



ECU Mount Lawley Precinct Structure Plan

*Retail & Commercial Market
Need and Demand Assessment*

November 2025
Prepared for DevelopmentWA

Acknowledgement of Country



Urbis acknowledges the Traditional Custodians of the lands we operate on.

We recognise that First Nations sovereignty was never ceded and respect First Nations peoples continuing connection to these lands, waterways and ecosystems for over 60,000 years.

We pay our respects to First Nations Elders, past and present.

The river is the symbol of the Dreaming and the journey of life. The circles and lines represent people meeting and connections across time and space. When we are working in different places, we can still be connected and work towards the same goal.

Urbis is committed to incorporating our respect for First Nations cultures, peoples and storytelling in our work across the Country. We are proud to have partnered with Darug Nation artist, **Hayley Pigram**, and to profile her artwork – **Sacred River Dreaming**.

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Executive Summary

Urbis has been engaged by DevelopmentWA to prepared an independent economic assessment to inform the market support for the proposed Precinct Structure Plan (PSP) for the ECU Mount Lawley redevelopment, alongside the associated economic and employment impacts. Specifically, assessments covered in this document include:

- **Market Need and Demand Assessment** for the proposed retail (supermarket anchor & other supporting retail shops/services), childcare, gym/fitness club, medical/health uses, alongside other ancillary uses (a proposed primary school and retained ECU library, administration and WAAPA buildings for adaptive re-use)
- A high-level **Employment Strategy**, including the anticipated employment creation and impacts that could be delivered on an on-going basis
- A **Net Benefits Test** to inform specifically the potential trading performance impact associated with the proposed retail facilities

Key findings are summarised adjacent, whilst the remainder of the report is structured as follows:

- Section 1: Proposed Precinct Structure Plan
- Section 2: Site Assessment
- Section 3: Need & Demand Assessment
- Section 4: Employment Strategy
- Section 5: Net Benefits Test

Other relevant information is presented in the Appendices.

Need & Demand for Proposed Retail/Commercial Uses

Mount Lawley and the surrounding areas have a well established, older resident profile and the proposed ECU Mount Lawley PSP will provide the opportunity to introduce much need new housing and be a catalyst to bring younger households in the area. It is estimated that the development will lead to a population increase of between 1,150 and up to 1,840 additional residents.

This, combined with a relatively modest yet stable growth of the existing population base within a defined catchment, will likely create demand for a range of proposed retail and commercial uses. Based on our analysis, the size and scale supportable for each of the proposed uses are

Proposed Use	Supportable Size/Scale at Capacity
Supermarket	800-1,200 sq.m
Other Specialty Shops*	1,100-1,200 sq.m
Childcare Centre	1,200-1,500 sq.m (~100 places)
Medical Centre	400-600 sq.m
Gym/Fitness Club	400-500 sq.m

**Note: includes both retail and non-retail shops at the future activity centre and in other locations on-site.*

Proposed Primary School

The ECU Mount Lawley PSP proposes the inclusion of a new public primary school with an estimated capacity of approximately 540 students. It is envisaged to complement the network's existing schools in the area. Such a new school will be able to service both the new families of the PSP area and elsewhere locally.

Proposed Adaptive Re-use of the WAAPA Facilities, ECU Library & Administration Buildings

The existing Western Australian Academy of Performing Arts (WAAPA) facilities, alongside the ECU Library and Administration buildings present an opportunity to be repurposed to establish a Creative Arts Hub. The WAAPA facilities will also accommodate educational uses, with the expansion of the Mount Lawley Senior High School as announced by the State Government in 2020.

This Creative Arts Hub will provide important facilities for the benefit of the local community and wider Perth and continue the historical role of the site for education purposes but evolve its functions to support the growth of cultural / creative activities.

The future workers and visitors of such a Creative Arts Hub will be able to support the daily activation of the PSP area as well as the on-site retail and services uses.

Executive Summary

Overall Employment Outcome & Impacts

Upon full delivery and operation of the proposed developments, the estimated employment creation and the associated benefits on an on-going basis are summarised below:

- **399–429 total direct on-site jobs** (i.e. total full-time, part-time and casual jobs) across the proposed retail, education, wellness, medical and arts/culture-related uses, at capacity
- Another **119–124 total indirect jobs** supported elsewhere within Western Australia through the local and regional supply chain.
- **Between \$66.1 million and \$70.4 million per annum** in direct and indirect Gross Value Added (GVA) contributions to the Western Australian economy as a result of the above employment activities on an on-going basis.

