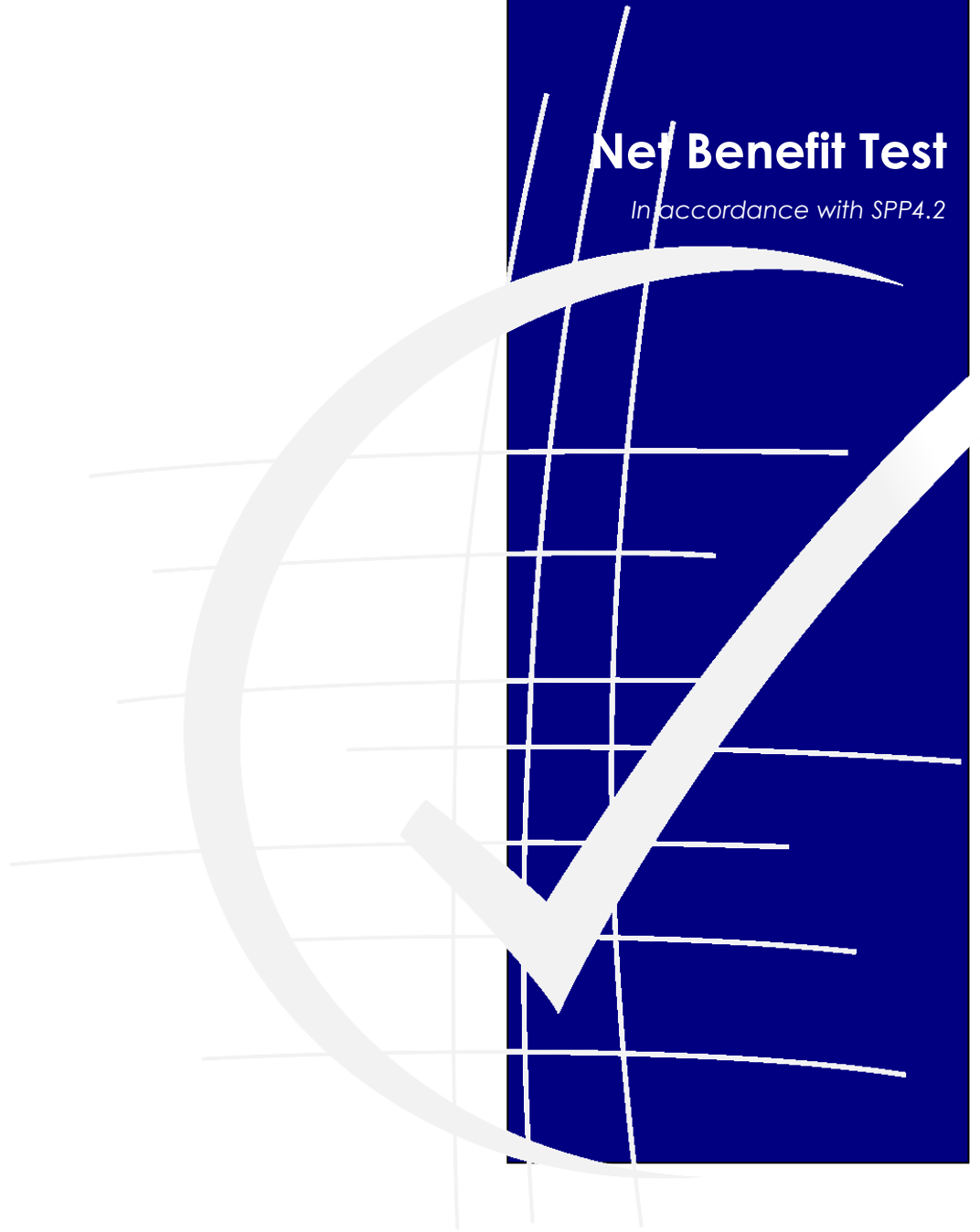


Taktics4
Proposed Activity
Ascot, City of Belmont

Net Benefit Test

In accordance with SPP4.2



Project

Project name	Ascot Centre
Project number	2360
Prepared for	Perth Racing / Rowe Group

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Acknowledgement of Country

Taktics4 acknowledges the First Nations people as the custodians of the land which is the subject of this assessment. Taktics4 recognise and respect their continuing culture, and Elders past, present, and emerging.

CONTENTS

1. EXECUTIVE SUMMARY	4
2. INTRODUCTION	6
2.1 Purpose	6
2.2 Out-of-Centre Development	7
2.3 Major Development	7
2.4 Activity Centre Uses	8
2.5 Scope and Methodology	8
2.6 Modelling Method	8
2.7 Measuring Impact	9
3. ACTIVITY CENTRE NETWORK	10
3.1 Strategic / Secondary Activity Centres	10
3.2 District Centres	10
3.3 Neighbourhood/Local	11
3.4 Service Commercial Precincts / Other Centres	12
3.5 Summary	12
4. TRADE AREA	15
4.1 Market Behaviour	15
4.2 Delineation of Trade Area	16
4.3 Population	16
4.4 Resident Demographic Profiles	18
4.5 Resident Retail Spending Profile	19
4.6 Resident Retail Spending Capacity	20
5. PART A – LOCAL CENTRE	21
5.1 Market Share	21
5.2 Sales Contribution	22
5.3 Sales Potential	23
5.4 Sales Impact	25
5.5 Sales Growth	27
5.6 Summary	28
6. PART B - BULKY GOODS	29
6.1 Market Share	29
6.2 Sales Potential	30
6.3 Sales Impact	31
6.4 Sales Growth	33
6.5 Summary	34
7. NET BENEFIT TEST	35
7.1 Employment	35
7.2 Impact	37
7.3 Impact on Activity Centre Hierarchy	37
7.4 Compatibility	37
7.5 Environment	37
7.6 Infrastructure	38
7.7 Strategic Alignment	38

1. EXECUTIVE SUMMARY

This assessment considers the net benefit of two proposed activity categories proposed in Ascot, in the City of Belmont. The assessment has been prepared in response to the policy requirements established by State Planning Policy 4.2. This Net Benefit Test assesses:

1. Proposed local centre of 3,400 sqm NLA (PLUC 5 – 'SHOP')
2. Proposed bulky goods precinct of 9,600 sqm (PLUC 6 – 'OTHER RETAIL')

Proposed Local Centre

The assessment reveals that the proposed local centre activity will generate a Net Benefit by:

- being sustainable from 2026 – satisfying an existing resident trade area and filling an existing demand/gap/need in the market
- having low – insignificant impacts on surrounding activity network – with any impacts likely to be offset by potential sales growth generated by additional resident population and spending over the next 15 years.
- creating up to 85 full time equivalent jobs,
- reducing the number of vehicle km required to be travelled by residents in the immediate trade area.

Residents in Ascot and Belmont:

- are the communities most likely to experience the benefit from the proposed activity.
- are estimated to account for 40% of total sales / trips at the proposed activity.
- do not currently have access to a full line supermarket-based centre within 2.5 km.
- travel up to 2.5 km each way (5 km round trip) every time they access their full line supermarket needs.

Proposed Bulky Goods

The assessment reveals that the proposed activity will generate a Net Benefit by:

- complementing the existing offer in the vicinity
- being accessible through strong north south and east west connections.
- creating up to 120 jobs.
- having low/insignificant impacts on existing and planned activity precincts – which will subsequently be offset by planned population and retail spending growth in the trade area.

Net Benefit

Subsequently, the proposed activity:

- will not impact the integrity of the surrounding activity centre network – and as such will not have any negative impact on existing or planned public or private investment in the trade area.
- will reduce the amount of trip kilometres that Ascot and Belmont residents must travel each year to satisfy their daily/weekly and bulky goods shopping needs.
- will save over 530,000 to 700,000 trips p.a. to centres outside their trade area
- will save between 40 and 50 trips per person per annum.

- will save between 2.7 M km p.a. and 3.5 M km p.a. of vehicular travel per annum
- is consistent with the objectives and outcomes of SPP 4.2.
- is aligned with local planning strategies.



2. INTRODUCTION

This assessment represents a 'Net Benefit Test' for two activity categories proposed in Ascot, City of Belmont. The Net Benefit Test has been prepared in response to the policy requirements established by State Planning Policy 4.2 – Activity Centres. The Net Benefit Test assesses:

1. a proposed local centre of 3,400 sqm NLA (PLUC 5 – 'SHOP')
2. a proposed bulky goods precinct of 9,600 sqm (PLUC 6 – 'OTHER RETAIL')

This assessment has been prepared in three distinct parts and should be read in conjunction with the proposed Local Structure Plan and Scheme Amendment documents.

Part 1	Relevant market variables appropriate to the assessment of both activity types	Activity Centre Network Trade Area Definition Population Retail Spending Profile Retail Spending capacity
Part 2	Proposed Local Centre (PLUC 5)	Market Demand/Need Impact Test Net Benefit Test
Part 3	Proposed Bulky Goods (PLUC 6)	Market Demand/Need Impact Test Net Benefit Test

2.1 Purpose

A net benefit occurs when the benefits (pros) to the community arising from a proposal outweigh any identified impacts (cons) to the community arising from a proposal. The Net Benefit Test assesses the potential impacts and benefits of a proposal to the community and on existing and planned activity centres and is expected to answer the following questions.

- Is there a demand for additional floorspace, and if so, how does the proposal meet this demand?
- How will the proposed development impact on the role of the activity centre?
- How will the proposal impact the viability and vibrancy of other activity centres in the hierarchy?
- Are any potential impacts reduced or mitigated over the longer term?
- What is the anticipated loss and/or gain of services to the community?
- What is the anticipated impact on access (distance, time, mode of travel) to services by the community?
- Will the proposal contribute to a net increase in employment?
- Does the proposal align with the objectives and outcomes of this policy and the planning framework?

A Net Benefit Test is to be prepared when:

- A proposal introduces floorspace in an existing or planned activity centre which exceeds the floorspace identified for that centre in a current 'Needs Assessment'.
- A proposal introduces new land or rezones land to facilitate major development or out-of-centre development.

2.2 Out-of-Centre Development

An Out of Centre Development is defined by SPP4.2 as a proposal which introduces:

- Category A or B activity centre (see table) uses outside of an existing or planned activity centre as identified by a Needs Assessment (regardless of land size).
- More than 500 sqm NLA of Category A uses outside an existing or planned activity centre as identified by a Needs Assessment.

