over 25,000~~m^2~~sq.m of Shop Retail and good mix of other uses to have a total commercial floorspace of almost 54,000~~m^2~~sq.m. With a floorspace totalling around 54,000~~m^2~~sq.m and a land area of 16.48 hectares, the Warwick centre has an intensity of about 3,300~~m^2~~sq.m per hectare. It currently achieves a Mixed Use ratio of 41.7%, which is well above the 30% target for centres with between 20,000~~m^2~~sq.m and 50,000~~m^2~~sq.m of Shop Retail floorspace.

Any major expansion of the Warwick centre will have flow on impacts in terms of traffic and transport as well as other infrastructure and servicing requirements. ~~T~~However, there is a substantial amount of vacant land at the Warwick centre and a structure plan ~~would~~ would have the potential to facilitate the expansion and growth of shop retail at Warwick while maintaining the current strong Mixed Use ratio through the provision of ~~identify~~ some alternative uses~~ for it~~, including higher density residential development (such as aged person accommodation).

All Centres "Health Check"

The Part A report includes a detailed analysis of the overall health of each centre based on a range of indicators assessed through specific data and site visits. These include:

1. Floorspace intensity;
2. Vacant Floorspace proportion
3. Shop Retail proportion
4. Estimated Shop Retail turnover per square metre per annum;
5. Amenity/Function; and
6. Access/ Parking/ Public Transport.

The observations made at each of the centres considered the general condition and appearance of the centre, streetscape and frontage as well as how busy the centre appeared. The centres with "very poor" or "poor" overall health include:

- Beldon;
- Heathridge;
- Coolibah Plaza; and
- Ocean Reef.

Part A also considers the Canham Way service industrial complex, which is located adjacent to a residential area. Consideration should be given to promote redevelopment of the southern area of the complex to include commercial/business in order to provide a buffer between the service industrial and the residential area. However, any changes should not result in a net decrease of service/commercial floorspace in the complex, with those businesses being encouraged to locate within the northern part of the complex. Redevelopment of the southern portion may also provide a catalyst to revitalise the whole complex. The City of Joondalup may wish to investigate the potential of this further through a separate study.

2.5. Implementation of SPP 4.2

The Statement of Planning Policy Activity Centres for Perth and Peel (SPP 4.2) was released in conjunction with Directions 2031 and Beyond in August 2010 by the WAPC. SPP 4.2, and represents a new strategic direction for the Perth Metropolitan Area which aims to realise the benefits of a more consolidated city, which include:

- A reduced overall need for travel;
- Support for the use of public transport, cycling and walking for access to services, facilities and employment; and
- A more energy efficient urban form.

To achieve the strategic objectives of SPP 4.2 and Directions 2031 and Beyond, the proposed Commercial Strategy (and any review of the City's draft Housing Strategy) will need to consider all aspects of SPP4.2, including matters previously not covered including:

- Integration with public transport;
- Employment targets outlined in Directions 2031 and Beyond;
- Residential dwelling targets set out in SPP 4.2;
- Diversity performance targets (excluding residential land uses) for strategic regional centres and finer grained centre design considerations such as: movement networks and associated accessibility; the quality of the public realm; and land use mix and any associated synergies or conflicts, particularly opportunities to co-locate land uses within a centre. Sufficient land should be included in the definition of the centre to support a range of uses;
- Retail sustainability assessments (RSA); the WAPC has yet to prepare relevant practice guidelines for these;
- Physical and spatial characteristics, for example unduly elongated centres or corridors will not be supported. A place based and integrated approach rather than a segregated and zoned approach is recommended; and
- Consideration of the significant economic activities undertaken outside the City's commercial/retail centres and alignment with both the City of Joondalup Economic Development Plan 2012 – 2015 and the Directions 2031 Economic Development and Employment Strategy for the North West Sub-Region (when released).

The centres within the City will require centre plans which will need to be consistent with the Model Centre Framework (Appendix 2 of SPP_4.2), the WAPC ~~guide for the preparation of activity centre structure plans~~Structure Plan Preparation Guidelines. The plans may be prepared by local government or the private sector (land owners, developers). ~~Revised WAPC Guidelines for structure plan preparation are underway.~~ Plans should be prepared within three years of the finalisation of SPP4.2 (Strategic Metropolitan Centres o~~O~~nly) and structure plans should be endorsed prior to major development being approved. A major development is defined in SPP 4.2 as where the proposed Shop Retail net lettable area of the proposed building is more than 10,000~~m^2~~sq.m or extension to existing Shop Retail floorspace is more than 5,000~~m^2~~sq.m. Major development is also defined to exclude non-retail uses. Any major development requires a Retail Sustainability Assessment (RSA) unless the proposed Shop Retail floorspace is consistent with a Retail Needs Assessment contained in an endorsed Local Planning Strategy or Structure Plan.

In the absence of a structure plan, major developments need to satisfy the Model Centre Framework. An RSA will also be required where proposals would result in the total shop retail floorspace of a neighbourhood centre exceeding 6,000~~m^2~~sq.m or where proposals seek to expand a neighbourhood centre by more than 3,000~~m^2~~sq.m of Shop Retail floorspace. An RSA is also required where a proposal seeks to significantly increase the shop retail floorspace beyond the indicative floorspace thresholds contained in an endorsed Local Planning Strategy, where ~~the indicative floorspace~~ a retail needs assessment has been an input into the identification of the thresholds~~has been derived from a retail needs assessment~~.

A retail needs assessment should be included in the Local Planning Strategy in order to provide the projected retail needs of the communities in the local government areas and its surrounds. A retail needs assessment forms a major part of this City of Joondalup draft Local Commercial Strategy report.

2.6. Emerging Issues

The nature of retailing changes constantly and these changes are pivotal to the future of activity centres. Emerging issues include:

- The growth of big box retailing. This type of store has been used to sell hardware, whitegoods, home wares, electrical goods and liquor. The format has proved successful in Australia and is expected to grow further. The WAPC held the Large Format Retail Forum held in 2005 which ultimately led to the inclusion of section 5.6.1 "Bulky goods retailing and mixed business" in SPP 4.2 which provides the appropriate level of information on how to manage large format retail and the local commercial strategy will need to respond to this, particularly for the Joondalup City Centre and surrounding areas including The Quadrangle. Large format retail areas therefore need to be identified in the City of Joondalup consistent with SPP 4.2 principles. Large format retail is specifically examined in Part C of the Strategy.

- A resurgence of the high street. This has coincided with inner area upgrading and redevelopment. Retail outlets such as cafes, restaurants, niche bookshops and boutique household goods suppliers are now part of the attraction of inner city living and is a sought-after environment for many new developments. These precincts are often associated with Transit-Oriented Design principles.

- The growth of franchising. Although there are limited data collected on franchising in Australia, surveys of Australian franchising indicate that around 28% of franchises are in the retail industry (Parliamentary Joint Committee on Corporations and Financial Services 2008) across a wide spread of retail sectors. This may contribute toward design issues or conflicts, particularly where franchise signage or building design is inconsistent with the amenity of a particular activity centre.

- Vertical integration of brands. Some retailers (such as Apple, Zara and other luxury apparel retailers, for example) have chosen to own and control more stages of the production and distribution process for a more seamless delivery of their goods. More generally there has been a trend toward the use of 'house' brands by retailers, including supermarkets, as a mechanism for increasing profit margins. The Joondalup City Centre, in its role as a Strategic Metropolitan Centre, should actively seek to encourage these types of retailers such as an Apple Store to locate within the Central Core Area. This will contribute toward a greater attraction to the centre both for customers and other businesses.

- The increasing attention given to meeting the needs of income-rich but time-poor consumers through extended trading hours and locational convenience that increased competition across the retail industry. This affected the retail product mix, with for example, a growth in pre-prepared and take-away foods.

- Technological change, such as scanning and computerisation, enhanced retail productivity by reducing labour input and changing management systems. The scanner at the supermarket checkout and the single operator console at service stations are examples of labour saving technology.

- The emergence of online retailing and e-commerce. This has radically altered interactions between consumers and retailers in the industry and provides an alternative means of delivery of each of the above functions and undermines the rationale for a retail outlet in many sectors. It is the major structural change likely to affect the industry in the longer term and its impacts are likely to be substantial.

Potential impacts on activity centres and considerations for policy and strategy at the local level may include:

- Across Australia there have been marked job losses in the retail sector as it adjusts to the GFC and online retailing impact. Non-food store based retailing is the most likely casualty with a consequential growth in online retailing jobs (mostly work from home positions). Food and entertainment jobs may increase with an economic upturn. Caution should be applied in calculating jobs associated with increased retail floorspace proposals and a variety of economic scenarios should be tested.

- Employment changes will be accompanied by physical changes in activity centres, with an overall reduction in demand for non-food retail floorspace and a re-direction to food and beverage retailing, cafes and restaurants and non-retail personal services. There is likely to be an overall reduction of retail as a proportion of total activity centre floorspace. This might represent an overall reduction in centre floorspace, unless retail floorspace is replaced by other activity, such as cafes and restaurants, personal services, medical services and entertainment. There may be a rise in boutique retailing and showrooms which will allow internet consumers to touch and feel the online product.

- The environment in an activity centre must offer more than functional access to retail and services – it must be convenient, accessible and attractive and provide multiple reasons not only to go there but also to stay for a length of time. With the exception of very local convenience retailing, this is likely to favour larger centres, including the Joondalup City Centre. This implies the need for flexibility in land use provision and fewer restrictions in the zoning table, with a wide mix of separately identified activities being suitable for inclusion in activity centres. Control should therefore be generally limited to only those activities which have a demonstrable and unmanageable negative (environmental) impact on surrounding uses.

3. Strategies for Achieving Local Planning Strategy and State Planning Policy 4.2 Outcomes

3.1. Local Planning Strategy Outcomes

The City of Joondalup District Planning Scheme No. 2 came into operation in November 2000. The Planning and Development Act 2005 requires each local government to review its Planning Scheme every five years. To support this review, and in accordance with the Town Planning Regulations 1967, the City has prepared a Local Planning Strategy to support the development of the new district planning scheme. The Local Planning Strategy identifies the preparation of a Commercial Centres Strategy in line with principles of the WA Planning Commission documents Directions 2031 and Beyond (2009) and the Draft Activity Centres Policy (2009) as a key action. Both of these documents are now finalised and this draft Local Commercial Strategy is prepared within the context of the new documents.

Some of the outcomes identified in the draft Local Planning Strategy include:

- To ensure there is a suitable level of employment, land and commercial floor space in order to generate the required level of employment;
- The Joondalup City Centre has been designated as a Strategic Regional Centre in the final SPP 4.2 for the North-West sector and should be promoted as such. SPP 4.2 identifies that some strategic regional centres have the potential to develop to Primary Centres and the Joondalup City Centre should develop accordingly;
- Future employment opportunities should be promoted through the development of the Ocean Reef Marina site, the train station precincts, and through the redevelopment of existing Commercial Centres in established suburbs;
- Employment density from the remaining areas of undeveloped employment land ('greenfield' sites) within the City as well as from redevelopment opportunities of 'brownfield' sites and existing Commercial Centres should be maximised;
- Consideration of the role of the various centres in light of the Western Australian Planning Commission document, Draft Activity Centres for Perth and Peel Policy 2009 (now SPP 4.2);
- The review of City Policy 3-3 — Centres Strategy and the preparation of Centre Plans should be in accordance with the Draft Activity Centres for Perth and Peel Policy 2009 (now SPP 4.2); and
- Plans should be made for the rejuvenation of low-amenity Commercial Centres.

The Local Planning Strategy expresses the intended outcomes with a series of strategies and actions. The draft Local Commercial Strategy generates additional strategies and actions as well as reviewing the relevant strategies and actions contained within the Local Planning Strategy.

3.2. Local Planning Strategies and Actions Review and additional Local Commercial Strategies

The draft City of Joondalup Local Planning Strategy includes a set of strategies and actions under eight themes. Of these themes, the Local Commercial Strategy relates mainly to the following three themes:

- Joondalup City Centre
- Commercial Centres (Outside the City Centre); and
- Employment.

These themes are examined below, providing context to Part B and Part C of the Local Commercial Strategy.

1. LPS Theme- Joondalup City Centre

Vision statement 1 is that the Joondalup City Centre will drive the economic growth of the City and become an economic anchor for the North West Sub-Region. This vision is certainly consistent with the State policy direction. This vision can be achieved through implementation of the Local Planning Strategies:

- Promoting the City as a place for major regional offices;
- Supporting industrial growth;
- Ensuring development standards are conducive to developing the CBD as a primary centre and retail hub of the region;
- Providing an adequate supply of public parking; and
- Providing diverse retail experiences from markets to speciality to Department Stores.

Vision statement 2 is to facilitate the cultural and entertainment hub of the North West Sub-Region. Again this is consistent with State policy and can be achieved in part through the Local Planning Strategy but can be strengthened through additional Commercial Strategies.

Vision statement 3 is for the city to be a place for people. This is consistent with the State containment and connected City Strategy and is supported through the Local Housing Opportunity Areas and the draft Joondalup City Centre Structure Plan which seeks to intensify development. Additional population in the CBD will also support additional commercial and retail trade in the city zones.

Vision statement 4 acknowledges the need to address the natural environment and achieve sustainable development. The land identified for redevelopment and intensification in the centre zones provides a major opportunity to realise this vision which can be supported through commercial and residential development.

Additional Commercial Strategies to Support Joondalup City Centre

Additional strategies for Joondalup City Centre in this Local Commercial Strategy to support the Local Planning Strategy are:

Strategies:

- Lot amalgamation is to be encouraged;
- Further subdivision and strata titling of activity centres should not be supported and mechanisms to prevent this are to be investigated
- Expansion of commercial and retail activity, particularly bulky goods, should not further reduce the overall quantity of industrial use floorspace as identified by the City of Joondalup 2008 survey and mechanisms to help retain appropriate industrial uses will be investigated. Large format retail and its distribution within the City has been examined, in conjunction with the distribution of Commercial Office within Part C of the Strategy;;
- Offices should not be located on land zoned for industry except where incidental to or servicing industrial developments.~~;~~ Commercial office and its distribution within the City has been examined within Part C of the Strategy;;
- Encourage intensification of uses in the CBD above the current 1,800~~m^2~~sq.m per hectare level, up to an average intensity of above 2000~~m^2~~sq.m per hectare in the city zones and mechanisms to promote this will be investigated
- Encourage the integration of a University Town based in and around intensification of the ECU campus. Such a development should include the provision of commercial and residential floorspace and high

levels of sustainable/energy efficient built form. The ECU Master planning process should be encouraged and supported by the City;

- Facilitate additional development diversity in the central city areas with an additional 600,000~~m^2~~sq.m of residential, commercial and retail floorspace through optimising development opportunities identified in the draft Joondalup City Centre Structure Plan;
- Encourage small format commercial and retail opportunities (sub 40~~m^2~~sq.m) through leasing and tenancy arrangement rather than strata or subdivision to include, convenience micro-markets and specialty food outlets, home work/living spaces, artisan outlets, retail incubators and speciality arcades, in tandem with appropriate parking provisions, particularly within the designated Joondalup train station TOD precincts (where all other requirements are met subject to Council policy);
- Ensure the landscape masterplan for the city is consistent with the plans for additional intense development and maintain high amenity levels, Designing Out Crime Guidelines, water sensitive design and district water and drainage management principles which can be applied as the city develops and intensifies; and
- Encourage and promote opportunities for kiosk and cart trade zones and street performance in pedestrian precincts as a means of developing occasional market and event related activity. Mechanisms to promote this will be investigated.

2. LPS Theme- Commercial Centres (Outside the City Centre)

The vision statement is that the City commercial centres will be accessible to residents, attractive and successful. This vision is consistent with the State's aim to increase self-sufficiency and sustainable communities, to reduce the need for car travel and to allow intensification in selected neighbourhoods with development potential. The vision will be supported by the Local Planning Strategy and Local Housing Opportunity areas. The vision will be further supported by the centre hierarchy and floorspace requirements proposed in the Commercial Strategy.

Additional Commercial Strategies to Support Commercial Centres Outside the Joondalup City Centre

Additional strategies for Activity Centres outside the Joondalup City Centre in this Local Commercial Strategy to support the Local Planning Strategy are:

Strategies:

- Lot amalgamation is to be encouraged where possible f~~F~~urther subdivision and strata titling of activity centres should not be supported and mechanisms to prevent this are to be investigated;
- Expansion of commercial and retail activity, particularly bulky goods, should not further reduce the overall quantity of industrial use floorspace as identified by the City of Joondalup 2008 survey and mechanisms to help retain appropriate industrial uses will be investigated. Large format retail and its distribution within the City has been examined, in conjunction with the distribution of Commercial Office within Part C of the Strategy;;
- Where Activity Centre Structure Plans are not required, centres should consolidate vacant land and build to increase height where appropriate before extending beyond current boundaries to discourage ad-hoc commercial development;
- Where additional retail and /or commercial floorspace cannot be supported as a viable option, consideration should be given to residential development (including aged care) and short stay tourist accommodation on vacant and underutilised land and apartments or home based businesses on upper floors consistent with the Local Housing Strategy;
- Review parking requirements for centres with significant public transport access (bus and rail) and/or opportunities for shared parking consistent with SPP 4.2 guidelines;

- Public realm upgrade of centres should be consistent with Designing Out Crime Guidelines and water sensitive design principles; and
- Further studies including tenancy surveys and infrastructure services are recommended for the following centres which appear to be trading poorly, have significant vacant and underutilised land or which are in need of public realm upgrade, to determine priority actions and strategies required for revitalisation of each centre:
  - Coolibah Plaza, redevelopment opportunity;
  - Heathridge, under trading, strata titled, redevelopment opportunity;
  - Ocean Reef, potential for additional upper storeys/mixed use development;
  - Beldon, redevelopment potential but should be private sector led;
  - Canham Way (Greenwood Plaza), potential redevelopment of southern section to act as catalyst for general 'facelift' subject to ensuring an appropriate quantity of service industrial uses are maintained;

3. ~~1~~LPS Theme- Employment

The Employment vision statement aims to achieve greater employment self-sufficiency. This vision supports the State's policy and will support the public transport network particularly the rail system to the City of Joondalup. The Local Planning Strategy is to establish greater diversity and office and service based land uses in the CBD and to capture embryonic businesses through facilitating home based business, incubators and local medical and tourism facilities in appropriate locations. The Local Planning Strategy will support SPP 4.2 and the self-sufficiency goal of 60% for the North West Sub-Region and also and the hierarchy of centres. The vision will be further supported by the floorspace and diversity requirements proposed in the Commercial Strategy.

Additional Commercial Strategies

Additional strategies to achieve employment targets in the draft Local Commercial Strategy that will support the Local Planning Strategy are shown below.

Strategies:

- In order to achieve the self-sufficiency target of 60% or an additional 69,000 jobs in the North West Sub-Region of which 20,000 are to be in the City of Joondalup, the priority is on attracting businesses and employment to the Joondalup City Centre which is the most viable location with appropriate development capacity and where the greatest agglomeration and additional economic benefit can be derived;
- Tourism and local recreation opportunities along the coast should be optimised and diversified for local, domestic and international visitors;
- Adequate provision must be made through review of DPS 2 for at least ~~12,300~~ 20,000 new dwellings ~~and~~ within ~~an additional population in~~ the CBD, the Housing Opportunity Areas and infill sites ~~totalling at least 20,000~~, which will support population driven employment and support higher levels of employment self-containment; and
- ~~Provision s~~Scheme and policy initiatives ~~hould be made~~ to promote and support appropriate ~~for a~~ home based business sector ~~target of 12% and provisions in DPS 2 to encourage this~~ will be investigated.

3.3. State Planning Policy 4.2 Outcomes

Achievement of SPP 4.2 outcomes will be enabled by incorporating the main elements of the draft Local Commercial Strategy into a new Local Planning Strategy and District Planning Scheme.

The draft Local Commercial Strategy is to be read in conjunction with the revised Local Planning Strategy, DPS and Local Economic Development Strategy (currently under review). Together this suite of documents provides ample direction and guidance for the future development of the City of Joondalup consistent with State policy and particularly SPP 4.2 regarding Activity Centres.

Furthermore, guidance is to be provided to development applications in the CBD through the finalisation of the Joondalup City Centre Structure Plan.

Specifically Parts A and B of the Local Commercial Strategy cover the following requirements of SPP 4.2:

- Confirmed the data baseline for retail needs assessment and retail sustainability assessments;
- Confirmed the centre hierarchy, floorspace and diversity requirements for the city; and
- Identify additional commercial strategy considerations for integration within the Local planning Strategy and District Planning scheme.

4. Recommendations Measures and Provisions – District Planning Scheme and Local Planning Strategy

4.1. District Planning Scheme

The District Planning Scheme was gazetted in 2000 and is due for review. The review will integrate the latest State policy principles on Growth and Settlement SPP3, on developing a connected region with specific housing targets under Directions 2031 and Beyond, the revised R~~D~~-Codes integrating the Multi Housing Code and at a local level the revised Local Planning Strategy, Economic Development Strategy, Housing Opportunity Areas and the latest guidance on Commercial centres from SPP 4.2 and the Local Commercial Strategy. The structure and content of the revised Scheme should be consistent with the Model Scheme Text.

Whilst it is not the purpose of the Local Commercial Strategy to review the text of the current scheme in its entirety, some guidance has been formulated regarding matters pertinent to commercial development, with the aim of allowing greater flexibility for entrepreneurial activity and trends in commercial and retail development and to remove any impediments to economic and employment growth.

Recommendation: The structure and content of the District Planning Scheme should be revised consistent with the Model Scheme text.

4.2. Aims and Objectives

The aims and objectives in the scheme should reference the Local Planning Strategy and associated supporting documents to give weight to the analysis and recommendations which will form part of the decision making framework.

Recommendation: The aims and objectives should include a separate set of economy and employment objectives:

- Maintain and support the primacy of the Joondalup City Centre area as the Strategic Regional Centre in the centre hierarchy;
- Promote development which increases employment opportunities close to living places (currently under Land Use and Development);
- Promote development which increase the diversity of the employment mix within the City, particularly in the Strategic Regional Centre; and
- Maintain industrial zoned land for industrial purposes.

4.3. Zones

A significant issue experienced by developers in the Perth Metropolitan area is the inconsistency of planning schemes and the consequences of this are that some developments that may be approved in one jurisdiction would not be approved under similar circumstances in another jurisdiction. The Local Planning Manual (March 2010) seeks to provide a more uniform approach to planning strategies and schemes and suggests zones for common uses in local planning schemes. In addition, SPP 4.2 has introduced R~~D~~-Codes related specifically to the larger centres in the hierarchy with an aim of intensifying the density over and above that which might be within the normal suburban range. The R-AC codes are similar to the Inner City coding. In addition the RD Codes integrates the multi-unit housing code for locations with medium densities. Where the multi-unit code is not appropriate, for example for heritage reasons, the exception should be identified within the Scheme and Scheme Maps.

In terms of a commercial strategy, it would therefore be reasonable for the City of Joondalup to revise the zones to achieve a more consistent alignment with the Local Planning Manual suggested zones.

If the zones are revised to be more consistent with the Local Planning manual as suggested this would result in a total of approximately nine zones. In terms of SPP 4.2, the zones would align with the centre hierarchy types located within the City and would likely provide a more robust framework for centre development with definitions of zones aligning with definitions of centre types as per SPP 4.2.

Recommendation: Revise current zones in the Scheme and the Zoning Table (Table 1) to be more consistent with Local Planning Manual guidelines, revised R~~D~~-Codes and SPP 4.2.

4.4. General Development Requirements

Building setbacks for non-residential development should be reviewed in line with structure planning exercises as a 'one size fits' provision all is not conducive to small lot and small format retailing and the aim of creating a lively 'high street' appeal to the strategic centre and larger centres outside the CBD. The provision clearly allows for a standard approach to grade frontage parking, but some innovation may be possible in some locations and provisions should encourage a less intrusive parking format wherever possible.

Similarly the parking standards should be varied where the location of development supports the use of public transport, for example in the TOD locations alongside the train stations, or where specific incubator style retail and offices and small format speciality shopping is proposed. Another option is the identification of sites for multi decked parking stations to which cash contributions in lieu can be made. There is also a trend towards 'unbundling' car parking from high density residential development and as a separately purchased option associated with affordable housing. A review of parking standards and response to emerging high street and medium to high density housing trends should be integrated into Table 2 and the associated Scheme Text.

Landscape requirements should also reflect emerging trends in water sensitive design and centre regeneration in a high street format. The standard approach to curtilage landscape around each development lot may be less appropriate in the future. Structure planning should consider street frontages as a whole and landscape solutions should be related to the form and function of the specific location and centre hierarchy.

Recommendations:

- Building setbacks for non-residential development should be reviewed in line with structure planning exercises;
- A review of parking standards and response to emerging high street and medium to high density housing trends should be integrated into Table 2 and the associated Scheme Text; and
- Structure planning should consider street frontages as a whole and landscape solutions should be related to the form and function of the specific location and centre hierarchy

4.5. Matters to be Considered by Council

Recommendation: Reference should be made in the scheme to the centre hierarchy, centre diversity requirements and employment generation proposals in the context of the Local Planning Strategy and specifically the Local Commercial Strategy.

4.6. Structure Plans

The WAPC has released guidance in 2011 on the structure and content of structure plans which should be referred to.

SPP 4.2 outlines the activity centre types that require an activity centre structure plan approved by the WAPC. These include strategic metropolitan centres and secondary centres and district centres if the floorspace exceeds 20,000~~m²~~sq.m Shop Retail. The centres in the City of Joondalup required to have an activity centre structure plan endorsed by the Western Australian Planning Commission are:

1. Joondalup City Centre;
2. Whitfords; and
3. Warwick.

If any of the district centres in the City proposes to increase the Shop Retail floorspace beyond 20,000~~m²~~sq.m then this would trigger the need for the preparation of an activity centres structure plan in alignment with SPP 4.2 policy. For all other centres an activity centre structure plan is not required, however SPP 4.2 suggests a specific area plan may be required by local government. For some centres less than 20,000~~m²~~sq.m, the City may still recommend that a structure plan may be more appropriate.

Recommendation: Ensure that activity structure plans are prepared and endorsed by the WAPC where required under SPP 4.2.

4.7. DPS Schedule 1 Interpretations

Recommendation: The interpretations in the Scheme should be consistent with the Model Scheme Text and Regulations in order to provide consistency and certainty to developers.

4.8. DPS ~~Schedule 3~~

~~Schedule 3 should be deleted from the District Planning Scheme.~~ The Local Planning Strategy should be referred to in the District Planning Scheme as providing a list of activity centres, position in the retail hierarchy and indicative maximum Shop Retail floorspace determined by a retail needs assessment. This would enable changes to the Local Planning Strategy, including revisions to the retail needs assessment, without requiring scheme amendments.

Recommendation: ~~Delete Schedule 3 from T~~The District Planning Scheme ~~and~~ to include Strategy Map and indicative retail floor spaces in LPS.

4.9. Local Planning Strategy

The Local Planning Manual recommends that the preparation of a Local Planning Strategy is formulated in conjunction with the preparation of a new scheme to enable both to be advertised at the same time and modified consistently. The strategy generally incorporates any update of existing strategy such as the housing and commercial strategy. The City is well placed to achieve this with an updated housing strategy and this local commercial strategy both able to be incorporated into a new local planning strategy.

Recommendation: Revise Local Planning Strategy to incorporate the draft Local Commercial Strategy taking account of the strategies contained in section 3.2 of this Part B report.