The above assessed benefits highlights the ability of the ECU Mount Lawley PSP site to create long-term economic impact and support the on-going provision of employment opportunities to local residents, including future on-site residents. Importantly, those future jobs will be well aligned with the current local workforce and provide needed services for a steadily growing population over the longer term.

Net Benefits Test

The Net Benefits Test (NBT) indicates that there is a market need for the proposed retail floorspace within the ECU Mount Lawley PSP. This is demonstrated by:

- The proposed retail shops and services will provide convenient access to essential daily shopping needs for residents of the PSP and residents elsewhere in the catchment.
- Reflecting retail is the 'heart' of successful precincts and activity centres, the shops will also provide important amenities for future workers, students and visitors in the PSP.
- Retail spending generated by catchment residents is forecast to increase by \$414 million between 2025 and 2042, which will provide significant demand for new retail floorspace.

Furthermore, the proposed retail shops and services is expected to provide a significant range of demonstrable benefits for the community whilst maintaining a sustainable activity centre hierarchy. This is highlighted by the following:

- The proposed retail floorspace in the ECU Mount Lawley PSP (assumed at 1,950 sq.m for the NBT) is estimated to have only modest impacts (generally 1.0% to 2.0%) on other activity centres.

The level of impact would not cause any loss of existing shops and services.

- Due to future market growth, each activity centre is expected to be 'better off' performance wise even with the proposed addition retail floorspace.
- Accordingly, the proposed retail floorspace will broaden the range of and choice of shops available to consumers.
- The retail development is estimated to significantly increase employment opportunities through both the construction phase and ongoing operation of the shops.

1 Proposed Precinct Structure Plan

Proposed Precinct Structure Plan

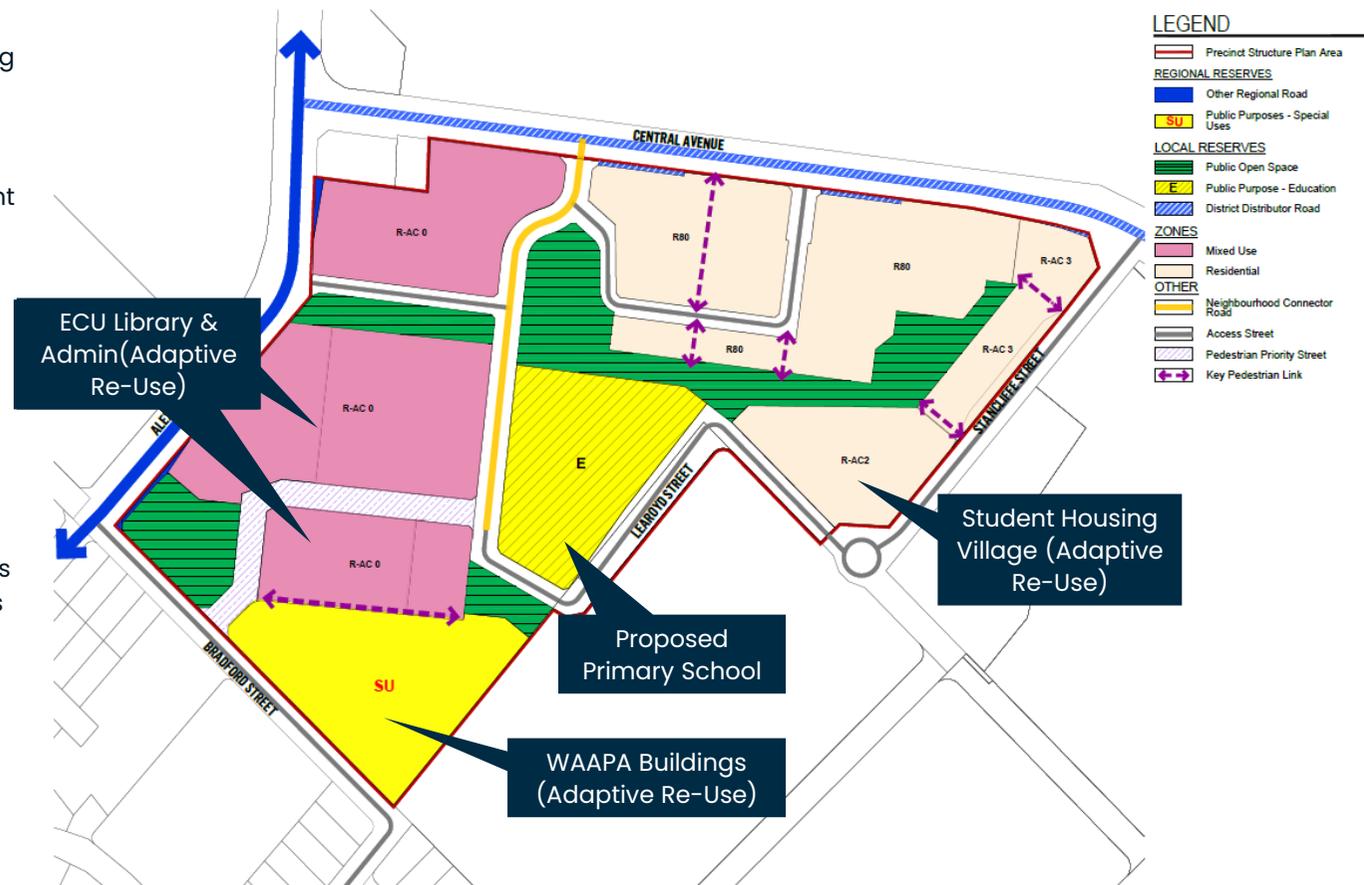
The ECU Mount Lawley Redevelopment Master Plan has been prepared by DevelopmentWA to guide the proposed redevelopment of the ECU Mount Lawley site. It presents a forward-thinking vision for a new community incorporating housing, public open space and amenity and education uses. The vision and aspiration presented in the Master Plan has been the basis for the preparation of a Precinct Structure Plan (PSP) to guide subdivision and development of the site.

