



NORTH ELLENBROOK (WEST) DISTRICT STRUCTURE PLAN ACTIVITY CENTRES AND EMPLOYMENT STRATEGY

Prepared for Parcel Property
January 2020

FINAL

JANUARY 2021 ADDENDUM

The North Ellenbrook West District Structure Plan was amended following the completion of this report. The key amendments included increasing the light industrial / service commercial area and shifting the High School / DOS to the east. This results in lower expected dwelling and population yields and a higher level of employment land.

A review of this report concluded that the findings and recommended activity hierarchy considerations are still valid despite the lower expected yields. The most significant update is the expected ongoing employment levels which are illustrated to the right.

EMPLOYMENT ESTIMATES AT BUILD OUT, NORTH ELLENBROOK (WEST)

	Shop Retail	Other Retail	Non-Retail	Total
District Centre	517	125	140	782
Neighbourhood Centre (west)	207	6	10	223
Local Node/s (west)	-	-	24	24
Service Industry	-	994	4,240	5,234
Schools & Public Recreation / Community Facilities	-	-	310	310
Home-Based Workers (@ 5%)	-	-	319	319
Total Supportable Jobs				6,263

Source: DPLH Land Use and Employment Survey; Urbis

EMPLOYMENT SELF SUFFICIENCY ESTIMATES, NORTH ELLENBROOK (WEST)

	At Build Out
Labour Force	6,375
Employment	6,263
Employment Self Sufficiency	98%

Source: ABS Census of Population and Housing; Urbis

CONTENTS

EXECUTIVE SUMMARY	PAGE 4
INTRODUCTION	PAGE 6
REGIONAL CONTEXT	PAGE 9
TRADE AREA ANALYSIS	PAGE 13
NEEDS ASSESSMENT	PAGE 18
HIERARCHY RECOMMENDATIONS	PAGE 24
EMPLOYMENT STRATEGY	PAGE 27

EXECUTIVE SUMMARY

KEY FINDINGS AND RECOMMENDATIONS

The analysis and findings outlined in this report support the provision of a range of activity centres that will service the needs of future residents in North Ellenbrook.

The proposed centre hierarchy for North Ellenbrook is summarised below.

Centre Hierarchy	Floorspace (sq.m NLA)	Indicative Gross Land Area (ha)
District Centre	32,000	12
Neighbourhood Centre (east)	7,000	3
Neighbourhood Centre (west)	3,300	1
Local Node/s	1,200	1
Service Industry	16,500	6
Total Supportable Floorspace	60,000	23

Source: Urbis

A district centre should be accommodated for within the eastern portion of the North Ellenbrook (West) precinct along a major east west route which provides ease of access to residents within the main trade area. This central location will maximise the extent of its catchment and provide proximate amenities and services for North Ellenbrook residents.

The larger proposed neighbourhood centre should be located within the central core of the North Ellenbrook (East) precinct, along a north south connector. A smaller neighbourhood centre is considered best placed within the North Ellenbrook (West) precinct in order to complement the district centre offering.

There is potential for small local nodes which may feature a stand alone child care, medical centre or similar service. These centres are flexible in their location within the North Ellenbrook area.

The service industry precinct is expected to have limited potential given the proximity of the existing heavy industrial area and the existing and future competition in the Ellenbrook town centre and established areas further south.

The proposed activity centres are expected to support the delivery of local employment opportunities whilst complementing the existing and planned activity centres in the corridor and the planned industrial development to the north.

The construction phase of the residential mixed-use development is expected to deliver significant employment and economic opportunities for the local area. Overall, the construction phase is expected to directly and indirectly support approximately 10,800 employment opportunities (in terms of full-time equivalent job years) over the development period.

The development of the subject site will support ongoing employment opportunities locally. Based on estimated non-residential uses and a moderate home-based worker estimate, the subject site is expected to accommodate approximately 1,300 jobs.

An employment strategy and associated action plan is included within this report to ensure that local employment opportunities are supported in a timely manner. The strategy supports the achievement of the following objectives:

- Maximise access to local employment opportunities within the north east corridor.
- Deliver required infrastructure and services in a timely manner to catalyse private sector investment and support liveability.
- Attract private sector investment in urban and business development projects.
- Deliver a diversity of housing options that meet the needs of residents with different lifestyles and life stages.

INTRODUCTION

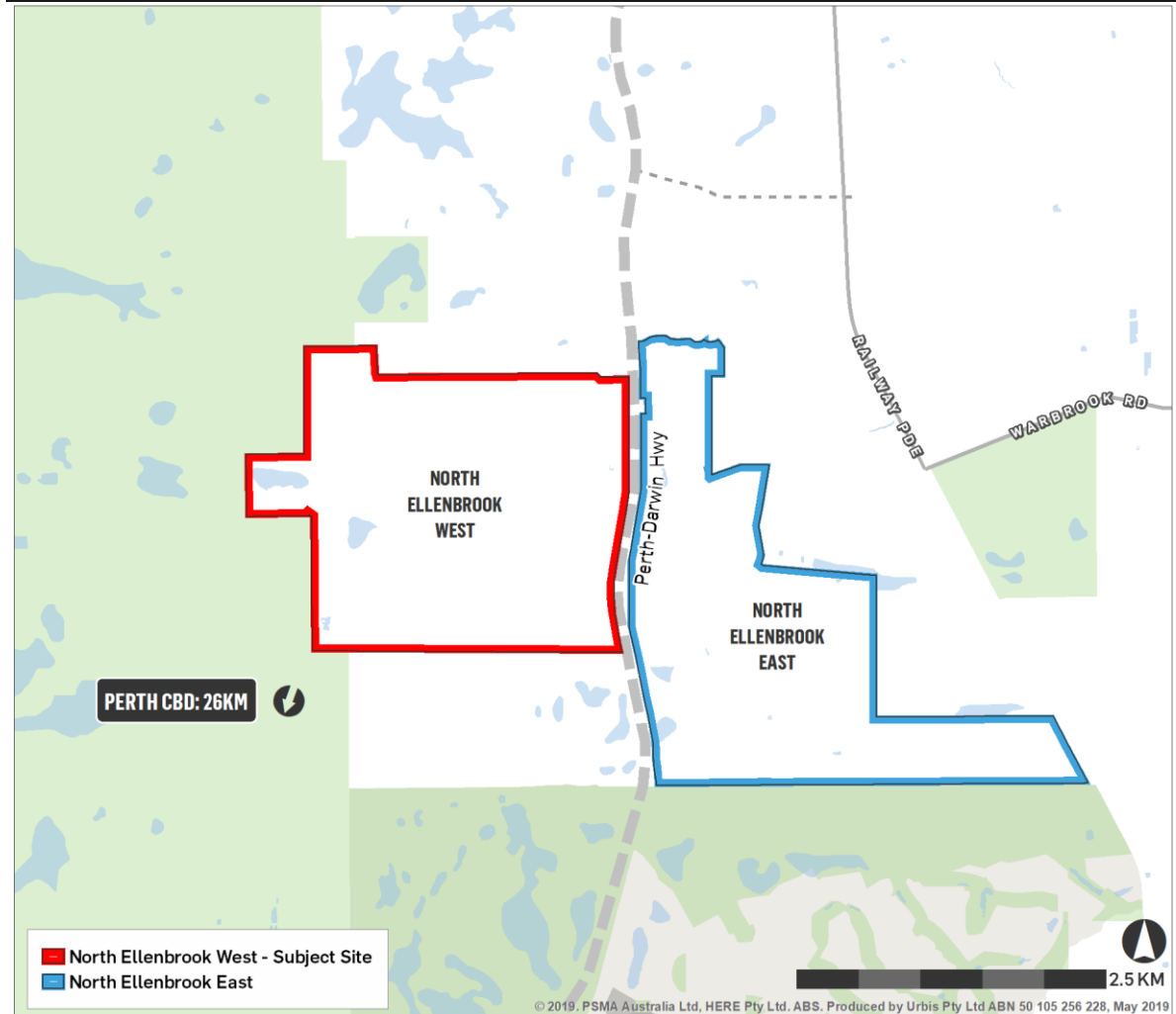
STUDY PURPOSE AND STRUCTURE

STUDY BACKGROUND AND PURPOSE

PURPOSE

- North Ellenbrook is identified as a future urban growth area located in Perth's north east corridor. Parcel Property and Lend Lease are preparing district structure plans for the western and eastern sites, respectively.
- Urbis was engaged by Parcel Property as part of its development of a district structure plan for North Ellenbrook West (the subject site) to assist with understanding:
 - The sustainable scale, mix and staging of activity centres;
 - Anticipated employment; and
 - Strategies and actions to support employment and economic activity.
- In order to understand the supportable sustainable centre hierarchy within the subject site, the assessment drew on an initial analysis of activity centre need across the two precincts which was prepared as part of the Metropolitan Scheme Amendment (January 2019). The findings however are moderately different due to amended population yield estimates and more detailed site information.