5. Implementation

5.1. Strategy Plan

The Strategy Plan consists of a table (see the following Table 3~~Table 3Table 3~~) outlining all activity centres within the City of Joondalup, their recommended position in the retail hierarchy, the indicative ~~maximum~~ Shop Retail floorspace thresholds, the current overall health of the centre (from the draft Local Commercial Strategy Part A report) and other individual centre considerations. To enable the implementation of the draft Local Commercial Strategy, a spatial map showing the location of each activity centre has also been included (see following Figure 2~~Figure 2Figure 2~~).

It is anticipated that the activity centres, position in the retail hierarchy and indicative ~~maximum~~ Shop Retail floorspace thresholds ~~figures~~ will be used to inform a revised Schedule 3 from the District Planning Scheme. A revised City of Joondalup Local Planning Strategy would also consider including Figure 2~~Figure 2Figure 2~~ and Table 3~~Table 3Table 3~~ as a minimum.

This Part B – Shop Retail Assessment ~~Draft Local Commercial Strategy~~ report provides the necessary detail to inform the Local Planning Strategy in terms of guiding future ~~commercial~~ shop retail development within the City of Joondalup. Further detail and research on the range of issues influencing future ~~commercial~~ shop retail development in the City is provided in the Part A - Background Research, Economic Analysis and Retail Needs Assessment report. Additional analysis and research on the need for and distribution of Bulky Goods/Large format retail and commercial office development is included in Part C of the Strategy.

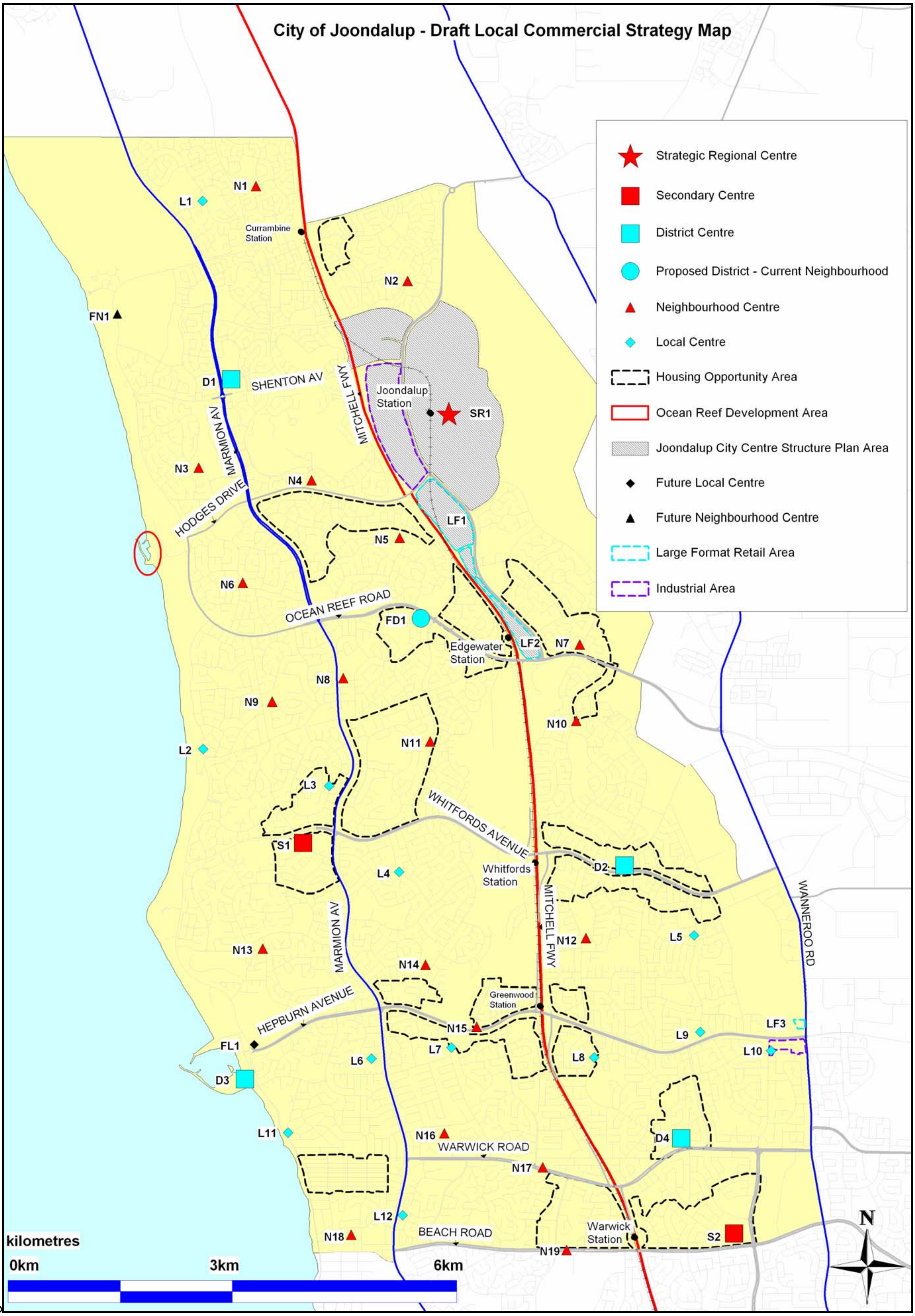
Table 3~~3~~: City of Joondalup Draft Local Commercial Strategy Part B Summary Table and Strategy Map Reference

Map Ref	WAPC Ref	WEPC Hierarchy Position	Activity Centre	Indicative Shop Retail Floorspace Threshold 2026 (sq.m)	Overall Centre Health	Other Considerations
SR1	600/1-4	Strategic Metropolitan	Joondalup City Centre (incl Winton Rd)	125,000 ~~(no limit)~~	Average	This is a strategic metropolitan centre with potential to become a primary centre and is therefore highest priority. The complex has the potential to increase floorspace to land intensity ratio and has experienced significant increase of over 200,000m^2 in floorspace between 1997 and 2007 and 48,000m^2 in the Winton Road precinct.
S1	602	Secondary	Whitfords City	75,000 ~~50,000~~	Good	If expansion beyond 50,000m^2 Shop Retail floorspace is proposed, a structure plan and Retail Sustainability Assessment would be required. Mixed Use floorpace targets would also need to be met consistent with SPP 4.2
S2	601	Secondary	Warwick Grove	50,000 ~~38,000~~	Good	Several large areas could be utilised for other land uses or expansion. Would benefit from significant study and ownership will be a key factor. Mixed Use floorspace targets need to be met consistent with SPP 4.2.
FD1	669	District*	Gwendoline Drive (Belridge)	10,000	Excellent	A fairly busy centre that appears to trade well. Includes significant health related activities and daily to weekly needs shopping. There are several take-away and restaurant activities on the site. The location on Ocean Reef Road gives easy access by car and bus.
D1	946	District	Currambine Market Place	15,000	Good	Relatively new and still emerging. Centre is currently being extended. Mixed Use floorspace targets need to be met consistent with SPP 4.2.
D2	8732	District	Woodvale Park	15,000 ~~12,000~~	Excellent	Good range offered with passing trade on Whitfords Avenue. Mixed Use floorspace targets need to be met consistent with SPP 4.2.
D3	676	District	Sorrento Quay	8,000 ~~9,000~~	Average	Unlikely to influence retail provision at the local and district level. Predominantly tourist related business but a significant proportion of government office space as well.
D4	609	District	Greenwood Village	10,000	Excellent	Good range of activities with ample car parking.
N1	671	Neighbourhood	Kinross A	6,000 ~~5,000~~	Average	Relatively new centre that appears to trade well for daily / weekly shopping needs. 15 Selkirk Dr is City owned, community purpose. Floorspace measured by WAPC includes Kinross B centre on Kinross Drive (500m^2 Shop Retail)
N2	8734	Neighbourhood	Candlewood	3,000 ~~2,000~~	Excellent	Serves the purpose for daily and weekly shopping needs.
N3	8733	Neighbourhood	Beaumaris City	3,000	Good	Close to schools and includes community centre and medical centre. Relatively new and appears to trade well for daily / weekly shopping needs.
N4	627	Neighbourhood	Connolly	3,500	Average	Relatively new centre and appears to trade well for daily / weekly shopping needs.
N5	620	Neighbourhood	Heathridge	2,500 ~~3,500~~	Poor	A limited range of activity, run down and a long way off the street with circulation issues. New housing provides passive surveillance. Unlikely to be trading well with competition from Belridge centre (Gwendoline Dr.) 103 Caridean Street may be suitable to accommodate future residential or aged persons accommodation. Strata titled commercial units severely limit the ability for future redevelopment.
N6	622	Neighbourhood	Ocean Reef	4,000	Poor	Centre is looking old and would benefit from refurbishment. Poor levels and circulation. Views of the ocean to the south west could provide an opportunity in any redevelopment proposal.
N7	621	Neighbourhood	Edgewater	3,000 ~~2,000~~	Excellent	Serves the purpose for daily and weekly shopping needs.
N8	618	Neighbourhood	Beldon	4,500 ~~4,000~~	Very Poor	This centre has significant floorspace and is in need of a facelift. ~~There are current plans for refurbishment to centre and car park.~~ Takeaway food outlet application at 1 Gunter Grove and may be suitable to accommodate future residential or aged persons accommodation at 11 Pacific Way.
N9	619	Neighbourhood	Mullaloo	2,000 ~~3,000~~	Average	Appears to operate reasonably well for daily / weekly shopping needs. ~~Currently being developed to add a L~~liquor store recently added.
N10	624	Neighbourhood	Woodvale	4,000 ~~3,200~~	Excellent	Includes tavern, supermarket and health related activities. Residential ~~development underway~~ developed on old service station site on the north west corner of the site.
N11	615	Neighbourhood	Craigie Plaza	2,500 ~~3,500~~	Average	Bowling centre (2,000m^2) ~~recently~~ converted to a large medical centre. Different levels for tavern and shopping centre component. Possible development opportunity on south east corner similar to south west corner. 1~~89~~78 Camberwarra Drive ~~is City owned and~~ may be suitable to accommodate future residential or aged persons accommodations.
N12	616	Neighbourhood	Kingsley	5,000 ~~4,000~~	Average	Good range of uses, some graffiti, possible opportunity for residential on north side to provide passive surveillance. 52 Creaney Drive is owned by the City and may be suitable to accommodate future residential or aged persons accommodation.
N13	665	Neighbourhood	Hillarys	3,000 ~~2,100~~	Good	The centre includes a medical centre and the adjacent police station. Appears to trade well for daily / weekly news.
N14	617	Neighbourhood	Padbury	3,000 ~~2,100~~	Excellent	Fairly typical neighbourhood centre with a wide range of offerings and quite attractive. 77 Gibson Ave is owned by City and may be suitable to accommodate future residential ~~development~~ or aged persons accommodation.

Map Ref	WAPC Ref	WEPC Hierarchy Position	Activity Centre	Indicative Shop Retail Floorspace Threshold 2026 (sq.m)	Overall Centre Health	Other Considerations
N15	668	Neighbourhood	Hepburn Ave	4,000 ~~2,000~~	Excellent	Small centre with vacant lot in between 2 sites. Mostly restaurants other than the petrol station. ~~A~~ The vacant lot is zoned for civic and cultural uses. The site may be considered for residential development or aged persons.
N16	610	Neighbourhood	Duncraig	3,000 ~~2,400~~	Good	Located high on a ridge with an internal design. Good range of offerings and presents reasonably well. 34 Mari Road has development approval for a three storey mixed use development consisting of 3 dwellings, office and shop. Amendment to increase the density from R20 to R60 to permit 8 dwellings on site was finalised 2 September 2011. 57 / 59 (Lot 2) Marri Road are City owned sites and may be suitable to accommodate future residential or aged persons accommodation.
N17	612	Neighbourhood	Glengarry	4,000 ~~3,000~~	Excellent	Hospital adjacent to centre with additional health related activities. The circulation and integration of elements could be better.
N18	611	Neighbourhood	Marmion Village Sheppard Way	2,000 ~~1,800~~	Average	Centre is well leased with a good range. Setback from road. Appears to trade well for daily / weekly shopping needs.
N19	614	Neighbourhood	Carine Glades	4,500	Average	Some recent new development on the site with ongoing redevelopment. Integration of uses / buildings could be better.
FN1	NA	Neighbourhood	Iluka	3,500 ~~3,300~~	NA	This centre may not be developed to the full 3,5~~3~~00m^2 Shop Retail as proposed in the structure plan. Consideration could be given to allocated the difference to the Currumbine District Centre.
L1	671	Local	Kinross B	1,000 ~~700~~	Average	Floorspace measured by WAPC includes Kinross A centre - recommend future surveys report the two centres separately.
L2	623	Local	Mullaloo Tavern	200 ~~1,500~~	Good	This is a beach node development with hotel and accommodation and with limited local shopping component other than a cafe. The cafe may have been reflected in the vacant floor area at the time of the WAPC Survey.
L3	607	Local	Springfield	1,000	Average	A typical daily needs focussed local centre with a liquor store, deli, restaurant, hairdresser and take-away food.
L4	606	Local	Forrest Plaza	1,000	Average	A marginal centre in need of a facelift. Potential for some housing if redevelopment occurs.
L5	625	Local	Moolanda North	500 ~~300~~	Average	A small local centre with some interesting uses including a musical instrument shop and a training provider.
L6	628	Local	Seacrest Village Harman Rd	1,000 ~~800~~	Good	Adjacent to Seacrest Retirement Village. Supports daily needs and has a medical centre.
L7	661	Local	Lilburne Road	1,000 ~~500~~	Good	A typical daily needs focussed local centre with a deli and a restaurant.
L8	613	Local	Coolibah Plaza	1,500	Poor	Some graffiti. Located near high school. Sufficient for daily to weekly shopping needs. Adjacent to the shopping centre~~, (~~Lots 200 - 202 Kanangra Crescent~~)~~ are City owned and may be suitable to accommodate future residential or aged persons accommodation.
L9	629	Local	Moolanda South	1,000	Good	Lot 549 Moolanda Boulevard is a City owned site, currently facilitates offices for Silver Chain and Community Vision Incorporated Kingsley Family Day Care. This site may be suitable to accommodate future residential or aged persons accommodation.
L10	1 - 27	Local	Greenwood Plaza	1,500 ~~1,000~~	Average	A marginal centre in need of a facelift. Rezoning of the southern section may provide a catalyst for redevelopment as well as a buffer between the service commercial and the residential area.
L11	605	Local	Sorrento	1,500 ~~1,300~~	Average	This is a tourism related coastal node complex with restaurants and no supermarket.
L12	951	Local	Duncraig Village	1,500 ~~900~~	Good	Includes a large deli but no supermarket. Sufficient for daily needs and passing trade (Marmion Ave) works for the takeaway businesses.
FL1	NA	Local	Harbour Rise	1,000 ~~800~~	NA	Refer to Harbour Rise Structure Plan.
NA	NA	Local	Burns Beach	500	NA	Not assessed in the Gravity Model. Refer to Burns Beach Structure Plan.

* Proposed to the elevated to District Centre

Figure ~~2~~2: City of Joondalup Draft Local Commercial Strategy



Map

ATTACHMENT 3

RPS

Draft Local Commercial Strategy Part C – Bulky Goods and Commercial Office assessment

City of Joondalup
2013

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Document Status

Version	Purpose of Document	Orig	Review	Review Date
Draft A	Draft Strategy for client review	MP, SS	MW	2.10.13
Draft B	Draft Strategy incorporating Client edits	MW	MW	1.11.13
Draft C	Strategy incorporating Joondalup edits	JC	DP	27.11.13

Approval for Issue

Name	Signature	Date
Mark Wallace		1.11.13

Contents

Tables

Figures

Appendices

1.0 Introduction

1.1 Background

A Draft Local Commercial Strategy for the City of Joondalup was prepared by Syme Marmion and was comprised of two parts:

- Part A - Background Research, Economic Analysis and Retail Needs Assessment; and
- Part B - Draft Local Commercial Strategy (Shop Retail).

Subsequent to public comment and peer review, the need for further analysis of bulky goods retail and commercial office development was identified.

This report represents Part C – Local Commercial Strategy (Bulky Goods Retail & Commercial Office).

1.2 Part C Purpose

The purpose of Part C – Local Commercial Strategy (Bulky Goods Retail & Commercial Office) is to provide additional analysis of commercial activity in the City of Joondalup. It focuses on Bulky Goods Retail and Commercial Office Development within the City, providing guidance on the sizing, timing and location of potential future development and recommendations for incorporation by the City into the Local Planning Scheme.

1.3 Part C Structure

Part C is comprised of four primary sections:

- Introduction
- Bulky Goods Retail;
- Commercial Office Development; and
- Recommendations.

1.4 Relationship with Parts A & B

Part B and C together represent the completed, consolidated DRAFT Local Commercial Strategy for the City of Joondalup. Both Parts are supported by analysis in Part A, which provides background research and analysis for the assessments and recommendations included within Parts B & C.

BULKY GOODS RETAIL

2.0 Trends in Bulky Goods Retail

2.1 Definition of Bulky Goods

Bulky goods (also referred to as showroom retail) is the merchandising of cumbersome items which are defined as per the State Planning Policy 4.2 as being the following:

Large premises used to display, sell by wholesale or retail, or hire:

- *automotive parts and accessories;*
- *home entertainment goods;*
- *camping and recreation equipment;*
- *household appliances;*
- *electrical light fittings;*
- *office equipment supplies;*
- *animal and pet supplies;*
- *party supplies;*
- *floor coverings;*
- *swimming pools and supplies;*
- *furnishings, bedding and manchester;*
- *furniture;*
- *hardware;*
- *garden supplies; and*
- *goods of a bulky nature that require a large area for handling, display or storage; or direct vehicle access to the site of the premises by the public for the purpose of loading goods into a vehicle after purchase or hire.*

2.2 Evolution of Bulky Goods

Bulky goods retailing emerged in the 1970's with small areas of industrial zones selling items such as whitegoods and furniture. At the time this was seen as ancillary sales, however, over time critical masses of these retail outlets started to form in light industrial areas which led to a comparison shopping destination for consumers[1].

By the late 1990's, bulky goods had become a new form of land use in its own right. Across many different land use types in Australia bulky goods was no longer allowed in traditional industrial zones, but critical mass of bulky goods was also unable to locate in retail or commercial zoning. In many instances, bulky goods locations evolved in 'out of centre' locations from ad hoc developments occurring in high visibility locations.

[1] Rowe (2008), Taking Control of Bulky Goods Retail in Sydney, Michael Rowe BPlan Undergraduate Thesis, Sydney

Over the last decade, bulky goods has been the fastest growing form of retail, with average real growth in spend on bulky goods outstripping that of other retail formats[2].

While there have been attempts by many municipalities throughout Australia to prevent the ‘out of centre’ bulky goods developments from occurring, it is clear that there is strong consumer demand for the retail formats and in many cases the evolution of bulky goods centres has help relieve pressures on other land uses – particularly core retail (commercial) and industrial uses.

2.3 Emerging Trends and Issues

While planning consideration has now been provided to the future of bulky goods, there are still a range of concerns from both the property sector, and governments about the direction of bulky goods.

There remain the demand drivers to locate bulky goods retail in, or on the edge of industrial lands due to the similarities between the needs of the two uses. Particularly the large open land parcels and visibility from key road networks are of importance to bulky goods, and is often not found in close proximity to activity centres.

Social planners argue that the use of car based retailing, particularly bulky goods in unsustainable and socially inequitable. That said, given the out of centre locations invariably lead to lower rental costs that allow for lower prices to be passed onto consumers, these centres arguably benefit the medium to lower income consumers who are the target market of the centres. While high income individuals are also a key market for bulky goods, they also tend to move towards higher quality (e.g. higher quality furniture locations, using labour instead of undertaking DIY hardware etc). The Bulky Goods Retailers Association (BGRA) disputes the social inequity argument, stating that customers are “attracted to the high level of competition on price, range and service available from the various retailers”.

Figure 1 provides a broad overview of how bulky goods retail compares to a range of other retail categories. While emotional rather than functional purchases grow when incomes grow, two retail categories that tend to attract a relatively higher number of lower income groups are Discount Department Stores and bulky goods retail.

[2] ABS (2013), Australian Retail Trade Catalogue Number 8501.0, Australian Bureau of Statistics, Canberra

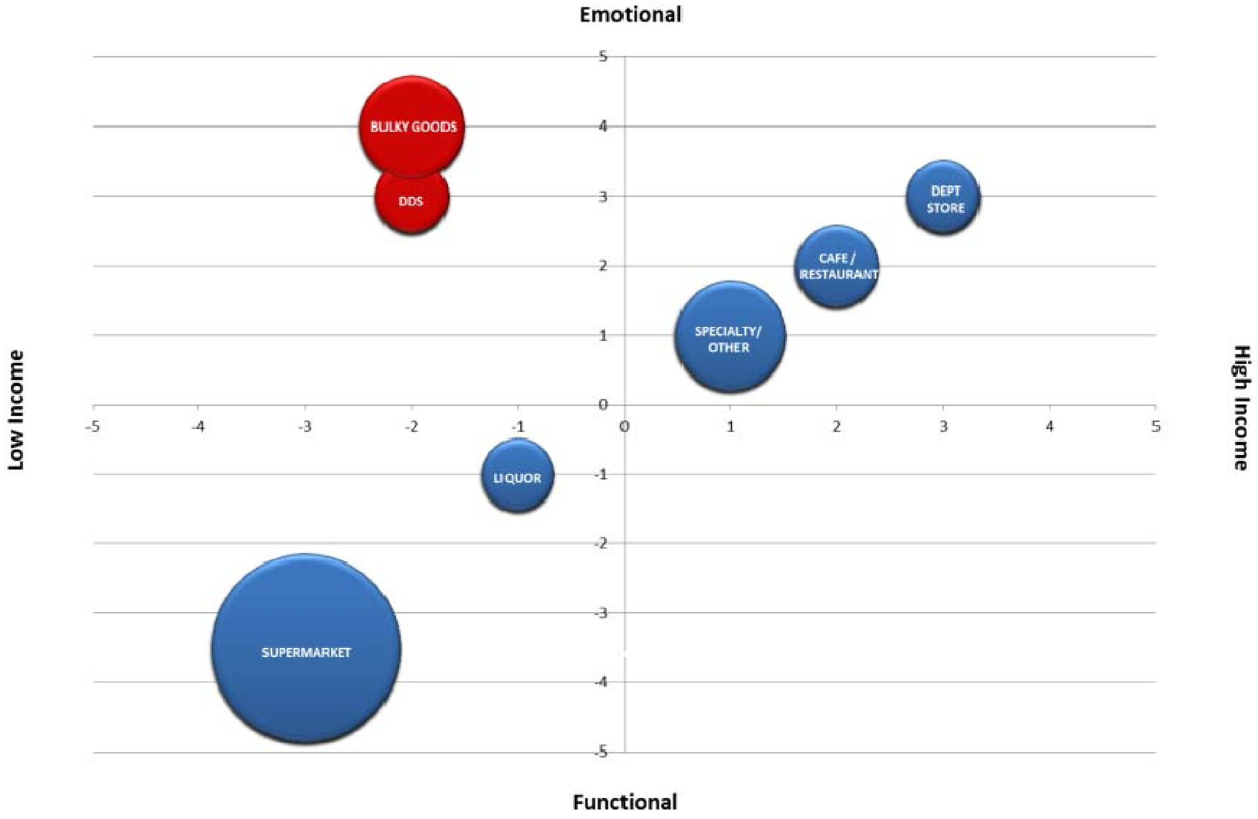


Figure 1 Income and Need Quadrant by Retail Category

This form of retail is therefore a relatively 'innovative' form of retail which is strongly delivering on a need which is not only servicing the higher income customers, but also the medium and lower income population.

The BGRA outline how bulky goods have evolved to be different to core retail:

- Key focus on price and range;
- Destination of shoppers that rarely undertake shopping at the same time as cores retail categories such as clothing and supermarket items;
- Need for access by private vehicles (does not require public transport access);
- Co-location (clustering) of similar bulky goods outlets;
- Large land parcels to meet floorplate needs, unloading requirements and large number of cark bays.

2.4 Bulky Goods in State Planning Policy

State Planning Policy 4.2 (SPP 4.2) is the Activity Centres Policy for the Perth and Peel Regions. The policy also provides direction for out-of-centre developments such as bulky goods.

Under *Section 5.6.1 Bulky goods retailing and mixed business*, SPP 4.2 indicates that in general bulky goods are unsuited to walkable catchments or the general activity centre precinct due to their size, car parking requirements, employment densities and need for freight vehicle access.

Bulky goods retail does not include the sale of food, clothing or personal effects goods as per the policy, however, these forms of retail are becoming more prevalent in bulky goods centres.

The policy also states that bulky goods should be promoted in clusters, particularly 'adjacent to, or in close proximity to activity centres and the regional road and public transport networks'. While car parking is a crucial element in bulky goods retail, developments will be seen favourably when they increase the level of shared car parking, limit car trips and economically support other businesses.

SPP4.2 makes specific reference to the land use permissibility of bulky goods retail in order to reduce its potential dispersal throughout industrial zones. Developments should not be developed in an ad hoc manner and 'ribbon' developments along main roads are discouraged. The policy directs bulky goods retail uses to selected Mixed Business or equivalent zones with suitable road and public transport access[3].

The policy indicates that consideration should be given for future bulky goods needs and local planning should therefore consider future bulky goods in current decision making.

SPP 4.2 provides the following sequencing for suitable bulky goods locations:

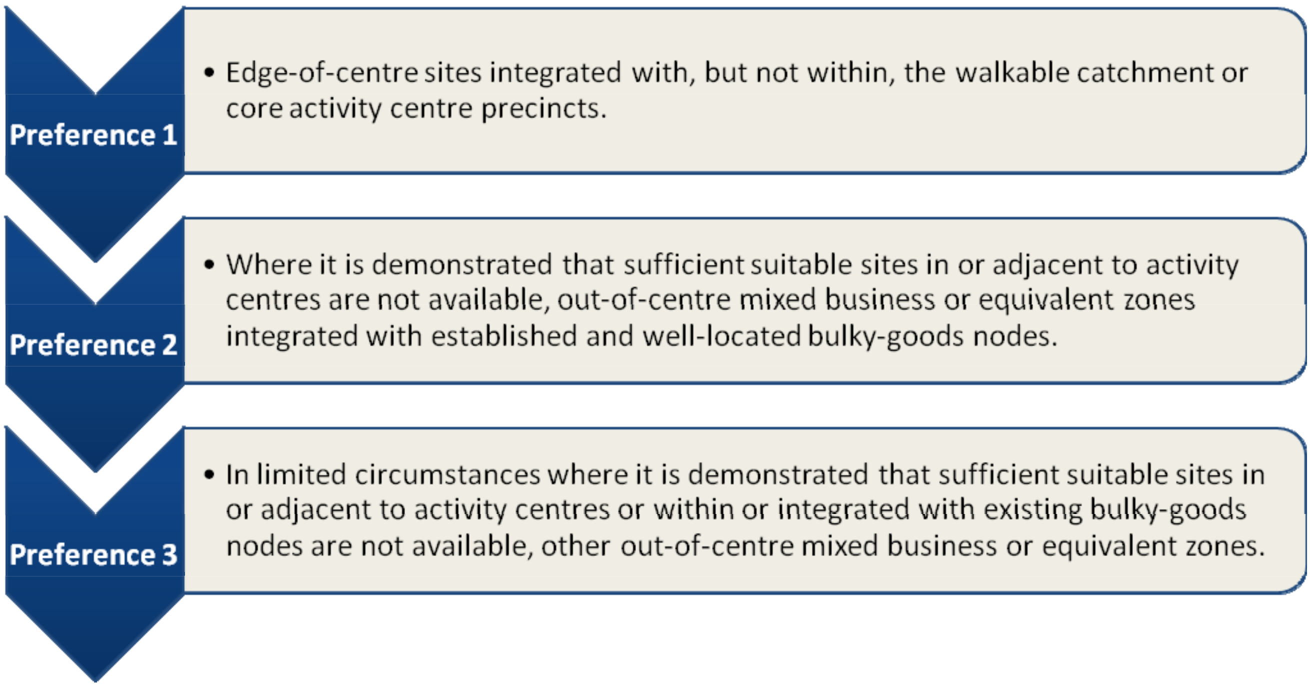


Figure 2 Bulky Goods Preferred Locations in SPP 4.2

Western Australian planning policy has therefore evolved to understand the importance of bulky goods and the need for proper future planning to accommodate its growing needs.