The proposed development of the 18.7 hectare site proposed by the PSP is anticipated to include:

- New housing - a mix of medium and high density dwellings (including potential for social / affordable dwellings and student accommodation).
- Convenience retail and commercial offerings
- A new primary school
- Retained Western Australian Academy of Performing Arts (WAAPA), the ECU Library and Admin buildings as well as student housing village for adaptive re-use. Uses being considered include education, creative arts/culture related uses
- Public open space and green links

The PSP area has three different dwelling yield scenarios (i.e. low, medium & high) for the new housing planned on the site, reflecting different dwelling density outcomes. These scenarios are informed by DevelopmentWA and have been used to assess the future resident population and growth on-site (refer sub-section 1.1). For the purposes of the assessment outlined in this report Urbis has adopted the medium residential development yield scenario (~900 dwellings).

ECU Mount Lawley Proposed Precinct Structure Plan (November 2025)



Source: DevelopmentWA; Urbis

Proposed Masterplan – Schedule of Uses

A summary of the schedule of uses proposed in the Master Plan is provided in the table to the right. Of note:

- Residential development will be the main use that will increase the amount and broaden the choice of housing in an established area of Perth.
- This includes the retained student housing village which will be repurpose to provide housing (assumed at circa 100 units)
- The masterplan also includes essential new facilities to serve the on-site population and local community including retail shops, other commercial space.
- A primary school is also proposed, alongside the envisaged adaptive re-use of the existing Western Australian Academy of Performing Arts (WAAPA) facilities, the ECU library and administration buildings.
- The WAAPA facilities will likely be re-used for education (including potentially culture and performing arts space for the co-located Mount Lawley Senior High School) and creative arts purposes. More detail on these uses is outlined later in this report.
- The non-residential uses will provide new employment opportunities that have the potential to increase self-containment levels in the area.

ECU Mount Lawley Redevelopment – Schedule of Uses

Proposed Land Use	Site Area (ha)	Site Area % of Total	Indicative Development Yield
Residential	4.19	22%	~200 housing units (medium-high outcome, including student housing village units at ~100 units)
Mixed Use*	4.81	26%	500-900 housing units; 20,800 GFA sq.m of existing ECU Library & Admin buildings to be retained/repurposed
Education (Primary School)	1.6	9%	~ 540 students
WAAPA Buildings (adaptive re-use)	1.86	32%	~13,130 GFA sq.m
Public Open Space/Road Reserves	6.03	10%	n.a.
Other (PAWs)	0.25	1%	n.a.
Total PSP Area	18.74	100%	

* Including the existing ECU library and admin facilities to be retained for adaptive re-use.
Source: DevelopmentWA; Urbis

1.1 Proposed Residential

Residential Development Yield & Key Assumptions

Forecasts have been prepared for the proposed ECU Mount Lawley Redevelopment area, as well as the local and other surrounding SA2s to contextualise the size and scale of the subject development.