Exemptions to Out of Centre Development includes:

- Development applications for Category B activity centre uses where the existing zoning contemplates (P, D, A) land uses.
- Development applications for Category A activity centre uses up to 1,500 sqm NLA where they are located substantially within the 400m walkable catchment of a rail station.

Out of Centre Development may only be appropriate where a proposal:

- is sufficiently separated from nearby activity centres to minimise negative impacts to those activity centres (as demonstrated through the Net Benefit Test).
- is in proximity to existing housing at an average dwelling density of at least 25 dwellings per gross Urban Zone (Region Schemes) hectare within a 400 m walkable catchment of the development; and
- accessible to its catchment community by walking and cycling, minimising the need for additional private vehicle trips.

2.3 Major Development

A major development is defined by SPP4.2 as a proposal which introduces additional Category A activity floor space which exceeds the threshold for the activity centre hierarchy in the table below.

FIGURE 1 - MAJOR DEVELOPMENT FLOORSPEACE THRESHOLDS by CENTRE TYPE

Existing Activity Centre Hierarchy	Additional Floor space threshold (sqm NLA)
Strategic	10,000
Specialised	3,000
Secondary	10,000
District	5,000
Neighbourhood	3,000
Local	1,500
Proposed Activity Centre Hierarchy	any development in a proposed / planned centre is a major development regardless of floor space amount

2.4 Activity Centre Uses

Assessments are only required to be undertaken for the following activity types.

FIGURE 2 – PLANNING CATEGORY

Planning Land Use Code (PLUC)	Category A Activity Centre Uses	Category B Activity Centre Uses
5 – 'SHOP'	Shop Liquor Store - Large Fast Food Outlet Lunch Bar Restaurant & Café	Convenience store Liquor store - small Restricted premises Service station
6 – 'OTHER RETAIL'		Bulky goods showroom Motor vehicle, boat, or caravan sales

2.5 Scope and Methodology

The Net Benefit Test is to be based on:

- The contextual description of the proposal and location with supporting maps, identifying if out-of-centre, within-centre or new activity centre.
- The change in net lettable area (NLA) of the shop/ retail (PLUC 5 - SHP) and/or other retail (PLUC 6 - RET) floor space.
- The defined trade area (including primary trade area and any secondary and tertiary trade areas).
- The estimated existing and forecast population of the trade area.
- The trade area resident attributes and implications for floorspace need and spending estimates.
- The estimated existing and forecast expenditure of the trade area using latest ABS Household Expenditure Survey or other reliable source.
- The estimated average annual sales (aggregate and per sqm NLA) for the proposed development and/or activity centre pre-and post-development proposal.

2.6 Modelling Method

The retail model is designed to assess the likely propensity for a resident in a particular area to visit/spend at each centre in the network. Based on the proximity of the resident to each centre, the role and function of each centre, the size of the retail offer at each centre, relative to other centres. The sales potential for the proposed centre will be based on the extent to which it may capture retail sales from each trade area. The results of the retail modelling shows:

- The expected market share that each centre may expect to capture from each trade area.
- The retail sales that may therefore be expected to be captured by each centre in the network from the designated trade areas.
- The relative contribution of each trade area to the overall sales at each centre.

The model results are focused primarily on the centres which can be expected to generate most of their sales from within the modelled trade areas. Centres located on the fringe of, or outside the trade areas will only show that proportion of sales captured from the trade areas. Subsequently, centres on the fringe of, or outside will not show a true sales figure, but rather

that part of the sales captured solely from within the trade area modelled. The impact assessment typically focuses primarily on the existing and planned centres closest to the proposed centre.

2.7 Measuring Impact

The potential sales generated by the development of the proposed centre will be drawn from centres in the network that would have reasonably expected to capture those sales had the proposed centre not been developed. The impact of the proposal on existing and planned activity centres is defined as an estimate of the retail turnover for each relevant activity centre identified for the following scenarios:

- without the proposed activity centre and
- with the new activity centre(s) assumed to be developed (or expanded).
- The differences between the 'without' and 'with' scenario is the potential turnover impact for each activity centre.

Competition between businesses in and of itself is not considered a relevant planning consideration. The impact of a proposal on an activity centre is defined as the potential loss of services and any associated detriment to the community caused by the proposed development. The following impact percentage and risk level for retail turnover is provided as a general guide and should not be used as the only indicator of acceptability of a proposal.

FIGURE 3 - SPP4.2 IMPACT and RISK GUIDE

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

Where the short-term impact is initially high before falling to a medium or low level in the long term, consideration should be given to how the development can be staged or if there needs to be any additional short-term benefits to ensure that level of service is always maintained. However, the overall impact of the proposal may be lessened or offset by the potential growth in sales each activity centre may generate from the introduction of additional residents and spending in the trade area over time.

3. ACTIVITY CENTRE NETWORK

The existing and planned activity centres in the immediate network of a proposed activity centre represents a key determinant for assessing the demand for a proposed activity centre. The following activity centres are considered most likely to influence and be influenced by the proposed activity.

3.1 Strategic / Secondary Activity Centres

A Strategic Centre and two Secondary Centres are estimated to influence the potential demand and sustainability of the proposed activity.

Morley Strategic Centre

Designated / Classified	Strategic Centre	SPP4.2
Performs the role of a	Strategic Centre	
Location from proposed activity	4.5 km north	
Estimated current 'Shop' floor space (PLUC 5)	99,000 sqm NLA	(LUS 2015/17)
Majors / Anchor Tenants	C, W, A, S, K, T	
Estimated current 'Other Retail' floor space (PLUC 6)	22,500 sqm NLA	(LUS 2015/17)
Development potential	Medium	

Belmont

Designated / Classified	Secondary Centre	SPP4.2
Performs the role of a	Secondary Centre	
Location from proposed activity	3.0 km south	
Estimated current 'Shop' floor space (PLUC 5)	63,000 sqm NLA	(LUS 2015/17)
Majors / Anchor Tenants	C, W, A, K, BW	
Estimated current 'Other Retail' floor space (PLUC 6)	30,000 sqm NLA	(LUS 2015/17)
Development potential	Medium	

Victoria Park

Designated / Classified	Secondary Centre	SPP4.2
Performs the role of a	Neighbourhood	
Location from proposed activity	4.5 km southwest	
Estimated current 'Shop' floor space (PLUC 5)	22,000 sqm NLA	(LUS 2015/17)
Majors / Anchor Tenants	W	
Estimated current 'Other Retail' floor space (PLUC 6)	25,000 sqm NLA	(LUS 2015/17)
Development potential	Low	

3.2 District Centres

Four district centres are estimated to influence the potential demand and sustainability of proposed the activity.

Inglewood

Designated / Classified	District Centre	SPP4.2
Performs the role of a	Neighbourhood	
Location from proposed activity	4 km north	
Estimated current 'Shop' floor space (PLUC 5)	10,000 sqm NLA	(LUS 2015/17)
Majors / Anchor Tenants	C, W, A	
Estimated current 'Other Retail' floor space (PLUC 6)	2,700 sqm NLA	(LUS 2015/17)
Development potential	Low	

Bayswater

Designated / Classified	District Centre	SPP4.2
Performs the role of a	Local	
Location from proposed activity	2.5 km north	
Estimated current 'Shop' floor space (PLUC 5)	3,800 sqm NLA	(LUS 2015/17)
Majors / Anchor Tenants	IGA	
Estimated current 'Other Retail' floor space (PLUC 6)	0 sqm NLA	(LUS 2015/17)
Development potential	Low	

Maylands

Designated / Classified	District Centre	SPP4.2
Performs the role of a	Neighbourhood	
Location from proposed activity	3 km northwest	
Estimated current 'Shop' floor space (PLUC 5)	12,000 sqm NLA	(LUS 2015/17)
Majors / Anchor Tenants	C, 2 x IGA	
Estimated current 'Other Retail' floor space (PLUC 6)	0 sqm NLA	(LUS 2015/17)
Development potential	Low	

Ashfield

Designated / Classified	District Centre	SPP4.2
Performs the role of a	Local	
Location from proposed activity	3 km northeast	
Estimated current 'Shop' floor space (PLUC 5)	750 sqm NLA	(LUS 2015/17)
Majors / Anchor Tenants	IGA	
Estimated current 'Other Retail' floor space (PLUC 6)	0 sqm NLA	(LUS 2015/17)
Development potential	Medium	

3.3 Neighbourhood/Local

Four neighbourhood/local centres are estimated to influence the potential demand and sustainability of the proposed activity.

Rivervale

Designated / Classified	Neighbourhood Centre	
Performs the role of a	Local	
Location from proposed activity	2.5 km southwest	
Estimated current 'Shop' floor space (PLUC 5)	3,000 sqm NLA	(LUS 2015/17)
Majors / Anchor Tenants	IGA	
Estimated current 'Other Retail' floor space (PLUC 6)	0 sqm NLA	(LUS 2015/17)
Development potential	Low	

Kooyong

Designated / Classified	Neighbourhood Centre	
Performs the role of a	Local	
Location from proposed activity	3 km southwest	
Estimated current 'Shop' floor space (PLUC 5)	2,250 sqm NLA	(LUS 2015/17)
Majors / Anchor Tenants	IGA	
Estimated current 'Other Retail' floor space (PLUC 6)	0 sqm NLA	(LUS 2015/17)
Development potential	Low	

Belvidere

Designated / Classified	Neighbourhood Centre	
Performs the role of a	Local	
Location from proposed activity	1.5 km east	
Estimated current 'Shop' floor space (PLUC 5)	6,200 sqm NLA	(LUS 2015/17)
Majors / Anchor Tenants	IGA	
Estimated current 'Other Retail' floor space (PLUC 6)	0 sqm NLA	(LUS 2015/17)
Development potential	Low	

Epsom

Designated / Classified	Local Centre	
Performs the role of a	Local	
Location from proposed activity	1.5 km east	
Estimated current 'Shop' floor space (PLUC 5)	6,200 sqm NLA	(LUS 2015/17)
Majors / Anchor Tenants	IGA	
Estimated current 'Other Retail' floor space (PLUC 6)	0 sqm NLA	(LUS 2015/17)
Development potential	Low	

3.4 Service Commercial Precincts / Other Centres

Airport

Designated / Classified	Specialised Centre	
Performs the role of a	Neighbourhood	
Location from proposed activity	2.5 km east	
Estimated current 'Shop' floor space (PLUC 5)	5,000 sqm NLA	
Majors / Anchor Tenants	W	
Estimated current 'Other Retail' floor space (PLUC 6)	25,000 sqm NLA	
Development potential	High	

Great Eastern Highway

Designated / Classified	N/a	
Performs the role of a	Service Commercial	
Location from proposed activity	1.5 km east	
Estimated current 'Shop' floor space (PLUC 5)	8,600 sqm NLA	(LUS 2015/17)
Majors / Anchor Tenants	-	
Estimated current 'Other Retail' floor space (PLUC 6)	4,700 sqm NLA	(LUS 2015/17)
Development potential	Medium	

3.5 Summary

Analysis of the activity centre network reveals that:

- Residents in the trade area have access to approximately 70,500 sqm NLA of total convenience-based retail floor space.
- There are no full line supermarkets within 1.5 km of the proposed activity.
- There are only two full line supermarkets (Coles at Maylands and Woolworths at Airport) within 3km of the proposed activity.
- There are four small, limited line IGA supermarkets located between 1.5 km and 3 km of the proposed activity.
- The closest 'clusters' of multiple supermarket operators are located at Belmont (3 km) and Inglewood (4 km)

- There are three classified district activity centres north of the proposed activity (Maylands, Bayswater, Ashfield), yet none of these activity centres perform the role of a district centre and function more as neighbourhood or local centres due to their limited retail offer.
- Residents in the trade area have access to nearly 105,000 sqm NLA of bulky goods retail activity across six precincts.