SUBJECT SITE LOCATION



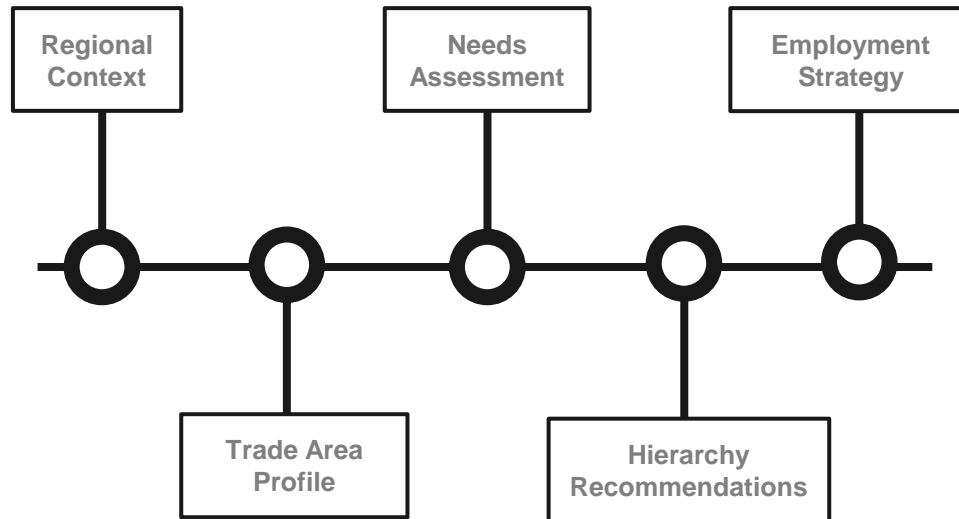
Source: Urbis

STUDY APPROACH

APPROACH

- This strategy was developed to understand the sustainable centre mix with consideration given to the broader activity centre hierarchy.
- The activity centre analysis was developed in line with the requirements of SPP 4.2 Activity Centres for Perth and Peel and the City of Swan Local Commercial and Activity Centres Strategy (2016).
- This study included the following tasks.
 - **Regional context** – assessment of the activity centre environment and urban development context;
 - **Trade area profile** – assessment of the attributes of the defined trade area;
 - **Needs assessment** – assessment of needs in the trade area;
 - **Hierarchy Recommendations** – recommended sustainable activity centre hierarchy mix and location; and
 - **Employment Strategy** – strategies and actions to support employment and economic activity.

STUDY TASKS



SECTION ONE

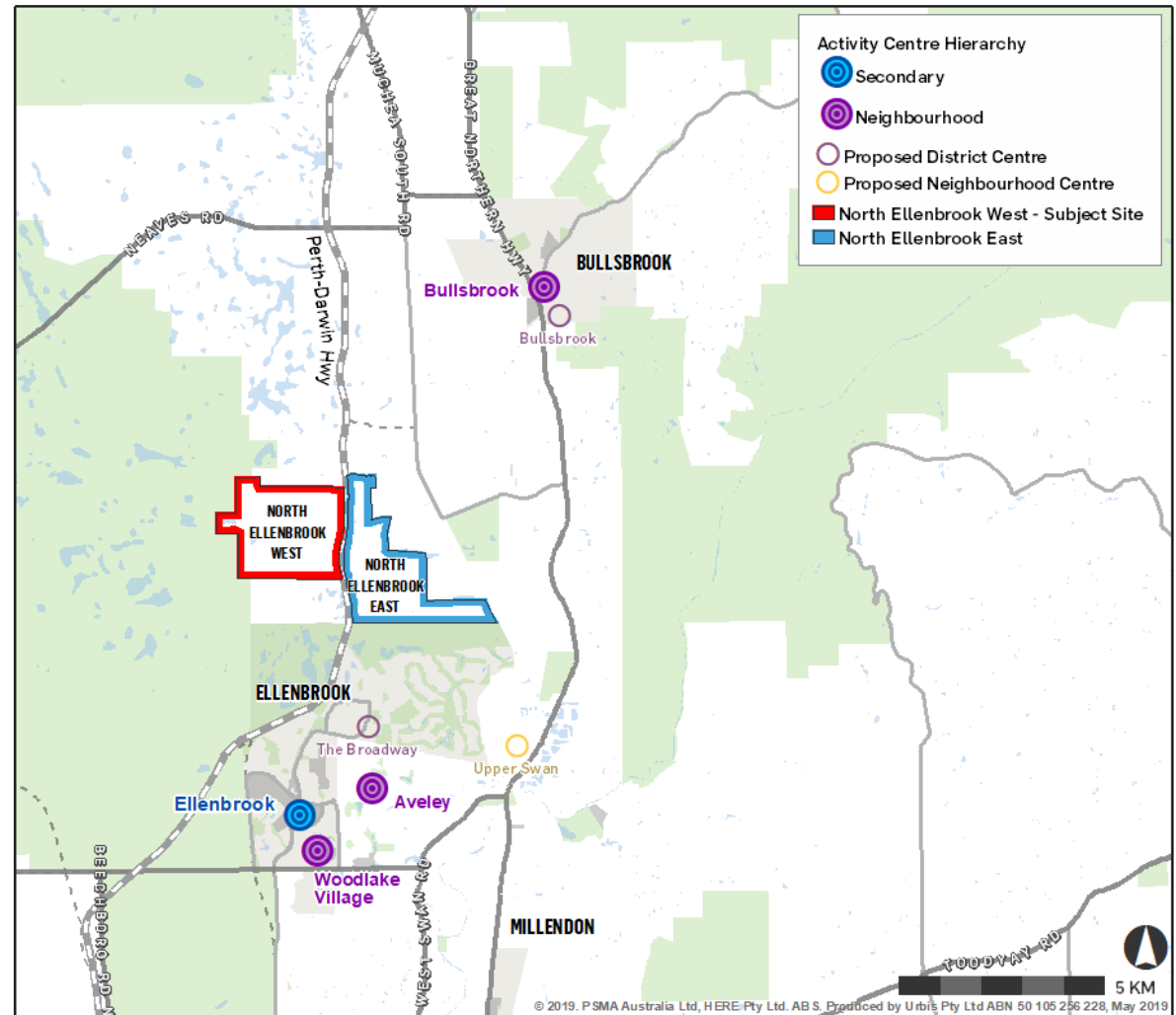
REGIONAL CONTEXT

ACTIVITY CENTRE HIERARCHY

KEY INSIGHTS

- There is a defined hierarchy of centres in the urban development areas of Bullsbrook to the north and Ellenbrook to the south. The key activity centres of relevance to the development potential within North Ellenbrook are summarised below.
- **Ellenbrook Secondary Centre:** Ellenbrook is an emerging Secondary centre which is anchored by Ellenbrook Central. This centre is expected to continue to expand in response to infill development within and surrounding the town centre and broader greenfield development in the corridor.
- **The Broadway District Centre (Future):** A future district centre is identified for the site on the corner of The Broadway and Bordeaux Lane in Ellenbrook. The service commercial site is partially developed and the retail site is vacant.
- **Central Bullsbrook District Centre (Future):** A district centre is planned as part of the Kingsford estate in Bullsbrook.
- The close proximity of the Ellenbrook Secondary Centre will limit the need for higher order secondary centres within the subject site.