- The on-site population is informed by total dwelling yield for the three density scenarios and average household sizes for each dwelling type.
- **Note the dwelling yield for each scenario provides only an indication on the potential dwelling outcome.**
- Average household size assumptions for each dwelling type have been informed by the latest ABS Census data, mix of dwelling sizes and also Urbis' experience in population outcomes for similar developments. (refer Appendix A for detail)
- On-site population growth is based on assumed annual dwelling sales rates over an anticipated 13-year development timeline (2030-2042), with reference to historical and recent local residential market activities (refer Appendix B for detailed sales rates assumptions).

ECU Mount Lawley Masterplan – Indicative Development Yield¹

High Density Scenario	1-bed	2-bed	3-bed	Total
Apartments	186	583	199	968
Townhouses	0	0	108	108
Grouped Sites	0	40	0	40
Total Dwellings	186	623	307	1,116
Medium Density Scenario	1-bed	2-bed	3-bed	Total
Apartments	176	449	178	803
Townhouses	0	0	108	108
Grouped Sites	0	40	0	40
Total Dwellings	176	489	286	951
Low Density Scenario	1-bed	2-bed	3-bed	Total
Apartments	86	292	136	552
Townhouses	0	0	108	108
Grouped Sites	0	40	0	40
Total Dwellings	125	332	244	700

1. Note: numbers may not add up accurately due to rounding.

Source: DevelopmentWA; Urbis

Forecast Population – ECU Mount Lawley Redevelopment

The on-site population capacity has been estimated first for each of the three density scenarios, as summarised in the adjacent table.

- Depending on dwelling density outcomes, the redeveloped ECU Mount Lawley site could support between 1,170 and 1,810 residents at full capacity.
- On the above basis, the potential population growth for each scenario is illustrated in the adjacent chart. This is based on forecast dwelling sales rates (refer Appendix B) over an assumed 13-year delivery horizon of 2030–2042 (note that the actual delivery timeframe may extend beyond this).
- On average, and depending on dwelling density outcomes, the annual population increase could range approximately between 90 and up to 140 people on average.
- Reflective of the stronger sales for townhouses, growth is anticipated to moderate from 2037 when all townhouses are assumed to be sold out (refer Appendix for sales rates assumptions). Beyond 2037, growth is expected to be driven primarily by apartment delivery.

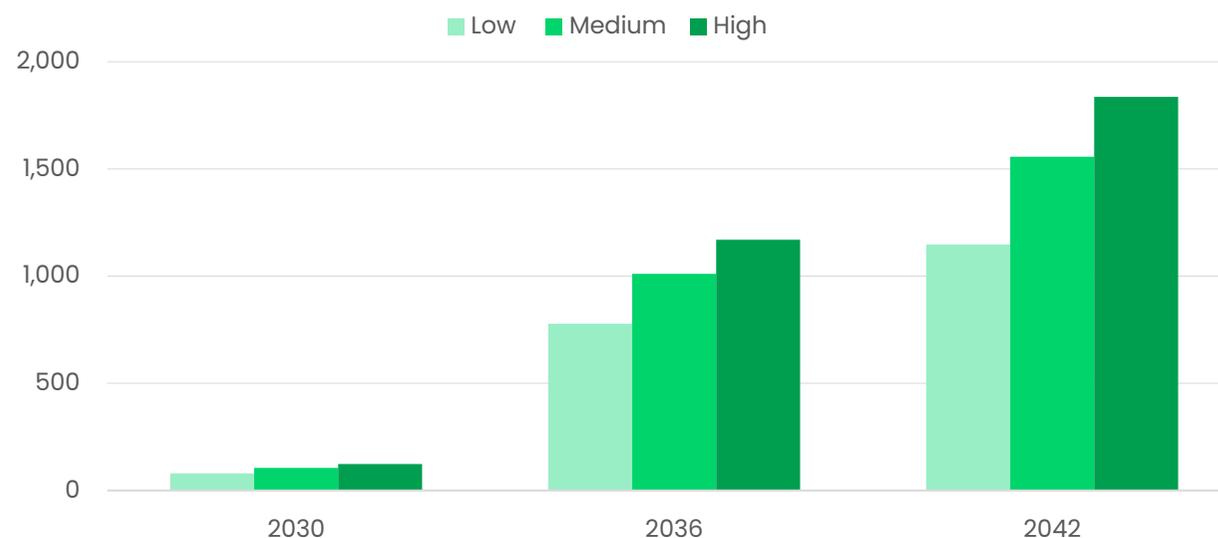
For the purpose of the subsequent analysis of retail and commercial outcomes at the ECU Mount Lawley site, Urbis has adopted the medium scenario.