[3] WAPC (2012), Economic and Employment Lands Strategy: non-heavy industrial, Western Australian Planning Commission, Perth

3.0 Bulky Goods Needs Assessment

Bulky goods retail continues to grow as part of the Joondalup landscape, and new bulky goods developments in and around the municipality are changing the face of the property and consumer market in the region.

The following assesses the growing demands from residents in and around Joondalup for bulky goods retail and how the municipality is placed to meet the needs of the customers. This needs assessment will be undertaken by forecasting demand through RPS' Bulky Goods Needs Model and comparing it to the current and proposed supply in the area.

The level of growing need is advised to be delivered in the locations outlined in section 4.

3.1 Demand Drivers

There are a number of drivers for growth in the need of bulky goods supply in the Joondalup area. As is the case with core retail, the growth in bulky goods demand is largely driven by the following two factors:

- **Population growth –** more people in an area will mean there is more demand for bulky goods items. That is, an extra resident in an area will add to the demand for a television or refrigerator, just as they would add to core retail goods such as fruit and vegetables.
- **Real growth in expenditure –** over time, residents have been spending more on retail over and above the inflation rate, which increases the demand for goods.

The combination of these two factors will lead to an increase in demand for bulky goods floorspace in the Joondalup area. These two key demand drivers are explored in more detail below.

3.1.1 Population Growth

Population growth has slowed as the Joondalup LGA has matured over the last decade, with the growth being focused around the northern growth areas in Wanneroo. The table below shows the overall population in Joondalup is only expected to grow by around 12,000 residents by 2028. Over the same period, the City of Wanneroo will expand by over 107,000 residents. Given the destination factor of Joondalup, many residents of Wanneroo will undertake retail spending in Joondalup, and as such this population growth will add to the demand for space in Joondalup.

Table 1 Population Growth, Joondalup and Wanneroo, 2001 to 2028

Historic and Forecast Population						
Catchment	**2006**	**2011**	2013	2018	2023	2028
Joondalup LGA	157,800	161,783	165,865	172,349	178,639	184,832
Wanneroo LGA	110,940	160,332	177,428	214,797	252,562	291,401
Metropolitan Perth	*1,485,087*	*1,687,826*	*1,787,918*	*1,984,812*	*2,171,225*	*2,364,001*
Regional WA	*474,001*	*551,344*	*579,953*	*640,462*	*698,686*	*760,545*
WA	*1,959,088*	*2,239,170*	*2,367,871*	*2,625,274*	*2,869,911*	*3,124,546*
Average Annual Growth (no.)						
Trade area	**2001-2006**	**2006-2011**	**2011-2013**	2013-2018	2018-2023	2023-2028
Joondalup LGA	1,906	797	2,041	1,297	1,258	1,239
Wanneroo LGA	6,117	9,878	8,548	7,474	7,553	7,768
Metropolitan Perth	17,776	40,548	50,046	39,379	37,283	38,555
Regional WA	3,791	15,469	14,305	12,102	11,645	12,372
WA	21,567	56,016	64,351	51,481	48,927	50,927
Average Annual Growth (%)						
Trade area	**2001-2006**	**2006-2011**	**2011-2013**	2013-2018	2018-2023	2023-2028
Joondalup LGA	1.3%	0.5%	1.3%	0.8%	0.7%	0.7%
Wanneroo LGA	6.7%	7.6%	5.2%	3.9%	3.3%	2.9%
Metropolitan Perth	*1.2%*	*2.6%*	*2.9%*	*2.1%*	*1.8%*	*1.7%*
Regional WA	*0.8%*	*3.1%*	*2.6%*	*2.0%*	*1.8%*	*1.7%*
WA	*1.1%*	*2.7%*	*2.8%*	*2.1%*	*1.8%*	*1.7%*

The chart below provides a visual representation of this strong growth in population. The Joondalup 'primary' catchment will remain flat relative to the Wanneroo 'secondary' catchment area. While population growth at present is lower than the Perth metropolitan average, it is anticipated this will return to higher relative growth over the coming decade.

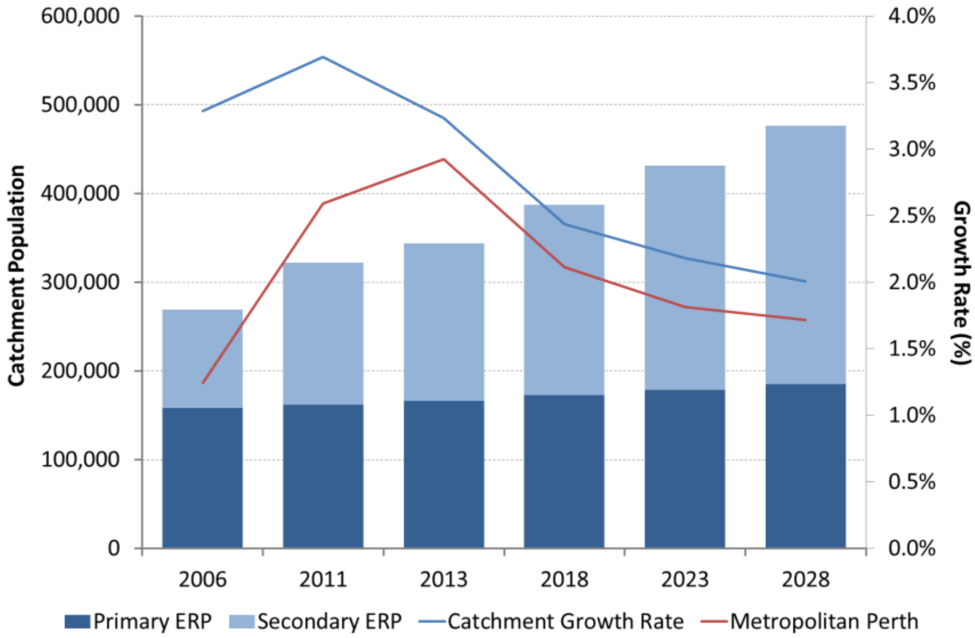


Figure 3 Population Growth, Joondalup and Wanneroo, 2006 to 2028

3.1.2 Real Growth in Expenditure

Real growth rates in retail spending have averaged 1.1% over the last three decades according to Retail Turnover and Inflation data from the Australian Bureau of Statistics.

Over that time period, bulky goods spending has increased at a real growth rate of 1.8% as demand for this format continues to grow while prices for products continue to deflate.

3.2 Bulky Goods Expenditure Profile

Bulky goods demand is a product of the number of people in a location and the amount they each spend on bulky goods categories as per the ABS. As such, the current bulky goods demand is calculated through the estimated residential population for an area and the levels that they each spend on bulky goods retail. Change to the level of demand in the catchment is dependent on population growth and spending growth.

RPS has derived bulky goods expenditure using MarketInfo 2012. MarketInfo is a microsimulation model developed by MDS Market Data Systems which reports small area spending estimates. The model has been based on SA1 geographical regions from the ABS, and a range of statistical data releases from the ABS (Census, Household Expenditure Survey, National Accounts, ATO statistics etc). This estimates an area's propensity to spend on bulky goods retail goods based on a range of socio-economic characteristics. MarketInfo is an independently formulated model and is used by the majority of retail economists in understanding the bulky goods needs of an area.

The analysis below has explored the current per capita bulky goods spending in the catchment and then applied them to current and future population forecasts to understand the level of bulky goods spending from the residents in the catchment.

Typically across Western Australia, each person will spend around $1,900 on bulky goods retail per annum. As noted in the figure below, residents in Joondalup spend higher amounts on bulky goods retail, which is often due to there being less retail options available to these residents.

Bulky goods retail spending per capita in Joondalup is higher than both the WA and Perth Metropolitan average. The Wanneroo LGA spends almost $250 less per annum on bulky goods than Joondalup, with the largest difference being in electrical goods (including whitegoods).

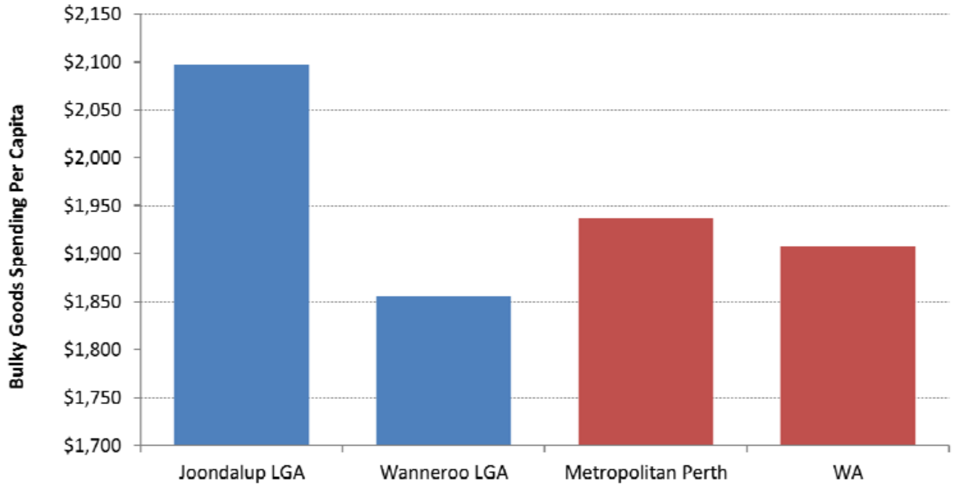


Figure 4 Bulky Goods Spending Per Capita

The above per capita bulky goods spending have been broken down further into the levels of spending at bulky goods centres by major spending category.

The majority of bulky goods expenditure surrounds the following categories:

- **Hardware and building supplies**. This accounts for around 28% of the bulky goods spend per capita in Joondalup;
- **Furniture, floor coverings, housewares and textiles**. This accounts for around 26% of the bulky goods spend per capita in Joondalup;
- **Electrical and electronic goods**. This accounts for around 23% of the bulky goods spend per capita in Joondalup;
- Larger format (out-of-centre) **liquor**. This accounts for around 10% of the bulky goods spend per capita in Joondalup;
- **Garden supplies**. This accounts for around 6% of the bulky goods spend per capita in Joondalup;
- **Sports and camping**; **entertainment media**; **chemist warehousing**; and **other retailing**. These accounts for around 7% of the bulky goods spend per capita in Joondalup.

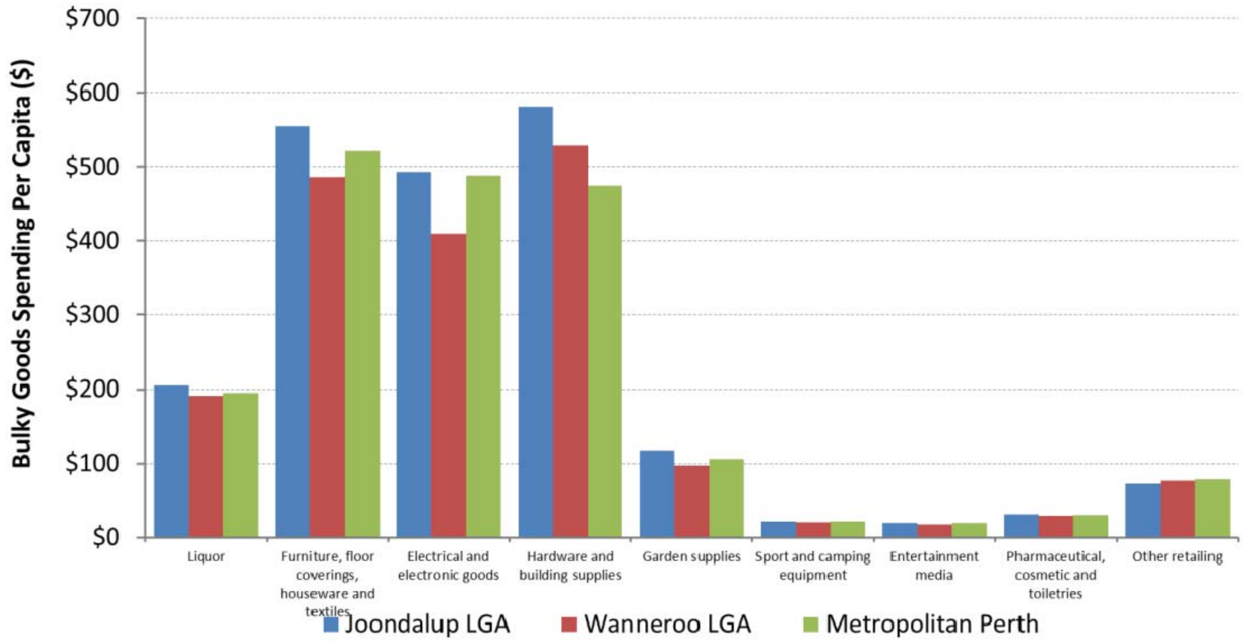


Figure 5 Bulky Goods Categories Spending Per Capita

The above outlines the current spending amount per capita for each of the bulky goods categories, however, doesn't indicate the overall growing spending amounts for bulky goods retail. Figure 6 applies the real growth in expenditure and applies the projected population to arrive at the total spending profile of the catchment residents. The real growth in bulky goods spending is based on historic rates for each bulky goods category, and the growth rate for the population is derived from WA Tomorrow forecasts from the Western Australian Planning Commission.

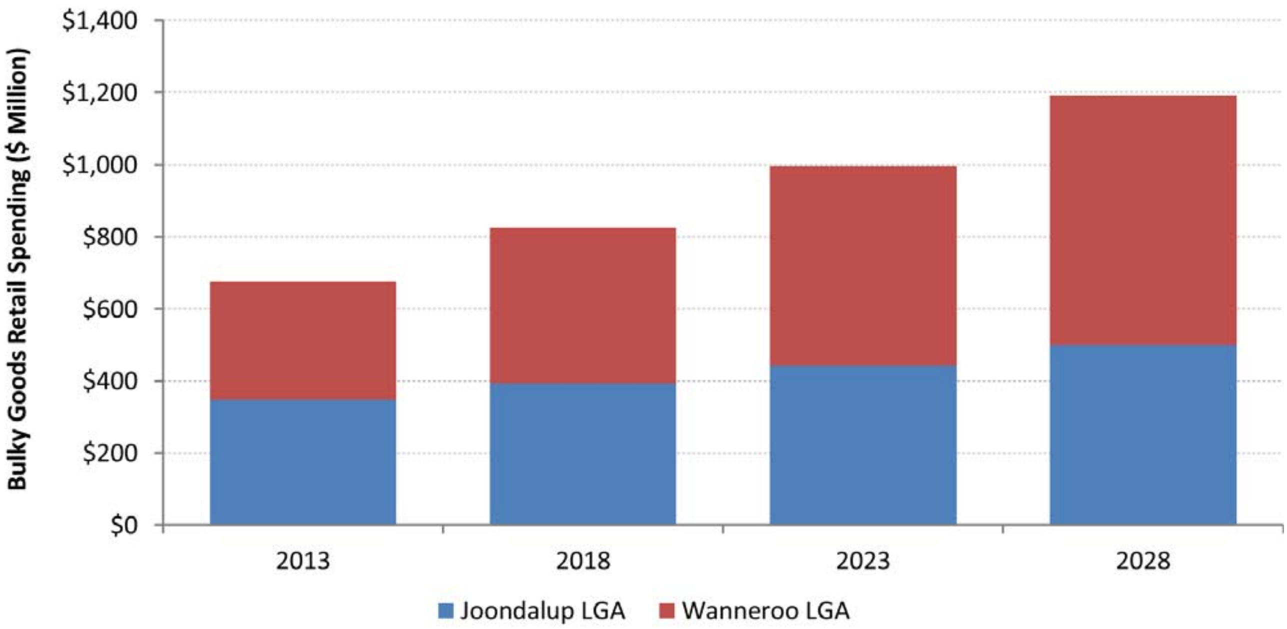


Figure 6 Bulky Goods Spending Growth, 2013 to 2033

The majority of bulky goods spend in the overall catchment area is currently strongly centred around Joondalup, despite Wanneroo now having a larger population. Within the next decade, it is anticipated that Wanneroo residents will spend a higher level on bulky goods than their Joondalup neighbours. While this spending will largely be centred at bulky goods outlets close to the homes of these residents, as noted in

Section 2.2, the importance of critical mass and co-location of bulky goods retail will increasingly place importance on Joondalup to be a destination for bulky goods retail as is currently the case in locations such as Osborne Park and Cannington.

The chart below breaks this spending growth into the different bulky goods categories which is forecast for the coming decade. Based on real growth rates and population expansion, there is anticipated to be significant level of growth in a number of bulky goods categories, specifically the three largest categories.

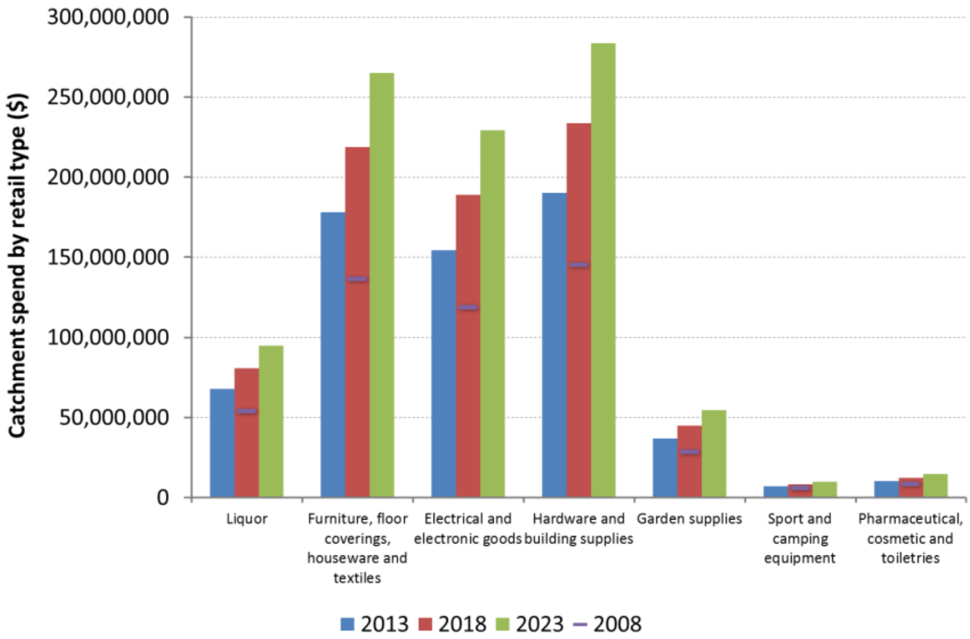


Figure 7 Bulky Goods Categories Spending Growth, 2013 to 2033

This forecast spending per category across both Joondalup and Wanneroo has been utilised to estimate the growing demand for bulky goods floorspace in the area.

3.3 Bulky Goods Floorspace Demand

RPS has applied sales densities to each bulky goods category to estimate how the retail spending of residents in the catchment translates into demand for bulky goods floorspace need. Sales densities are the dollar sales per square metre of NLA required to sustainably operate floorspace.

As such, the sales densities convert sales forecasts to sustainable floorspace forecasts.

Figure 8 Floorspace Demand Methodology

The table below provides a breakdown of broad floorspace sales densities for bulky goods retail categories.

Table 2 Bulky Goods Sales Densities, 2013

Bulky Goods Category	Sales Density ($/sqm)
Liquor	$5,000
Furniture, floor coverings, houseware and textiles	$3,000
Electrical and electronic goods	$4,000
Hardware and building supplies	$2,500
Garden supplies	$2,500
Sports and camping equipment	$3,000
Pharmaceutical, cosmetic and toiletries	$4,000
Other retailing	$2,500

The above sales densities are broad averages and individual tenancies can trade substantially above or below these averages.

These densities have been applied to the forecast sales to find the estimated floorspace demand for bulky goods in each of the categories. It should be noted, that these figures should not be utilised as caps on the overall level of bulky goods across the two municipalities, rather as a guide to the likely level of demand for floorspace by the residents of Joondalup and Wanneroo.

Table 3 Bulky Goods Floorspace Demand, Joondalup and Wanneroo, 2013 to 2033

	Liquor	Furniture, floor coverings, houseware and textiles	Electrical and electronic goods	Hardware and building supplies	Garden supplies	Sport and camping equipment	Entertainment media	Pharmaceutical, cosmetic and toiletries	Other retailing
2013	13,580	59,423	38,628	76,079	14,698	2,377	1,087	2,629	10,225
2014	14,092	62,057	40,323	79,477	15,341	2,467	1,127	2,729	10,621
2015	14,602	64,715	42,032	82,906	15,990	2,557	1,168	2,828	11,016
2016	15,105	67,378	43,745	86,342	16,640	2,645	1,208	2,926	11,406
2017	15,610	70,081	45,483	89,829	17,299	2,734	1,248	3,024	11,797
2018	16,132	72,896	47,293	93,461	17,986	2,826	1,289	3,125	12,202
2019	16,668	75,807	49,165	97,218	18,696	2,920	1,332	3,229	12,617
2020	17,217	78,818	51,101	101,104	19,430	3,017	1,376	3,336	13,044
2021	17,773	81,892	53,076	105,072	20,180	3,114	1,420	3,444	13,475
2022	18,347	85,090	55,132	109,201	20,959	3,215	1,465	3,556	13,920
2023	18,936	88,399	57,259	113,471	21,766	3,319	1,512	3,671	14,376
2024	19,531	91,776	59,429	117,831	22,589	3,424	1,559	3,786	14,839
2025	20,137	95,247	61,659	122,313	23,435	3,530	1,607	3,904	15,309
2026	20,758	98,834	63,964	126,944	24,309	3,639	1,657	4,025	15,791
2027	21,395	102,539	66,344	131,728	25,212	3,751	1,707	4,149	16,286
2028	22,047	106,365	68,802	136,669	26,144	3,866	1,759	4,276	16,792
2029	22,715	110,314	71,337	141,768	27,105	3,983	1,812	4,406	17,311
2030	23,399	114,387	73,953	147,029	28,097	4,104	1,866	4,539	17,842
2031	24,098	118,588	76,651	152,456	29,120	4,227	1,922	4,675	18,386
2032	24,813	122,919	79,431	158,051	30,175	4,353	1,979	4,814	18,942
2033	25,545	127,383	82,297	163,818	31,261	4,481	2,037	4,956	19,510
Floorspace need growth (sqm)									
2013 - 2023	5,355	28,977	18,631	37,392	7,068	941	425	1,041	4,152
2023 - 2033	6,609	38,984	25,037	50,346	9,495	1,162	525	1,286	5,134
Floorspace need growth (%)									
2013 - 2023	39.4%	48.8%	48.2%	49.1%	48.1%	39.6%	39.1%	39.6%	40.6%
2023 - 2033	34.9%	44.1%	43.7%	44.4%	43.6%	35.0%	34.7%	35.0%	35.7%

There is currently significant demand for bulky goods floorspace from the residents in Joondalup and Wanneroo, with over 190,000sqm of demand from the current residents. This is around a quarter of the total retail requirement across the two regions.

It should be noted that there is significant growth in demand for bulky goods in the area which will lead to need for an extra 88,000sqm of floorspace demand in the next decade, and over 200,000sqm to 2031. While the majority of this bulky goods demand will be in Wanneroo, the growth of the wider region will mean demand will focus on the Joondalup hub.

3.4 Bulky Goods Floorspace Supply

RPS has undertaken an assessment of the supply of bulky goods in the Joondalup LGA to understand if there is a small market gap for bulky goods in the region at present. The assessment has also considered the future supply of bulky goods given proposed developments.

3.4.1 Current Supply

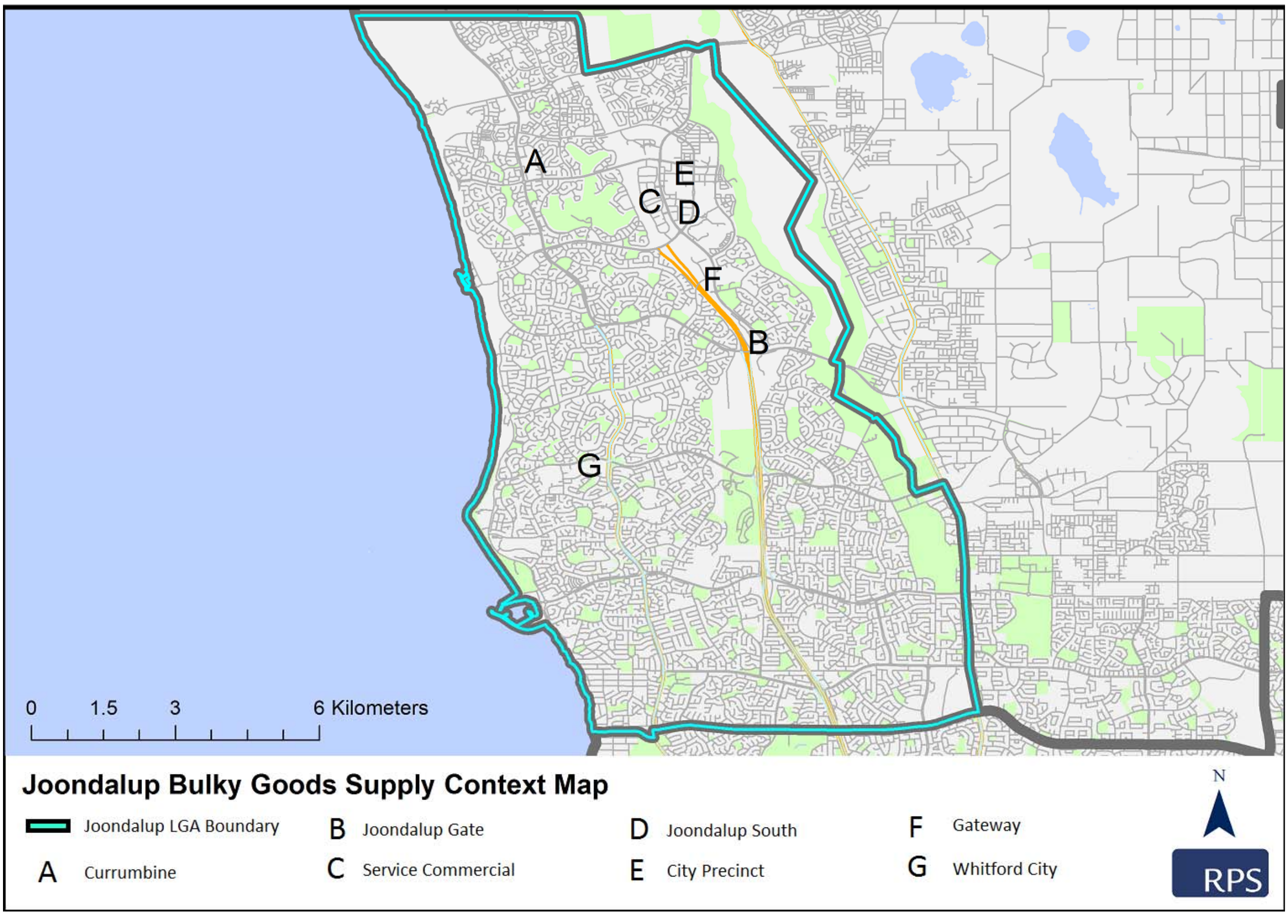
Joondalup has a critical mass of bulky goods floorspace, with the large majority of the municipalities bulky goods space being located in close proximity to the Joondalup City Centre area. While there is a significant level of bulky goods floorspace in this precinct, the tenancies are heavily fragmented and do not have many attributes of newer format bulky goods centres.