ACTIVITY CENTRE HIERARCHY



Source: SPP 4.2 Activity Centres for Perth and Peel; City of Swan Local Commercial and Activity Centres Strategy; Urbis

ACTIVITY CENTRE HIERARCHY

KEY INSIGHTS

- The City of Swan Local Commercial and Activity Centres Strategy (2016) was informed by a retail needs analysis which identified potential retail floorspace growth for relevant centres to the north and south of the subject site.
- Planning has advanced for the Central Bullsbrook District Centre which identifies potential for urban growth in Bullsbrook and peri-urban and rural areas to the north. The analysis for this centre states that it has potential to support up to 25,000 square metres (sq.m) of retail floorspace by 2031 (assuming no population growth within North Ellenbrook).
- The Ellenbrook Secondary Centre is considered to have significant expansion potential. The Ellenbrook Central expansion is currently underway which will add approximately 11,000 sq.m. This will be complemented by further development of bulky goods / showrooms sites.
- Overall, analysis prepared for the City of Swan and the land owners demonstrates that there is existing urban zoned land that will support the viability and growth of these existing and planned centres. As such, population growth within the subject site and any associated spending leakage would support the earlier expansion of these employment centres than envisaged.

ACTIVITY CENTRE FLOORSPACE MIX

		<u>Current (2015-17)</u>		Anticipated Retail
	Shop Retail	Other Retail	Total Floorspace	Floorspace (2031)
Secondary Centre				
Ellenbrook	28,501	30,926	99,719	70,000+
District Centre				
The Broadway	-	-	≈4,000	15,000
Central Bullsbrook	-	-	-	25,000
Local and Neighbourhood Centre				
Bullsbrook Town Centre	1,808	1,600	15,577	10,000
Aveley Shopping Centre	4,599	-	4,599	6,500
Woodlake Village	2,225	-	3,605	3,000
Upper Swan	-	-	-	6,000

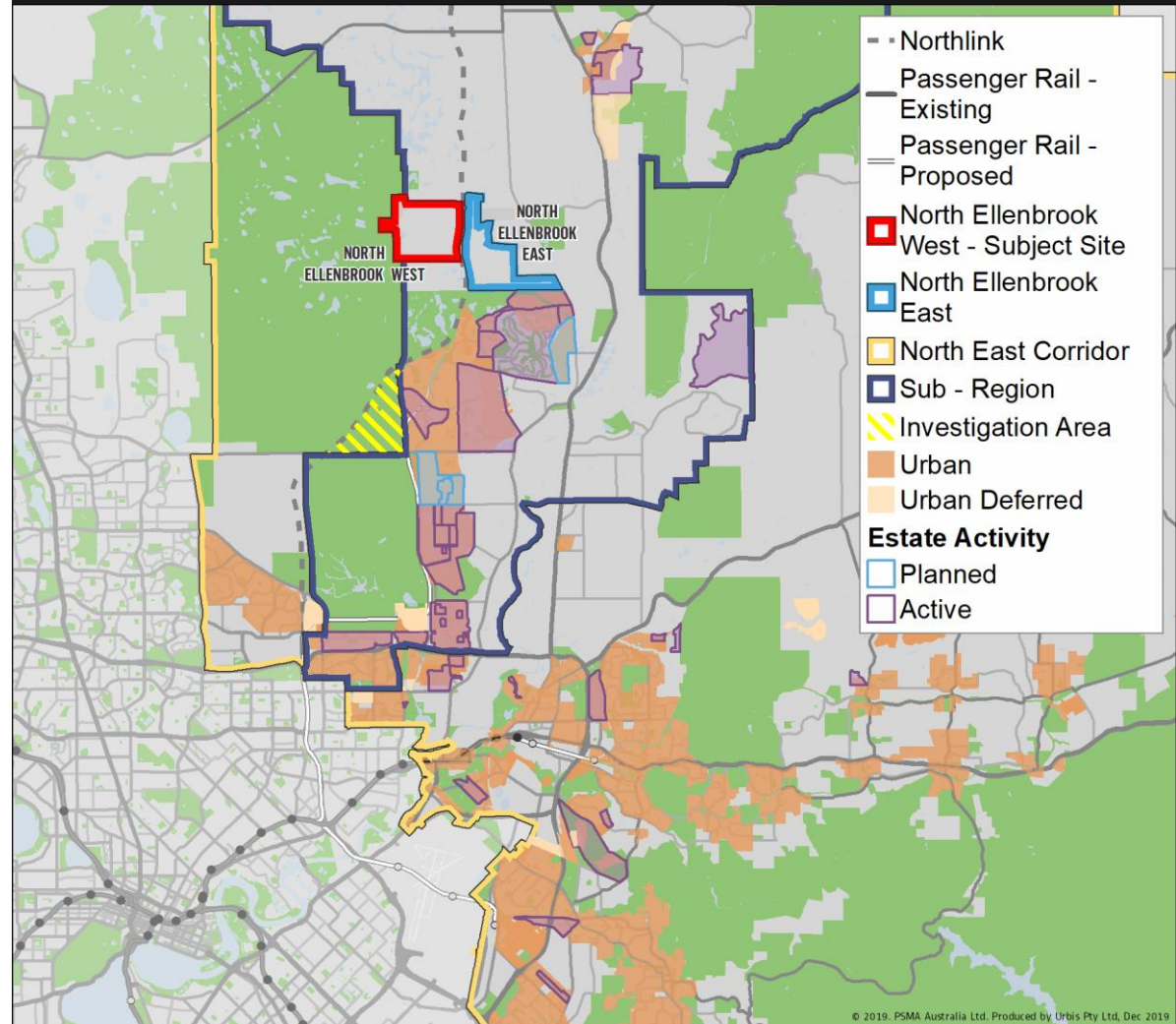
Source: DPLH Land Use and Employment Survey; City of Swan Local Commercial and Activity Centres Strategy; Bullsbrook Central Structure Plan; Property Council Shopping Centres Online; Urbis

URBAN DEVELOPMENT OUTLOOK

KEY INSIGHTS

- There are a range of existing and future urban developments which will influence the opportunities to accommodate activity centres within the subject site. The key development areas are summarised below.
- **Bullsbrook:** Bullsbrook is a major urban growth area which is expected to accommodate increased population growth in central and southern areas of the suburb.
- **Ellenbrook / The Vines / Aveley:** These suburbs are in their final stages of development however there are expected to be increased levels of infill development in the Ellenbrook town centre which will support population growth.
- **Upper Swan:** Satterley is expected to launch this 140 hectare estate in 2020.
- **West Ellenbrook:** This site is identified as an Investigation Area and is expected to accommodate future residential growth.
- **North Ellenbrook (East):** Land owners are currently advancing district structure planning for this development area which is expected to yield approximately 5,500 dwellings and commence development by 2025.
- **North Ellenbrook (West):** The subject site is expected to accommodate approximately 6,500 households and commence development by approximately 2028.
- Whilst population growth within these areas will influence activity centre requirements within the subject site, this analysis seeks to understand what level of additional activity centre need is required due to growth within North Ellenbrook.