Est. On-site Population Capacity by Density Scenario, ECU Mount Lawley PSP

Density Scenario	Total Potential Dwellings	Est. Population Capacity
High	1,116	1,810
Medium	951	1,555
Low	700	1,170

Source: DevelopmentWA; Urbis

Forecast Population Growth by Density Scenario, ECU Mount Lawley PSP



* Assumes 100% occupancy of dwellings
Source: ABS, DevelopmentWA, Urbis

1.2 Proposed Primary School

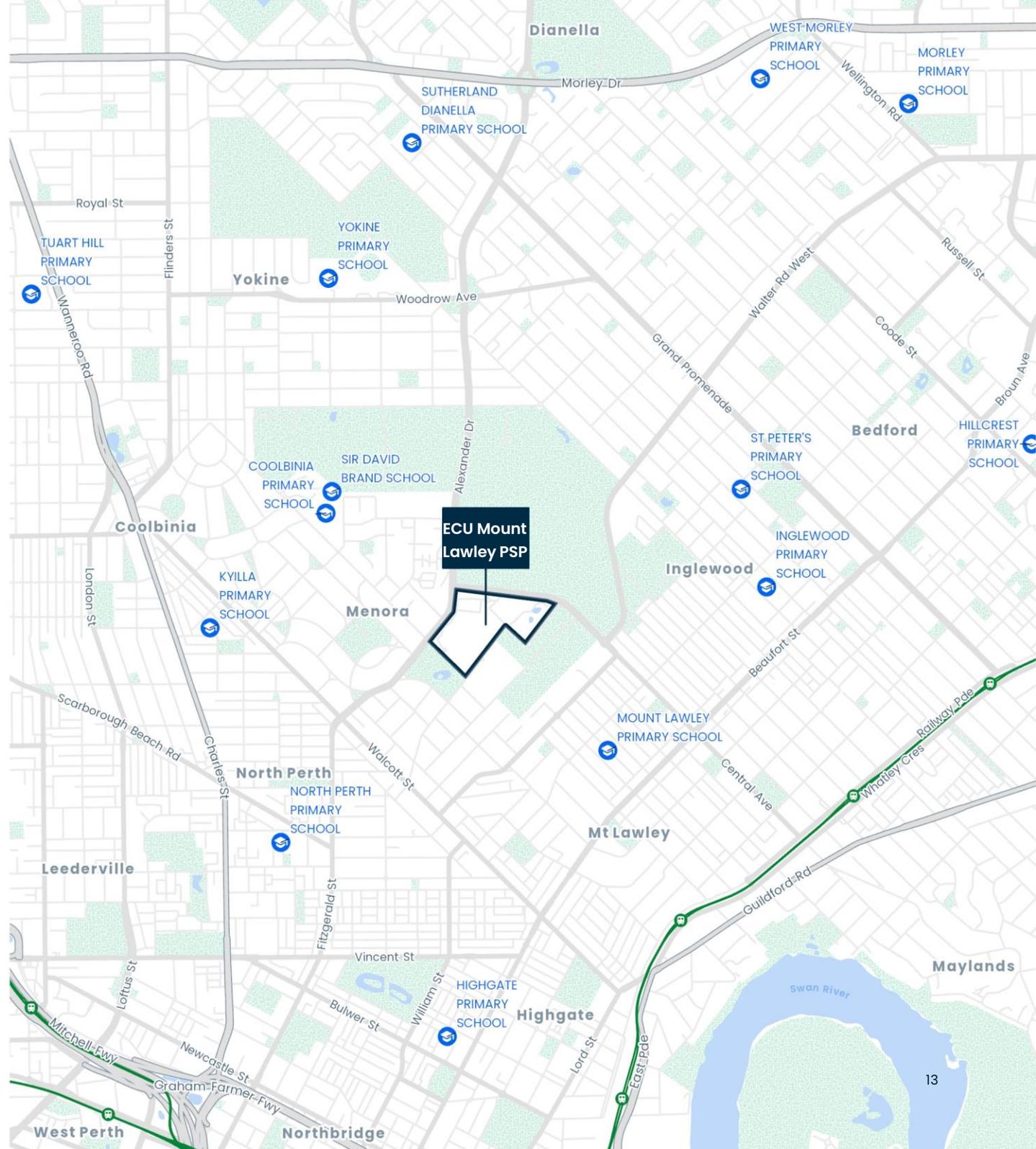
Proposed On-site Primary School

The ECU Mount Lawley PSP proposes the inclusion of a new public primary school that would complement the network existing schools in the area.

The proposed primary school occupies a 1.6ha site and has a total capacity of approximately 540 students. It is intended as an inner-format (multi-level) primary school bordered by Learoyd Street, adjoining Mount Lawley Senior High School.

The Department of Education has identified that a new primary school may be required to support future growth and provide for families in the local area. Planning for Mount Lawley West Primary School was recently announced in early 2025 and is being led by the Department of Education. This has been considered in this assessment.

The primary school will complement the existing Mount Lawley Senior High School and create an education cluster in the region, that can take advantage of the range of nearby recreation facilities as well as the Creative Arts Hub (discussed in following sub-section) proposed within the ECU Mount Lawley PSP.



 Train Station & Line

0 200 400 m

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1.3

Proposed Adaptive Re-use (Creative Arts Hub)

Proposed Adaptive Re-use of the WAAPA, Library and Administration Facilities for a Creative Arts Hub

In 2020, the Government announced plans for Mount Lawley Senior High School to expand into the existing WAAPA facilities. Since this time, the Department of Creative Industries, Tourism and Sport (**DCITS**) has identified the potential to establish a Creative Arts Hub on the site, leveraging ECU Mount Lawley's longstanding association as a centre for creativity.

The Creative Arts Hub is currently subject to a business case which will confirm the nature and extent of education (potentially more space for Mount Lawley Senior High School) and creative arts uses.

In recognition of this potential, the ECU Mount Lawley PSP allows for the adaptive re-use of the existing WAAPA facilities, the Library, and Administration buildings to establish a Creative Arts Hub, subject to the outcomes of the business case.