FIGURE 4

EXISTING & PLANNED ACTIVITY CENTRES FRAMEWORK

By Centre Name, by Centre Type, by Floorspace /Year

Total Convenience		Estimated NLA Floorspace (sqm) by Year				
Centre Name	Centre Type	2023	2026	2031	2036	2041
Morley	Strategic	13,100	13,100	13,100	13,100	13,100
Belmont	Secondary	11,250	11,250	11,250	11,250	11,250
East Vic Park	District	5,400	5,400	5,400	5,400	5,400
Victoria Park	Secondary	3,750	3,750	3,750	3,750	3,750
Inglewood	District	8,750	8,750	8,750	8,750	8,750
Bassendean	District	4,400	4,400	4,400	4,400	4,400
Maylands	District	4,600	4,600	4,600	4,600	4,600
GEH (west)	Local	1,500	1,500	1,500	1,500	1,500
Airport	Special	4,400	4,400	4,400	4,400	4,400
Bayswater	District	500	500	500	500	500
Belvidere	Local	3,000	3,000	3,000	3,000	3,000
Rivervale (Kooyong)	Local	1,250	1,250	1,250	1,250	1,250
Ashfield	District	550	550	550	550	550
GEH (east)	District	6,900	6,900	6,900	6,900	6,900
Epsom	Local	1,200	1,200	1,200	1,200	1,200
All Existing and Planned Centres		70,550	70,550	70,550	70,550	70,550
Ascot		-	3,400	3,400	3,400	3,400
All Centres		70,550	73,950	73,950	73,950	73,950

Land Use Employment Survey (WAPC 2015) / Taktics4

FIGURE 5

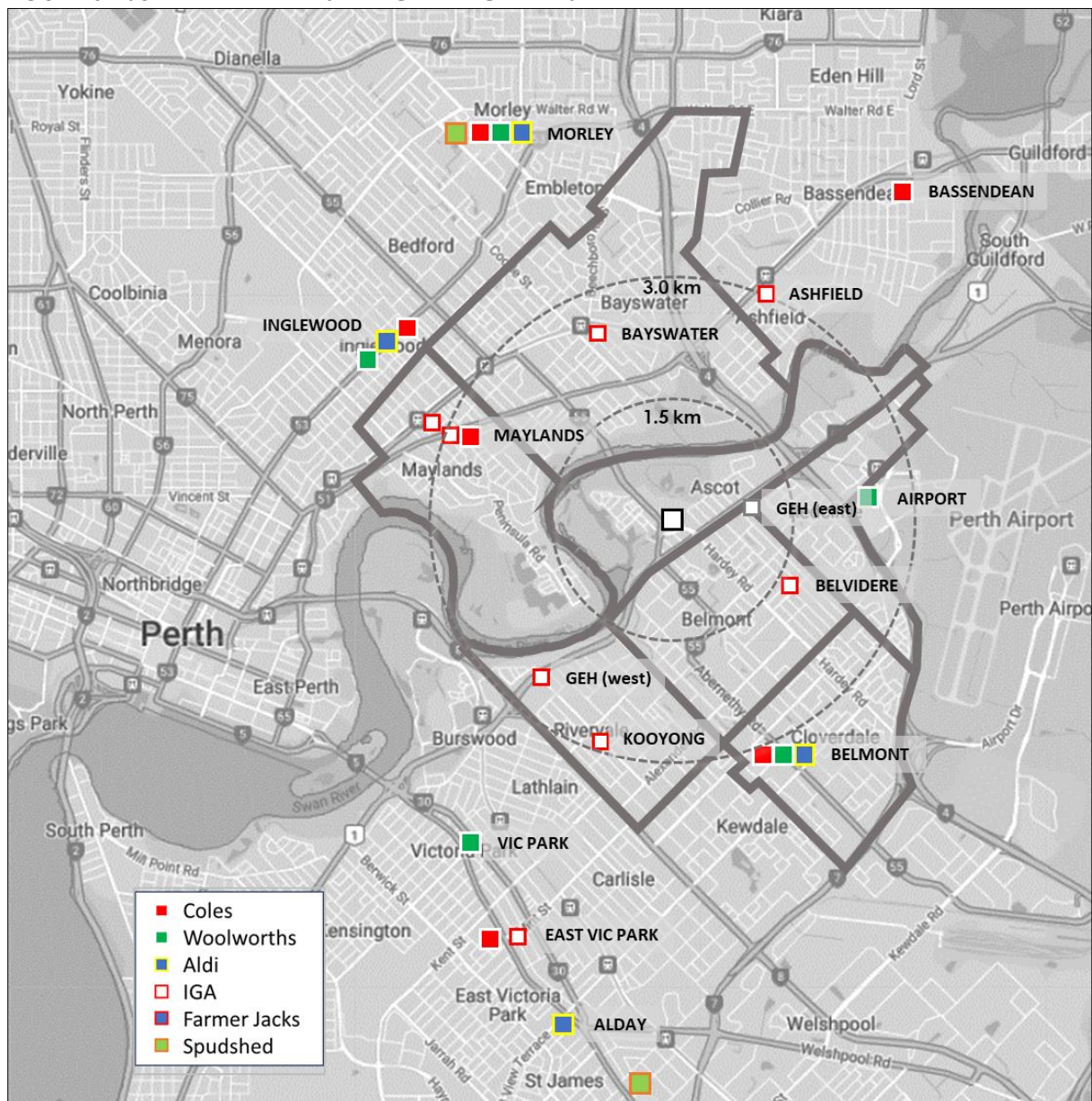
EXISTING & PLANNED ACTIVITY CENTRES FRAMEWORK

By Centre Name, by Centre Type, by Floorspace /Year

Bulky Goods/LFR		Estimated NLA Floorspace (sqm) by Year				
Centre Name	Centre Type	2023	2026	2031	2036	2041
Morley	Strategic	22,500	22,500	22,500	22,500	22,500
Belmont	Secondary	30,000	30,000	30,000	30,000	30,000
East Vic Park	District	0	0	0	0	0
Victoria Park	Secondary	25,000	25,000	25,000	25,000	25,000
Inglewood	District	2,700	2,700	2,700	2,700	2,700
Bassendean	District	0	0	0	0	0
Maylands	District	0	0	0	0	0
GEH (west)	Local	0	0	0	0	0
Airport	Special	20,000	20,000	20,000	20,000	20,000
Bayswater	District	0	0	0	0	0
Belvidere	Local	0	0	0	0	0
Rivervale (Kooyong)	Local	0	0	0	0	0
Ashfield	District	0	0	0	0	0
Eastgate/GE Hwy	District	4,700	4,700	4,700	4,700	4,700
Epsom	District	0	0	0	0	0
All Existing and Planned Centres		104,900	104,900	104,900	104,900	104,900
Ascot		-	9,600	9,600	9,600	9,600
All Centres		104,900	114,500	114,500	114,500	114,500

Land Use Employment Survey (WAPC 2015) / Taktics4

FIGURE 6 - SUPERMARKET BASED ACTIVITY CENTRES



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4. TRADE AREA

The trade area for retail activity is largely determined by a range of industry, market and consumer-based principles. Consumer dynamics vary significantly between different retail categories and is influenced by the frequency in which consumers require access to certain retail goods and services. Retailers, shopping centre developers, and urban planners acknowledge this variation in dynamics through the establishment of a clearly defined hierarchy of activity centres which reflect different shopping trips and expectations for consumers/residents.

4.1 Market Behaviour

Convenience retail

Convenience retail trips include visits to supermarkets, other food and grocery stores, newsagencies, and cafes/takeaway stores. These trips are typically daily or weekly trips and are generally made to activity centres closest to the resident/consumer. Activity centres serving this category are typically anchored by a supermarket, or small grocery store and classified as Neighbourhood and/or Local Centres.

Comparative retail

Comparative retail trips include visits to department stores, discount department stores, fashion, and household goods stores. These are typically less frequent trips than convenience-based trips and consumers are more likely to target specific items, brands, products, and prices on these trips. They are therefore more likely to travel further to access these goods and services. Centres serving this category are typically anchored by a Department Store or DDS and classified as Strategic, Secondary, or District Centres. These centres invariably also serve a convenience-based role.

Large Format/Bulky Goods

Homewares, furnishing, and recreation goods are more likely to reflect infrequent trips for targeted goods/purchases. Consumers are prepared to travel further for these goods and services. These centres are less likely to include a convenience-based role beyond access to cafes/takeaway facilities as part of the shopping experience.

Behaviour Philosophy

The fundamental retail consumer principles adopted by modelling techniques in this assessment are that residents are generally:

- Less likely to travel beyond the nearest Strategic Centre and or Secondary Centre to visit another centre with the same role/function/offer.
- Less likely to travel beyond the nearest District Centre to visit another District Centre with the same role/function/offer.
- Just as likely to travel beyond one supermarket-based neighbourhood centre to visit another supermarket-based centre with another operator (i.e., to shop at a Coles instead of a Woolworths or vice versa).
- Less likely to travel beyond the nearest local centre to visit another local centre with the same role/function/offer (i.e., to drive past one IGA to shop at another IGA).