ACTIVE AND PLANNED RESIDENTIAL ESTATES, NORTH-EAST CORRIDOR



Source: Urbis, DPLH

n.b. excludes small developments

SECTION TWO

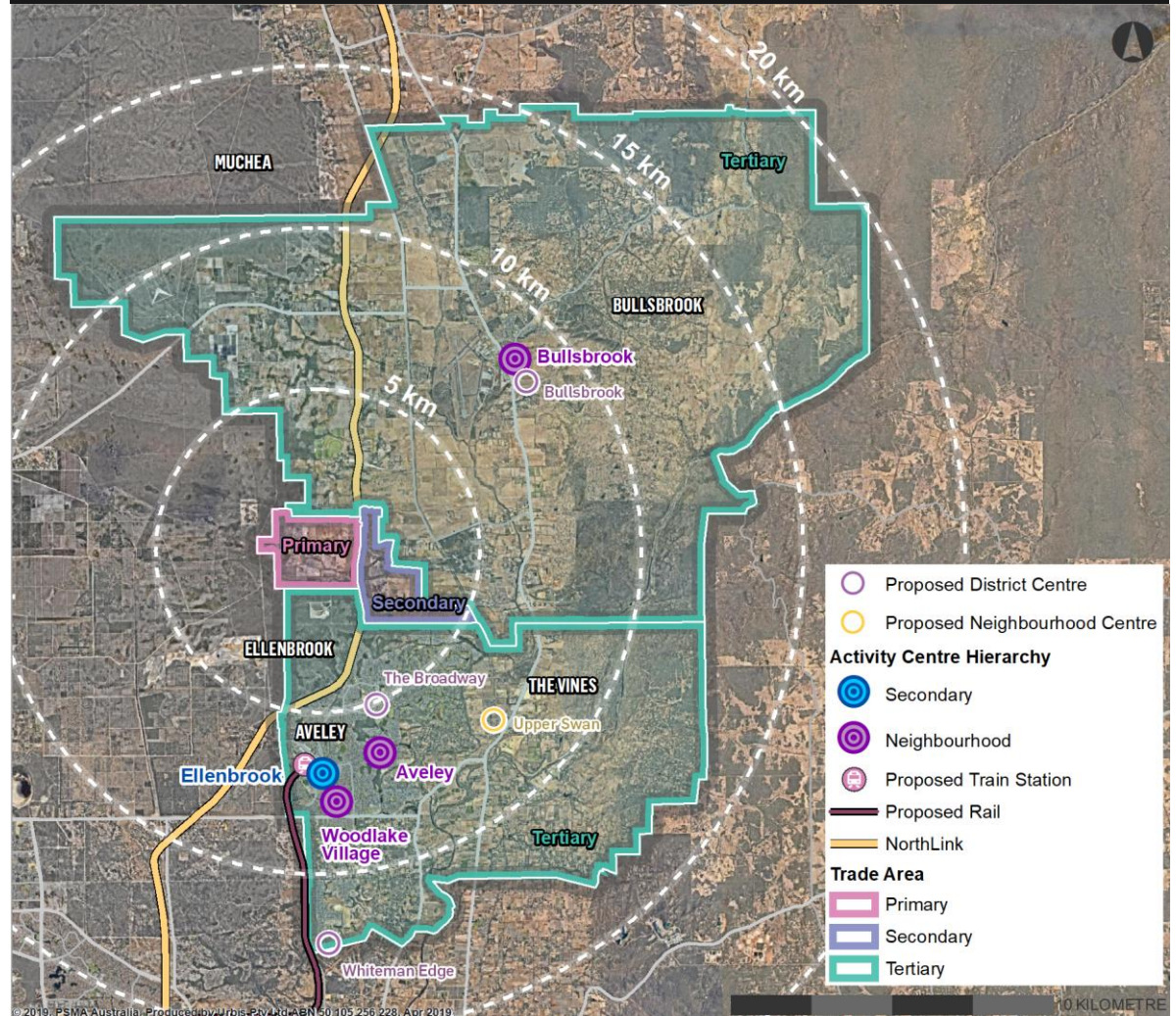
TRADE AREA ANALYSIS

TRADE AREA DEFINITION

KEY INSIGHTS

- In order to understand the opportunities for activity centres we have defined a trade area for the subject site based on:
 - The existing and expected supply and mix of surrounding centres;
 - The accessibility of the site from urban areas; and
 - Physical barriers that may limit access (such as NorthLink).
- Given the focus of this assessment on activity centre capacity and need within the subject site, a primary trade area was defined for this site. This reflects the assumption that future residents in the subject site will represent the vast majority of customers for future activity centre uses in the subject site.
- North Ellenbrook (East) will have relatively good access to the southern portion of the subject site given a proposed on / off ramp at this location. As such, this site was defined as a secondary trade area.
- Whilst limited patronage of future activity centre uses in the subject site is assumed for residents located in Bullsbrook and urban areas to the south, a tertiary trade area was defined to recognise growth and activity centres in these areas. Tertiary trade levels however are expected to be

TRADE AREA



Source: Urbis

ESTIMATED RESIDENT POPULATION

KEY INSIGHTS

- The primary trade area is expected to accommodate a build out population of approximately 18,850. The main trade area, including North Ellenbrook (East), is estimated to accommodate 34,800 residents at build out.
- This estimate is based on a ratio of 2.9 residents per dwelling which is comparable to observed estimates across Perth's growth corridors as of the 2016 Census of Population and Housing.
- Further detailed local structure planning is expected to influence the ultimate yield.

ESTIMATED DWELLINGS AND POPULATION AT BUILD-OUT, MAIN TRADE AREA

	Dwellings	Resident Population
North Ellenbrook (West)	6,500	18,850
North Ellenbrook (East)	5,500	15,950
Main Trade Area	12,000	34,800

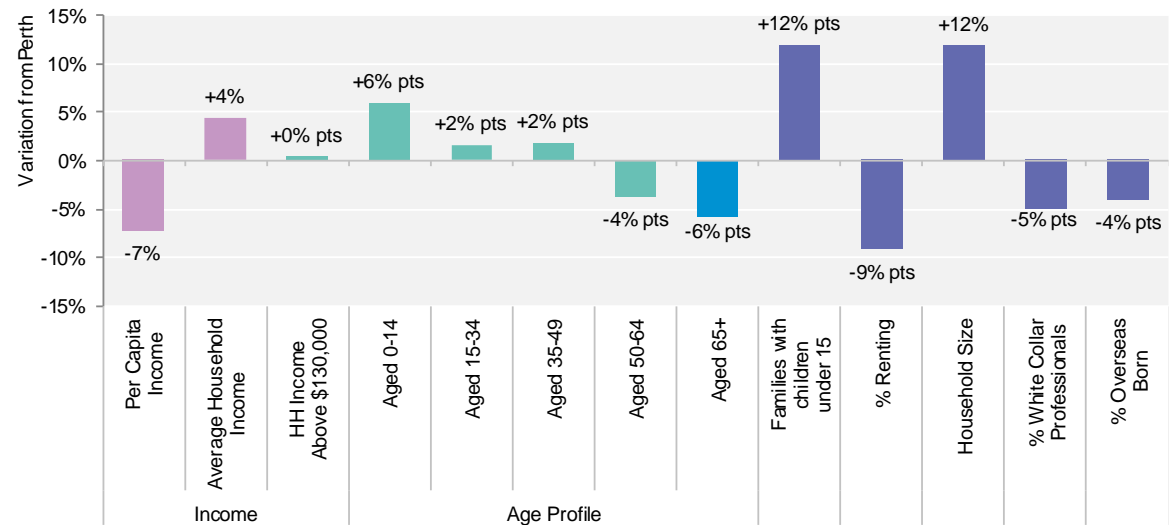
Source: ABS Census of Population and Housing; Urbis