The majority of current bulky goods space is located directly to the south of the Lakeside Joondalup Shopping Centre and further to the south in the Joondalup Gate centre. There is also a blend of bulky goods and service commercial to the west of Joondalup drive adjacent to the Lakeside Joondalup centre. This area has a number of smaller tenancies which sometimes locate in bulky goods centres such as Retravision, Home Timber and Hardware and Alberts Car Stereo.

RPS has conducted a full audit of the bulky goods supply within the Joondalup Local Government Area and have estimated that at present the total supply is in the order of 97,000sqm. This is broadly in line with demand for bulky goods floorspace which is estimated in 2013 to be at 109,000sqm, with additional demand from residents of Wanneroo estimated at 91,000sqm.

RPS has also explored the current supply of bulky goods floorspace in Wanneroo which is in significant undersupply estimated at over 65,000sqm, and therefore significantly lower than the demand in that region.

Part of the reason for this undersupply in the Wanneroo region is due to the ‘destination’ of Joondalup and the need for critical mass of bulky goods to be delivered in order to become an effective and viable centre. Supply in Joondalup is therefore delivering for residents of the wider region and therefore it is estimated that there is a moderate market gap in bulky goods supply for the Joondalup and Wanneroo region.



Identifier	Centre	Floorspaces qm	Anchor Tenants
A	Currambine	3,250	Dan Murphys
B	Joondalup Gate	28,500	Bunnings
C	Service Commercial Area	20,250	Retravision, Fantastic Furniture
D	Joondalup South	6,500	Harvey Norman
E	City Precinct	8,500	Chemist Warehouse, Officeworks
F	Gateway	9,500	Harvey Norman, Good Guys
G	Whitford City	15,500	Bunnings

Identifier	Centre	Floorspaces qm	Anchor Tenants
	Other Bulky Goods	5,000	-

Figure 9 Joondalup Bulky Goods Supply Context Map and Estimated Floorspace

3.4.2 Proposed Supply

Joondalup is currently undergoing a significant expansion in the supply of bulky goods floorspace with the development of Joondalup Square, the Landcorp Masters site and nearby blocks. This will result in a substantial increase in bulky goods supply in the area and will create a high amenity bulky goods precinct.

The development will include at Joondalup Square and surrounding bulky goods which is estimated to include current proposals for almost 60,000sqm of bulky goods space.

This precinct will include major bulky goods anchor tenants such as Masters, Bunnings and Super Amart. The area will also include a small amount of office and business park space, and fast food retail to largely service the employment population.

In Wanneroo there is a significant increase to the supply of bulky goods in Butler which will create a precinct just 10 kilometres to the north of Joondalup. This will deliver a 30,000sqm bulky goods precinct[4] closer to the growing population along the north coast, however, there will still be demand from this growing resident population for increased higher order bulky goods in Joondalup.

Other bulky goods in Wanneroo will be delivered as population growth ensues, the most likely of locations bulky goods will be surrounding the Alkimos Secondary Centre and in the longer term at the Yanchep Strategic Metropolitan Centre.

3.5 Bulky Goods Future Needs

Based on the above assessments of both growing demand and supply for bulky goods demand and supply in Joondalup and Wanneroo, this assessment has considered the future needs of bulky goods floorspace in Joondalup. The assessment has considered proposed bulky goods developments in Wanneroo, but the focus of the need for bulky goods has only been considered for the Joondalup LGA.

A summary of the future needs in the bulky goods market for Joondalup is as follows:

- There is total demand across the two catchments of 219,000sqm of bulky goods space in 2013. There is total estimated supply of 120,000sqm in the catchment at present leading to a current market gap of almost 100,000sqm of floorspace.
- Demand is expected to grow by over 100,000sqm in the coming decade, with currently proposed supply surrounding Joondalup Square (60,000sqm) and in Butler (30,000sqm). This will result in the floorspace gap for Joondalup/Wanneroo as over 100,000sqm in the coming decade.

[4] CLE 2012, Butler District Centre Activity Centre Structure Plan *Explanatory Report*. CLE Town Planning and Design, Perth

Future needs are expected to largely be delivered in closer proximity to the large scale growth in population in Wanneroo (e.g. at Alkimos and Yanchep), however, a degree of this future need should be delivered in Joondalup.

While this won't fully prevent escape expenditure to areas such as Osborne Park and Malaga, it is expected to reduce this escape expenditure and therefore increase visitation and trip linking.

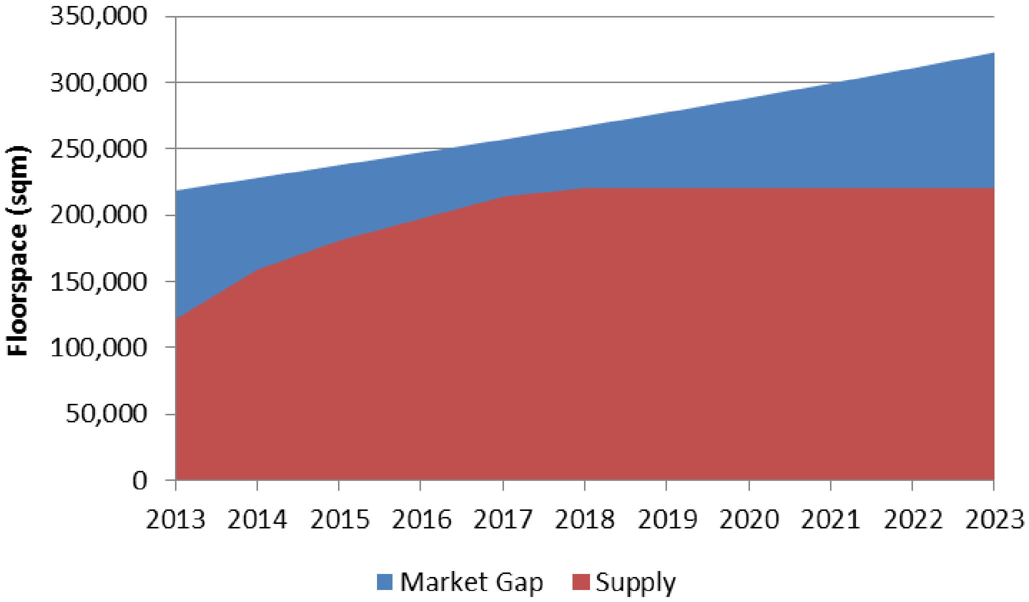


Figure 10 Bulky Goods Floorspace Market Gap, Joondalup and Wanneroo, 2013 to 2023

RPS expects to see a convergence of demand a supply over the coming 5 years as a result of the large scale bulky goods developments in and around Joondalup Square, and the development of the bulky goods site near the Butler Town Centre. This will reduce the overall market gap for the region to around 40,000sqm, which will grow again to current levels by 2023 as the population growth to the north continues.

In the past there would have an expectation of market gap due to 'escape expenditure' to other major bulky goods areas such as Osborne Park and Malaga. This should become less pronounced in future as Joondalup becomes the destination bulky goods precinct and residents to the north no longer have to travel significant distances for bulky goods needs.

Without any additional supply in Joondalup or Wanneroo, the market gap is expected to grow to over 240,000sqm by 2033.

Of the market gap by that stage, RPS believes that at least 20% should be delivered in Joondalup - particularly in the earlier years to compensate the areas further to the north where bulky goods may not be viable until population nears capacity. This will result in at least 50,000sqm of additional supply to be delivered in Joondalup between 2023 and 2033.

4.0 Location Criteria & Analysis

It is important to understand the need and location for bulky goods in an area. This section explores the current and potential future locations for bulky goods floorspace within the City of Joondalup. The analysis examines the criteria for best bulky goods locations, an overview of current and potential locations to arrive at a staging and implementation outlook for Joondalup.

4.1 Criteria for Bulky Goods Centres

There are some key criteria that are important for a well-functioning bulky goods centre. These criteria are important to remember when assessing the best future locations for bulky goods centres and include:

- Key focus on price and range;
- Destination of shoppers that rarely undertake shopping at the same time as cores retail categories such as clothing and supermarket items;
- Need for access by private vehicles (does not require public transport access);
- Co-location (clustering) of similar bulky goods outlets;
- Large land parcels to meet floorplate needs, unloading requirements and large number of cark bays.

The following figure outlines typical bulky goods layouts. The most common in new format bulky goods is the bulky goods retail parks which act as a one stop shop for bulky goods. Retail strips and haphazard centres make up the majority of existing bulky goods centres that have evolved over a period of time.

Figure 11 Typical bulky goods layouts[5]

[5] Rowe (2011) Taking Control of Bulky Goods Retail in Sydney. Undergraduate Thesis, Sydney

4.2 Recommended Future Locations & Timing

Based on the location criteria outlined in section 4.1, existing and potential Bulky Goods locations were identified and summarised. This is outlined in the table below.

Table 4 Bulky Goods Locations Assessment

Location	Profile	Suitability	Expansion Capacity
Joondalup Gate/Edgewater	Currently anchored by Bunnings which is transitioning from the site in the short-term. Proximity to Edgewater train station raises questions of whether Bulky Goods retail is highest and best use in medium term.	Moderate	Moderate
Service Commercial/Winton Road Precinct	Existing employment precinct adjacent the City Centre. Primarily service commercial with distributed Bulky Goods, showroom and other large format retail and wholesale businesses.	Moderate	Low
Whitford City	Secondary Centre currently anchored by a Bunnings store. Expansion of large format retail within the Centre is currently spatially constrained and shop retail expansion likely represents highest and best use.	Low	Low
The Gateway	Collocated with the new Quadrangle development, though future expansion potential for the site likely limited	High	Low
Joondalup City Centre	Strategic Metropolitan Centre with residential, commercial office and shop retail representing highest and best use. Minor bulky goods supply likely to expand slightly in response to larger format retail offerings by some shop retailers.	Low	Low
Joondalup South	Heavily constrained site with limited potential for expansion.	Low	Low
Currambine	Currently anchored by Dan Murphy's with only small level of additional Bulky Goods proposed.	Low	Low
The Quadrangle/ Joondalup Square	Currently under development adjacent to City Centre. Will become primary concentration of Bulky Goods floorspace in City in short-term.	High	High (currently under development)
Lot 104	Located on Joondalup Drive opposite Joondalup South. Currently zoned POS though use is under investigation by Council. Potential opportunity for Bulky Goods Retail strip along Joondalup Drive.	Moderate	Moderate
Alternative Locations	There is likely to be proposals put forward for bulky goods in other locations around the Joondalup LGA. These proposals should not be dismissed but the large majority of future bulky goods in the municipality should be in critical mass at the locations above. Centres outside this should comply with State Planning Policy 4.2.	Case by Case	Case by Case

Based on this assessment of the suitability and expansion capacity of current and potential Bulky Goods retail locations within the City, RPS recommends the following indicative floorspace distribution be used by the City of Joondalup to inform the Local Planning Strategy.

Table 5 Recommended Floorspace Distribution, Bulky Goods Locations, City of Joondalup

Centre	Current Size (sqm)	Recommended Size (sqm)
Joondalup Gate/Edgewater	28,500	30,000
Service Commercial/Winton Road Precinct	20,250	20,000
Whitford City	15,500	15,500
The Gateway	9,500	9,500
Joondalup City Centre	8,600	10,000
Joondalup South	6,500	6,500
Currambine	3,250	5,000
The Quadrangle/ Joondalup Square	0	100,000
Lot 104	0	10,000
Alternative locations (highway locations etc)	5,000	10,000

A summary of these tables along with recommended timing and distribution of bulky goods retail floorspace within the City is provided in Appendix 1.

COMMERCIAL OFFICE

5.0 Commercial Office Market

Commercial office development in the City of Joondalup is and will continue to be influenced by trends in the CBD and suburban office markets in Greater Perth. This section provides an overview of the macro-factors influencing commercial office demand and supply in Joondalup.

5.1 Perth CBD Office Market

Perth CBD office market has performed strongly in recent years despite increased global economic uncertainty. This is largely attributed to the Perth office market being a direct beneficiary of growth in the State's resources sector. It was the only capital City market in Australia to experience its white collar employment strengthen and by mid-2012, saw its net absorption equal that of Sydney, Melbourne and Brisbane combined[6].

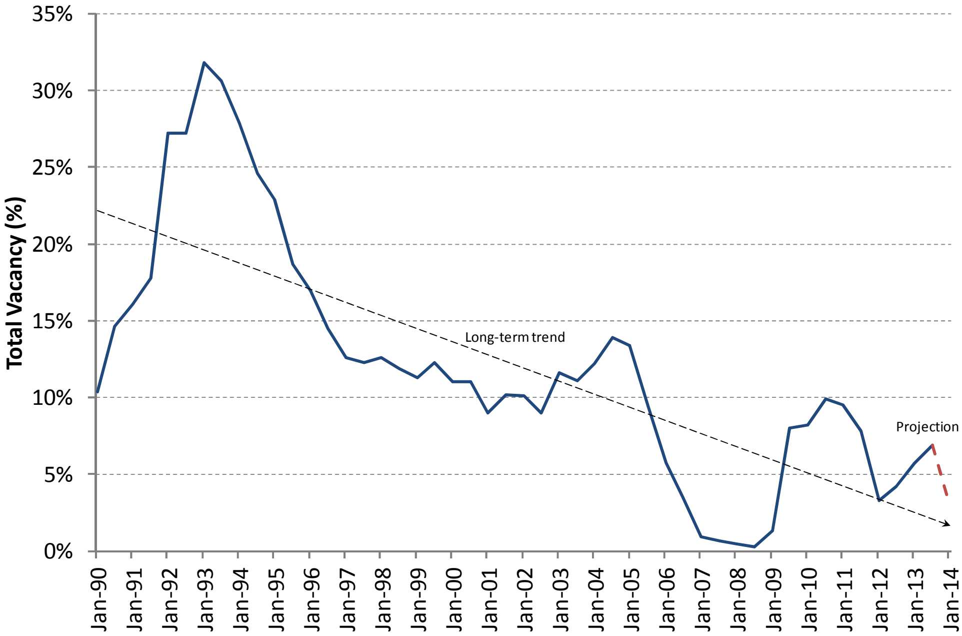


Figure 12 Total Vacancy Rates, Perth CBD, 1990 to 2014

Total vacancy rates in Perth CBD declined to a near zero level (0.3%) in July 2008, just prior to the Global Financial Crisis. Subsequent to this, vacancy rates spiked in response to decreased demand and strong supply, peaking just under 10% in July 2010. However, since mid-2010, vacancy rates have once again been declining. The release of recent developments (Raine Square, 140 William Street , 181 Adelaide Terrace, Bankwest Place and Brookfield Place resulted in a slight uptake in vacancy rates to 4.2% in the September quarter. New office space supply proposed for the market over the next two years is around 50,000sqm, indicating strong demand which will continue the downward vacancy trend to a low of 3.0% by late 2013[7].

Rental levels and growth have reflected the recent movements in vacancy rates. Currently, average net face rents for Prime Office space in the Perth CBD is securing between $600 and $750 persqm. This is below the

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[6] PCA (2012), Office Market Report, June 2012
[7] Colliers (2012), Perth CBD Office Market Report, Colliers, Perth

peaks of the pre-GFC period where rents regularly exceeded $1,000 persqm but are expected to climb, as vacancy rates continue their downward trend. In comparison, Secondary office space was securing between $590 and $640 persqm.

The average rental yields for Perth CBD in June 2012 ranged from 7.5% - 8.5% for Premium Grade, 8.0% - 8.5% for A Grade and 8.5% – 9.0% for B Grade[8].

5.2 Suburban Office Market

The continued growth of Perth's main office precincts has benefitted the suburban office market. This increase demand for office space in Perth CBD by bigger tenants and the lack of capital for new developments is creating a gap, especially for small to medium sized tenants.

The suburban office market in Perth comprises 1,512,169 millionsqm of office space and currently, there is 176,965sqm vacant in 524 buildings across Perth's suburbs, representing a vacancy rate of 11.7%. Vacancy rates also vary across the regions of Western Australia from the outer north (19.4%) having the highest vacancy rates to the inner north (10.4%) having the lowest[9]. This is illustrated in the following figure.

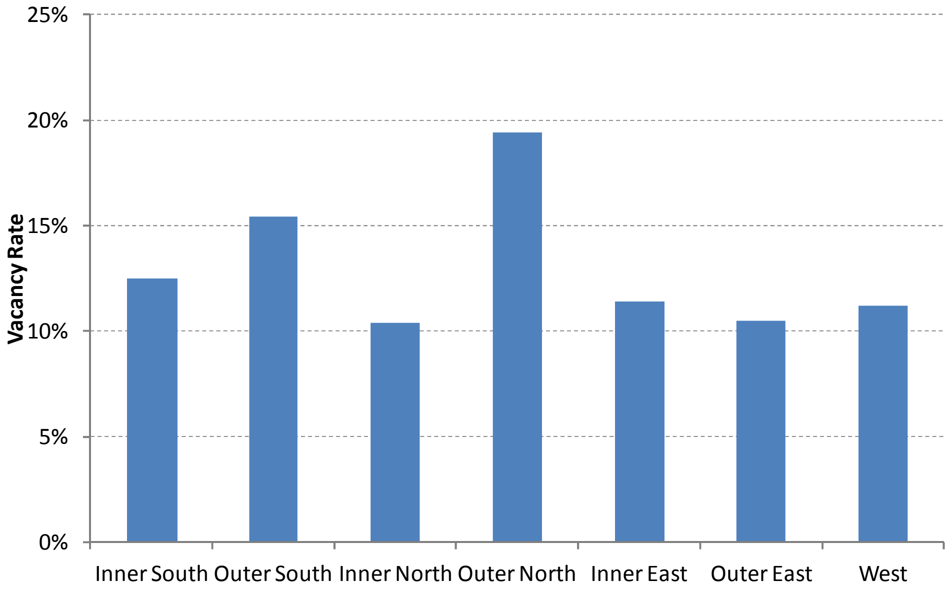

Figure 13 Current Vacancy Rates of Office Space, Perth Regions, 2012

Suburban vacancy rates generally lag that of the CBD in property cycles, as suburban tenants return to the CBD during downturns when inner Town rentals become more affordable and floorspace more accessible. However, vacancy rates in suburban locations of Perth are also heavily influenced by the quality of office stock available. Almost half of stock is C Grade (48%) with A Grade stock – most equivalent to CBD supply – comprising just over one fifth of total floorspace[10]. This is illustrated in the following figure.

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[8] Colliers (2012), Perth CBD Office Market Report, Colliers, Perth
[9] YResearch, Western Australian Suburban Office Report 2012
[10] YResearch, Western Australian Suburban Office Report 2012

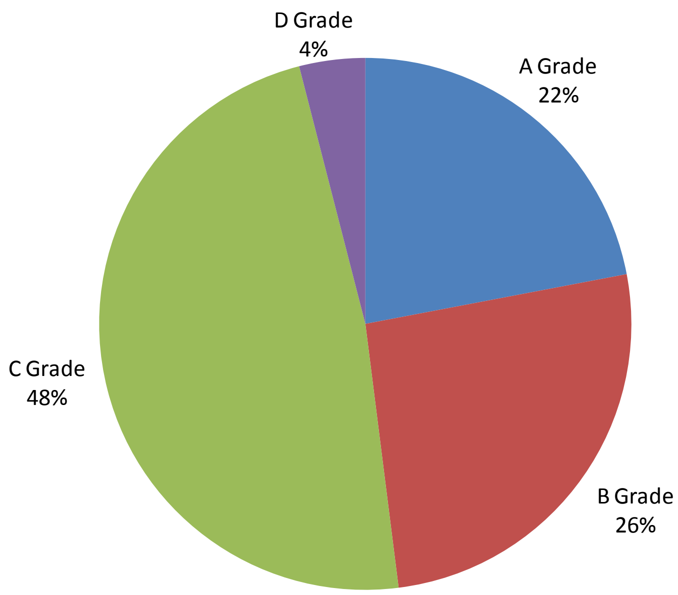

Figure 14 Quality of Suburban Office Stock, Perth, 2012

The age of office stock is a driver in determining the quality of the stock and therefore the vacancy rate, as demand for older product is less than that of newer offices. Perth suburban office market has significant variation in terms of the age of offices available, with almost half of all current supply developed prior to or during the 1980s (48%). Only 28% is less than 10 years old[11]. This is illustrated in the following figure.

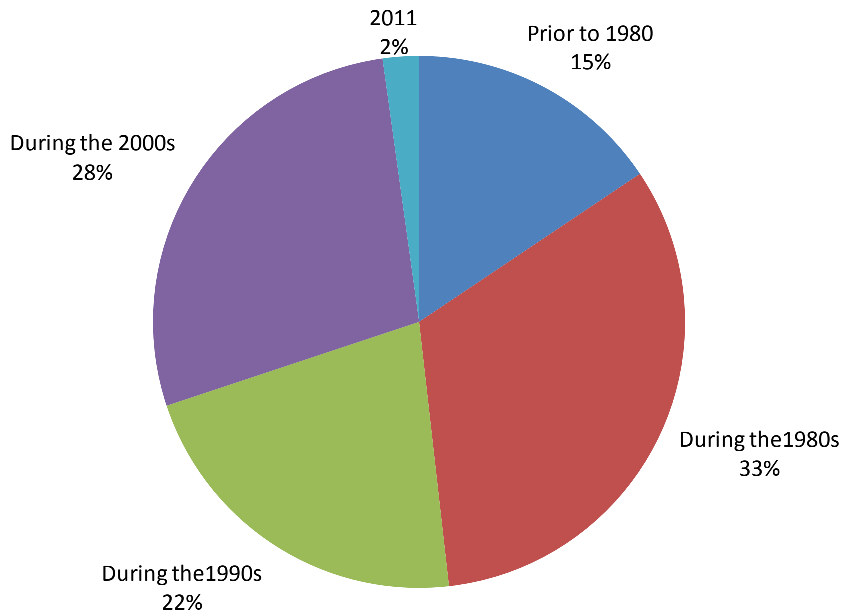

Figure 15 Age of Suburban Office Stock, Perth, 2012

[11] YResearch, Western Australian Suburban Office Report 2012

5.3 What are Suburban Offices?

5.3.1 Defining Suburban Office

Suburban offices are effectively intentional (i.e. planned) clusters of office buildings on a site or in a precinct. All the activity within a suburban office development is commercial in nature, rather than industrial, which separates suburban offices from industrial estates.

Suburban offices are traditionally located in suburban (i.e. non-CBD) locations and are usually characterised by low and medium density built form within a landscaped urban environment. Buildings usually have a range of floorplates to accommodate businesses of different sizes and also provide flexibility in terms of sub-floor tenancy sizes.

Historically, suburban offices have been associated with car-based travel and therefore are usually supported by strong parking provision, either at grade or undercroft. Underground parking is unusual due to the cost of development. However, sites with strong accessibility to major public transport infrastructure (particularly rail) are increasingly popular, providing workers with multiple journey-to-work travel options.

Rental rates for suburban offices are usually lower than the CBD, reflecting comparatively lower land costs and associated lower construction costs (due to a medium rather than higher density built form) and target tenant market that is more price sensitive.

High profile examples of large suburban offices in Australia include:

- Norwest Business Park, Bella Vista, New South Wales;
- Eastlink Business Park, Carrum Downs, Victoria; and
- Sydney Corporate Park, Alexandria, New South Wales.

5.3.2 Drivers of Suburban Offices

The emergence of suburban offices within a metropolitan area usually occurs when the population approaches 1.5 to 2 million people. This reflects a number of economic drivers:

- The growth in demand for office space begins to outstrip the capacity of the CBD and inner city to accommodate;
- Increased rental rates in the CBD incentivise relocation of businesses to more affordable locations;
- Increased transport congestion undermines the attractiveness of the CBD as a business location due to reduced labour force accessibility and business transaction costs; and
- Larger corporate businesses seek to consolidate operations within a single, often branded location, which is difficult within a CBD market.

These drivers have been emerging in the metropolitan Perth market over the past decade, and are increasingly supporting the establishment and development of suburban offices within suburban locations.

5.3.3 Examples in Western Australia

There are limited examples of true suburban offices in metropolitan Perth, as the development type is a relatively new phenomenon. Some examples are outlined below.

- **The Garden Office Park,** located on 10 minutes by car north of the Perth CBD, on Scarborough Beach

Road in Osborne Park. The Garden Office Park is located close to the Mitchell Freeway and Glendalough Railway station, affording convenient access north and south. The Office Park comprises approximately 15,000sqm of office floorspace spread over four individual buildings in a parkland style development. Tenant facilities include 685 car bays, 100 seat conference centre, landscaped gardens, ponds, streams and shady seating areas, a gourmet café, fully equipped gymnasium, 20 metre swimming pool and sauna and full size tennis court.

Figure 16 The Garden Office Park

- **The Optima Centre**, located in the Herdsman Business Park, is one of the largest suburban office developments in Western Australia, with more than 16,200sqm net lettable area constructed across two separate towers with 519 car spaces. It was one of the first buildings outside of the Perth CBD to achieve a 4 star Green Star (V2 Design) rating and a 4.5 star NABERS rating.

Figure 17 The Optima Centre

- **Eastlink Office Park (WA)**, located on Great Eastern Highway with Swan River and parkland views, Eastlink Office Park will be one of Belmont's most prestigious business addresses. Eastlink is a new office building with a net lettable area of approximately 3,105sqm over four floors. This 5-star Green Star (Office Design v2 Certified Rating) development features multi stair and lift access, balconies with Swan River views, architectural design, landscaped business park surroundings and ample car parking.

Figure 18 East Link Office Park (WA)

- **29 Roydhouse Street, Subiaco -** There is a new development in 29 Roydhouse Street located within the popular new commercial precinct of Subiaco. It is within easy walking distance to the Subiaco Train station and bus port and is close to cafes, shopping, parking and entertainment. An A grade office building with large efficient floor plates over 7 levels and 5 office floors, with two basement levels below. End of trip facilities include bike racks and lockers and male and female showers and change rooms. This 4.5 Star NABERS Energy Rating development features multi stair and lift access, balconies with Swan River views, architectural design, landscaped business park surroundings and ample car parking. It has a total floor area of 6,089sqm and is due for completion by the end of 2014.

Figure 19 Roydhouse Street, Subiaco

- **57 Shenton Avenue, Joondalup -** This new building is prominently located on the corner of Shenton Avenue and Grand Boulevard directly opposite the Joondalup Health Campus. With a walkway connecting Shenton House to the hospital it is ideal for medical professionals seeking proximity to the hospital with the convenience of on-site secure parking. Being located within the Joondalup Central Business District also brings the benefits of restaurants, coffee shops, retail and all the other amenities of the City Centre. The building specifications include all features expected in a modern commercial building including quality air conditioning, three lifts for visitor convenience and efficiency and other environmental considerations such as window shading. The building also include its own ground floor cafe.