That is not to say that residents will not visit other centres, but that they will not visit these centres frequently enough to establish a pattern of behaviour.

4.2 Delineation of Trade Area

The trade area for proposed activity represents the area likely to generate most of the sales for a proposed activity centre. A trade area can be defined by applying these market behaviour principles, collating proximity of existing and planned urban areas with their accessibility to existing and planned centres, based on road networks, and physical barriers.

The trade area for the proposed activity may be delineated by residents in:

Ascot, Belmont	Mainly within 1.5 km of the proposed activity.
Redcliffe, Rivervale, Bayswater, Maylands, Cloverdale	All or partly within 1.5 km-3.0 km of the proposed activity.

This trade area comprises residents which are likely to generate most of the sales for the proposed activity. The trade area is divided north and south by the Swan River. However, the proposed activity is located on a road with access across the river, which therefore creates direct access to residents in the trade areas to the north and the south. The trade area incorporates residents across three Local Government Areas – City of Belmont, City of Bayswater, and Town of Victoria Park.

4.3 Population

The existing and forecast resident population in the trade area represents the first variable for determining the demand for retail activity in a trade area. According to adopted population forecasts for the three local government areas the total trade area is:

- Estimated to contain nearly 78,000 residents in 2026.
- Forecast to increase to 93,500 residents by 2041.
- Therefore, estimated to grow by 15,800 additional residents over the 15-year period at an average of over 1,050 additional residents p.a.

Ascot and Belmont trade areas are:

- Estimated to contain a resident population of 11,000 residents in 2026.
- Forecast to increase to 16,400 residents by 2041.
- Therefore, estimated to grow by an additional 5,400 over a 15-year period at an average of 300 additional residents per annum.
- Expected to be the trade areas with the largest proportional growth over the next 15 years.

FIGURE 7 - TRADE AREA MAP



Tactics4/Australian Bureau of Statistics/ id forecast

FIGURE 8

CURRENT and FORECAST POPULATION
By Trade Area by Year

Catchment	2023	2026	2031	2036	2041	2023-2041	%
Bayswater	25,050	25,600	26,800	28,000	29,200	4,150	17%
Maylands	13,350	13,400	13,900	14,400	14,900	1,550	12%
Ascot	3,300	3,400	3,700	4,600	5,200	1,900	58%
Belmont	7,400	7,600	9,000	10,300	11,200	3,800	51%
Rivervale	11,850	12,400	13,400	14,200	15,000	3,150	27%
Redcliffe	5,400	5,500	5,700	5,800	7,000	1,600	30%
Cloverdale	9,500	9,800	10,200	10,500	11,000	1,500	16%
Total Trade Area	75,850	77,700	82,700	87,800	93,500	17,650	23%
Average growth per census		1,850	5,000	5,100	5,700		
Average growth p.a.	-	617	1,000	1,020	1,140		
Average growth p.a. (%)		0.8%	1.3%	1.2%	1.3%		

id forecast - LGA Bayswater, Belmont Victoria Park

Tactics4/Australian Bureau of Statistics/ id forecast

4.4 Resident Demographic Profiles

The demographic profile of the resident population in a trade area represents a second level of demand for retail activity in a trade area. Consumer spending surveys confirm that residents with different personal, household and economic characteristics are likely to exhibit different spending behaviour regarding the amount they buy and the type of goods they buy. The demographic characteristics of the resident population in the trade area will determine the retail spending profile and retail spending capacity available to retailers/centres in the trade areas. Key demographic characteristics include household composition, dwelling tenure, and income potential. Relevant socio-economic characteristics for residents in the trade area are highlighted below.

Person and Household Profile

The resident population in the Ascot, Belmont, Bayswater trade area is characterised by:

- an average age of 40 years which is 3.8% above the Perth average.
- an average household size of 2.3 persons per dwelling which is 9% smaller than the Perth average.
- a higher representation of one person households.
- a predominantly Australian born population.
- an ethnic/cultural balance consistent with Perth averages.
- a stable resident base with longevity in the trade area.

Employment, Income, Economic Profile

The resident labour force in the Ascot, Belmont, Bayswater trade area is characterised by:

- a labour force participation rate consistent with Perth averages.
- a higher representation of professionals.
- a higher representation of labour force employed in the retail, accommodation, and F&B sector and professional services sector.
- an average personal income that is 6% above Perth averages.
- an average of 2 incomes per dwelling which is 5% below Perth averages.
- an average household income that is 1% higher than Perth averages.
- an average mortgage that is 1% higher than Perth averages.
- an average rent that is 6% lower than Perth averages.
- a higher representation of rental dwellings.
- a slightly lower representation of dwellings with a mortgage.

Dwelling Profile

The dwelling stock in the Ascot, Belmont, Bayswater trade area is characterised by:

- slightly higher representation of townhouses and semi-detached dwellings.
- an average of 3 bedrooms per dwellings which is 9% smaller than the average Perth dwelling.

4.5 Resident Retail Spending Profile

Resident retail spending profiles for the trade area are derived by extrapolating data from a range of sources including:

- Household Expenditure Survey by socio economic characteristics (ABS 2015)
- Population and Household Census by socio economic characteristics (ABS 2021)
- Retail Sales by store categories (ABS 2024)

Correlation of data from these sources relative to the demographic profiles of an area produces an estimate of the average retail spending potential of residents within that area. Some of the trade areas may not currently have sufficient population bases to extract valid demographic profiles. Where trade areas do not have sufficient population base the retail spending profiles have been adopted from neighbouring/adjoining trade areas. Correlation of demographic profiles to retail spending profiles for residents in the trade area reveal that:

- Ascot and Bayswater residents are estimated to have an average total retail spending profile of between \$19,550 and \$21,900 per resident p.a. which is higher than Perth averages.
- Maylands, Belmont, Rivervale, Redcliffe, and Cloverdale residents have an average total retail spending profile of between \$15,200 and \$16,600 per resident p.a. which is lower than Perth averages.

FIGURE 9

ESTIMATED AVERAGE RETAIL SPENDING PER CAPITA					
By Retail Category by Trade Area					
Dec-23					
Retail Store Category	Total Convenience Retail	Total Comparison Retail	Total Shop	Bulky Goods/LFR	Total 'Shop' & 'Other Retail'
Bayswater	\$11,143	\$5,367	\$16,510	\$3,046	\$19,556
Maylands	\$9,464	\$4,446	\$13,910	\$2,605	\$16,515
Ascot	\$12,289	\$6,240	\$18,529	\$3,363	\$21,891
Belmont	\$8,933	\$4,198	\$13,130	\$2,468	\$15,598
Rivervale	\$9,495	\$4,461	\$13,956	\$2,613	\$16,568
Redcliffe	\$8,829	\$4,149	\$12,977	\$2,441	\$15,418
Cloverdale	\$8,741	\$4,108	\$12,848	\$2,418	\$15,267
Perth Average	\$10,374	\$4,872	\$15,246	\$2,839	\$18,086
8501.0 Retail Trade, Australia					
Retail Turnover, State by Industry Subgroup					

4.6 Resident Retail Spending Capacity

The resident retail spending capacity represents the total retail spending that is generated by residents in a trade area that is available to be captured by existing and planned centres in the trade area (and beyond). It is measured by multiplying the average potential resident retail spending profile for each area by the forecast resident population in each area to determine the forecast resident retail spending capacity of each trade area over time. Based on the average potential resident retail spending profiles for supermarkets, residents in the trade area are estimated to generate:

FIGURE 10

<i>ESTIMATED ANNUAL RESIDENT RETAIL SPENDING CAPACITY in TRADE AREA (\$M p.a.) By Retail Category by Year</i>					
	2023	2026	2031	2036	2041
Total Convenience Retail	\$755	\$774	\$823	\$875	\$931
Total Comparison Retail	\$360	\$368	\$392	\$417	\$444
Total Shop	\$1,115	\$1,142	\$1,215	\$1,291	\$1,374
Bulky Goods/LFR	\$208	\$213	\$226	\$240	\$256
Total 'Shop & Other' Retail	\$1,323	\$1,355	\$1,441	\$1,532	\$1,630
<i>8501.0 Retail Trade, Australia Retail Turnover, State by industry Subgroup</i>					

Convenience based retail spending

Residents across the total trade area are estimated to spend:

- \$774 M p.a. in convenience-based shops/centres in 2026.
- \$931 M p.a. in convenience-based shops/centres by 2041.

Residents in Ascot and Belmont trade areas are estimated to:

- spend \$106 M p.a. in convenience-based shops/centres in 2026.
- spend \$164 M p.a. in convenience-based shops/centres by 2041.

Other Retail (Bulky Goods/Showroom)

Residents across the total trade area are estimated to spend:

- spend \$213 M p.a. in total bulky goods/LFR outlets in 2026.
- spend \$256 M p.a. in total bulky goods/LFR outlets by 2041.

5. PART A – LOCAL CENTRE

This section assesses the potential market demand for, and potential sustainability of a proposed local centre at Ascot. This assessment subsequently informs the assessment of potential impacts at existing and planned activity centres. The proposed local centre is:

- Included as part of the planning for the City of Belmont Golden Gateway Precinct.
- Located 3 km from the nearest supermarket-based activity centre.
- Classified as a planned activity centre.
- Not classified as an out of centre development.
- Considered a major development because it proposes 3,400 sqm NLA of PLUC 5 activity.

Eligibility for Exemption from a Net Benefit Test

The proposed local centre activity:

- is accessible to an existing walkable trade area.
- includes more than 1,500 sqm NLA of PLUC 5 activity
- is not located within 400 metres of a railway station.
- is therefore not eligible for exemption from a Net Benefit Test under the provisions of SPP4.2.

5.1 Market Share

Market share represents the proportion of resident spending generated from a trade area to a proposed activity centre. Market share is a measure of influence that a centre will have over customers in an area.

Example:

Total annual retail spending generated by residents in a trade area is \$100M p.a.