If progressed, the Creative Arts Hub is intended to provide facilities that benefit the local community and wider Perth, continuing the site's historical role in education while evolving to support cultural and creative activities.

Workers and visitors associated with the Creative Arts Hub would also contribute to the daily activation of the area and provide additional support for retail and service uses.



Source: Urbis

Other Market Segments

In addition to the resident population market segment, a few other non-resident segments either on-site or adjacent will also provide market support for the proposed retail and commercial uses. These other market segments include:

- More than 1,900 existing students at the adjacent Mount Lawley Senior High School
- Around 1,800 existing workers within a 500m radius of the subject site
- Up to 420 future on-site workers at capacity (refer section 4 for detail)
- Approximately 540 future students potentially accommodated at the proposed primary school

ECU Mount Lawley Redevelopment – Other Market Segments



~1,900 existing students at adjacent Mount Lawley Senior High School



~1,800 existing workers in the immediate surrounds



Up to **420** future on-site workers at capacity (refer Section 5)



~540 future students estimated capacity at proposed primary school

Source: DevelopmentWA; Mount Lawley Senior High School; ABS; Urbis

2 Site Assessment

Site Attributes

The ECU Mount Lawley Master Plan site is located in the inner northern suburbs municipality of Stirling, approximately within 5 km from the Perth CBD. Key features of the subject site's location that have an influence on the market potential for retail and other commercial uses include:

- An accessible and prominent site with frontage to Alexander Drive which is a key north-south secondary road in the region. This road connects with Grand Promenade / Morley Drive in the north and Walcott Street in the south.
- The site also abuts Central Avenue which is an important local connector road that facilitates access to the site from the east, including Inglewood. Public transport access includes bus services along Alexander Drive and the nearest train station is at Mount Lawley (~2 km from the site).
- A range of uses that drive visitation to the area, including the Mount Lawley Senior High School (next to the subject site), Terry Tyzack Aquatic / Stirling Leisure Centre, Sir David Brand School, the cluster of retirement villages in Menora, Mount Lawley Golf Club and various park / open space reserves and social clubs.