Figure 20 Shenton Avenue, Joondalup

5.4 Government Office Decentralisation

The suburban office market in metropolitan Perth has historically be dominated by second-tier mining and engineering companies, real estate and property services, finance and community and not for profit organisations.

However, in recent years, that State Government has become increasingly active in the suburban office market as it seeks to save rental costs through the implementation of the Government Office Accommodation Master Plan[12]. This Master Plan seeks to implement a range of changes to the way State Government activity is accommodated including:

- Consolidation of CBD office space away from high cost locations (namely Governor Stirling Tower) into a lower cost accommodation; and
- Relocation of Government departments and activities from the Perth CBD to major activity centre locations in metropolitan Perth.

In June 2012, the State Government announced the plan to relocate staff from the CBD to office accommodation in Stirling, Murdoch and Fremantle. This has been expanded upon recently with the announcement of 600 staff relocating to Joondalup[13], with another 12,000sqm of potential office accommodation current subject to an EOI process.

Government office demand is not driven by market forces and so therefore cannot be accurately projected into the future. However, Government demand can play an important role in facilitating commercial office development by:

[12] Department of Finance (2012), Government Office Accommodation Master Plan 2012-2018, accessed at http://www.finance.wa.gov.au/cms/content.aspx?id=15911 on 6/12/2012

[13] WA State Government (2012), Ministerial Media Statements, access at http://www.mediastatements.wa.gov.au/Pages/default.aspx?ItemId=150385 on 6/12/2012

- Acting as anchor tenants for new developments that also accommodate commercial tenants; and
- Generating a supply chain and procurement opportunities, supporting growth of commercial office-based businesses.

It is noted that the City is currently investigating options to develop up to 15,000sqm of office accommodation and associated car parking in the City Centre on its site at 90 Boas Avenue, Joondalup.

6.0 Catchment Demographics & Drivers Analysis

The growth of commercial office floorspace demand in the City of Joondalup will be primarily determined local socio-economic, demographic, business and economic drivers of the LGA. This section defines the journey-to-work catchment of workers in Joondalup office jobs and analyses the population, labour force, office employment and business activity.

6.1 Defining the Catchment

For the purpose of this study, RPS has defined two catchments for analysis:

- ***Primary Catchment*** – City of Joondalup LGA representing the local business community; and
- ***Secondary Catchment*** – City of Stirling and Wanneroo based on current journey-to-work travel patterns of workers filling office-based jobs in Joondalup.

Together, these catchments represent the North West metropolitan region of Greater Perth .

6.2 Residential Population & Growth

In 2011, the Primary Catchment had a population of 161,783 up 5,727 or 3.7% since 2001 and projections indicate that by 2031, the population will grow to over 188,590, or a further 14.2%. This is illustrated in the following figure.

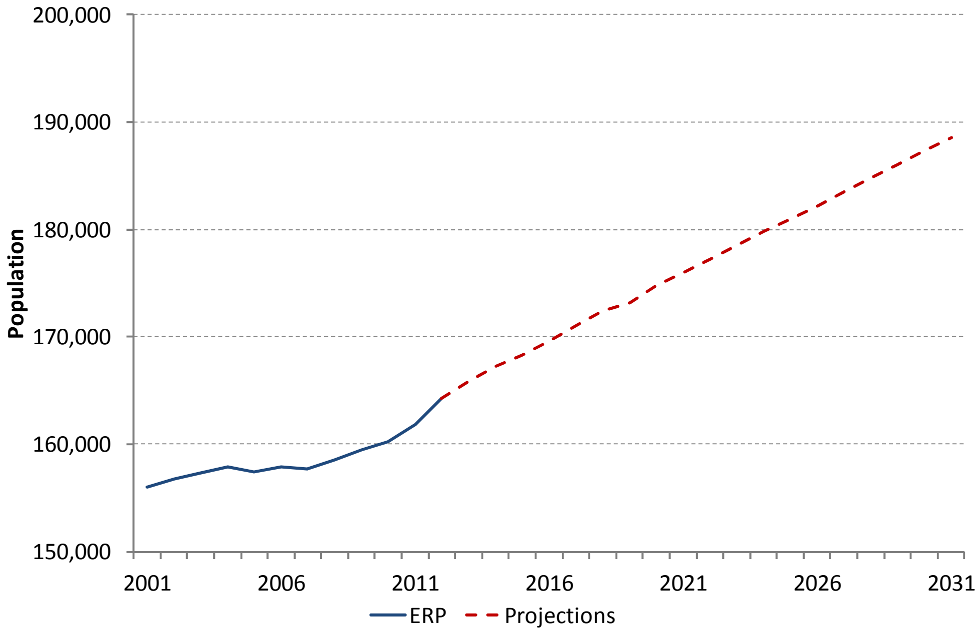

Figure 21 Estimated Residential Population and Projection, City of Joondalup, 2001 to 2031[14]

[14] ABS (2013), Regional Population Growth, Australia Cat No 3218.0, Australian Bureau of Statistics, Canberra and WAPC (2012), WA Tomorrow Population Projections, Band C, WAPC, Perth

The population for Joondalup is projected to grow slowly as it is already an established city. However, in terms of the Secondary Catchment areas surrounding Joondalup, most of the population in 2011 was located in Stirling (56.5%) and Wanneroo (43.5%). By 2031, projections indicate that most of the population in the Secondary Catchment areas will be located in Wanneroo (55.6%) and Stirling (44.4%). This is illustrated in the following figure.

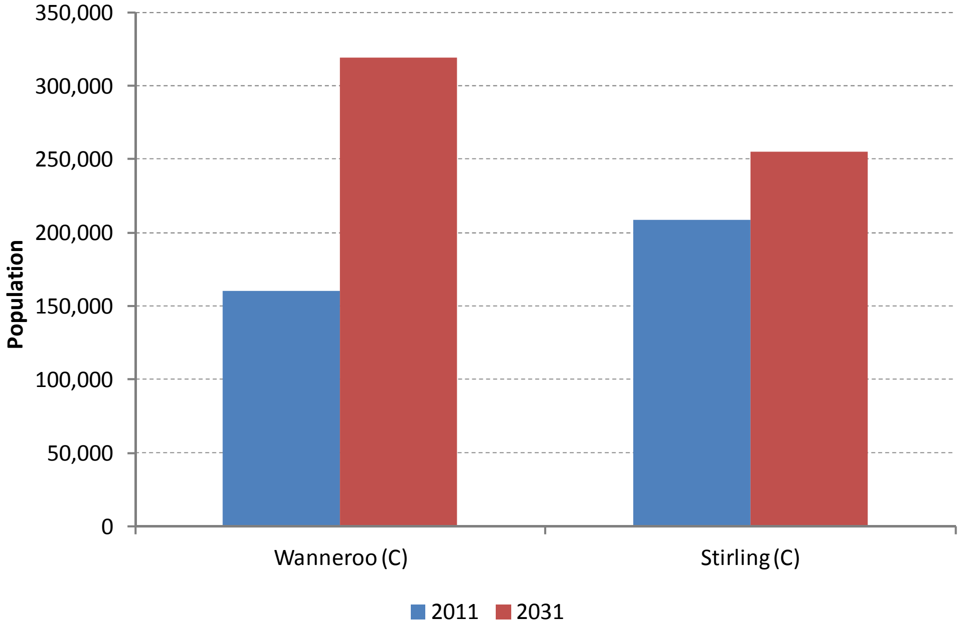

Figure 22 Population Concentration, Secondary Catchment Area, 2011 & 2031

Of the Secondary Catchment areas, Wanneroo (99.1%) is projected to have the largest population increase from 2011 to 2031, while Stirling's population is projected to increase by 22.3%. As a whole, population in the Secondary Catchment area is projected to increase by 55.7% to over 574,140 people by 2031. This is illustrated in the following figure.

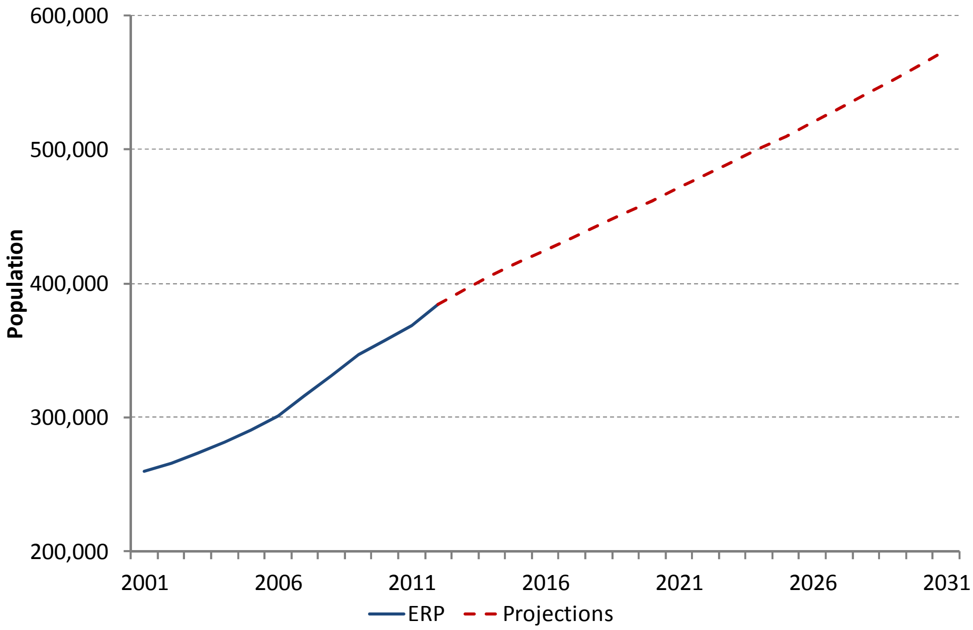

Figure 23 Estimated Residential Population and Projection, Secondary Catchment, 2001 to 2031

This population does translate into workforce sizes evenly across the Primary and Secondary Catchment due to relatively consistent worker-to-population ratios. The worker to population ratios for the Secondary

Catchment is 45.8% for Wanneroo and 47.4% for Stirling. Joondalup has a worker to population ratio of 51.3%.

The unemployment rate for the Secondary Catchments also varies considerably with Stirling having the lowest at 4.5% and Wanneroo the highest at 5.9%, while Joondalup has the lowest unemployment rate of 1.9%. This is illustrated in the following figure.

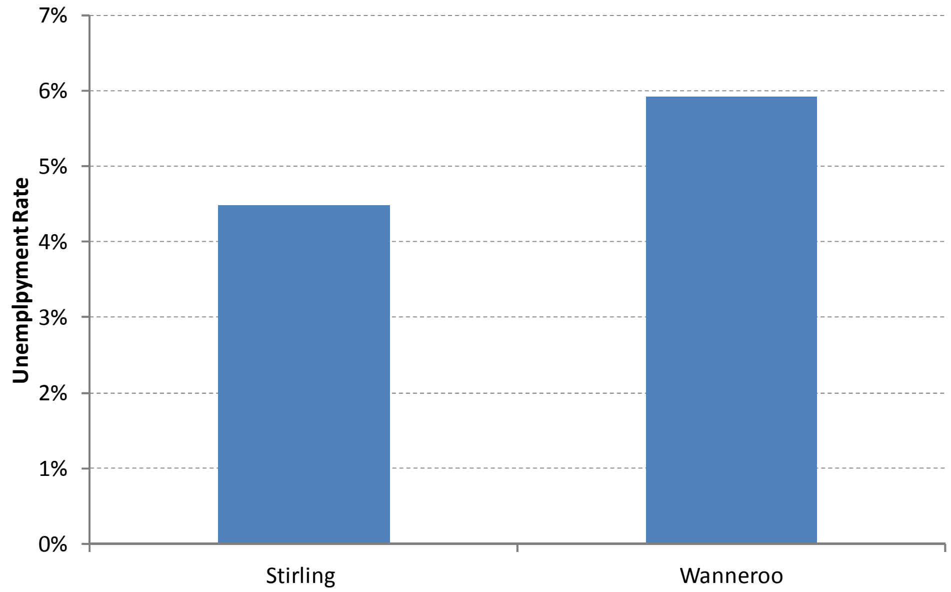

Figure 24 Unemployment Rates, Secondary Catchment Area, 2013[15]

6.3 Office-Based Jobs

Core office-based jobs include managers, professionals and clerical and administrative staff in following industries:

- Information Media and Telecommunications;
- Financial and Insurance Services;
- Rental, Hiring and Real Estate Services;
- Professional, Scientific and Technical Services;
- Administrative and Support Services; and
- Other Services.

In 2012, there were 3,875 core office jobs located in Joondalup LGA, with most of the workers originating from within the Primary Catchment area (68.2%). A considerable amount of core office jobs were also filled by workers originating from the Secondary Catchment areas of Wanneroo (18.1%) and Stirling (6.0%).

[15] DEEWR (2013), Small Area Labour Market, Department of Education, Employment and Workplace Relations, Canberra.

6.4 Local Business Registrations

Joondalup represents a sizeable concentration of core office business activity in northern Perth. In 2012, there were 1,423 core office-based businesses with their registered address in Joondalup, up 5.8% since 2009[16]. In 2011, the share of core office businesses was 35.7% of all businesses in Joondalup. As expected, most of these businesses are dominated by Professional Services, Real Estate Services and Other Services.

From 2009 to 2012, the City of Joondalup has seen some growth in population (3.0%) although there was a much higher growth in the number of businesses registered in Joondalup (5.8%). This is illustrated in the following figure.

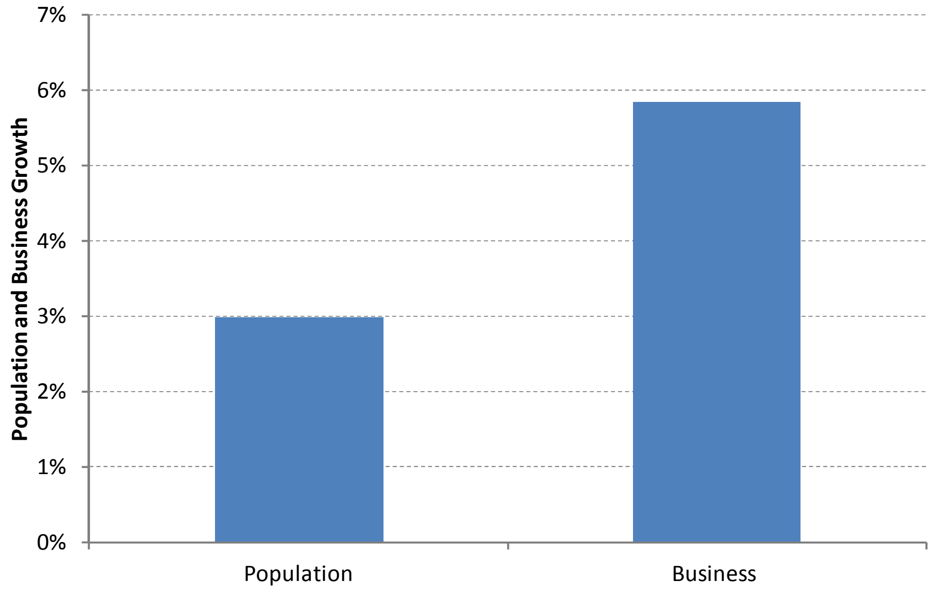

Figure 25 Population and Business Registrations Growth from 2009 – 2012, City of Joondalup

[16] ABS (2012), Count of Businesses, Cat No 8165.0, Australian Bureau of Statistics, Canberra.

7.0 Commercial Office Need Analysis

Commercial office floorspace is required to accommodate core and ancillary office jobs and workers. In this section RPS has modelled current and future need for commercial office floorspace in the City of Joondalup.

7.1 Methodology & Assumptions

RPS has employed a population and labour force-based approach to estimating current and future need for commercial office floorspace in Joondalup. This has taken into consideration journey to work flows from within and outside the primary and secondary catchments as well as current office-based employment self-sufficiency ratios in Joondalup LGA.

The methodology employed to calculate commercial office need is summarised in the following diagram.

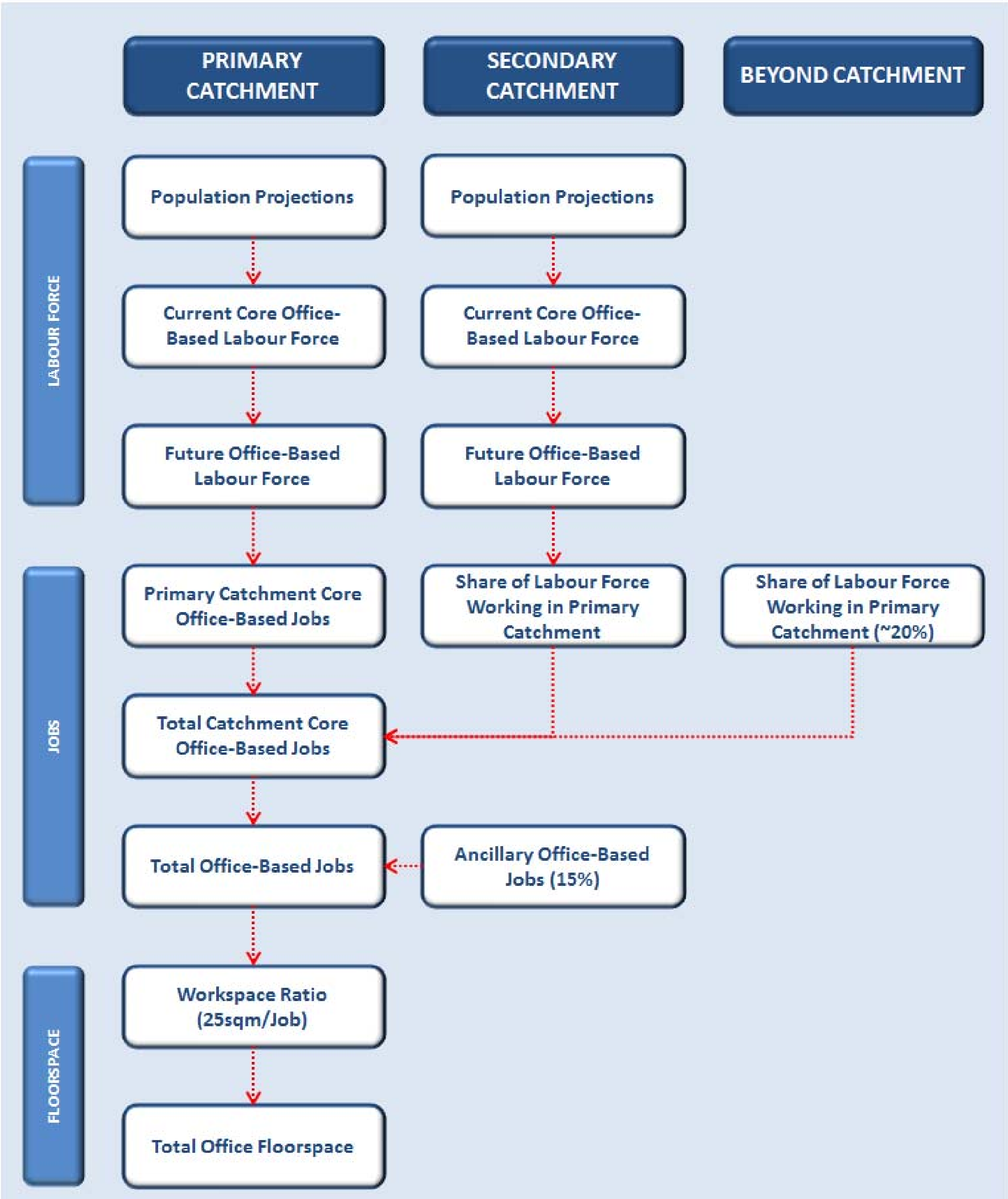

Figure 26 Commercial Office Need Methodology

Note that this methodology calculates non-government, commercial office floorspace need only. Government need is not subject to the same market forces as private and not for profit sectors and therefore cannot be estimated based on the same labour-constrained approach.

The following core assumptions have been made as part of this analysis:

- Current workforce-to-population ratios and core-office shares of labour force remain consistent for each catchment for the assessment period.
- Current office-based employment self-sufficiency for Joondalup remains consistent for the assessment period.
- The share of office-workers in the Secondary Catchment employed in Joondalup remains consistent for assessment period.
- Beyond Catchment shares of office demand in Joondalup starts at 10.0% of office demand in 2011 before climbing to current share of office-based employment in 2026.
- Ancillary office demand – demand originating from non-core occupations and industries – is estimated at 15%, in line with historical capital CBD shares[17].
- Workspace ratio (floorspace per worker) of 25sqm in line with suburban office/business park floorspace.
- Vacancy rate of 5% across the Primary Catchment, for both public and private sectors.

These assumptions are inherently conservative and defensible and are therefore suitable for use in strategic investment decision making. The results of this methodology are outlined in the sections below.

7.2 Commercial Office Floorspace Need

7.2.1 Core Occupied Commercial Office

Based on the application of the methodology outlined above, RPS estimates that core office jobs currently located in the City of Joondalup generate a requirement for over 103,000sqm of Gross Floor Area (GFA). This is comprised of:

- 67,700sqm of demand originating from the Primary Catchment;
- 27,400sqm of demand originating from the Secondary Catchment; and
- 7,600sqm of demand originating from Beyond the Catchment.

This need is projected to grow significantly over the assessment period to 2031, on the back of strong residential population growth in the Secondary Catchment. By 2021, core office floorspace need is projected to increase to 129,000sqm, before accelerating over the following 10 years to reach 183,000sqm by 2031. This represents a net increase in floorspace need over the 18 year period from 2013 of 80,200sqm or 77%.

[17] This assumption is based on the application of this methodology to Capital City CBDs for 5 yearly from 1996 to 2011. The result of 15% represents the average across the Capital Cities during this period and has remained broadly consistent.

7.2.2 Ancillary Occupied Commercial Office

Not all demand for office floorspace in a region can be accounted for by core office workers. Other industries and occupations regularly require dedicated commercial office space as part of their operations. Common sources of ancillary office demand include the following industries:

- Education and Training
- Health Care and Social Assistance; and
- Arts and Recreation Services.

This is particularly relevant for the City of Joondalup, where recent developments (namely 57 Shenton Avenue) have demonstrated the strong demand for commercial office floorspace being generated from Joondalup Health and Education Precincts.

Applying industry standard estimates of the contribution to total office demand of non-core office employment, RPS estimates that the ancillary office market currently generates demand in the City of Joondalup for 18,200sqm. This is projected to increase to 22,800sqm by 2021 and 32,350sqm by 2031.

7.2.3 Total Occupied Commercial Floorspace Need

Based on the results of core and ancillary office floorspace need assessments above, RPS estimates that there is a total current need for commercial office floorspace in the City of Joondalup of 121,300sqm GFA. This is projected to increase to 152,200sqm by 2021 and 215,700sqm by 2031. This is illustrated in the figure below.

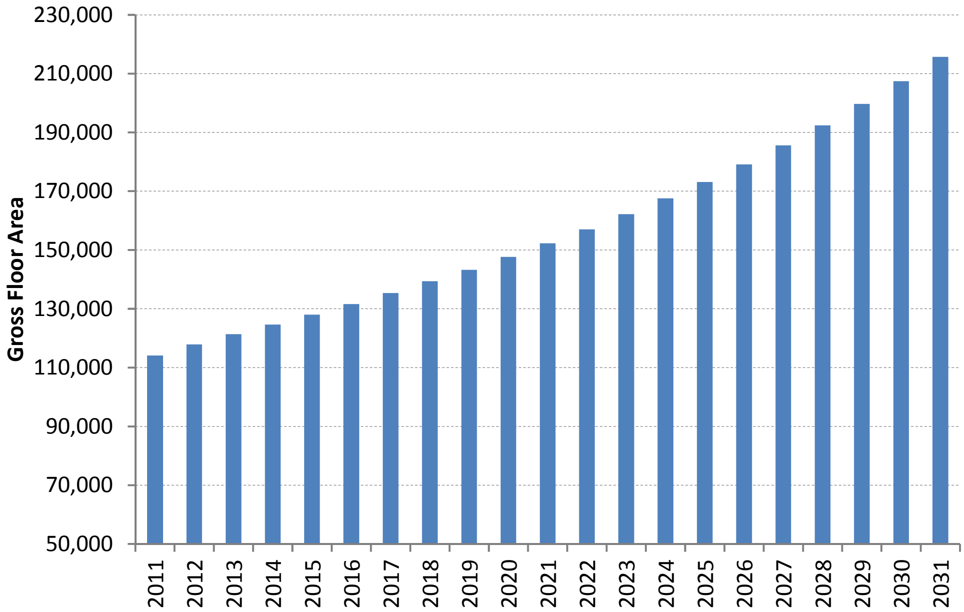

Figure 27 Total Occupied Commercial Office Floorspace Need, City of Joondalup, 2012-2031

7.3 Vacant Floorspace

Any office market is never going to have a vacancy rate of zero. At any time, office floorspace is vacant for a range of reasons. According to Y Research, the current average vacancy rate across the suburban office market of metropolitan Perth is 10.6%. This is more than double that of the CBD. This vacancy is not evenly spread across all office developments with higher quality, newer floorspace experiencing considerably lower vacancy rates than older more established product.

Adjusting for this fact and considering the low vacancy rates of Government related offices, RPS has assumed a 5% vacancy rate for the Joondalup area for the assessment period. This equates to 7,750sqm in 2013, increasing to 8,000sqm by 2021 and 11,350sqm in 2031.

7.4 Total Commercial Office Floorspace Need

Combining commercial and Government office floorspace need and adjusting for vacant floorspace, RPS estimates that there is currently sufficient demand for 127,700sqm of office floorspace in Joondalup LGA. This is projected to increase to 160,200sqm by 2021 and 227,000sqm by 2026. This is illustrated in the figure below.

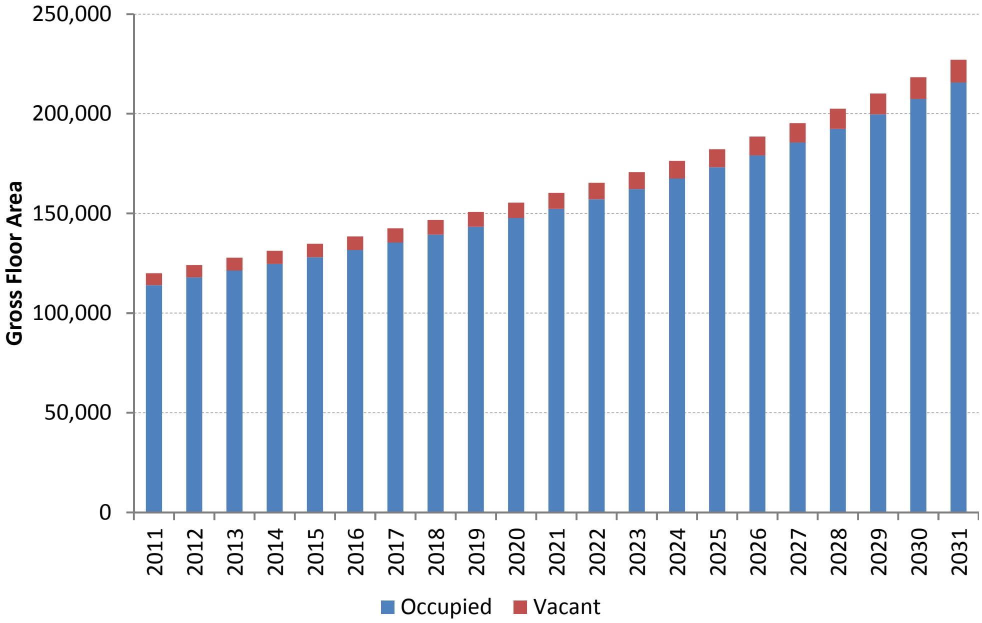

Figure 28 Total Office Floorspace Demand, City of Joondalup, 2011-2031

8.0 Commercial Office Supply & Gap Analysis

Joondalup is already recognised as a major suburban office market in Greater Perth, a role that will likely further intensify in the medium term in response to the strategic significance of Joondalup City Centre in the activity centres hierarchy and transport congestion, land cost and other development factors. This section analyses information on known commercial office supply in the City to estimate the current and future potential market gap.