A centre is capturing a market share of 20% of that retail spending

The centre therefore captures \$20M p.a. in sales from the trade area

The proposed local centre if developed by 2026, is estimated to capture:

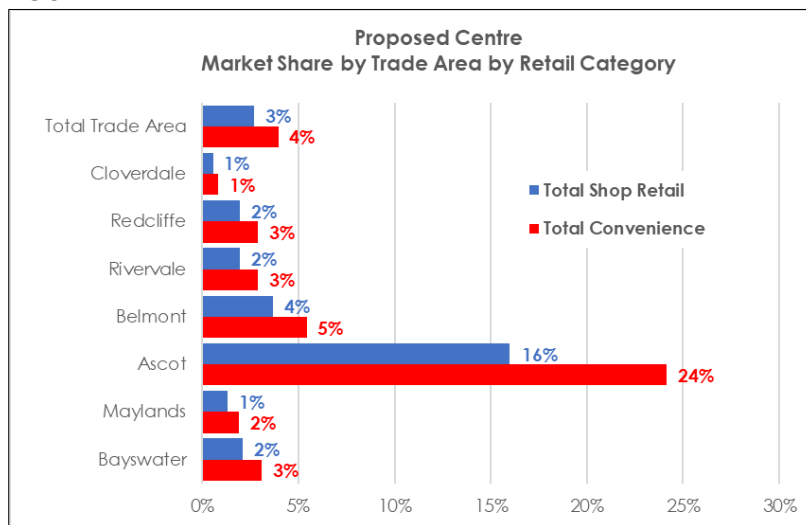
Convenience Spending

- 24% of all convenience/food/grocery/local spending generated by residents in Ascot.
- 5% of all convenience/food/grocery/local spending generated by residents in Belmont.
- A combined total of 4% of all convenience/food/grocery/local spending generated by residents across the total trade area.

Total Retail Spending

- 16% of all retail spending generated by residents in Ascot.
- 4% of all retail spending generated by residents in Belmont.
- A combined total of 3% of all retail spending generated by residents in the total trade area.

FIGURE 11



Tactics4 Retail Model

5.2 Sales Contribution

Sales contribution represents the proportion of a centres annual sales that is captured from a trade area. Sales contribution is a measure of the reliance / exposure that an activity centre has to a trade area.

Example:

A centre is capturing total retail sales of \$20M p.a.

\$15M p.a. of those sales are being captured from one trade area.

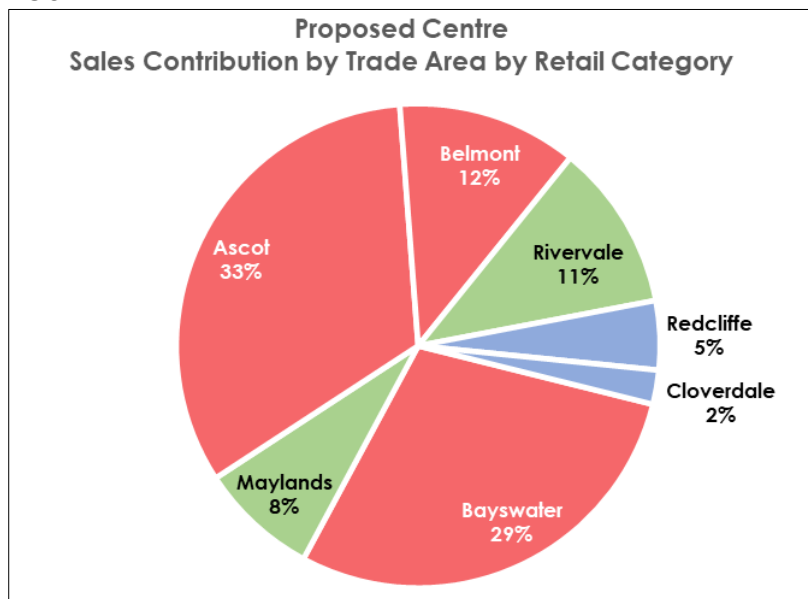
Therefore 75% of the centre sales are being contributed from that trade area.

The proposed local centre is ultimately estimated to generate:

- 62% of its forecast annual retail sales from residents in the immediate suburbs of Ascot (33%), and Bayswater (29%).
- 31% of its forecast annual retail sales from residents in Maylands, Belmont, and Rivervale.
- A combined total of 74% of its forecast annual retail sales will be derived from residents in the immediate local catchment it is intended to serve.

This sales contribution level is consistent with industry expectations.

FIGURE 12



Tactics4 Retail Model

5.3 Sales Potential

The Sales Potential represents the total sales that a centre may be expected to capture based on achieving the estimated market share from each trade area. It is a measure of a centre's viability and sustainability. Sales potential is measured by either annual sales and/or by sales productivity. Sales productivity is the total annual sales of centre divided by the total retail floor space NLA of the centre.

Example:

A centre captures total annual retail sales of \$20M p.a.

The centre has a retail floor space of 4,000 sqm NLA.

The centre has a sales productivity of \$20M p.a. divided by 4,000 sqm NLA = \$5,000/sqm p.a.

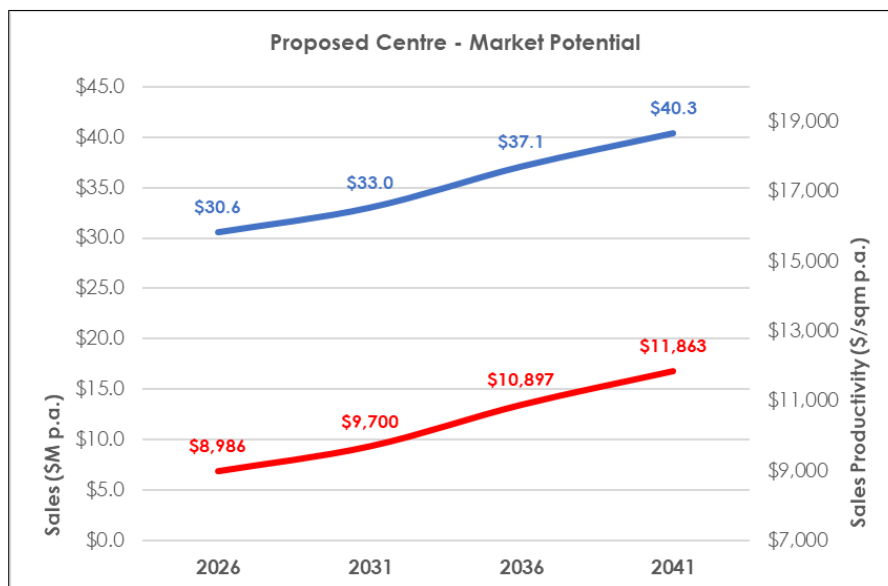
The proposed local centre if developed in 2026 is estimated to have the potential to generate:

- \$30.6M p.a. at \$9,000/sqm p.a. by 2026
- \$33.0M p.a. at \$9,700/sqm p.a. by 2031
- \$37.1M p.a. at \$10,900/sqm p.a. by 2036
- \$40.3M p.a. at \$11,800/sqm p.a. by 2041

The proposed local centre at Ascot:

- Has the potential to generate sufficient sales to be sustainable by 2026, satisfying industry measures conducive to a sustainable supermarket based local centre.
- Serve an immediate role in meeting the day-to-day convenience needs of residents in the immediate walkable catchment of the proposed local centre.
- Rely predominantly on sales being captured from the immediate suburbs of Ascot, Maylands and Belmont.
- Be sustainable despite a potential market capture of only 16% of total retail sales from resident spending in Ascot, leaving 84% of retail spending to be captured by existing and planned centres.

FIGURE 13



Taktics4 Retail Model

5.4 Sales Impact

Sales impact represents the potential loss of sales at a centre due to the development of another centre. Sales impact is measured by comparing the potential sales of a centre at a particular year/period with the other centre included and excluded from the equation/modelling. Sales impact may be measured by potential actual annual sales or a percentage of potential annual sales.

Example

A centre is forecast to generate annual sales of \$20M p.a. in 2026 without the proposed centre being developed by 2026.

The centre is forecast to generate annual sales of \$18M p.a. in 2026 if the proposed centre is developed by 2026.

The centre is therefore estimated to experience a potential sales impact of \$2M p.a. in 2026.

The centre is estimated to subsequently experience a potential sales impact of 10% of its sales (\$2M p.a. loss from its \$20M p.a.)

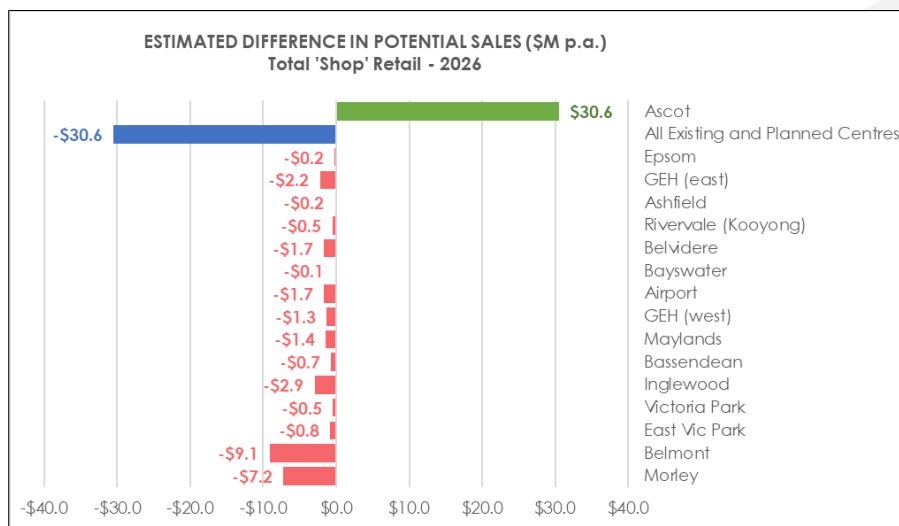
Actual Sales

Modelling the activity centres network with and without the proposed activity reveals that the development of the proposed activity by 2026 would have the potential to capture \$30.6M p.a. in retail sales that might otherwise be captured from existing or planned centres.

Over 68% of all retail sales generated by the proposed local centre would be captured from four centres including Belmont Centre (-\$9.1M p.a.), Morley Centre (-\$7.2M p.a.), Inglewood (-\$2.9M p.a.), and Maylands (\$1.4M p.a.). This is because these centres currently contain the retail offer that a proposed local centre is likely to provide at Ascot.