RESIDENT PROFILE

KEY INSIGHTS

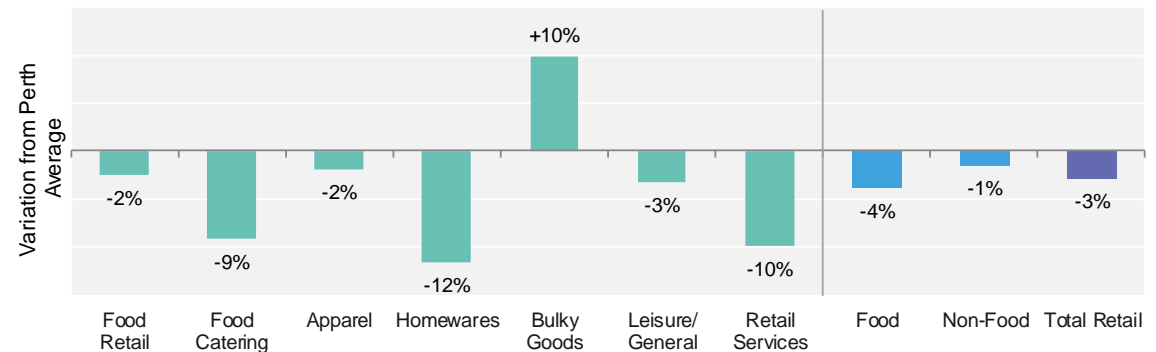
- In order to determine the likely spending patterns of residents in the main trade area, this report assessed the attributes and spending patterns of residents in the total trade area (i.e. spending patterns in the main trade area are expected to reflect the average patterns of residents in the Bullsbrook and Ellenbrook areas).
- The retail spending market was estimated using MarketInfo—a micro-simulation model developed by MDS Market Data Systems Pty Ltd. This model is based on information from the ABS' Household Expenditure Survey (HES), the Census of Population and Housing and other information sources that provide up-to-date information on changes in spending behavior and/or income levels (e.g. Australian National Accounts, Australian Taxation Statistics, etc.). MarketInfo is used widely by stakeholders in the retail industry and by other consultants preparing retail assessments. The model uses micro-simulation techniques to combine propensity to spend on commodities with the socio-economic characteristics of individuals to derive spending per capita estimates.
- Of note, residents in the main trade area are anticipated to spend lower amounts on retail than the Perth metropolitan average resident; particularly on discretionary retail such as food catering and retail services.

DEMOGRAPHIC & SOCIO-ECONOMIC CHARACTERISTICS, TOTAL TRADE AREA, 2016



Source: ABS; Urbis

SPENDING CHARACTERISTICS, TOTAL TRADE AREA, 2016



Source: ABS; MarketInfo; Urbis

RETAIL SPENDING PROJECTIONS

KEY INSIGHTS

- Based on current observed spending patterns in the total trade area, the build out population in the main trade area is estimated to support approximately \$509 million retail expenditure.
- The forecast retail expenditure by trade area residents was influenced by the following assumptions and inputs.
 - Forecast population estimates at build-out within the main trade area.
 - Whilst per capita spending growth is likely to occur as a result of real wage growth, retail spend per capita increases were assumed to be 0%. This assumption is considered valid given the long term and uncertain timing of future population growth. As such, it should be noted that floorspace potential could exceed estimates developed in this report.
 - No allowance has been made for future inflation, with future spending expressed in constant 2018 dollar terms.

RETAIL SPENDING ESTIMATES (2018\$, MILLIONS), MAIN TRADE AREA

	Food Retail	Food Catering	Apparel	Home- wares	Bulky Goods	Leisure / General	Retail Services	Total Retail
North Ellenbrook (West)	131	27	24	19	33	34	9	276
North Ellenbrook (East)	111	23	20	16	28	29	8	233
Main Trade Area	241	49	44	35	60	63	16	509

Source: ABS; MarketInfo; Urbis

SECTION FOUR

NEEDS ASSESSMENT

SUPERMARKET POTENTIAL

KEY INSIGHTS

- Based on estimated expenditure at build out, the main trade area is estimated to support approximately 13,000 sq.m of supermarket floorspace (in net lettable area terms). This is equivalent to:
 - Three full-line supermarkets (e.g. Coles / Woolworths of approximately 3,500 sq.m);
 - a smaller format supermarket (e.g. ALDI of approximately 1,500 sq.m); and
 - One small format limited-line grocer (approximately 1,000 sq.m).
- A likely configuration of these supermarkets would be two of the full-line supermarkets and the smaller discount supermarket within a district centre, the remaining full line within a neighbourhood centre and the small format grocer as part of a local or neighbourhood centre.
- This assessment assumes that a notable proportion of supermarket expenditure will be captured by existing and future centres located outside the main trade area; thus supporting their viability at an earlier stage than anticipated.

SUPERMARKET CAPACITY ASSESSMENT (\$2018), MAIN TRADE AREA

	Unit	North Ellenbrook (West)	North Ellenbrook (East)	Main Trade Area
Catchment Area (CA) F&G Spending	\$M	116.9	98.9	215.8
F&G Spend to All Supermarkets (@ 75%)	\$M	87.7	74.2	161.8
Smkt F&G Spend to CA Supermarkets (@ 65%)	\$M	57.0	48.2	105.2
Allowance for Spend from Beyond CA (@ 12%)	\$M	7.8	6.6	14.3
Allowance for Spend on non-F&G (@ 7%)	\$M	4.9	4.1	9.0
Total Available Supermarket Turnover	\$M	69.6	58.9	128.5

Supportable Supermarket Floorspace

Supportable ATL	\$ per Sq.m	10,000
Supportable Supermarket Floorspace	Sq.m	12,852

Note: F&G = Food and Grocery, CA = Catchment Area, Smkt = Supermarket, ATL = Average Trading Level

Source: Urbis

OTHER SHOP RETAIL POTENTIAL

KEY INSIGHTS

- In addition to supermarket floorspace, centres in the main trade area will include a range of additional shop retail uses such as take-away food, restaurants, cafes, apparel stores, news agencies etc.
- Whilst the degree of floorspace within each centre will be influenced by its location attributes, the ability to accommodate anchor uses such as supermarkets and discount department stores will be a key factor for attracting other tenants.
- A high level assessment estimates that the main trade area could accommodate approximately 11,000 sq.m of other shop retail uses, with the vast majority of floorspace is expected to be accommodated within the district centre.
- As per the supermarket assessment, this report assumes that main trade area residents will support spending within existing and planned centres located outside the main trade area.

OTHER SHOP RETAIL CAPACITY ASSESSMENT (\$2018), MAIN TRADE AREA

	Unit	North Ellenbrook (West)	North Ellenbrook (East)	Main Trade Area
Catchment Area (CA) OSR Spending	\$M	127.6	108.0	235.6
OSR Spend to CA Centres (@ 35%)	\$M	44.7	37.8	82.4
Allowance for Spend from Beyond CA (@ 12%)	\$M	6.1	5.2	11.2
Total Available OSR Turnover	\$M	50.7	42.9	93.7

Supportable Other Shop Retail Floorspace

Supportable ATL	\$ per Sq.m	8,500
Supportable Other Shop Retail Floorspace	Sq.m	11,022

Note: OSR = Other Shop Retail (i.e. excluding supermarkets and bulky goods), CA = Catchment Area, ATL = Average Trading Level

Source: Urbis

SHOWROOM / BULKY GOODS RETAIL POTENTIAL

KEY INSIGHTS

- Spending by main trade area residents on large format retail categories is estimated at approximately \$111M based on current retail spending patterns.
- Given the degree of competition existing and proposed in Midland, Ellenbrook and Bullsbrook, approximately 15,000 sq.m of floorspace within the main trade area centres is considered viable at build-out.
- The majority of showroom floorspace should be, where possible, co-located with the district centre.