8.1 Land Use & Employment Survey

A review of the results of the 2008 survey of Land Use & Employment by the Department of Planning, indicate that there was approximately 149,800sqm of office floorspace at that time[18]. However, only 107,800sqm was located in commercial complexes. The remainder of this floorspace is not regarded as commercial office floorspace and instead is comprised of:

- Government floorspace;
- Floorspace associated with the administration of education, health and other public institutions and facilities; and
- Floorspace that forms an ancillary component of industrial, entertainment or retail activities.

New office supply between 2008 and 2013 has generally been limited in suburban Perth, as the effects of the GFC on development viability and suburban market vacancy and rental rates undermined new supply entering the market. As such, RPS considers the level of supply in 2013 to be only slightly above that in the 2008 survey.

As expected, commercial office floorspace supply is highly concentrated with Joondalup City Centre accounting for 61,000sqm or 57.5% of total supply in the LGA. The next highest share of supply was Sorrento Quay (7,125sqm) followed by the Secondary Centres of Warwick (6,095sqm) and Whitfords City (5,967sqm).

[18] DoP(2010), Land Use & Employment Survey 2008, Department of Planning, Perth

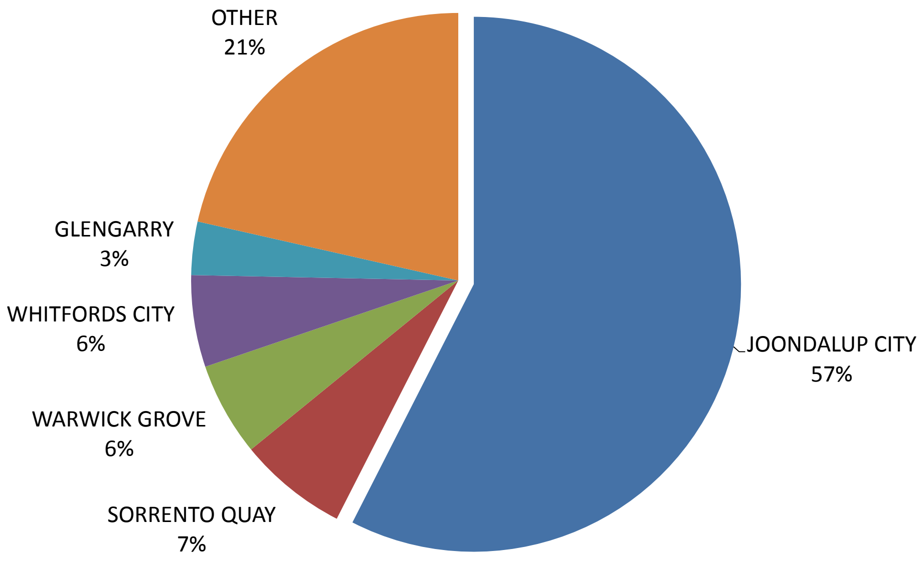

Figure 29 Distribution of Commercial Office Floorspace, by Location, 2008

8.2 Market Gap

Based on current estimated supply and need, RPS considers the Joondalup commercial office market to have a small supply shortage of up to 10,000sqm. However, the projected growth in total floorspace need to in excess of 227,000sqm in 2031 is expected to increase this market gap to 42,500sqm in 2021 and almost 110,00sqm by the end of the assessment period. This is illustrated in the figure below.

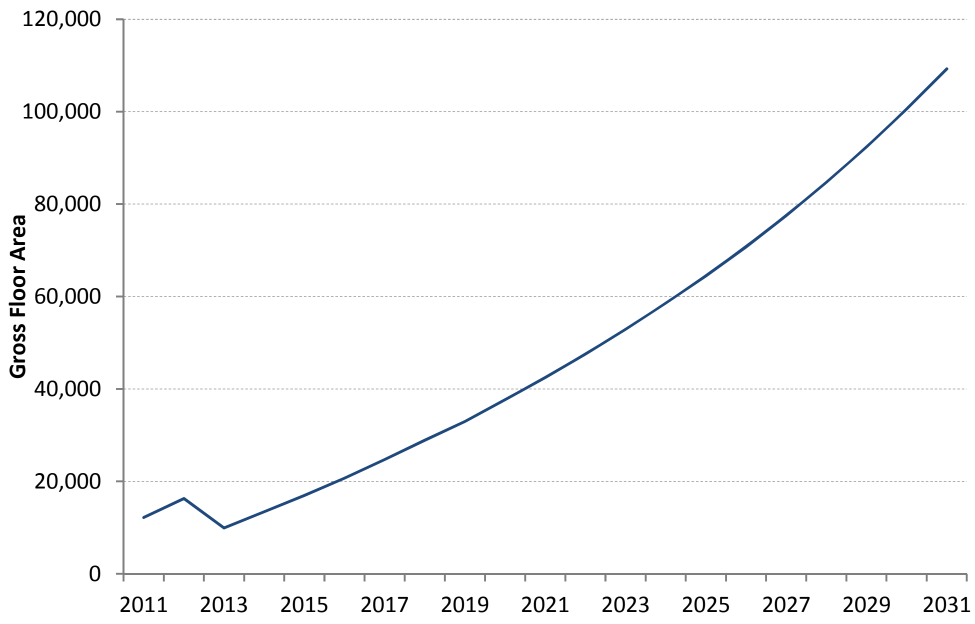

Figure 30 Commercial Office Floorspace Supply Gap, City of Joondalup, 2011-2031

This represents the net increase in commercial office floorspace that must be accommodated by the City of the period to 2031.

9.0 Location Criteria & Analysis

This section establishes a spatial criteria for the identification and assessment of current and potential locations of commercial office development in the City of Joondalup and provides an indicative distribution of office floorspace across identified locations.

9.1 Criteria for Commercial Office Development

SPP 4.2 confirms the primacy of the Joondalup City Centre, as a Strategic Metropolitan Centre, in the distribution of commercial office floorspace in the City of Joondalup. This corresponds with the current distribution in the City (refer to section 8.1). Future commercial office floorspace development should therefore continue to be concentrated in the City Centre in the medium and long-term.

However, towards the end of the assessment period, the Joondalup office market is likely to have reached a critical mass that will justify greater segmentation and distribution of floorspace in the City. Additionally, strategic locations around the City are likely to be suitable for commercial office development, particularly around train stations, sites with highway frontage and concentrations of retail and amenity.

Developers, investors and tenant groups commonly assess the attractiveness and suitability of a location for commercial office based on a range of criteria. These criteria include:

- High exposure location – on a highway frontage;
- Collocated with Anchor Activities – like Government offices, health and education institutions etc,;
- Collocated with Amenities – such as major retail, parks etc
- Concentrated around Public Transport Nodes – in line with TOD principles, maximising the size of tenant labour force catchments; and
- Large Land Parcels – providing flexibility in the type and structure of office development including supporting parking.

9.2 Recommended Future Locations & Timing

Based on the location criteria outlined in section 9.1, existing and potential Commercial Office locations were identified and summarised. This is outlined in the table below.

Table 6 Commercial Office Locations Assessment

Location	Profile	Suitability	Expansion Capacity
Joondalup City Centre	Principal location of future commercial office development in the City, in line with SPP 4.2 and current concentration. Four main Precinct's identified		
City Centre	Core of the City Centre adjacent Lakeside Joondalup and Council Administration buildings. Strategically located sites available, including Council car parks, suitable for intensive commercial office development.	High	High
Health Precinct	Health anchored commercial office precinct along Shenton Avenue opposite and adjacent Joondalup Health Precinct. Viability recently demonstrated by Shenton House. Vacant sites as well as redevelopment opportunities available.	High	Moderate
Education Campus	Education anchored commercial office precinct. Currently limited supply though significant opportunities along Grand Boulevard, including vacant sites and car park redevelopments.	High	Moderate
Edgewater	Current Bulky Goods retail development though ~~medium~~ long term potential for transition to Commercial Office once the office market within the Central Core and City Fringe districts of the City Centre have reached a critical mass to justify major office floorspace at this location. ~~With transistion of Bunnngs.~~The relocation of Bunnings to occur in the short term. Collocated with Edgewater train station and with high exposure off Mitchell Freeway and Ocean Reef Road.	Moderate	Moderate
South East Suburbs	Minor, medium term potential for South East suburbs, particularly at Warwick and Greenwood train stations, collocated with Centro Warwick.	Moderate	Low
South West Suburbs	Limited capacity for South West suburbs to accommodate additional commercial office development. Shop retail remains highest and best use for Whitfords while other centres are at effective capacity. Some opportunity around Whitfords train station, though more likely in the long-term and constrained by POS.	Low	Low
Western Suburbs	Currently limited office supply in Western Suburbs location with proximity to City Centre likely to impact viability in the medium to long-term. Limited exposure to passing traffic as well as lack of major public transport nodes.	Low	Low
Northern Suburbs	Short-to-medium term potential, namely in Currambine. Highway and Burns Beach Broad exposure and collocation with major train station provides opportunities, with vacant sites and redevelopment potential available.	Moderate	Moderate

Based on this assessment of the suitability and expansion capacity of current and potential Commercial Office locations within the City, RPS recommends the following indicative floorspace distribution be used by the City of Joondalup to inform the Local Planning Strategy.

Table 7 Recommended Floorspace Distribution, Commercial Office Locations, City of Joondalup

Centre	Current Size (sqm 2008)	Recommended Size (sqm)
Joondalup City (Excluding Edgewater) City Centre Health Precinct Education Campus	61,990	180,000
Edgewater	285	20,000
South East Woodvale Kingsley Greenwood Warwick	10,338	15,000
South West Hillarys Padbury/Whitfords Duncraig Sorrento Marmion	14,287	15,000
Western Ocean Reef Connolly Heathridge Mullaloo Kallaroo Beldon Craigie	1,984	4,000
Northern Burns Beach Kinross Iluka Currambine	340	10,000

A summary of these tables along with recommended timing and distribution of Commercial Office floorspace within the City is provided in Appendix 1.

RECOMMENDATIONS

10.0 Recommendations

This report provides a range of development, planning and implementation-related recommendations for the City of Joondalup for both Bulky Goods Retail and Commercial Office.

10.1 Bulky Goods

10.1.1 Retail Needs Assessment

Joondalup has the potential to position itself in the North West Corridor as a high order bulky goods destination, similar to that of Osborne Park. Achieving this objective will require a highly concentrated bulky goods provision, to provide customers with easy access to a critical mass of diverse bulky goods retail.

SPP 4.2 does not expressly require the provision of a retail needs or sustainability assessment for Bulky Goods retail developments. The purpose of the Retail Needs Assessment is to confirm the need for the development within the existing retail supply environment to ensure that the sustainability of the network.

Concentrate bulky goods developments within the City at strategic nodes (as listed at Table 8) to ensure a critical mass of offering to customers. Any developments with a cumulative total of 4,000 sqm GLAR or more outside these locations will require a Retail Needs Assessment.

10.1.2 Ancillary Uses

The attractiveness of bulky goods offering to customers is increasingly dependent on the provision of uses such as convenience retail, café/restaurant and personal services. This is particularly the case for large, diverse bulky good centres of a regional or whole-of-metropolitan significance.

However, such uses must be ancillary to the core role and function of the development and should not compete with established, dedicated shop retail and personal services nodes within the City. The ancillary nature of such uses is determined by the size and position of the offering within the development.

Allow shop retail, café/restaurant and personal services uses within bulky goods developments so long as they remain ancillary in nature and service bulky goods customers.

10.1.3 Car Parking

Bulky goods retail is generally dependent on ample provision of car parking. This reflects the size and scale of many of the goods sold by such retailers, including, but not limited to, gardening equipment, white goods and furniture. However, the position of car parking on a bulky goods site can have significant implications for the visual amenity and pedestrian accessibility of customers.

Review the car parking requirements for bulky goods developments to ensure they are accommodating for customers. Require that parking and servicing, where possible, be primarily located at the rear of the bulky goods developments, sleaved behind built form, to enhance urban and pedestrian amenity and accessibility.

10.1.4 Use Transition

Bulky goods are commonly a transitory land use, with development shifting to higher density activities like commercial office or apartment-style residential in the long-term. In locations where higher density activity are viable– within walkable distance of public transport nodes and in high amenity areas – the transition of bulky goods to such land uses should be supported by Council.

Put in place a robust and flexible planning framework for strategic bulky goods nodes (as listed at Table 8) to allow for redevelopment and transition to higher intensity commercial activities in the medium to long term, in line with changing market conditions.

10.2 Commercial Office

10.2.1 Distribution

Over the next 20 years, the City of Joondalup will reach a critical mass of commercial office supply that will result in the segmentation of the local market, within the context of broader suburban office market trends in Greater Perth. Non-City Centre floorspace should be concentrated in the first instance around Edgewater train station, in line with TOD principles and co-located with Secondary Activity Centres.

While maintaining the primacy of the Central Core and City Fringe districts of the City Centre, support commercial office development outside of these areas in the medium to long term, in line with changing market conditions and only once the office market within the Central Core and City Fringe districts of the City Centre have reached a critical mass to justify major commercial office floorspace at other specific locations including: ~~at specific locations including:~~

- *Within 200m of Edgewater train station in line with TOD principles* (long term)
- *Co-located within Secondary Activity Centres.*

10.2.2 Redevelopment Potential

Commercial property is attractive to the market and investors as it provides ongoing revenue in the form of commercial rents. Centralised ownership and management also makes associated built form more easily refurbished and redeveloped in the future, in response to both the deterioration of the asset and change market conditions. This assists with Centre regeneration and long-term economic sustainability. The incorporation of residential uses into commercial buildings in line with mixed use principles can undermine this redevelopment potential through fragmentation of ownership and use conflicts.

Investigate the use of strata subdivision restrictions and the introduction of minimum lot sizes as a mechanism for protecting the redevelopment potential of the City Centre where the ultimate land use type and intensity is not achieved.

10.2.3 Ground Floor Activation

Commercial office developments can accommodate considerable numbers of workers, supporting local employment generation and employment self-sufficiency. The attraction and retention of these workers by commercial office tenants can be enhanced through effective delivery of supporting services at the ground floor level, including cafes, restaurants, convenience retail and business services (printers, real estate management etc.). Ground floor activation also improves the impact of commercial built form on the pedestrian environment.

Require the ground floor activation of all commercial office developments within the Central Core City Centre, and all commercial office developments over three storeys outside of the Central Core of the City Centre.

10.2.4 Clustering

The City Centre has a number of drivers of commercial office development, including but not limited to:

- Joondalup Health Precinct;
- Joondalup Education Precinct; and
- Local and State Government administration.

The clustering of development around/within Precincts can allow the economy to capture the benefits of business agglomeration, including economies of scale, local supply chains and market recognition/branding.

Investigate measures that will facilitate clusters of high intensity office development around key drivers of economic activity within the City Centre (as listed in Table 9).

10.2.5 Service Commercial Areas

Campus and low density commercial office development is often attracted to service commercial, bulky goods and industrial areas due to larger contiguous sites and lower underlying land costs. The development of commercial office in lower density employment areas can however create conflicts within existing uses, crowding out key services and activities essential for the functioning of the local economy. As such, restrictions are commonly placed on the scale and built-form type of commercial office development in employment areas.

Restrict commercial office floorspace in bulky goods, service commercial and service industrial areas until market demand exits for secondary office locations outside of the Central Core of the City Centre, except where the floorspace is ancillary to service commercial or service industrial activity.

10.2.6 Car Parking

As a suburban office location, strategically located within the North West Corridor, car parking will be an important early driver of commercial floorspace take-up in the City. This reflects the fact that the public transport network within the broader Corridor is unlikely to be fully established until full residential build out in the long-term, necessitating the continued predominance of car-based travel to the Centre for many workers.

Develop a parking strategy for the City Centre that identifies strategic car parking locations and allows existing car parking areas to transition to higher intensity uses in the medium-long term.

Appendix 1

Recommended Floorspace

Table 8 Recommended Floorspace Sizing & Distribution, Bulky Goods Retail, City of Joondalup

Centre	Current Size (sqm)	Recommended Size (sqm)	Timing	Comments
Joondalup Gate/Edgewater	28,000	30,000	5-15 years	Currently anchored by Bunnings which is transitioning from the site in the short-term. Proximity to Edgewater train station raises questions of whether Bulky Goods retail is highest and best use in medium term.
Service Commercial/Winton Road Precinct	20,000	20,000	5-15 years	Existing employment precinct adjacent the City Centre. Primarily service commercial with distributed Bulky Goods, showroom and other large format retail and wholesale businesses.
Whitford City	15,000	15,000	5-15 years	Secondary Centre currently anchored by a Bunnings store. Expansion of large format retail within the Centre is currently spatially constrained and shop retail expansion likely represents highest and best use.
The Gateway	9,500	9,500	5-15 years	Collocated with the new Quadrangle development, though future expansion potential for the site likely limited
Joondalup City Centre	8,600	10,000	5-15 years	Strategic Metropolitan Centre with residential, commercial office and shop retail representing highest and best use. Minor bulky goods supply likely to expand slightly in response to larger format retail offerings by some shop retailers.
Joondalup South	6,500	6,500	5-15 years	Heavily constrained site with limited potential for expansion.
Currambine	3,500	5,000	5-15 years	Currently anchored by a Dan Murphy's store with only a small level of bulky goods currently proposed in the Currambine District Centre. Unlikely to have a significant level of bulky goods in the future.
The Quadrangle/ Joondalup Square	0	100,000	0-20 years	Currently under development adjacent to City Centre. Will become primary concentration of Bulky Goods floorspace in City in short-term.
Lot 104	0	10,000	5-15 years	Located on Joondalup Drive opposite Joondalup South. Currently zoned POS though use is under investigation by Council. Potential opportunity for Bulky Goods Retail strip along Joondalup Drive.
Alternative locations (highway locations etc)	5,000	10,000	5-15 years	There is likely to be proposals put forward for bulky goods in other locations around the Joondalup LGA. These proposals should not be dismissed but the large majority of future bulky goods in the municipality should be in critical mass at the locations above. Centres outside this should comply with State Planning Policy 4.2.

Table 9 Recommended Floorspace Sizing & Distribution, Commercial Office, City of Joondalup

Centre	Current Size (sqm, 2008)	Recommended Size (sqm)	Timing	Comments
Joondalup City (Excluding Edgewater) City Centre Health Precinct Education Campus	61,990	180,000	0-20 years	Most commercial office development will occur in and around Joondalup City Centre in the short to longer term. Currently, there is commercial office development potential at the site of the City's Administration Building and car park (11,347sqm), the Lotteries House building and car park (10,087sqm), along with the extension of Joondalup Health Campus and Learning Precinct. In particular, Lot 9000 Grand Boulevard (ECU owned land) provides the opportunity to deliver floorspace to increase strategic employment including knowledge based, higher value jobs. Other potential opportunities to provide strategic employment exist at the Education and Health campuses as well as the corner of Grand Boulevard and Collier Pass.
Edgewater	285	20,000	15-20 years	There is long term potential in Edgewater due to its strategic location along the rail route and potential for residential density. Planning Scheme, structure plan and policies will need to be worded to ensure the primacy of the Central Core and City Fringe Districts of the City Centre is protected until those office markets reach a critical mass to justify major commercial office development in Edgewater. Further, the WA State Budget 2013-14 has allocated $46.5million over the next three years to construct a new multi-storey car park at Edgewater train station. Further strategic planning is needed for this site.
South East Woodvale Kingsley Greenwood Warwick	10,338	15,000	5-15 years	There is medium term potential for small commercial office development in the South East of the City. In particular, Warwick Centro is located only a kilometre from the train station, and has development potential, particularly in regard to the lots fronting Ellersdale Avenue and Dugdale Street.
South West Hillarys Padbury/Whitfords Duncraig Sorrento Marmion	14,287	15,000	5-15 years	There is medium term potential for further commercial office development in the South West of the City. The Whitford Activity Centre has the most potential, with potential for some office space around Sorrento Quay.

Centre	Current Size (sqm, 2008)	Recommended Size (sqm)	Timing	Comments
Western Ocean Reef Connolly Heathridge Mullaloo Kallaroo Beldon Craigie	1,984	4,000	5-15 years	There is medium term potential for further minor commercial office development in the Western area of the City within the existing neighbourhood and local centres.
Northern Burns Beach Kinross Ilkuke Currambine	340	10,000	0-15 years	There is short to medium term potential for further commercial office development towards the north of the City, particularly due to its relatively close proximity to the city centre and also as a result of high population growth around this area. In particular, Currambine District Centre has the potential for high amenity use due to its strategic location near the Mitchell Freeway and also a growing residential population to the north. There is already land zoned for commercial/business use for potential development.

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DRAFT LOCAL COMMERCIAL STRATEGY
SCHEDULE OF SUBMISSIONS FOLLOWING ADVERTISING

NO	NAME AND ADDRESS OF SUBMITTER	DESCRIPTION OF AFFECTED PROPERTY	SUBMISSION SUMMARY	CITY RESPONSE
1	K & M Kitchen 29 Kirkdale Turn KINROSS WA 6028	29 Kirkdale Turn KINROSS WA 6028	Comment. Requests a dedicated turning lane into the shopping centre (Kinross), two access points to the centre and angled on street park.	Noted. This comment doesn't relate to the draft strategy content, rather it is a comment about exiting conditions at a specific centre.
2	C & B McLennan 15/10 Timbercrest Rise WOODVALE WA 6026	15/10 Timbercrest Rise WOODVALE WA 6026	Comment. States there are two main problems: 1. Businesses leave large bins open and it attracts lots of noisy birds that then come onto their property. 2. Parking lots at night are used by drug dealers and for drinking and then they throw rubbish over the fence into residents' yards.	Noted. This comment doesn't relate to the draft strategy content, rather it is a comment about exiting conditions at a specific centre.
3	B Baldwin 20 Davallia Road DUNCRAIG WA 6023	20 Davallia Road DUNCRAIG WA 6023	Comment. They are not against the commercial centre but more needs to be done about parking as more buildings are built but not more parking bays. This results in people parking on both sides of Davallia Road, right in front of their house so that when they have visitors there is no where to park.	Noted. This comment doesn't relate to the draft strategy content, rather it is a comment about exiting conditions at a specific centre. Parking for centres will either be based on scheme requirements or the provisions outlined in an activity centre structure plan.
4	E McQueen 2/22 Oatley Turn DUNCRAIG WA 6023	2/22 Oatley Turn DUNCRAIG WA 6023	Comment. States a service station is needed in the area and is not pleased that the super deli has been replaced by a fruit and veg	Noted. This comment doesn't relate to the draft strategy. The draft strategy doesn't mandate specific uses to be included in centres rather

NO	NAME AND ADDRESS OF SUBMITTER	DESCRIPTION OF AFFECTED PROPERTY	SUBMISSION SUMMARY	CITY RESPONSE
			shop.	the appropriate provision of retail floor space to provide for a range of uses.
5	J & D Shaw 6/243 Timberlane Drive WOODVALE WA 6027	6/243 Timberlane Drive WOODVALE WA 6027	Comment. Moved close to the shops as they don't drive and it is convenient to walk around the corner to the shopping centre. However there are issues with patrons leaving the pub or hooning in the car park, driving over verges, leaving tyre tracks and smoke. They support residential living alongside shopping centres but believes pubs should be located elsewhere.	Noted. This comment doesn't relate to the strategy, rather it is a comment about exiting conditions at a specific centre. Issues of anti social behaviour can be ameliorated through improved design for new or refurbished centres and the implementation of security measures such as lighting and cctv. By collocating land uses with varying operating hours offers opportunities for active and passive surveillance of areas which also improves the security of an area.
6	Name and address withheld by request	Withheld by request	Comment. Believes the City should pay for double glazing to windows and screening to properties that border Marmion Avenue as it will only get busier with the expansion of shops. This will also result in an increase in anti social behaviour which will impact on the quality of life for nearby residents.	Noted. This comment does not relate to the draft strategy content.
7	Name and address withheld by request	Withheld by request	Comment. Based on the effect of the trading hours on shops in the Duncraig Village centre, when alongside residences the following is recommended: 1. Trading hours restricted to 8am-12 midnight.	Noted. This comment doesn't relate to the draft strategy content, rather it is a comment about exiting conditions at a specific centre. It is not appropriate to address these issues through the strategy however these elements may be considered through the development application process and based on the merits of

NO	NAME AND ADDRESS OF SUBMITTER	DESCRIPTION OF AFFECTED PROPERTY	SUBMISSION SUMMARY	CITY RESPONSE
			2. Vehicles and noisy facilities not located adjacent residences. 3. Cooking smells vented as high as possible or eliminated. 4. Security personnel for all trading hours after 9pm. 5. Located generally away from homes.	each development.
8	L Jones 4 Toona Gardens EDGEWATER WA 6027	4 Toona Gardens EDGEWATER WA 6027	Comment To support strategies to increase employment and residential opportunities an upgrade of infrastructure such as roads, schools and social support networks would be required. Current access into and out of Edgewater is compromised due to traffic congestion particularly during peak periods.	Noted. Infrastructure upgraded would need to be considered on a case by case scenario as each centre serves a different purpose and not all issues may be applicable to each centre. The comment is noted, however, specific access issues are not part of the draft strategy content.
9	J Barnett 21 Gilmerton Way GREENWOOD WA 6024	10 Pimelia Court GREENWOOD WA 6024	Comment. Supports the draft local commercial strategy 100% and believes it would encourage a vibrant community. Zoning and rezoning should be consistent and residential zoning codes should be clearly conveyed to local residents.	Noted.
10	V & D Skea 110 Sundowner Meander BANKSIA GROVE WA 6031	9 Allston Way CURRAMBINE WA 6027	No comment.	Noted.
11	Anonymous	Anonymous	Comment.	Noted

NO	NAME AND ADDRESS OF SUBMITTER	DESCRIPTION OF AFFECTED PROPERTY	SUBMISSION SUMMARY	CITY RESPONSE
			States we could do with more clothing shops, nail shops, lotto shops, coffee shops, a Coles, David Jones, Myers, travel agencies, shoe shops, Bunnings, a helipad, bus station, with routes through Forrest Road, direct rail to the airport, footie stadium, Starbucks, cricket pitch and a swimming pool; and a duck pond with gold fish, a skate boarding area, horse racing, and a free liquor venue every Friday night for senior card holders.	The strategy doesn't mandate specific uses to be included in centres rather the appropriate provision of retail floor space to provide for a range of uses.
12	M Howden 21/177 Dampier Avenue KALLAROO WA 6025	7/145 Harman Road SORRENTO WA 6020	Comments. Agree with what decisions you make.	Noted.
13	R & K Snape 64 Leichhardt Avenue PADBURY WA 6025	64 Leichhardt Avenue PADBURY WA 6025	Comment. Ensure that: • Contracts for cleaning the area of shops are enforced; • Security lighting doesn't interfere with residents; • Restrictions on the times delivery vans/trucks can start operation; and • Recycle bins are not an eyesore.	Noted This comment relates to proposed standards to which a centre should be developed to or operates at. While the City cannot get involved in contracts the Centre operators may have with contractors the design requirements can be addressed through the development application process.
14	M Woods 32 Transom Way OCEAN REEF WA 6027	32 Transom Way OCEAN REEF WA 6027	Comment. Has read the strategies for centres outside of the City centre, specifically Ocean Reef commercial centre where it states it is trading poorly and has potential for additional upper storey/ mixed use development.	Noted. While the draft strategy does not specifically address the issue of building height, this would be addressed either through the planning scheme or an approved structure plan for a centre. The height may vary depending on the character of a centre and surrounding