FIGURE 14

ESTIMATED ACTUAL ANNUAL SALES CAPTURED from OTHER ACTIVITY CENTRES by SHOP SALES by FIRST YEAR TRADE of PROPOSED ACTIVITY (2026)



Tactics4 Retail Model (2024)

Percentage of Sales

The modelling shows that upon trading in 2026, the retail sales captured by a proposed local centre has the potential to impact the overall retail sales generated by residents in the trade area at:

Belmont

The public and private investment at Belmont Centre will not be impacted by the proposed local centre. The potential sales impact is forecast to be less than 3.0% which is classified as insignificant impact/risk. The potential sales impact at Belmont is in effect considerably less than 3.0% as the model only shows the potential loss in sales at Belmont from residents in the modelled trade area. The Belmont Centre generates sales from a more extensive trade area than the trade area for the proposed local centre.

Morley

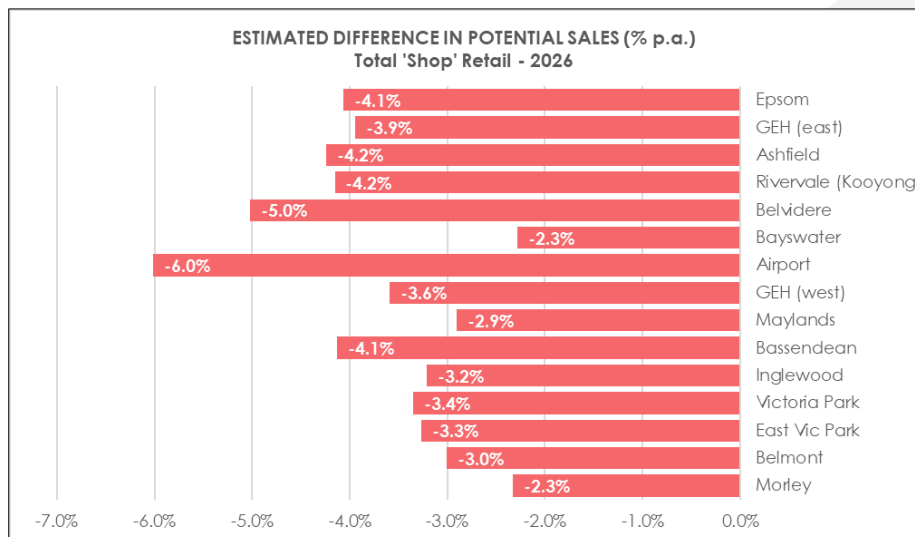
The public and private investment at Morley Centre will not be impacted by the proposed local centre. The potential sales impact is forecast to be less than 2.3% which is classified as insignificant impact/risk. The potential sales impact is in effect considerably less than 2.3% as the model only shows the potential loss in sales at Morley from residents in the modelled trade area. The Morley Centre generates sales from a more extensive trade area than the trade area for the proposed local centre.

Bayswater

The public and private investment at Bayswater will not be impacted by the proposed local centre. The potential sales impact at Bayswater is less than 2.3% which is classified as low impact/low risk. The low impact is because the Bayswater Centre does not provide the offer intended at the proposed local centre. Therefore, the Bayswater Centre is not capturing the sales that will be captured by the proposed local centre.

FIGURE 15

ESTIMATED IMPACT of PROPOSED ACTIVITY on ANNUAL SALES at OTHER ACTIVITY CENTRES by SHOP SALES by FIRST YEAR TRADE of PROPOSED ACTIVITY (2026)



Tactics4 Retail Model (2024)

Local Centres

Centres at Epsom (4.1%), Ashfield (4.2%), Rivervale/Kooyong (4.2%) and Belvidere (5.0%) are all estimated to be impacted by between 4% and 5%. These impacts are classified as insignificant impact/ low risk. There is not expected to be an impact to private or public investment. This is because these centres do not currently offer the extent of the retail offer intended to be provided by the proposed local centre.

Airport

The convenience-based centre anchored by Woolworths at the Airport, is the only centre which is estimated to experience a moderate impact (6%). The potential sales impact is in effect considerably less than 6.0% as the model only shows the potential loss in sales at the Airport from resident spending generated from within the modelled trade area. The Airport Centre generates sales from a far more extensive trade area than the trade area for the proposed local centre.

5.5 Sales Growth

Sales Growth represents the increase in retail sales that may be expected from a centre because of an increase in population growth in the trade area.

For example:

A centre is currently capturing total retail sales of \$20M p.a.

It achieves these sales by capturing 20% market share of all resident spending in the trade area.

Therefore, the trade area has a current resident retail spending capacity of \$100M p.a.

Residential development occurs in the trade area at 10% growth over a five-year period.

In five years, the resident retail spending capacity in the trade area has increased to \$110M p.a.

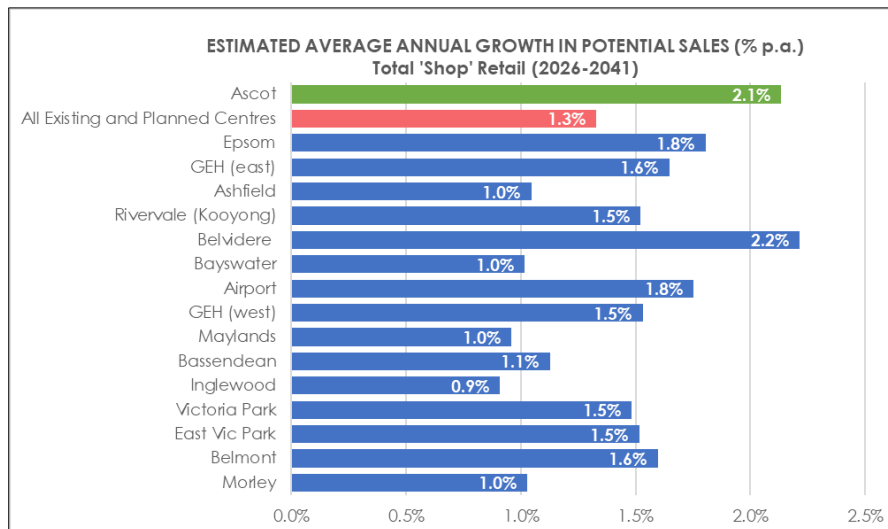
The sales potential for the centre is forecast to increase to \$22M p.a. (in constant dollars) despite maintain the same market share within the trade area.

This potential sales growth across centres has the potential to offset any initial sales impact generated by the development of a proposed local centre.

The population in the total trade area is expected to increase from 77,700 in 2026 to 93,500 in 2041. This population growth will result in an increase in resident retail spending capacity in the total trade area from \$1,142M p.a. in 2026 to \$1,374M p.a. in 2041. That represents an additional \$232M p.a. in the total trade area for all centres to capture.

The graph shows that beyond the development of the proposed local centre in 2026, all centres in the trade area, or area of influence by the proposed local centre is forecast to have the potential to experience an average annual growth in sales of between 1% and 2.0% p.a. over the subsequent 15 years.

FIGURE 16
ESTIMATED AVERAGE ANNUAL SALES GROWTH at ACTIVITY CENTRES SHOP SALES
Between 2026 and 2041



Tactics4 Retail Model (2024)

5.6 Summary

The findings in this Net Benefit Test confirm that a proposed local centre at Ascot will result in insignificant/low risk impacts on the surrounding existing and planned activity centres network. With any potential sales impact offset by the potential for substantial average sales growth in the trade area over the next 15 years.

Overall, the development of the proposed local centre at Ascot is not expected to generate significant impacts for the surrounding centres network. The centres network is currently bereft of full line supermarket-based centres. This means that residents in the trade area are already bypassing the smaller local centres to access their convenience retail needs at centres further afield than they should have to travel.

6. PART B - BULKY GOODS

This section assesses the potential market demand for, and potential sustainability of proposed 'Other' Retail Bulky Goods Precinct at Ascot. This assessment is necessary to subsequently inform the assessment of potential impacts at existing and planned activity centres. The proposed bulky goods activity is considered an 'out of centre' development.

6.1 Market Share

Market share represents the proportion of resident spending generated from a trade area to the proposed centre. Market share is a measure of influence that a centre will have over customers in an area.

Example:

Total annual retail spending generated by residents in a trade area is \$100M p.a.

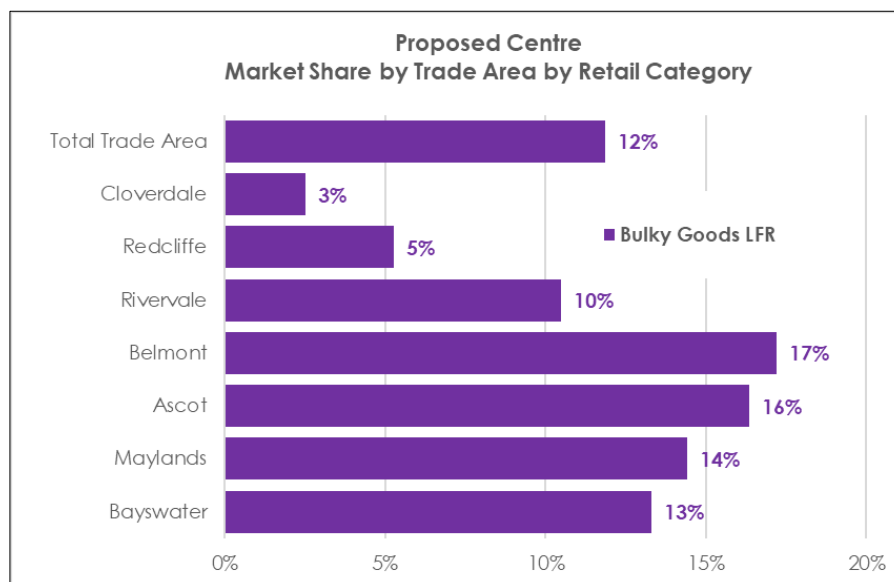
A centre is capturing a market share of 20% of that retail spending

The centre therefore captures \$20M p.a. in sales from the trade area

The proposed bulky goods activity if developed by 2026, is estimated to capture:

- 12% of all bulky goods spending generated by residents across the total trade area.
- relatively consistent market capture between 13%-17% of all bulky goods retail spending from residents in Ascot, Belmont, Maylands, Bayswater and Rivervale. 5% of all convenience/food/grocery/local spending generated by residents in Belmont, reflecting the propensity for residents to travel further to access this type of retail category.

FIGURE 17



Tactics4 Retail Model

6.2 Sales Potential

The Sales potential represents the total sales that a centre may be expected to capture based on achieving the estimated market share from each trade area. It is a measure of a centre's viability and sustainability. Sales potential is measured by either annual sales and/or by sales productivity. Sales productivity is the total annual sales of centre divided by the total retail floor space NLA of the centre.