SHOWROOM RETAIL CAPACITY ASSESSMENT (\$2018), MAIN TRADE AREA

	Unit	North Ellenbrook (West)	North Ellenbrook (East)	Main Trade Area
Catchment Area (CA) Showroom Spending	\$M	60.3	51.0	111.4
Showroom Spend to CA Centres (@ 35%)	\$M	21.1	17.9	39.0
Allowance for Spend from Beyond CA (@ 14%)	\$M	3.3	2.8	6.1
Total Available OSR Turnover	\$M	24.4	20.7	45.1

Supportable Other Shop Retail Floorspace

Supportable ATL	\$ per Sq.m	3,000
Supportable Other Shop Retail Floorspace	Sq.m	15,037

Note: CA = Catchment Area, ATL = Average Trading Level

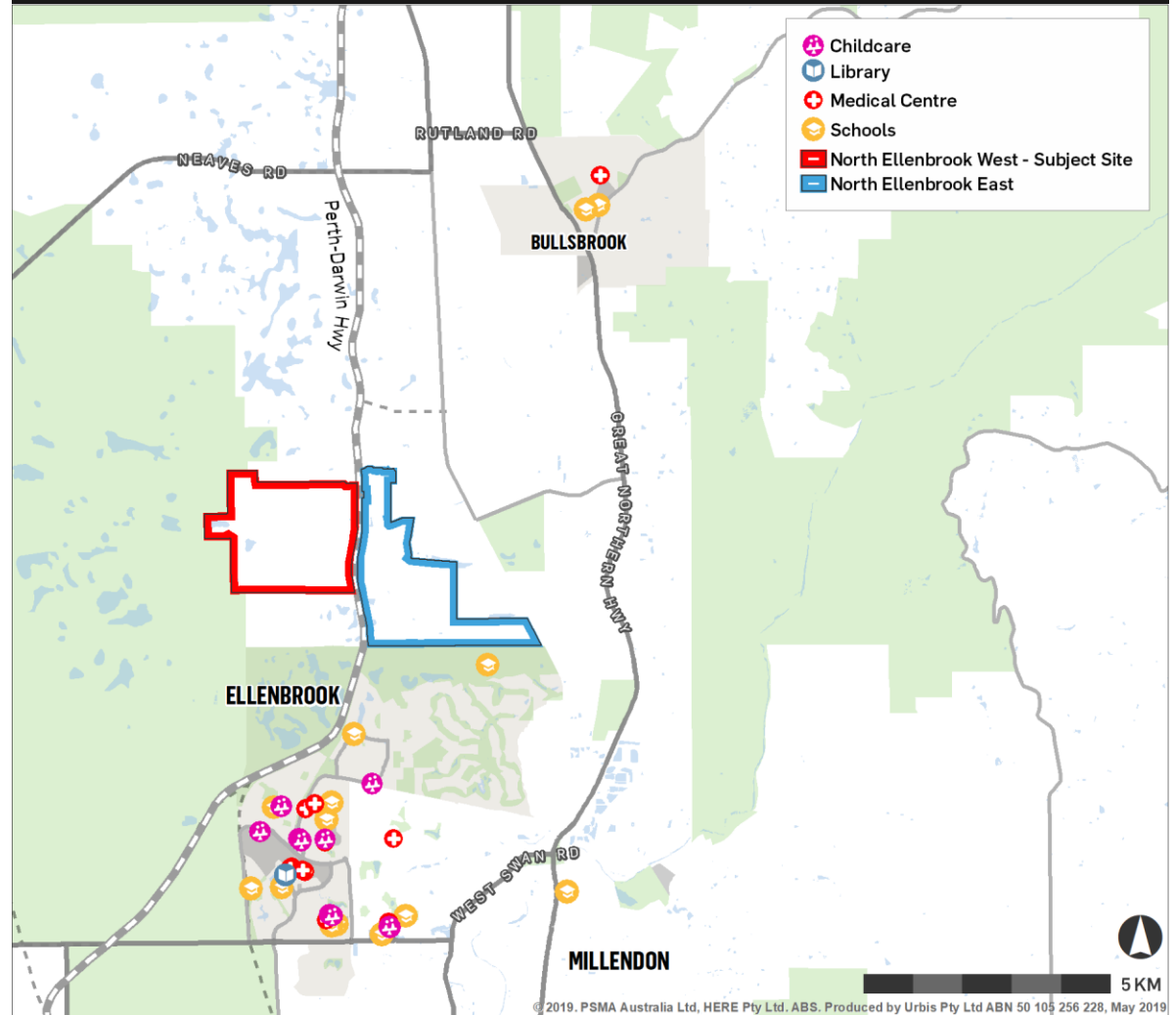
Source: Urbis

NON RETAIL USES POTENTIAL

KEY INSIGHTS

- In addition to retail uses, centres within the subject site and main trade area will accommodate a range of non-retail uses that service the local population. This will include, for instance:
 - Child care centres
 - Medical and allied health services;
 - Community facilities;
 - Recreation facilities;
 - Education facilities; and
 - Service industry.
- Whilst the Ellenbrook town centre will accommodate regional facilities, many of the aforementioned uses will need to be accommodated locally to support the liveability of the area. Where possible, these uses should be co-located with centres or developed as local nodes.

LOCATION OF EXISTING MEDICAL, COMMUNITY AND CHILDCARE USES



NON-RETAIL USES POTENTIAL

KEY INSIGHTS

- Based on observed benchmarks across growth areas of metropolitan Perth, this report identified indicative estimates for non-retail uses that could be accommodated within the subject site.
- The benchmarks were primarily based on detailed floorspace estimates from the 2015-17 Land Use and Employment Survey undertaken by the Department of Planning, Lands and Heritage.
- The degree to which the service commercial uses can be accommodated within North Ellenbrook (West) will be influenced by the development within the industrial areas to the north and within the Ellenbrook town centre.

CAPACITY FOR NON-RETAIL USES, NORTH ELLENBROOK (WEST)

Non Retail Use	Benchmark	Estimated Capacity within Subject Site
Medical and Allied Health Services	150-200 sq.m per 1,000 persons	3,300 sq.m
Child Care Centres	75-125 sq.m per 1,000 persons	1,900 sq.m
Primary Schools	One per 1,500 dwellings	4
Secondary Schools	One per 6,500-7,000 dwellings	1
Suburban Offices	50-500 sq.m per 1,000 persons	950 sq.m
Private Entertainment and Recreation Uses	150-300 sq.m per 1,000 persons	2,800 sq.m
Service Industry	500-2,000 sq.m per 1,000 persons	12,000 sq.m
Multi-Purpose Community Centre	One per 25,000 persons	1
Sub-District Recreation Facilities	One per 25,000-50,000 persons	1

Source: DPLH Land Use and Employment Survey; Community Infrastructure Plans (misc.); Urbis

SECTION FIVE

HIERARCHY

RECOMMENDATIONS

CENTRE HIERARCHY RECOMMENDATIONS

KEY INSIGHTS

- Based on the estimated floorspace needs generated by forecast residents within North Ellenbrook (west) and the main trade area, a range of activity centres and commercial areas are proposed. There will however be the opportunity to further review floorspace requirements during the activity centre planning and local structure planning stages.
- A district centre should be accommodated for within the eastern portion of the North Ellenbrook (West) precinct along the major east west route which provides ease of access to residents within the main trade area. This central location will maximise the extent of its catchment and provide proximate amenities and services for North Ellenbrook residents. The district centre should be easily accessible from a NorthLink access ramp.
- The larger proposed neighbourhood centre should be located within the central core of the North Ellenbrook (East) precinct, along a north south connector.
- A smaller neighbourhood centre is considered best placed within North Ellenbrook (West) in order to complement the district centre offering.
- There is potential for small local nodes which may feature a stand alone child care, medical centre or similar service. These centres are flexible in their location.
- The service industry precinct is expected to have limited potential given the proximity of the industrial area and existing and future competition in Ellenbrook.