NO	NAME AND ADDRESS OF SUBMITTER	DESCRIPTION OF AFFECTED PROPERTY	SUBMISSION SUMMARY	CITY RESPONSE
			Supports the need to revitalise the centre however wants development to be restricted to two storeys. Any higher would detract from the amenity of the area and would impose additional stress on parking and traffic flow in the area especially as the centre is located opposite Ocean Reef Primary School.	developments.
15	Name and address withheld by request	Withheld by request	Comment. Is opposed to redevelopment or changes to neighbourhood centres such as Candlewood Shopping Village. Believes this hub provides important service to the local residents, particularly for convenience and access to parking. If future plans include changes to this centre for the purpose of density residential housing they believe it would diminish the sense of community and its facilities. In regard to planning and approvals for all future commercial premises within major centres such as Joondalup Shopping and Business precinct it is suggested that all new buildings provide adequate allocation for business parking (not timed paid parking), specifically for customers and service providers. Current development within Joondalup City has reduced street parking and the number of driving lanes from two to one,	There is no obligation for any landowner within a centre to develop or redevelop their site. It will be up to the landowners to consider the land use mixes for each centre which will be in accordance with the scheme requirements for the applicable zone or in some instances an approved structure plan. This comment relates to the development of the centres rather than the strategy. The provision of car parking bays will be considered at the development application stage. The parking standards will either be in accordance with the scheme or an approved activity centre structure plan where applicable. This comment relates to the development of the City Centre rather than the strategy. Street widths are one way of managing the

NO	NAME AND ADDRESS OF SUBMITTER	DESCRIPTION OF AFFECTED PROPERTY	SUBMISSION SUMMARY	CITY RESPONSE
			which significantly reduces ease of access and flow for transportation within the city centre. There is too much congestion at present. Better planning is essential for future development.	volume and flow of traffic in an area. Where the streets are narrow the speed of traffic reduces. This can be reviewed through the development of an activity centre structure plan for the City Centre.
16	B Boulter 10 Flinders Avenue HILLARYS WA 6025	10 Flinders Avenue HILLARYS WA 6025	Comment. Supports: • redevelopment and upgrading of existing commercial centres; • the inclusion of residential dwellings in commercial centres; • greater opportunities for employment within existing centres; • a reduction in car parking facilities for centres with good public transport access; • encouraging home businesses; • tourism accommodation options within existing centres; • centre expansion through increase in building height; • maintaining existing quality industrial land; • promotion of diverse land uses within centres; • discourage fragmented landowners ship and encourage lot amalgamation within centres.	Noted.
17	F & E Wade 59A Sandalwood Drive GREENWOOD WA 6024	59A Sandalwood Drive GREENWOOD WA 6024	Comment. Has been looking around Greenwood for work done by the City which has	Noted. This comment does not relate to the strategy, it is a general comment about works carried out

NO	NAME AND ADDRESS OF SUBMITTER	DESCRIPTION OF AFFECTED PROPERTY	SUBMISSION SUMMARY	CITY RESPONSE
			been done well but in their area the park with new paths has been made but left a path of asphalt between Calasta Street and Sandalwood Drive by the church. This path is well used, it's a little rough.	by the City.
18	S Galpin 12 Lofty Court WOODVALE WA 6026	12 Lofty Court WOODVALE WA 6026	Comment. Recommends: • designated parking bays for 4wd vehicles. Vision of drivers in cars reversing out of bays with a 4wd on either side is nil; • pedestrian walkways across car parks; • one way traffic; and • toilets accessible inside shopping centres.	Noted. This comment does not relate to the draft strategy content, rather it is a general comment about provisions which should be included in and around centre.
19	P & M Maszniew 4A Oceanside Promenade MULLALOO WA 6027	4A Oceanside Promenade MULLALOO WA 6027	Comments. States they live two doors south of the Mullaloo Tavern and directly behind an ugly bus shelter. They request the bus shelter be removed or made transparent. There are many problems with this bus shelter and around it such as drug taking, sleeping, drinking, fighting, mess, obstruction of line of vision for traffic, especially bikes, damage to their property, access to their property. They've complained before and it appears the problem has reduced lately but its winter and so it's a quiet time	Noted. The comments provided in the submission relate to the provision of bus stops and the frequency of public transport in Mullaloo and Hillarys.

NO	NAME AND ADDRESS OF SUBMITTER	DESCRIPTION OF AFFECTED PROPERTY	SUBMISSION SUMMARY	CITY RESPONSE
			anyway. In summer there are additional problems but especially the long time between buses and sometimes no buses on Sundays. They've taken groups of children to Hillarys Boat Harbour to catch buses on Sundays. There are no bus timetables, routes available, no Joondalup Rangers or emergency numbers. There is inadequate parking. There is adequate land for a bus stop and additional parking and freeing up of traffic flow and vision in the Mullaloo Drive, Oceanside Prom round about area which is not used at present.	
20	B & S Kiely 8 Harman Road SORRENTO WA 6020	8 Harman Road SORRENTO WA 6020	Objection. As a home owner within 100m of a shopping/commercial centre they strongly object to any further development of this centre or any further sites within this area.	Noted. The draft strategy indicates that there is limited opportunity for additional retail development for this centre.
21	D Bradley 5 Mayhill Place CRAIGIE WA 6025	5 Mayhill Place CRAIGIE WA 6025	Comment. Is supportive of rezoning of the area for high density living. Their property is suited to this type of development as it is flat, The house is situated metres from bus routes to Joondalup and walking distance to Heathridge Shopping Centre and businesses and primary school. States this proposal comes at a time	Noted. The comment is more reflective on the City's draft Local Housing Strategy.

NO	NAME AND ADDRESS OF SUBMITTER	DESCRIPTION OF AFFECTED PROPERTY	SUBMISSION SUMMARY	CITY RESPONSE
			when the expansion, housing shortage and public transport problems to the CBD areas are at critical levels and expansion and relaxation of the rules needs to be applied.	
22	E Haines 21 Timbercrest Rise WOODVALE WA 6026	21 Timbercrest Rise WOODVALE WA 6026	Comment. The management scheme seems to be of value. Trees are not needed they could block views. Speed humps would be of value leading up to the roundabout near village. Questions why the print is small on road plans.	Noted.
23	R & M Harrison 3 Copperhead Avenue PADBURY WA 6025	3 Copperhead Avenue PADBURY WA 6025	Comment. As fuel stations are closing and only operated by one console operator, they agree with the report. Small suburban shopping centres are now adversely affected by the new Sunday trading laws; ie have an IGA type operation which have been allowed to operate on Sundays, and now people are going to large shopping centres as there are more shops. With the aging population we need to look at this type of commercial operations, with medical residential needs.	Noted. The draft strategy does not propose to change retail operating hours or mandate specific uses for inclusion in a centre.
24	L Gan 44 Arnisdale Road	44 Arnisdale Road DUNCRAIG WA 6023	Comment.	Noted.

NO	NAME AND ADDRESS OF SUBMITTER	DESCRIPTION OF AFFECTED PROPERTY	SUBMISSION SUMMARY	CITY RESPONSE
	DUNCRAIG WA 6023		Feedback being sought by the City of Joondalup is appreciated. Good Council facilities.	
25	S Petterson & B Hardie 11A Carron Rise HILLARYS WA 6025	11A Carron Rise HILLARYS WA 6025	Comment. After reading the draft Local Commercial Strategy they gather that the proposal is that the only expansion to retail precincts will only be allowed for the Strategic Regional Centre – Joondalup Shopping Precinct. We strongly support this proposal. They do not support existing small neighbourhood centres expanding. Some issues they feel arise from this type of expansion range from extra traffic flow on small suburban streets, parking issues of not enough space to cater for all users (retailers, customers and delivery vehicles), too much competition for the existing small retailers; the tendency for groups of people to start congregating at these centres causing vandalism and the extra noise that may result of more eating venues being open in the evenings. As shopping centres are now open seven days a week there is enough stress on small business owners without further competition of expansion.	Noted. While competition between retailers is not a planning matter, the draft strategy outlines the retail floorspace thresholds for each centre with the intention of maintaining viable local centres that will benefit the local community. The issues raised relate to specific aspects of the development of centres which would be dealt with at the development application process.
26	Name not provided 10 Timbercrest Rise WOODVALE WA 6026	10 Timbercrest Rise WOODVALE WA 6026	Comment. Noise from warehouses, bins being left without lids on attracting crows that are	Noted. This comment relates to the existing conditions of a nearby centre rather than the draft

NO	NAME AND ADDRESS OF SUBMITTER	DESCRIPTION OF AFFECTED PROPERTY	SUBMISSION SUMMARY	CITY RESPONSE
			noise and a proper nuisance to the village. Big wagons using the back land (noisy) needs patrolling after business hours as we have had things thrown over their fence. A pillow as example as though people have slept there.	strategy content.
27	J & E Revell 4 Greenlaw Street DUNCRAIG WA 6023	4 Greenlaw Street DUNCRAIG WA 6023	Comment. Recommends that the strategy includes provisions of an adequate number of disabled parking bays as a priority at all shopping/commercial centres. Whereas most centres provide a reasonable number of disabled bays, Glengarry, a very busy shopping centre close to them, has only two bays, one near to an entrance and one further away. They are rarely vacant and available for use. A disabled person needs a wide bay to be able to fully open a passenger door of a car in order to alight and have access to a walking frame. The number of elderly persons requiring disabled bays is increasing rapidly with elderly population grown and needs to be included in planning parking bays at centres.	Noted. The provision of universally accessibly parking bays is provided for through the Australian Standards. The Australian Standards provide a minimum standard for development to adhere to, however, some existing or older centres may not provide the number of disabled bays that may now be required for a new development. Centre owners can choose to provide more bays than what is required.
28	M & M Waterfield 2 Stratford Place KINGSLEY WA 6026	2 Stratford Place KINGSLEY WA 6026	Comment. Each commercial zone needs to be looked at individually and consultation with the residents needs to be a priority. For example Kingsley shops are thriving, and has an excellent range of shops and commercial – plenty for the	Noted. The draft strategy provides an overall direction with regard to commercial development. Development within each centre will still be subject to a development approval process.

NO	NAME AND ADDRESS OF SUBMITTER	DESCRIPTION OF AFFECTED PROPERTY	SUBMISSION SUMMARY	CITY RESPONSE
			area. Green areas around the shops need to be kept as buffer zones. We do not want to live in a concrete jungle. More dense houses/ shopping centres should be looked at for new suburbs as people that like high density living can buy into those areas, and people that like high density living can buy into those areas and people who want open/green spaces can live where they want. Do not come in and make a green suburb a high density or commercial zone.	Noted. Increasing the opportunities for people to live, work and shop in the same area takes advantage of the existing infrastructure and services available in the area and in many cases ensures the feasibility of the services to they can continue to be provided.
29	K & P Smith 70 Marina Boulevard OCEAN REEF WA 6027	70 Marina Boulevard OCEAN REEF WA 6027	Comment. Feels that consideration of shopping centres especially local centres next to residential dwellings should be well scrutinised. For instance the Ocean Reef Shopping Centre, believes it is owned by foreign investors, who buy for investment and do not care about keeping up appearances, progress or development. Service areas and public entry access where large trucks with refrigeration motors running for considerable time polluting the area should never be allowed so close to residential dwellings where people live and sleep. Noise levels from delivery vans from 7am and rubbish removal are very important. Neglected grounds and	Noted. The draft strategy indicates that there is some potential for additional retail floorspace at the Ocean Reef Shopping Centre. This may provide some incentive for the centre to be upgrade. The specific issues outlined in the submission would be addressed through the development approval process.

NO	NAME AND ADDRESS OF SUBMITTER	DESCRIPTION OF AFFECTED PROPERTY	SUBMISSION SUMMARY	CITY RESPONSE
			small signs erected wherever people like, surely Councils' have some rules for local shopping centres. The centre is well patronised however it does need considerable upgrade. Hopes the above will be taken into consideration when approving this type of centre in the future as this one has been badly designed for this plot of land.	
30	KW Burbridge PO Box 155 GREENWOOD WA 6024	154 Dugdale St WARWICK WA 6024	Comment. As this rezone to commercial – housing boundaries will increase buildings and population there must also be an increase in vehicle traffic which should also require road changes- bus routes etc. These existing roads which will be modified should also include 'speed humps' to curtail speeding vehicles that even now ignore 'speed limits' knowing they can get away with it – no cops have ever had speed cameras in our area (40 years plus) roundabouts are the 'start zones' for idiots. The increase in population to these areas will also increase water use, sewerage and power. Warwick is already behind with concealed power lines. Why? The increase in sewerage will also have a bearing on the existing pipe network which often blocks up already. Questions whether existing service will	The potential increase in traffic associated with development or expansion of an existing centre is considered during the development approval process. The developer has a responsibility to ensure that proposed development is capable of being appropriately serviced.

NO	NAME AND ADDRESS OF SUBMITTER	DESCRIPTION OF AFFECTED PROPERTY	SUBMISSION SUMMARY	CITY RESPONSE
			be updated to handle the increase in all areas.	
31	Angela Lu 32A The Circle WARWICK WA 6024	32A The Circle WARWICK WA 6024	Comment. In regards to the draft Local Commercial Strategy for the City of Joondalup, they understand the growth of the area is inevitable that some areas will be included in future planning for commercial use. They have no objections although the house that they occupy may not be included as the houses on the main road may be more suitable.	Noted. Noted. The draft strategy includes recommendations about promoting home businesses (which is already an option for people) this would potentially see an increase in people working from home.
32	Alan Vawser 25 Peirse Way MARMION WA 6020	25 Peirse Way MARMION WA 6020	Comment. The shopping centre started out as small and local. As it got more busy kids hang around it with skate boards. The security has not been increased as it got busier. Shopping centre management does not actively manage the shops. At the rear lolly papers and empty drink bottles are thrown on the ground daily. Shop skip bins are rarely closed and crows flying around are a common site, feeding from bins.	Noted. This comment relates to the existing conditions of the specific centre. The draft strategy is not proposed to address these issues specifically.
33	Mrs C Tinley 42 Moondarra Way JOONDALUP WA 6027	42 Moondarra Way JOONDALUP WA 6027	Comment. Still waiting for safety crossing at Moondarra Way across to the Candlewood Shopping Centre. It's been nearly four or five years since requested.	Noted. This comment does not relate to the draft strategy.

NO	NAME AND ADDRESS OF SUBMITTER	DESCRIPTION OF AFFECTED PROPERTY	SUBMISSION SUMMARY	CITY RESPONSE
34	Alan & Maureen Latter 10 Cromer Grove KALLAROO WA 6025	10 Cromer Grove KALLAROO WA 6025	Objection. Surely the laws protect us from this type of development. The added traffic to Endeavour Road could be catastrophic. We do not approve of this development.	Noted. This comment does not relate to the draft strategy, potentially this is in reference to proposed development at the Whitford City Shopping Centre.
35	GJ, MJ and MJL Shenton 5 Newby Place SORRENTO WA 6020	58A Hillwood Avenue WARWICK WA 6024	Comment. They have been advertised to as they own a property within 100m of the Greenwood Village. They advise there is a walkway through which Greenwood Village can be accessed from their property which by walking less than 300m and it is at its closest border its less than 100m away. However, properties on Hillwood Avenue in close proximity to Greenwood Village (including their own)have not been included in the 'Housing Opportunity Area' in the Local Planning Strategy in spite of the document stating that it intends to incorporate properties within 400m of the district centres including Greenwood (such as Greenwood Village). There clearly exists a mismatch between the objectives of the planning strategy and its implementation. If the objectives are to be stated and rules defined then these must be applied consistently. The consistent application	Noted. This comment is in relation to the City's draft Local Housing Strategy and does not relate to the draft Local Commercial Strategy. 58 A Hillwood Avenue is located within Housing Opportunity Area 2.

NO	NAME AND ADDRESS OF SUBMITTER	DESCRIPTION OF AFFECTED PROPERTY	SUBMISSION SUMMARY	CITY RESPONSE
			of the rules would lead to the inclusion of our property at 58A Hillwood Avenue and others in close proximity in Hillwood Avenue in the Housing Opportunity Area. They strongly support the recommendations of the Draft Commercial Strategy that the structure and context of the District Planning Scheme should be revised and be consistent with the Model Scheme Text.	 Noted.
36	Mr SS Reed 3 Drakes Walk SORRENTO WA 6020	3 Drakes Walk SORRENTO WA 6020	Comment. Is against development of retail/mixed business/office/residential being over 3 storeys in height especially within 300m of the beach front. Believes all parking for development should be on site and not to be inadequate so that street parking becomes a problem.	Noted. Currently, development of commercial buildings along the coast would be subject to the City's *Height of buildings within the coastal area (non residential zones)* policy or where applicable an activity centre structure plan. Any redevelopment of a centre would need to be in compliance with the parking provisions of the scheme or relevant structure plan.
37	GM & T Peters 24 Burragah Way DUNCRAIG WA 6023	24 Burragah Way DUNCRAIG WA 6023	Comment. Supports the strategy and direction outlined in the draft, of specific importance is the distinction that large centres should be comprehensive satellites featuring most if not all retail and small commercial enterprises. Concurrent with that is a philosophy that	Noted.

NO	NAME AND ADDRESS OF SUBMITTER	DESCRIPTION OF AFFECTED PROPERTY	SUBMISSION SUMMARY	CITY RESPONSE
			higher density housing together with effective transport would be of substantial benefit to the community. Contrastingly that development (higher density housing) is the need for contained small retail and service centres. Requests the current local small centres servicing a mature market are not disturbed.	
38	Robert & Kerry Reverzani PO Box 485 GREENWOOD WA 6924	145 Coolibah Drive GREENWOOD WA 6024	Comment. Is in favour of the draft Local Commercial Strategy. They are located across the road from Coolibah Plaza which has become very busy over the past few years so allowing commercial development of nearby houses like theirs would open up opportunities for offices and restaurants to provide local employment. The option of redeveloping their property to a mix of commercial with a studio style residential living is very appealing to them. Has strong views on development possibilities for Whitfords City Shopping Centre which could be a high rise complex to provide executive style ocean view apartments and office space above the existing shopping centre.	Noted.
39	B & Jones	18 Goldfinch Loop	Comment.	Noted.

NO	NAME AND ADDRESS OF SUBMITTER	DESCRIPTION OF AFFECTED PROPERTY	SUBMISSION SUMMARY	CITY RESPONSE
	18 Goldfinch Loop WOODVALE WA 6026	WOODVALE WA 6026	Lives within 100m of the Woodvale Shopping Centre. Requests that residents living close to the named centre should also be afforded similar impact consideration as any future development of the centre has the potential to reduce the amenity of residents whose properties adjoin the centre. Believes as a minimum any future development should take into account the following points: • Nature of development • Expansion of retail floor space • Residential development within the shopping centre confines • Proximity of future buildings to adjacent residential properties. • Hours of operation, if night activity other than retail is required • Noise abatement/controls • Light intrusion/spillage • Buffer zones/setbacks from centre boundaries • Height of new building/structures. Any further commercial development of the Woodvale Shopping Centre should be limited and not necessarily be dependent on the presence of a single larger retailer generating the bulk of customer visitations.	Noted. The draft strategy deals with high level planning and development consideration. These elements raised would need to be considered at the development application process if and when the City receives an application for the centres. Noted. As Woodvale shopping centre is identified as a District centre under State Planning Policy 4.2 a structure plan would be required to be approved prior to any major development at the centre. It would be largely up to the applicant to propose the type and scale of the development and provide sufficient justification

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				for the proposal for the City's consideration.
40	R Repke 1 Pittwater Close KALLAROO WA 6025	1 Pittwater Close KALLAROO WA 6025	Comment.	Noted.
			Requested to know why the preparation of the report was outsourced and the cost of the report.	The preparation of the draft Local Commercial Strategy was outsourced as specialist retail analysis and modelling is required to develop this document. The costs are outlined in the Council report.
			Believes the strategy refers to too many references to other law, rules and regulations which the public are not familiar with therefore they would be unable to provide comment on the document.	The references to other policies, strategy and legislation are essential as these documents all influence the development of the draft strategy and provide the context for which is should be developed.
			Questions why the City needs to be concerned with competition between suburbs.	The draft strategy isn't about competition between suburbs rather it is about providing goods and services to the local community in a accordance with the retail hierarchy outlined in State Planning Policy 4.2.
			Believes the plans for the future commercial development of the City are too ambitious. If the plans work out the City will have to accommodate an increasing number of residents and business people.	The recommendations of the draft strategy are aimed at providing employment opportunities for the City's residents as well as increasing the number of services available.
			Is opposed to infill and believes the suburbs should remain more garden like and infill should be in the CBD, train stations and shopping centres with underground parking.	Current planning strategies support residential infill in appropriate locations.

NO	NAME AND ADDRESS OF SUBMITTER	DESCRIPTION OF AFFECTED PROPERTY	SUBMISSION SUMMARY	CITY RESPONSE
			Requests the City establishes a tree register. Believes that one or two high rise buildings of up to 20 floors with shops, office, residential, restaurants should be permitted at Whitfords shopping centre and Warwick shopping centre. Believes that people should live in Joondalup but work elsewhere.	This is not within the scope of the draft strategy. The submitters view is noted. The purpose of activity centres is to provide places for people to live and work so they don't have to leave the city for work. Activity centres aim to be sustainable by providing a mix of land uses and employment opportunities to meet the needs of the community.
41	Equation Pty Ltd 3 Turner Close DUNCRAIG WA 6023	Lot 146 Padbury Circle and Lots 147 & 148 The Plaza SORRENTO	Comment. The submission provides a summary of previous discussions with City officers, regarding the future redevelopment of the site. Asks whether Council will consult with the owners of the properties that are located within the centres before making decisions on the draft Local Commercial Strategy. States there are problems in relation to the availability of parking in and around the Sorrento Plaza.	Noted. Noted. Consultation on the strategy with landowners within and surrounding the commercial centres was undertaken. This comment doesn't relate to the draft strategy content, rather it is a comment about exiting conditions at a specific centre.
42	Landcorp Level 6 Wesfarmers House		Comment.	Noted.

NO	NAME AND ADDRESS OF SUBMITTER	DESCRIPTION OF AFFECTED PROPERTY	SUBMISSION SUMMARY	CITY RESPONSE
	40 The Esplanade PERTH WA 6000		Supports the Joondalup town centre as being the key commercial node with surrounding supporting nodes. Supports the findings of the strategy which warns against significant expansion outside of the City Centre and that secondary nodes such as Whitfords, could cause significant trade implications for other local areas including Currambine, Padbury, Hillarys, Mullaloo, Kingsway and Girrawheen. Supports the recommendation to encourage developments which increase employment opportunities close to living places as well as increasing diversity of employment mix within the City Centre. In particular the encouragement of small format commercial and retail opportunities which will aid in the diversification of use within the City Centre.	All comments are noted.
43	B &J Newcombe address withheld by request	With held by request.	Comment. Lives within 100m of the Whitfords City Shopping Centre and supports the upgrading of the present centre with the inclusion of department stores. Suggests a rooftop restaurant with ocean views should be included in the development.	Noted. This is something the individual landowners may consider as part of a development application. The draft strategy does not identify specific land uses for any centre.

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			Is against any buildings higher than 3 storeys plus underground parking relative to the existing height of the adjacent Whitfords Avenue. Anything higher would be a visual intrusion. Is against the cost of the provision of low cost housing concentrated in and immediately around the shopping centre as this would skew the socio-economic level of the immediate and surrounding areas to the detriment of those already living there. Whilst they see the need for low cost housing they believe it should be either scattered in small developments amongst existing communities or any large scale development should be in the new communities being built to the fringe of the City of Joondalup or City of Wanneroo with new facilities built in. Would object to any proposal which excludes St Mark's school site from the boundary of the Whitfords Activity Centre as they believe this is an asset which greatly enhances the feel of the area.	Development provisions for the Whitfords activity centre will be provided for through a structure plan, not specifically identified through the draft strategy. The submitter's view on the location of low cost housing is noted. The draft strategy does not address residential development. The comment is noted, however, is more relevant to the Whitford Activity Centre Structure Plan.
44	Urbanplan PO Box 1820 FREMANTLE WA 6959	2 Padbury Circle SORRENTO WA 6020 136 A- 136B, 134, 130, 126 West Coast Drive SORRENTO WA 6020	Comment. Believes the modelling used for the strategy is simplistic and outdated. Recommends a performance based	Noted. As a result of the submissions received during the advertising period the draft strategy has been reviewed by an independent economic consultant and adjusted accordingly.

NO	NAME AND ADDRESS OF SUBMITTER	DESCRIPTION OF AFFECTED PROPERTY	SUBMISSION SUMMARY	CITY RESPONSE
		1 Raleigh Road SORRENTO WA 6020	approach to retail floorspace allocation. Recommends increasing the permissible retail floor space for the Sorrento local centre to 2,500m².	No changes to the retail threshold are proposed for this centre as a result of the independent review. However, land owners/applicants can propose additional retail floorspace above the threshold where justified by a Retail Sustainability Assessment.
45	J & S Davis 4A Raleigh Road SORRENTO WA 6020	4A Raleigh Road SORRENTO WA 6020	Comment. While the strategy is general they hope that when implemented the specifics of individual centres are taken into consideration. For example, existing floor space, traffic flow, parking, density of surrounding houses and opinions of residents. Believes any consideration of any new plans and/or redevelopment of commercial centres must be sympathetic to the environment they exist in and that there is a complementary integration between location, local residents and commercial interests. Hopes they will be informed of any future planning decisions regarding their local centre. If it wasn't for the generosity of the owners of two vacant lots near the centre, the parking situation would be far	Noted. Noted. The specific development provisions for the centre will be guided either by the scheme or a structure plan. Noted. These points will be taken into consideration through the development of a structure plan or the assessment of a development application. The nature, scale, and compliance with town planning scheme provisions will determine whether public consultation is required for a particular development proposal. Noted.

NO	NAME AND ADDRESS OF SUBMITTER	DESCRIPTION OF AFFECTED PROPERTY	SUBMISSION SUMMARY	CITY RESPONSE
			worse.	
46	R & M O'Mara PO Box 2254 MARMION WA 6020	7 Raleigh Road Sorrento WA 6020 122 West Coast Drive SORRENTO WA 6020	Comment. They are strongly in favour of at least 1,300m² of indicative commercial floor space being available by 2026. States: • The existing hub is convenient, accessible and has multiple uses, mainly in food and beverage area. • Serves local residents as well as beach goers, passing trade and patrons from the Sorrento Beach Resort (local, domestic and overseas) • Customers, employees and businessmen can walk, cycle, drive or catch public transport. • Is an example of effective decentralisation with some amenities not available in larger centres such as Sorrento Quay and Marmion Village shopping centre. • Operates seven days a week catering for daily/weekly needs. • As infill continues the importance of the centre will grow particularly due to the proximity to a housing opportunity area. • Redevelopment of the commercial hub could satisfy greater residential and commercial integration.	Noted.