Example:

A centre captures total annual retail sales of \$20M p.a.

The centre has a retail floor space of 4,000 sqm NLA.

The centre has a sales productivity of \$20M p.a. divided by 4,000 sqm NLA = \$5,000/sqm p.a.

The proposed local centre if developed in 2026 is estimated to have the potential to generate:

\$25.2M p.a. at \$2,600/sqm p.a. by 2026

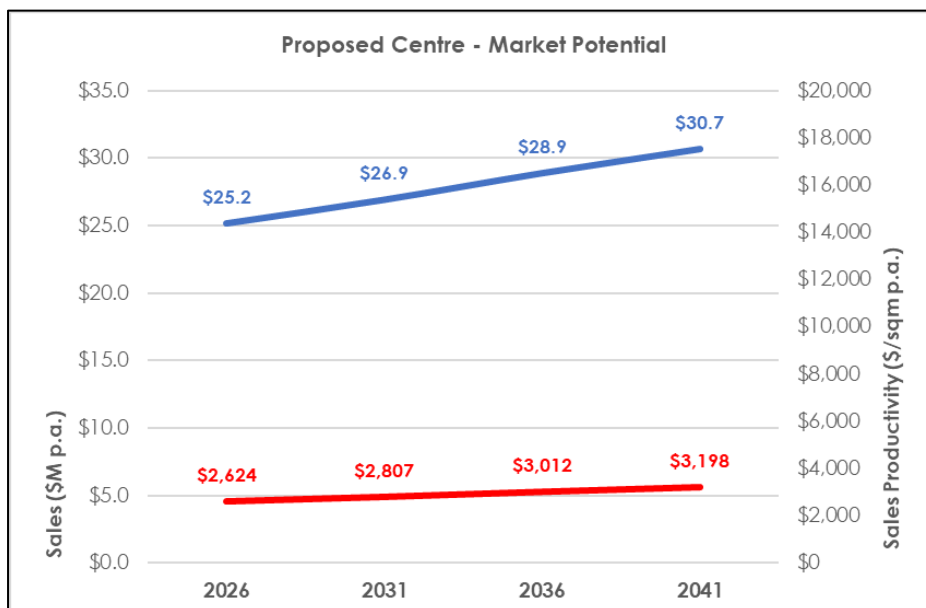
\$26.9M p.a. at \$2,800/m p.a. by 2031

\$28.9M p.a. at \$3,000/sqm p.a. by 2036

\$30.7M p.a. at \$3,200/sqm p.a. by 2041

The proposed bulky goods activity at Ascot has the potential to generate sufficient sales to be sustainable by 2026, satisfying industry measures conducive to a sustainable bulky goods activity. Be sustainable despite a potential market capture of only 12% of total bulky goods sales from resident spending in the total trade area, leaving 88% of bulky goods retail spending to be captured by existing and planned centres.

FIGURE 18



Tactics4 Retail Model

6.3 Sales Impact

Sales impact represents the potential loss of sales at a centre due to the development of another centre. Sales impact is measured by comparing the potential sales of a centre at a particular year/period with the other centre included and excluded from the equation/modelling. Sales impact may be measured by potential actual annual sales or a percentage of potential annual sales.

Example

A centre is forecast to generate annual sales of \$20M p.a. in 2026 without the proposed centre being developed by 2026.

The centre is forecast to generate annual sales of \$18M p.a. in 2026 if the proposed centre is developed by 2026.

The centre is therefore estimated to experience a potential sales impact of \$2M p.a. in 2026.

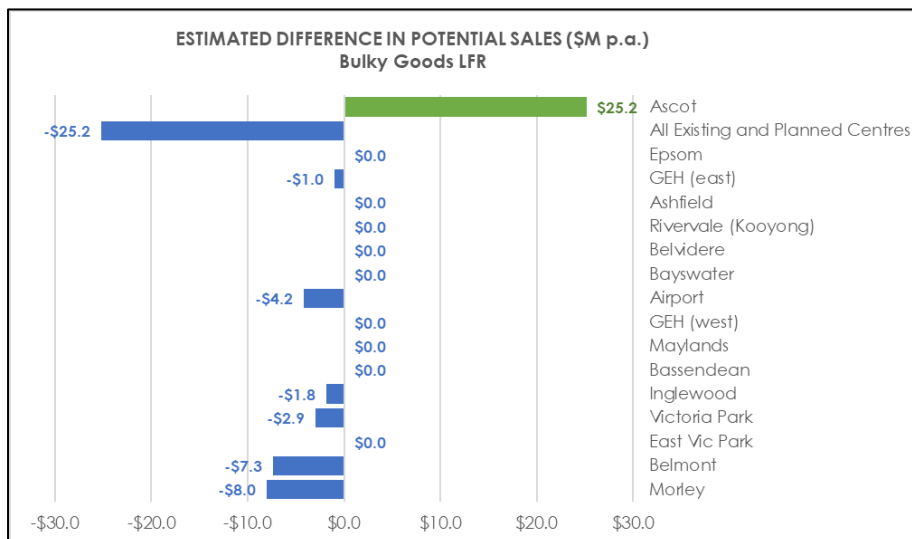
The centre is estimated to subsequently experience a potential sales impact of 10% of its sales (\$2M p.a. loss from its \$20M p.a.)

Actual Sales

The development/introduction of the proposed bulky goods activity in Ascot by 2026 will have the potential to capture \$25.2M p.a. in retail sales that might otherwise be captured from existing or planned centres.

Over 81% of all retail sales generated by the proposed bulky goods activity to be captured from four centres including Belmont Centre (-\$7.3M p.a.), Morley Centre (-\$8.0M p.a.), Airport (-\$4.2M p.a.), and Victoria Park (-\$2.9M p.a.).

FIGURE 19



Tactics4 Retail Model

Percentage of Sales

The modelling shows that upon trading in 2026, the retail sales captured by proposed bulky goods activity centre has the potential to impact the overall retail sales generated by residents in the trade area at:

Belmont

The public and private investment at Belmont Centre will not be impacted by the proposed local centre. The potential sales impact is forecast to be less than 4.2% which is classified as insignificant impact/risk. The potential sales impact at Belmont is in effect considerably less than 4.2% as the model only shows the potential loss in sales at Belmont from residents in the modelled trade area. The Belmont Centre generates sales from a more extensive trade area than the trade area for the proposed bulky goods activity at Ascot.

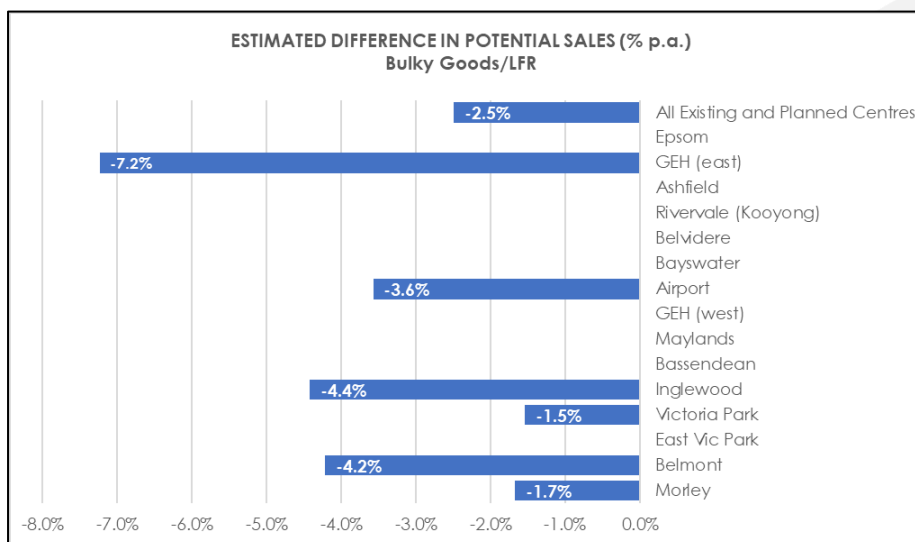
Morley

The public and private investment at Morley Centre will not be impacted by the proposed bulky goods activity. The potential sales impact is forecast to be less than 1.7% which is classified as insignificant impact/risk. The potential sales impact is in effect considerably less than 1.7% as the model only shows the potential loss in sales at Morley from residents in the modelled trade area. The Morley Centre generates sales from a more extensive trade area than the trade area for the proposed bulky goods activity at Ascot.

Airport

The public and private investment at the Airport will not be impacted by the proposed bulky goods activity. The potential sales impact is forecast to be less than 3.6% which is classified as insignificant impact/risk. The potential sales impact is in effect considerably less than 3.6% as the model only shows the potential loss in sales at the Airport from residents in the modelled trade area. The Airport generates sales from a more extensive trade area than the trade area for the proposed bulky goods activity at Ascot.

FIGURE 20



Tactics4 Retail Model

6.4 Sales Growth

Sales Growth represents the increase in retail sales that may be expected from a centre because of an increase in population growth in the trade area.

For example:

A centre is currently capturing total retail sales of \$20M p.a.

It achieves these sales by capturing 20% market share of all resident spending in the trade area.

Therefore, the trade area has a current resident retail spending capacity of \$100M p.a.

Residential development occurs in the trade area at 10% growth over a five-year period.

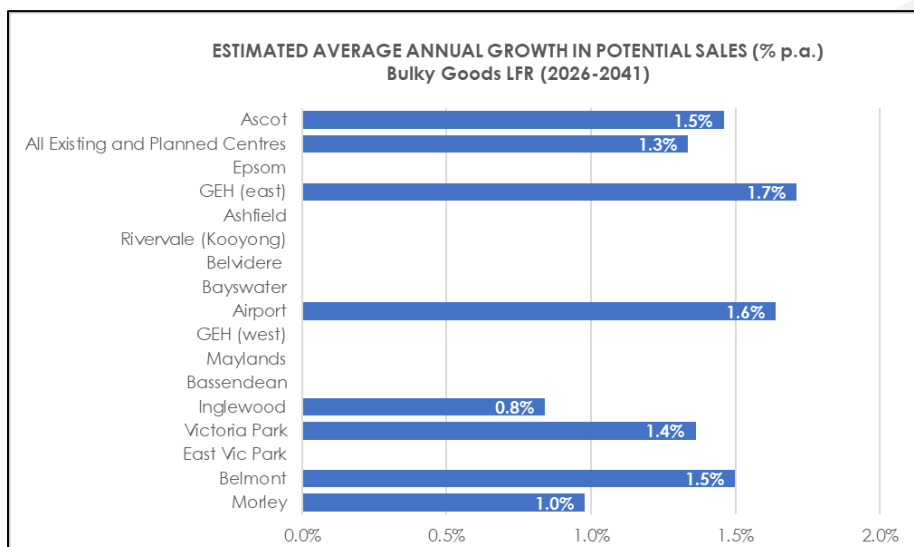
In five years, the resident retail spending capacity in the trade area has increased to \$110M p.a.