CENTRE HIERARCHY RECOMMENDATIONS

Centre Hierarchy	Floorspace (sq.m NLA)			Total	Indicative Gross Land Area (ha)
	Shop Retail	Other Retail	Non-Retail		
District Centre	15,000	10,000	7,000	32,000	12
Neighbourhood Centre (east)	6,000	500	500	7,000	3
Neighbourhood Centre (west)	3,000	-	300	3,300	1
Local Node/s	-	-	1,200	1,200	1
Service Industry	-	4,500	12,000	16,500	6
Total Supportable Floorspace	24,000	15,000	21,000	60,000	23

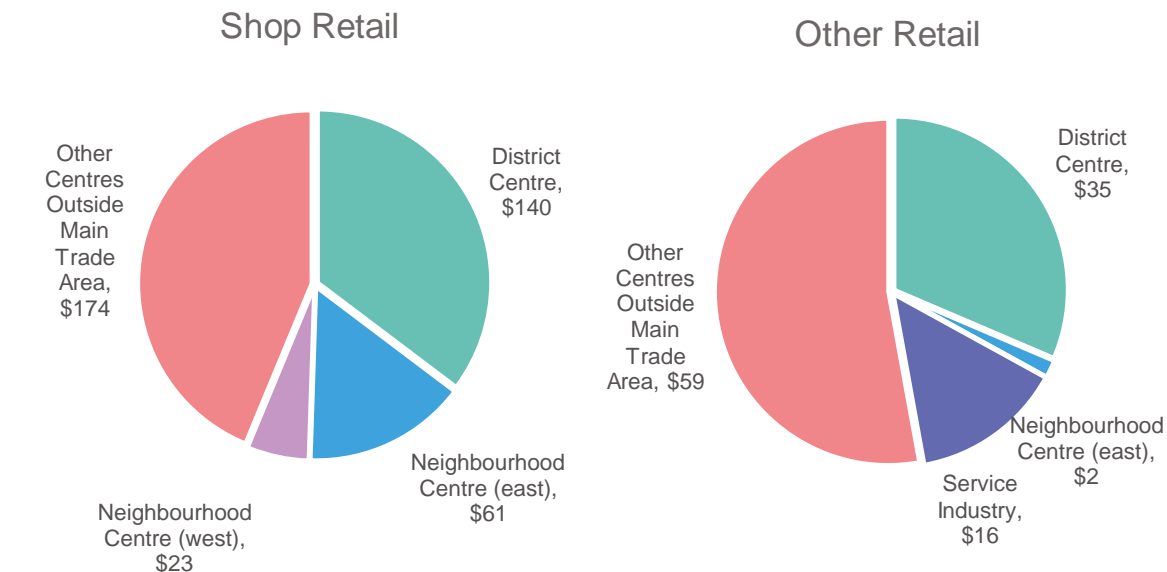
Source: Urbis

RETAIL SUSTAINABILITY CONSIDERATIONS

KEY INSIGHTS

- In line with SPP 4.2, this report assessed the sustainability of the hierarchy in the wider area. In order to ensure there was no potential loss of services and the identified centre hierarchy was not undermined, the proposed centre hierarchy was assessed in the context of the balance of demand available to other activity centres in the region.
- This analysis identified the following key findings.
 - The proposed centres in the main trade area are estimated to capture less than 60% of retail spending generated by main trade area residents. As such, the equivalent to \$233 million of retail spending generated by main trade area residents is expected to be captured by existing and planned centres outside the main trade area.
 - The proposed centres were assumed to only capture a moderate proportion of non-retail floorspace demand as higher order centres are expected to cater to these needs.
 - The future population in the main trade area is expected to support the viability of existing and planned centres outside the main trade area; supporting the earlier provision of floorspace within future district centres (The Broadway and Central Bullsbrook).
- A turnover impact assessment was not undertaken given the early stage of development of competitive centres, uncertain timing of the proposed centres and given this assessment does not propose any changes that would undermine the planned / existing hierarchy. Furthermore, a retail impact assessment is not a requirement of a district structure plan as per SPP 4.2.

ALLOCATION OF RETAIL SPENDING BY CENTRE (\$2018, MILLIONS)



Note: For illustrative purposes, this assessment assumes tertiary trade is nil
Source: Urbis

SECTION SIX

EMPLOYMENT STRATEGY

STRATEGY OBJECTIVES

KEY INSIGHTS

- This employment strategy is guided by the following objectives.
- Maximise access to local employment opportunities within the north east corridor.
- Deliver required infrastructure and services in a timely manner to catalyse private sector investment and support liveability.
- Attract private sector investment in urban and business development projects.
- Deliver a diversity of housing options that meet the needs of residents with different lifestyles and life stages.
- An action plan guides the achievement of the above objectives and the implementation of this strategy. The action plan outlines potential initiatives and responsible lead stakeholders to facilitate positive economic and employment outcomes for the area.

STRATEGY OBJECTIVES

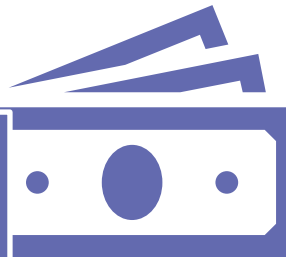
Maximise
Access to
Local
Employment



Timely
Delivery of
Infrastructure
and Services



Attract
Private
Sector
Investment



Deliver a
Diversity of
Housing
Options

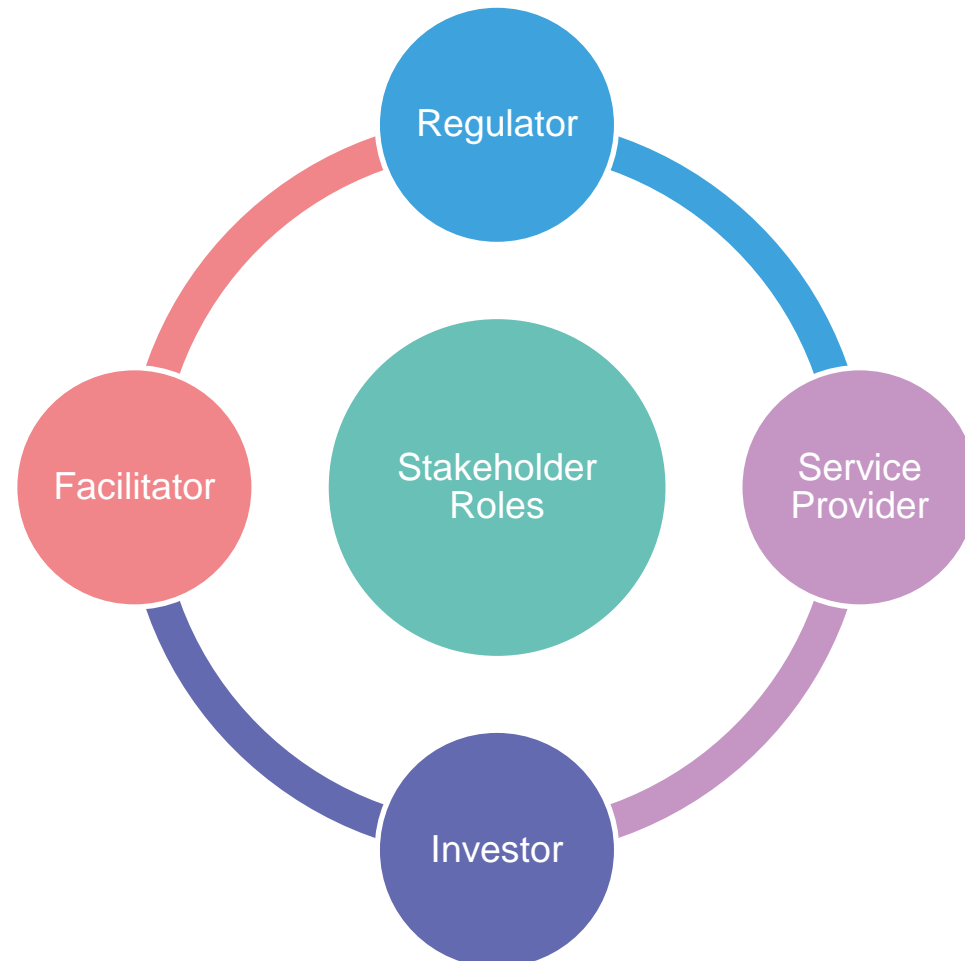


STAKEHOLDER ROLES

KEY INSIGHTS

- The realisation of the potential for sustainable economic and employment outcomes in North Ellenbrook (West) will rely on a long term cooperative relationship between land owners, the City of Swan and government agencies.
- Land owners and Parcel Property will play a key role through their commitment to and delivery of the development however government support and investment is critical to the optimisation of economic outcomes for the area. Government will play a fundamental role in the economic growth and prosperity of the area by:
 - Providing a regulatory framework conducive to private sector investment (regulator role);
 - Delivering a range of community services (service provider role);
 - Investing in enabling infrastructure that supports economic and business growth and employment generation (investor role); and
 - Implementing initiatives that support investment and employment (facilitation role).
- The absence of effective government involvement will significantly constrain the economic potential of the area and reduce its employment generation capacity.
- Land owners, Parcel Property and private organisations will support the lead role of government through:
 - Investment in hard and soft infrastructure and services (investor role); and
 - Branding and place making (facilitation role).