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			• Provides local employment. • Current premises is fully utilised with vacancies being short term only.	
47	L Tiede 5 Matisse Way KINGSLEY WA 6026	5 Matisse Way KINGSLEY WA 6026	Comment. Is against large format retail at the Moolanda Boulevard commercial centre because it would increase noise and traffic. The currently live in a quiet area and any changes would raise noise levels, increase times in which noise levels occur and increase traffic seven days a week. Tall buildings would cut out morning light. Noise around large format retail areas is very discordant, intrusive and disruptive as opposed to the current birdsong.	Noted. The comments are noted, however, are in regard to specific elements related to the development of the centre rather than the draft strategy.
48	M Sideris 12 Page Drive MULLALOO WA 6027	12 Page Drive MULLALOO WA 6027	Objection. The document makes no references whatsoever to the community, the ratepayers. Disagrees that only Part B of the strategy is available for comment without Part A being available. Believes that comment can't be made on Part B	The strategy was put out for public consultation in order to receive community feedback. Many of the recommendations of the strategy will impact the landowners directly rather than the broader community. The broader community will have, where applicable, the opportunity to comment on future development applications and structure plans. Feedback was primarily sought on the recommendations of the draft strategy rather than the methodology used, relevant

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			without reference to Part A. Considers this approach to be unprofessional and extremely improper.	legislation or the existing policy context.
			Believes the same applies to all the other documents mentioned in Part B not being included as available information so informed comment can be made.	Whilst it is not necessary to read Part A in order to comment on the proposed recommendations provided in Part B, Part A formed part of the attachments to the Council report which is publicly available. All the other documents were and are publicly available, either from the City (where produced by the City) or the applicable body that produced these documents.
			Disagrees with the attempt to conduct a general increase to retail net area without a fully informed comparative process. Believes that Part A and Part B are in complete disregard of the available plot capacity to support a significant increase without having a dramatic impact on the adjacent residential locality amenity.	This comment is in relation to the proposed indicative retail floor space recommended for each centre. The proposed retail floorspace is a recommended threshold, not a right or requirement to develop to that threshold. All other development provisions would need to be considered to such as the provision of car parking and building setbacks. The indicative retail floorspace cannot be viewed in isolation of the other development requirements.
			Refers to the case trialled in the Supreme Court where it was stated and supported by the City that 500m² would not affect the amenity of the locality and any further expansion would not be supported.	This comment relates to a previous development application and not the draft strategy currently being considered.
			Finds it interesting that Part B does not recommend the same significant	The recommendations vary for all centres

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			changes for this lot where it has been recommended for other similarly classified centres. Disagrees with the methodology of identifying commercial centres as stated in Part B as they are not directly referenced against stated lot references. This lack of definitive information, as clearly set out in DPS 2 denies proper and informed comment to be made at this stage. Disagrees with any strategy or policy that the City intends to adopt that can be subject to manipulation or flexible interpretation as this denies ratepayers and the community consistency of application, consistency of policy application and certainty of protection of amenity of the locality. Part B of the Local Commercial Strategy lacks the necessary information to provide the necessary levels of comfort or reassurance for a new long term City of Joondalup commercial strategy.	depending on the role, function and capacity of the centre. The commercial floor space is no longer outlined in Schedule 3 of the City's District Planning Scheme No .2. This was removed to align the Scheme with SPP 4.2. The strategy recommendations should they be adopted will now guide commercial development. The strategy provides direction for the potential implementation of provisions within both the planning scheme (statutory provisions) and through policy. It is considered that the draft strategy provides the appropriate guide to the distribution of retail services in the context current state planning policies.
49	Flint Moharich for Lend Lease Suite 3 70 Angelo Street SOUTH PERTH WA 6151	Lakeside Joondalup Shopping Centre. 420 Joondalup Drive Joondalup WA 6027	Refer Attachment 5.	
50	Dr P Nugawela 126 Coolibah Drive	126 Coolibah Drive GREENWOOD WA 6024	Comment.	Noted.

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	GREENWOOD WA 6024		Their property shares a common fence with the proposed development. They support the proposed development and would like to participate in the consultation process.	
51	M Macdonald 5 Mair Place MULLALOO WA 6027	5 Mair Place MULLALOO WA 6027	Objection. Believes Part A of the strategy should have been advertised with Part B. Objects to comments regarding the proposed Ocean Reef Marina being included in the strategy given the development has not received any proper environmental assessment. Agrees that: • the District Planning Scheme should be aligned with the Model Scheme Text. and Local Planning Manual guidelines, SPP 4.2 and R codes. • the aims and objectives should include a separate set of economy and employment objectives such as promoting Joondalup City Centre as the Strategic Regional Centre, promote development which increases employment opportunities • Maintain industrial zoned land for industrial use. • Non residential setbacks and parking should be reviewed.	Feedback was primarily sought on the recommendations of the draft strategy rather than the methodology used, relevant legislation or the existing policy context. As planning is progressing for the Ocean Reef Marina it is appropriate to acknowledge this in the draft strategy. Noted. This is not necessary as this is already captured in the recommendations for the City Centre as well as in other strategies being developed by the City. Any development on the Mullaloo Tavern site would be subject to a development application

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			• Structure plans should consider street frontages. • Activity centre structure plans are prepared and endorsed by the WAPC where required under SPP4.2 Disagrees with: • Mullaloo Tavern being able to increase retail floor space to 1500m². • Part B not including lot sizes. • Schedule 3 of DPS 2 being removed. • Optimising tourism and local recreations opportunities along the coast. • The provision of 12,300 new dwellings and supporting an additional 20,000 people in the City in the CBD, HOA's and infill sites. • Provisions for home based businesses	and the provisions of the scheme. It is not necessary for Part B to included lot sizes, it does not add any additional value to the recommendations. Schedule 3 of DPS 2 has already been removed from DPS2. Optimising tourism and local recreation opportunities along the coast is will encourage visitors to the City as well as support the existing opportunities. The provisions of addition dwellings is consistent with the City's Local Housing Strategy which has been endorsed by the City and is pending endorsement by the Department of Planning and the Western Australian Planning Commission. Home based businesses are already able to be considered in accordance with the provisions of DPS2.
52	Macro Plan Dimasi Ground Floor 12 St Georges Terrace PERTH WA 6000	21 & 57 Joondalup Drive EDGEWATER WA 6027 To be read with submission by R Pawluk	Refer Attachment 5.	
53	Urbis 1st Floor 55 St Georges Terrace PERTH WA 6000	Westfield Whitfords City 470 Whitfords Avenue Hillarys WA 6025	Refer Attachment 5.	
54	W Trimble	16 Goldfinch Loop	Comment.	

NO	NAME AND ADDRESS OF SUBMITTER	DESCRIPTION OF AFFECTED PROPERTY	SUBMISSION SUMMARY	CITY RESPONSE
	16 Goldfinch Loop WOODVALE WA 6026	WOODVALE WA 6026	No high rise buildings.	Noted.
55	City of Wanneroo Locked Bag 1 WANNEROO WA 6065		Comment. Acknowledges the importance of working with the City to achieve the employment self sufficiency target and maintain the hierarchy of the centres. Acknowledges the role of Yanchep Strategic Metropolitan Activity Centre as a future economic anchor for the North West Sub-Region, alongside Joondalup City Centre and the complimentary role of key employment centres within the City of Joondalup and City of Wanneroo. Agrees with and acknowledges that the rate of employment growth required within the Joondalup City Centre needs a more strategic approach. Agrees and supports the themes, vision statements, and strategies contained in Section 3 of the strategy. In particularly they support the points regarding the encouragement of lot amalgamation and restricting strata titling within activity centres. Agrees it is important for the City of Joondalup to retain industrial use floorspace. Where industrial businesses	The submitter's comments are noted.

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			cannot be appropriately located within the City of Joondalup, the City of Wanneroo is keen to promote and encourage business location in either Wangara or Neerabup Industrial Areas. Supports the inclusion of short stay accommodation in or around commercial centres. Supports and agrees with Section 4 of the draft Strategy particularly in regard to aligning the scheme with the model scheme text. Recommends the City require lower level activity centres to develop a structure plan particularly where more than one owner exists.	
56	A Moore PO Box 4157 WEMBLEY WA 6913	20 Addison Way WARWICK WA 6024	Comment. Agrees with basic premise to create employment in areas with established commercial centres. Traffic management is a specific concern surrounding Warwick Grove particularly the main points of access on Beach and Erindale Roads. Dorchester Avenue is already carrying too much through traffic to the shops. Believes that with an older population in the suburb due concern must be made with the types of employment created	 Noted. Traffic management will need to be considered with any further development or redevelopment of the centres. This will occur through the development application process and/or structure planning process. Noted. One of the aims of the strategy is to create employment opportunities which may included developing employment self

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			and social consequences.	sufficiency within activity centres or promoting home based businesses.
57	D Blackburn Address not provided	Address not provided	Comment. Questions where the Local Planning Strategy, Local Economic Development Strategy Local Housing Strategy and State Planning Policy 4.2 can be viewed/obtained. Questions why residents haven't been consulted on the draft Local Housing Strategy. Believes the 100m advertising radius around commercial centres was arbitrary. Believes Part B focuses on facilitating developers and meeting State Government targets rather than setting targets agreed to by the community. Believes the targets set for employment self sufficiency only take into consideration past and present data and ignore future patterns. Believes the implementation of SPP4.2 should involve major community consultation as residents will be opposed to the densities referred to in SPP4.2.	These documents were available on the City's website. Consultation for the City's draft Local Housing Strategy was undertaken in 2010 by way of letters to over 65,000 landowners and residents within the City. There were also notices in the local newspapers and on the City's website. The strategy has since been modified and re-advertised and referred back to the WAPC for consideration. The purpose of advertising the draft strategy is to seek public comment on the proposed recommendations. To consider future patterns for employment self sufficiency would be speculation as the employment patterns of the future are unknown. The draft strategy does not propose density changes.

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			Feels development in the City Centre will be at the cost of the environment and availability of open space. States that commercial land owners should make retail land uses viable rather than removing the retail land uses and replacing them with more viable land uses such as aged persons dwellings. Is concerned that reduced street frontages and setbacks will be minimise or eliminate open and green space. Believes residents should be alerted to the fact that through SPP4.2 there is potential impact on their current residential amenity.	The draft strategy does not deal with specific development proposals and consequently there is no proposal within the draft strategy for development on the public open space within the City Centre. The submitter's view is noted. Commercial development will still be required to meet the scheme and structure plan requirements for landscaping. SPP4.2 is a policy which sets targets for the development of commercial centres. The policy itself will not result in changes to the amenity of an area. It is the subsequent strategies, structure plans and developments which have the potential to change the character of an area. Future structure plans, strategies and major development applications will be advertised for public comment as and when they arise.

NAME AND ADDRESS OF SUBMITTER	Flint Moharich for Lend Lease Suite 3, 70 Angelo Street, SOUTH PERTH WA 6151
DESCRIPTION OF AFFECTED PROPERTY	Lakeside Joondalup Shopping Centre, 420 Joondalup Drive, Joondalup WA 6027

Summary of submission	Comments from City's Consultant
Planning and economic consultants were engaged by Lend Lease to prepare a response. Generally they indicated support for the strategy.	
Their concerns with the draft LCS include: • the study area inappropriately extends south into the City of Stirling • the future retail supply in the northern coastal half of the City of Wanneroo in the draft LCS is understated, particularly in relation to the proposed offering at Alkimos • the distribution of projected population growth in the study area, namely its concentration in the City of Wanneroo has not been appropriately considered, resulting in the floorspace requirement of the City of Joondalup being overstated. They generally agreed with the draft LCS in terms of: • the scale of the current and future shortfall in retail floorspace in the study area • The primacy of the Joondalup City Centre in terms of retail offering • The limited role of Westfield Whitfords City in meeting the current and future floorspace shortfall	The study area/trade area defined in the submission is considered appropriate. It encompasses the City's of Joondalup and Wanneroo but does not extend south into the City of Stirling towards the centres of Karrinyup and Innaloo.
To determine the current and future retail population for the Study Area, a floorspace-to-population ratio based assessment was undertaken.	The methodology used is different from that used for the draft LCS. However, as information in the draft LCS does not allow modelling to be replicated, this is considered appropriate. The approach used is not considered appropriate in the circumstances, due to: • the ratio based approach is commonly used as a 'rule of thumb' and is not sufficiently detailed to be used as the basis for the draft LCS • It relies on the universal application of a generic national average (2.2sqm per person) and does not take into consideration the differences in the WA retail environment that have existed or local retail conditions. • The ratio applies to all retail formats (including bulky goods) making the identification of shop retail needs, difficult to determine • The approach assumes that retail demand per person is the same across Australia and throughout the Study Area, therefore not considering local demographics, household income and associated expenditure patterns.

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Summary of submission	**Comments from City's Consultant**
The floorspace to population ratio applied was 2.0sqm per person (which is adjusted down from the national average of 2.2sqm to allow for expenditure leakage). This is above the current rate of 1.7sqm per person within the study area, with this shortfall used to justify the assertion that the study area is currently undersupplied in terms of retail floorspace.	The ratio for the City of Joondalup is currently 2.1sqm per person (note that this includes bulky goods), reflecting the presence of the Joondalup Strategic Metropolitan Centre. Applying the approach used in the submission this indicates that there is currently no shortfall of retail floorspace in the City.
The submission asserts the current rate of 1.7sqm aligns with the ratio used in the draft LCS of 1.63sqm per person, when bulky goods are excluded.	If this is the case, then there is likely to be a current shortfall in retail floorspace.
The 2.0sqm per person ratio is identified by the economic consultant as a medium term target for the Study Area.	This means that the immediate meeting of any "current" shortfall is not appropriate and that it should be addressed over time in response to improving household income and expenditure levels within the broader Study Area.
The Needs Assessment undertaken also allows for expenditure from beyond the Trade Catchment of 10%.	While this is considered to be appropriate, given the presence of a Strategic Metropolitan Centre in the Study Area, there is no corresponding assumption regarding the leakage of expenditure from the Area, apart from the allowance in the floorspace ratio for the Perth Central Area.
The submission highlights that, based on calculations of current and future additional floorspace potential, the 100,000sqm of additional shop floorspace proposed under the draft LCS for the City of Joondalup represents 26% of the total need in the Study Area. This is above Joondalup's share of future population growth of 16%.	
Based on this the submission asserts that Westfield Whitfords and Centro Warwick, are not well positioned to benefit to considerable population growth within the Clarkson and Wanneroo sectors of the Study Area. Lakeside Joondalup is regarded as an exception to this within the City of Joondalup due to its status as a Strategic Metropolitan Centre with a secondary and tertiary catchment that extends into the Clarkson and Wanneroo sectors of the Study Area, where population growth is at its highest.	Noted.

NAME AND ADDRESS OF SUBMITTER	Flint Moharich for Lend Lease Suite 3, 70 Angelo Street, SOUTH PERTH WA 6151
DESCRIPTION OF AFFECTED PROPERTY	Lakeside Joondalup Shopping Centre, 420 Joondalup Drive, Joondalup WA 6027

Summary of submission	**Comments from City's Consultant**
The submission asserts that the role of Lakeside Joondalup as the primary retail offering within the Joondalup Strategic Metropolitan Centre is the appropriate location for additional Department Store offering in the Study Area in the short-to-medium term.	Agreed.
The submission asserts that Lakeside Joondalup could expand by up to 70,000sqm to a total of 140,000sqm, making it *"one of the largest and most successful shopping centres in Australia supporting a very strong activity centre".*	This amount would account for the vast majority of the adjusted shop retail floorspace demand in the Joondalup sector, raising questions regarding the appropriateness of this concentration of growth.

NAME AND ADDRESS OF SUBMITTER	Macro Plan Dimasi on behalf of various land owners in Joondalup Gate Ground Floor, 12 St Georges Terrace PERTH WA 6000
DESCRIPTION OF AFFECTED PROPERTY	21 & 57 Joondalup Drive, EDGEWATER WA 6027

Summary of submission	**Comments from City's Consultant**
A retail sustainability assessment was undertaken to *"test time impact of more intensive development of Joondalup Gate on the surrounding activity centres".* Emphasis is also placed on the broader role of the Joondalup Strategic Metropolitan Centre, within which Joondalup Gate is located.	
The submission identified City of Joondalup as the Primary Trade Area of Joondalup Gate with the City of Wanneroo forming the Secondary Trade Area (together forming the Total Trade Area). This is justified by the role of Joondalup as a Strategic Metropolitan Centre as well as the fact the bulky goods offerings generally have a more extended trade catchment than shop retail centres.	Trade Areas as defined within the submission is considered to be correct.
To calculate the current and future population for the Total Trade Area the analysis primarily used WA Tomorrow projections from the WAPC for the City's of Joondalup and Wanneroo. Additionally, consideration	These population sources vary from that used in the draft LCS and are more current.

NAME AND ADDRESS OF SUBMITTER	Macro Plan Dimasi on behalf of various land owners in Joondalup Gate Ground Floor, 12 St Georges Terrace PERTH WA 6000
DESCRIPTION OF AFFECTED PROPERTY	21 & 57 Joondalup Drive, EDGEWATER WA 6027

Summary of submission	**Comments from City's Consultant**
has been given to other population data sources including Australian Government Department of Health and Ageing and Australian Bureau of Statistics Census of Population and Housing 2011.	
The submission confirms that 90% of additional population within the Total Trade Area (primary and secondary catchment) is expected to occur in the City of Wanneroo LGA, with only minor growth expected for the City of Joondalup (due to its more established nature). Analysis of the demographic profile of the City of Joondalup revealed the fact that the primary Joondalup Strategic Metropolitan Centre varies considerably from the Perth Metropolitan average, with higher household incomes and a more multi-cultural population. These issues influence retail demand and uptake in a region. An expenditure based methodology of estimating retail floorspace demand was employed. MarketInfo2010 data from Market Data Systems, which is acknowledged as the industry standard. The analysis undertaken estimates that only 20% of retail expenditure growth in the Primary Trade Area will be in household goods commonly associated with "Bulky Goods" retail with the remaining 80% of growth comprised of food and higher order goods and services.	It is considered that the use of these population sources in the submission are appropriate, though the projection scenario of the WA Tomorrow forecasts used in the assessment has not been identified. Noted. Although not the model used for the draft LCS, this methodology is to be appropriate in considering the growth potential of the Joondalup Strategic Metropolitan Centre. These arguments are broadly agreed. The establishment of a secondary retail destination within the Joondalup City Centre would be highly beneficial to the Joondalup community by: • Providing greater diversity of retail offering within the City Centre; • Intensifying uses around the Edgewater train station in line with Transit Oriented Development principles; • Providing lower order retail floorspace for the market, allowing for a diversity of business to locate in the Strategic Metropolitan Centre than could otherwise be accommodated by Lakeside Joondalup and "High Street" development; and • Providing some retail floorspace price competition, to mitigate potential floorspace rental spikes in the future that may threaten the long-term

NAME AND ADDRESS OF SUBMITTER	Macro Plan Dimasi on behalf of various land owners in Joondalup Gate Ground Floor, 12 St Georges Terrace PERTH WA 6000
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Summary of submission	Comments from City's Consultant
	sustainability of the Strategic Metropolitan Centre. RPS agrees that this would represent a significant economic cost for the City of Joondalup, in light of the potential development capacity and character of the location.
Based on estimates of expenditure growth in the Total Trade Area, and the application of industry standard retail turnover densities, the submission estimates that an additional 192,050sqm of retail floorspace will be required in the City of Joondalup by 2026. This is significantly smaller than the estimated requirements for City of Wanneroo with 446,793sqm, reflecting the concentration of population and expenditure growth in the Secondary Trade Area. The submission argues that Joondalup Gate's proximity to Edgewater Train Station and the Joondalup Strategic Metropolitan Centre, as well as the relocation of Bunnings from Joondalup Gate to the Quadrant and the establishment of a nearby Masters store "*will provide an opportunity for Joondalup Gate to intensify its retail offering without a significant negative effect on the surrounding centres."* The submission asserts that the draft LCS's maintenance of Joondalup Gate's historical role within the retail network – that of a regionally-oriented bulky goods destination – is flawed for a number of reasons: • It fails to take into consideration the emphasis in the Draft LCS and the Joondalup City Centre Structure Plan on the Joondalup South complex and its role as the primary bulky goods destination in the Strategic Metropolitan Centre; • That maintain the current use for a further 20 years will mean that the site will have a 40 year period with no appreciable change despite its proximity to Edgewater Train Station and increased residential density in the Primary trade Area as defined in the Joondalup Local Housing Strategy; • That arguments regarding that the creation of a secondary retail destination within the Strategic Metropolitan Centre would impact the	These estimates include bulky goods and shop retail floorspace and therefore are not comparable with that of draft LCS. Additionally, no consideration is given to the existence of any current shortfall in floorspace provision or to current and future supply – only to future demand growth. As such, the estimates represent total demand growth, not net floorspace need. It is acknowledged in the submission that the analysis does not determine where the additional floorspace should be located but does not emphasise the primacy of the Joondalup Strategic Metropolitan Centre in the Total Trade Area, particularly in light of the likely delayed development of Yanchep Strategic Metropolitan Centre. It is agreed further consideration needs to be given to the role of Joondalup Gate. However, Joondalup Gate should be predominantly non food.

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delivery of higher order retail in the Joondalup City Centre and the walkable catchment of Joondalup Train Station; and • That the Draft LCS contradicts itself by arguing both against the provision of higher order retail on the Joondalup Gate site, as well as the delivery of bulky goods, due to the site's prime land character, adjoining a rail station.	
The submission argues in favour of Joondalup Gate being allowed to provide shop retail with identical zoned tenants under DPS 2 text "use table" but that such offering on the site would be of a lower order than that of the City Centre due to market forces.	Noted. The role of Joondalup Gate will be considered further as part of the development of the Joondalup Activity Centre Structure Plan.
A DFO style of development is identified as a potential use for the Joondalup Gate site, based on the complimentarily of such offering to the City Centre as well as the capacity to assist the City of Joondalup retain such expenditure currently "leaking" to the Perth Central Area.	Noted. The role of Joondalup Gate will be considered further as part of the development of the Joondalup Activity Centre Structure Plan
The submission also outlines a number of travel, small business growth, retail floorspace price competition, business linkage and employment and investment benefits of the evolution of Joondalup Gate as a secondary retail destination in the City Centre. It argues that such a destination is in line with the Joondalup Economic Development Strategy 2008-2012 and the draft LCS.	Noted. The role of Joondalup Gate will be considered further as part of the development of the Joondalup Activity Centre Structure Plan
The report argues that failure to provide the opportunity to plan for higher and better use of that Joondalup Gate site in the Draft LCS will result in the site becoming vacant in 2016 with the relocation of Bunnings.	Noted. The role of Joondalup Gate will be considered further as part of the development of the Joondalup Activity Centre Structure Plan

NAME AND ADDRESS OF SUBMITTER	Urbis on behalf of the land owners for Westfield Whitford City 1st Floor, 55 St Georges Terrace, PERTH WA 6000
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The draft LCS does not align with the principles and intent of SPP 4.2. The draft LCS employs overly simplistic methodologies for determining the retail expansion potential of centres within the network. The draft LCS provides insufficient information for assessing the validity of modelling undertaken. The draft LCS incorrectly assumes the shop retail market is sufficiently supplied currently. The draft LCS does not take into consideration the effects of Sunday trading and likely understates the future growth in demand for shop floorspace.	It is considered that despite its serious shortcomings, the draft LCS does meet the minimum requirements of SPP 4.2. In particular, it is argued that the treatment of retail floorspace in the draft LCS is an appropriate implementation and operationalisation of the SPP 4.2 principles. It is broadly agreed that the approach employed by in formulating the draft LCS requires review. The examples provided in the submission are noted. Additionally RPS agrees that the use of the gravity model in the draft LCS – and the limitation in the number of variables (travel distance and centre size) – raises questions as to the appropriateness to the results. However, it is again acknowledged that the use of a gravity model in the Retail Sustainability Assessments is the preferred approach of the Department of Planning. It is agreed that there is insufficient information for the gravity model to be interrogated. This is particularly relevant for Whitfords as the draft LCS claims the centre has been subject to scenario testing at various centre sizes, however detail of this scenario is not provided. Noted Noted
The development potential of individual centres are not considered in the prescriptive approach adopted.	Disagree. The retail floorspace levels identified in the draft LCS do not represent maximum shop floorspace akin to caps under the previous Metropolitan Centres Policy. Instead, the indicative maximum shop floorspace figures represent "Thresholds" for the planning and approvals processes – namely that Centres seeking to expand above the associated identified "Threshold" must demonstrate, through an appropriate Retail Sustainability Assessment the viability and impact of such expansion.

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	It is acknowledged that this distinction is not clearly defined in the draft LCS. The draft LCS has been amended to provide greater clarity on this issue and remove potential sources of confusion (such as the use of the word "maximum").
The floor space restriction of 50,000sqm placed on Whitfords under the draft LCS will prevent the centre performing its proper role and function within the hierarchy. The submission provides analysis on floorspace requirement that questions the accuracy of the draft LCS estimates of current shop floorspace supply and demand. The submission notes that a Retail Sustainability Assessment was completed in November 2010 regarding the potential expansion of Whitfords. According to the Retail Sustainability Assessment in 2010, there is currently capacity for an additional 10,000 to 15,000 people in Whitfords	It is agreed that Whitfords is likely to continue to play an important role in servicing residents beyond its Main Trade Area. This reflects the proximity of the Centre to the coast and to Hillarys Boat Harbour and the general quality of the shopping experience with respect to its competitors. These factors were not considered in the gravity model for the draft LCS. The analysis conducted is at a very high level and there is limited information provided on the expenditure data utilised, the source of the current and future population projections and critical assumptions regarding expenditure growth. Arbitrary assumptions regarding the share of current shop floorspace provided in the City of Joondalup that is supported by Joondalup residents (70%), as well as the floorspace escaping from the City of Joondalup (25%) are applied without any explanation or justification. This calls into question the accuracy and validity of analysis. A copy of the report was provided to RPS in light of the reference made in the submission. It is acknowledged that the assessment is now over two years old. However, there are a number of issues with the report that raise concerns regarding the assertions made by in the submission on the draft LCS submission. This includes the extent of the trade area used, the use of forecast population data, and application of a universal per capita floorspace rate and limited allowance to the secondary centre of Alkimos. Overall, it is not regarded that the results of the conclusions of Retail Sustainability Assessment November 2010 as sufficiently convincing of the need for significant expansion of Whitfords. Notwithstanding it is believed that Whitfords is likely to continue to play an important role and total retail turnover originating from outside its Main Trade Area could increase overtime. The capacity identified for Whitford is also supported by the fact that SPP 4.2 establishes that Secondary Centres should have a Main Trade Area population of

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Main Trade Area before reaching this maximum. This would further support an increase in the retail floorspace size of Whitfords City.	up to 150,000 people.
The submission argues that the two Department Stores required for the broader North West Corridor in the short-term should be split between Whitfords City and Lakeside Joondalup.	The viability of a Department Store at Whitfords is questioned in light of the proximity of its Secondary South Trade Area to Karrinyup Secondary Centre. The fact that Karrinyup Secondary Centre, not Westfield Innaloo is home to Department Stores located in the City of Stirling has implications for how far south Department Stores in the City of Joondalup should be located. However there is nothing that would preclude a Department Store from locating at Whitford.