The sales potential for the centre is forecast to increase to \$22M p.a. (in constant dollars) despite maintain the same market share within the trade area.

This potential sales growth across centres has the potential to offset any initial sales impact generated by the development of a proposed local centre.

The population in the total trade area is expected to increase from 77,700 in 2026 to 93,500 in 2041. This population growth will result in an increase in resident retail spending capacity in the total trade area from \$1,142M p.a. in 2026 to \$1,374M p.a. in 2041. That represents an additional \$232M p.a. in the total trade area for all centres to capture. The graph shows that beyond the development of the proposed bulky goods in 2026, all relevant centres in the trade area, or area of influence by the proposed bulky goods activity at Ascot is forecast to have the potential to experience an average annual growth in sales of between 1.0% and 2.0% p.a. over the subsequent 15 years.

FIGURE 21



Tactics4 Retail Model

6.5 Summary

The findings in this Net Benefit Test confirm that proposed bulky goods activity at Ascot will.

- Result in insignificant/low risk impacts on the surrounding existing and planned activity centres network. With any potential sales impact offset by the potential for substantial average sales growth in the trade area over the next 15 years.
- Subsequently not have an unreasonable impact on the delivery and sustainability of private and public infrastructure at other activity centres.



7. NET BENEFIT TEST

When estimating benefits to the community, the Net Benefit Test should:

- Detail what benefit will occur due to the proposed development.
- Use existing data and standards to measure the size of the benefit and how important it will be to the community.
- Identify those in the community who will be likely to experience the benefit.
- Estimate how many individuals are expected to experience the benefit.
- Describe the degree of change expected due to the benefit.
- Determine the expected duration for which stakeholders are expected to experience the benefit.

SPP4.2 provides a guide to estimating/measuring the net benefit to the community including:

7.1 Employment

Will the proposal provide new jobs in addition to any that may be lost elsewhere – net additional jobs?

The proposed activity has the potential to create up to 205 Full Time Equivalent jobs including 85 in the shopping precinct and 120 in the bulky goods showroom precinct.

FIGURE 22

TOTAL EMPLOYMENT OPPORTUNITIES				
PLUC	Activity Type	Floor space (sqm NLA)	Ratio (FTE jobs/sqm)	FTE Jobs
PLUC 5	Shops	3,400	40	85
PLUC 6	Bulky Goods/Showroom	9,600	80	120
Combined		13,000	63	205
Land Use and Employment Survey (WAPC 2017)				

Will the proposed activity contribute to diversifying local jobs – creating more strategic employment versus population-driven employment?

Will the proposal have the potential to improve access to economic opportunity for minority and vulnerable groups?

Employment in shop and bulky goods activity typically attracts residents which fit the following:

- Female labour force
- Part time labour force
- Young adult labour force
- Local labour force
- Labour force without access to a motor vehicle

Gender	Employment Sector	
	Total Retailing	All Sectors
Male Employees	34%	43%
Female Employees	66%	57%
All Employees	100%	100%

The proposed activity is conducive to the female employment labour force. Females on average represent 66% of all retail related jobs compared to 57% for all job sectors.

Employment Status	Employment Sector	
	Total Retailing	All Sectors
Full Time Employment	38%	54%
Part time Employment	62%	46%
All Employment	100%	100%

The proposed activity is conducive to the part time employment labour force. Part time employees represent 62% of all retail related jobs compared to 46% for all job sectors.

Age of Employee	Employment Sector	
	Total Retailing	All Sectors
15-19 years	19%	9%
All Ages	100%	100%

The proposed activity is conducive to young adults in the labour force. Young adults represent 19% of all retail related jobs compared to 9% for all job sectors.

Distance Travelled	Employment Sector	
	Total Retailing	All Sectors
less than 2.5 km	15%	10%
2.5 km - 10 km	42%	32%
All Distances	100%	100%

The proposed activity is conducive to residents who live within 2.5 km of the proposed activity. 15% of all residents in retail related jobs on average travel up to 2.5km from their home compared to 10% for all job sectors.

Travel Mode	Employment Sector	
	Total Retailing	All Sectors
Car, as passenger	9%	6%
Bicycle	1%	0%
Walked only	2%	2%
Walked, Cycled, Passenger	11%	8%
All Modes	100%	100%

The proposed activity is conducive to residents who do not have ready access to motor vehicle for travel to work. 11% of residents working in the retail sector cycle, walk or travel by passenger to work compared to 8% for all job sectors.

The impact assessment shows that all activity centres in the network have the potential to increase sales and subsequently not need to reduce employment levels. The proposed local centre is therefore expected to provide new local jobs for residents.

7.2 Impact

How is the proposal expected to impact upon the current and expected turnover and role of relevant activity centres?

The proposed activity is estimated to have an initial low / insignificant risk to activity centres in the network. Any impacts on these activity centres are likely to be temporary and have no long-term effects on the viability of individual activity centres. The initial impacts to activity centres are expected to be offset by future growth in sales from resident and spending growth.

Will the proposal increase the choice and availability of goods and services in the area?

Retail modelling confirms that the residents in Ascot and Belmont are the communities most likely to experience the benefit from the proposed activity. Residents in Ascot and Belmont are estimated to account for 60% of total sales / trips at the proposed activity confirming the importance of the proposed activity to these residents.

Ascot and Belmont trade area currently comprise 11,000 residents. Ascot and Belmont trade area resident population base will grow to 16,400 residents by 2041. Despite this population profile, residents in Ascot do not currently have access to a full line supermarket-based centre within 2.5 km. Ascot residents must therefore travel up to 2.5 km each way (5 km round trip) every time they access their full line supermarket needs.

The introduction of the proposed activity will fill an identified gap in the supply and demand of convenience-based activity in the Ascot and Belmont area.

7.3 Impact on Activity Centre Hierarchy

Retail modelling confirm that the proposed activity centre is sufficiently sized, located and configured to satisfy the local trade area needs without impinging on the trading potential of other centres. And that the proposed centre will not have a significant or long-term impact on any of the individual activity centres modelled as part of the centres network.

It therefore follows that the proposed activity centre will not create any unreasonable or detrimental impact on the role and function of the activity centre hierarchy and framework in the trade area.

All centres will have the opportunity to compete for the additional retail sales available through the increased retail spending capacity planned in the trade area. It will be up to each of the centres and their respective operators in the existing and planned network to establish plans and strategies to target that additional retail spending capacity.

The forecast population growth in the trade area will ultimately create the potential for all centres in the network to achieve an average increase in sales of between 1% and 3% per annum over the period between 2026 and 2041. This average sales growth will further offset the immediate impact experienced from the introduction of the proposed activity.

7.4 Compatibility

Is the proposal compatible with surrounding land uses?

The proposed activity will introduce proposed activity in the middle of a trade area which contains 11,000 – 16,400 residents within a 1.5 km radius of the proposed activity. This resident population is a significant base for a supermarket-based centre.

7.5 Environment

Will there be an improvement in the level of amenity and vibrancy that benefits the wider community? Will the proposal include land uses such as healthcare, education, and community facilities? Will the proposal have an impact on overall vehicle trips? Will car-based net trips (by distance) increase or reduce because of the proposal?

The proposed activity has the potential to create a community hub for the Ascot and Belmont communities, increasing a sense of place for residents. The proposed activity does not in itself create these facilities. However, some of these facilities will likely be attracted to the area because of the introduction of the proposed activity.

The proposed activity has the potential to reduce the amount of trip kilometres that Ascot and Belmont residents must travel each year to satisfy their daily/weekly shopping needs. As stated, the Ascot and Belmont resident population base represents 11,000 growing to 16,400 residents who will benefit directly from the proposed activity. Ascot and Belmont residents therefore have the potential to:

- reduce the amount of trip kilometres that Ascot and Belmont residents must travel each year to satisfy their daily/weekly shopping needs.
- save over 530,000 to 700,000 trips p.a. to centres outside their trade area
- save between 40 and 50 trips per person per annum.
- save between 2.7 M km p.a. and 3.5 M km p.a. of vehicular travel per annum

7.6 Infrastructure

Is there significant government investment in services, infrastructure or development in the area or nearby centres that may be affected by the proposal? Will the proposal impact patronage/viability of the investment and what is the expected impact? Will the proposal include new, or improvements to existing transport infrastructure, particularly walking, cycling and public transport, that increases access and helps manage congestion? Will the proposal include enhancements to utilities that benefit the local area?

As previously stated, the proposed activity has the potential to significantly reduce the number of trips/trip km by residents especially for residents in Ascot and Belmont. Residents in these areas will be far more likely to walk to the proposed activity than their current trip patterns to supermarket-based centres over 2 km from the proposed activity. The proposed activity has the potential to generate demand for enhancements to community and non-retail related to services in the local area.

7.7 Strategic Alignment

Is the proposal consistent with the strategic planning for the area? Is it aligned with the relevant regional strategy and approved local planning strategy? Is the size and scale of the proposal consistent with the level of the hierarchy? What are the potential impacts on the activity centre hierarchy? Is the proposal consistent with the objectives and outcomes of SPP 4.2?

The proposed activity is classified as a planned centre in an adopted planning instrument. The proposed activity is a size, scale, function, and role that is consistent with and complements the overall activity centre hierarchy. The proposed local centre activity is consistent with the City of Belmont's Activity Centre Planning strategy.

The proposed activity will not have a significant impact on any of the activity centres in the network. The proposed activity does not have the potential to result in the loss of or change the role and function of any activity centre in the network. As such the proposed activity is not have the potential to have any impact or change to the activity centre hierarchy.

The Net Benefit Test confirms that the proposed activity satisfies the criteria for assessing the benefits to the community and is therefore consistent with the objectives and outcomes of SPP4.2.