STAKEHOLDER ROLES



ESTIMATED EMPLOYMENT CONTRIBUTION

KEY INSIGHTS

- The construction phase of the residential mixed-use development is expected to deliver significant employment and economic opportunities for the local area.
- The initial effect on the region's economy of the construction is estimated to be approximately \$2.0 billion. Combined with flow on benefits, the construction phase of the project is expected to support overall economic output by of approximately \$5.0 billion.
- Overall, the construction phase is expected to directly and indirectly support 10,800 employment opportunities (in terms of full-time equivalent job years) over the development period.
- The development of the subject site will support ongoing employment opportunities locally and support existing and planned employment centres in the wider area (such as the industrial areas to the north). Based on estimated non-residential uses and a moderate home-based worker estimate, the subject site is expected to accommodate approximately 1,300 jobs.
- Note, the construction and development cost estimates are high level order of magnitude assumptions based on average construction and civil costs. Costs exclude financing, project management and other fees and charges.

ECONOMIC BENEFITS FOR CONSTRUCTION PHASE, NORTH ELLENBROOK (WEST)

	Economic Output (\$m)	Gross Value Add (\$m)	Employment (FTE Job Years)
Direct Impact	2,000	536	3,240
Indirect Impact	3,000	1,304	7,560
Total Impact	5,000	1,840	10,800

Source: REMPLAN; Urbis

EMPLOYMENT ESTIMATES AT BUILD OUT, NORTH ELLENBROOK (WEST)

	Shop Retail	Other Retail	Non-Retail	Total
District Centre	517	125	140	782
Neighbourhood Centre (west)	207	6	10	223
Local Node/s (west)	-	-	24	24
Service Industry	-	56	240	296
Schools & Public Recreation / Community Facilities	-	-	310	310
Home-Based Workers (@ 5%)	-	-	471	471
Total Supportable Jobs				1,326

Source: DPLH Land Use and Employment Survey; Urbis

ACTION PLAN

Initiative	Description	Lead	Key Partners
REGULATION			
Urban Development Innovation	Support innovative urban design solutions that promote housing diversity and affordability	City of Swan	Land Owners
Flexible Housing Design	Promote flexible lot and building design to support affordable and diverse housing	City of Swan	Land Owners
Clean Technology	Support the adoption of clean energy, water and waste technologies and sustainability measures	City of Swan	Land Owners / Utility Providers / Government Agencies
SERVICE PROVISION			
Public Transport	Deliver frequent public transport services in a timely manner in this growth area	Public Transport Authority	City of Swan / Land Owners / Businesses / Residents
Co-Working Hub	Support co-working space development, business networking and support services	City of Swan	Land owners / Co-Working Hub Organisation / Business Association / Workers
INVESTMENT			
Local Amenities	Support liveability through development of recreation, entertainment, leisure, health and retail amenities and services	City of Swan	Land Owners / Businesses / Residents
External Funding	Advocate for state and federal government funding for key hard and soft infrastructure	City of Swan	Land Owners / Businesses / Residents
FACILITATION			
Brand and Profile	Promote and brand North Ellenbrook to support its desirability as a place to invest, live, work and visit	Land Owners	City of Swan / Businesses
Home-Based Employment	Facilitate home-based start-ups and small businesses to locate within North Ellenbrook	Land Owners	City of Swan
Private Education	Support the attraction of private education providers to North Ellenbrook	Land Owners	City of Swan
Development Investment Attraction	Identify and target strategic businesses and services to establish in the district centre	City of Swan	Land Owners / Businesses
Collaborative Forum	Support stakeholder collaboration through regular information exchange and shared advocacy	City of Swan	Land Owners / Businesses

This report is dated January 2020 and incorporates information and events up to that date only and excludes any information arising, or event occurring, after that date which may affect the validity of Urbis Pty Ltd's (Urbis) opinion in this report. Urbis prepared this report on the instructions, and for the benefit only, of Parcel Property (Instructing Party) for the purpose of a Activity Centre and Employment Strategy (Purpose) and not for any other purpose or use. Urbis expressly disclaims any liability to the Instructing Party who relies or purports to rely on this report for any purpose other than the Purpose and to any party other than the Instructing Party who relies or purports to rely on this report for any purpose whatsoever (including the Purpose).

In preparing this report, Urbis was required to make judgements which may be affected by unforeseen future events including wars, civil unrest, economic disruption, financial market disruption, business cycles, industrial disputes, labour difficulties, political action and changes of government or law, the likelihood and effects of which are not capable of precise assessment.

All surveys, forecasts, projections and recommendations contained in or made in relation to or associated with this report are made in good faith and on the basis of information supplied to Urbis at the date of this report. Achievement of the projections and budgets set out in this report will depend, among other things, on the actions of others over which Urbis has no control.

Urbis has made all reasonable inquiries that it believes is necessary in preparing this report but it cannot be certain that all information material to the preparation of this report has been provided to it as there may be information that is not publicly available at the time of its inquiry.

In preparing this report, Urbis may rely on or refer to documents in a language other than English which Urbis will procure the translation of into English. Urbis is not responsible for the accuracy or completeness of such translations and to the extent that the inaccurate or incomplete translation of any document results in any statement or opinion made in this report being inaccurate or incomplete, Urbis expressly disclaims any liability for that inaccuracy or incompleteness.

This report has been prepared with due care and diligence by Urbis and the statements and opinions given by Urbis in this report are given in good faith and in the belief on reasonable grounds that such statements and opinions are correct and not misleading bearing in mind the necessary limitations noted in the previous paragraphs. Further, no responsibility is accepted by Urbis or any of its officers or employees for any errors, including errors in data which is either supplied by the Instructing Party, supplied by a third party to Urbis, or which Urbis is required to estimate, or omissions howsoever arising in the preparation of this report, provided that this will not absolve Urbis from liability arising from an opinion expressed recklessly or in bad faith.

Urbis staff responsible for this report were:

Director	Tim Connoley
Consultant	Dermott Carr
Consultant	Yashwini Halai

Project code	P0009164
Report number	Final



BRISBANE

Level 7, 123 Albert Street
Brisbane QLD 4000
Australia
T +61 7 3007 3800

GOLD COAST

45 Nerang Street,
Southport QLD 4215
Australia
T +61 7 5600 4900

MELBOURNE

Level 12, 120 Collins Street
Melbourne VIC 3000
Australia
T +61 3 8663 4888

PERTH

Level 14, The Quadrant
1 William Street
Perth WA 6000
Australia
T +61 8 9346 0500

SYDNEY

Tower 2, Level 23, Darling Park
201 Sussex Street
Sydney NSW 2000
Australia
T +61 2 8233 9900

CISTRI – SINGAPORE

An Urbis Australia company
12 Marina View, Asia Square
Tower 2, #21– 01
Singapore 018961
T +65 6653 3424
W cistri.com

URBIS.COM.AU