 Commercial Precinct

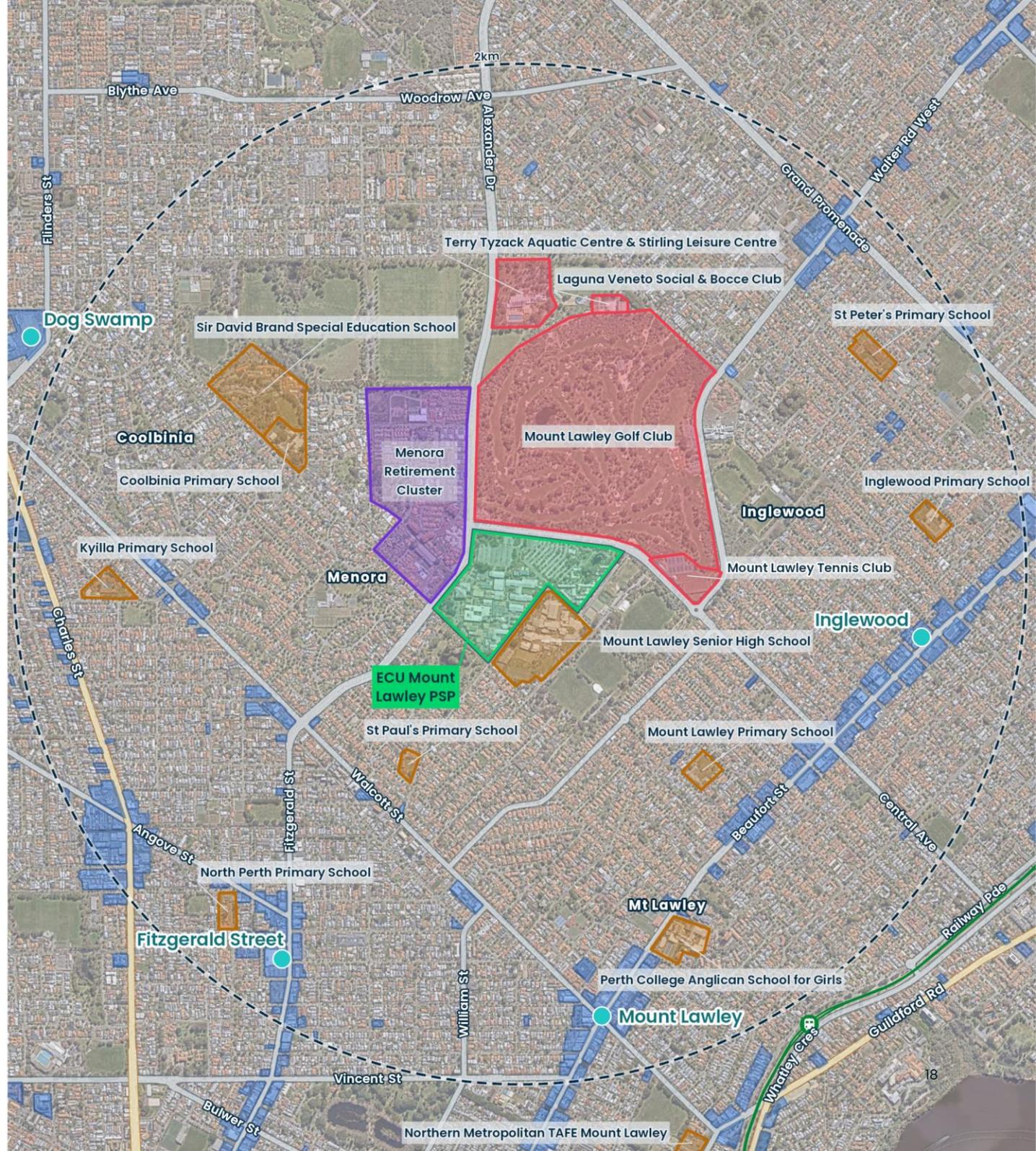
Activity Centres

 District

 Train Station & Line

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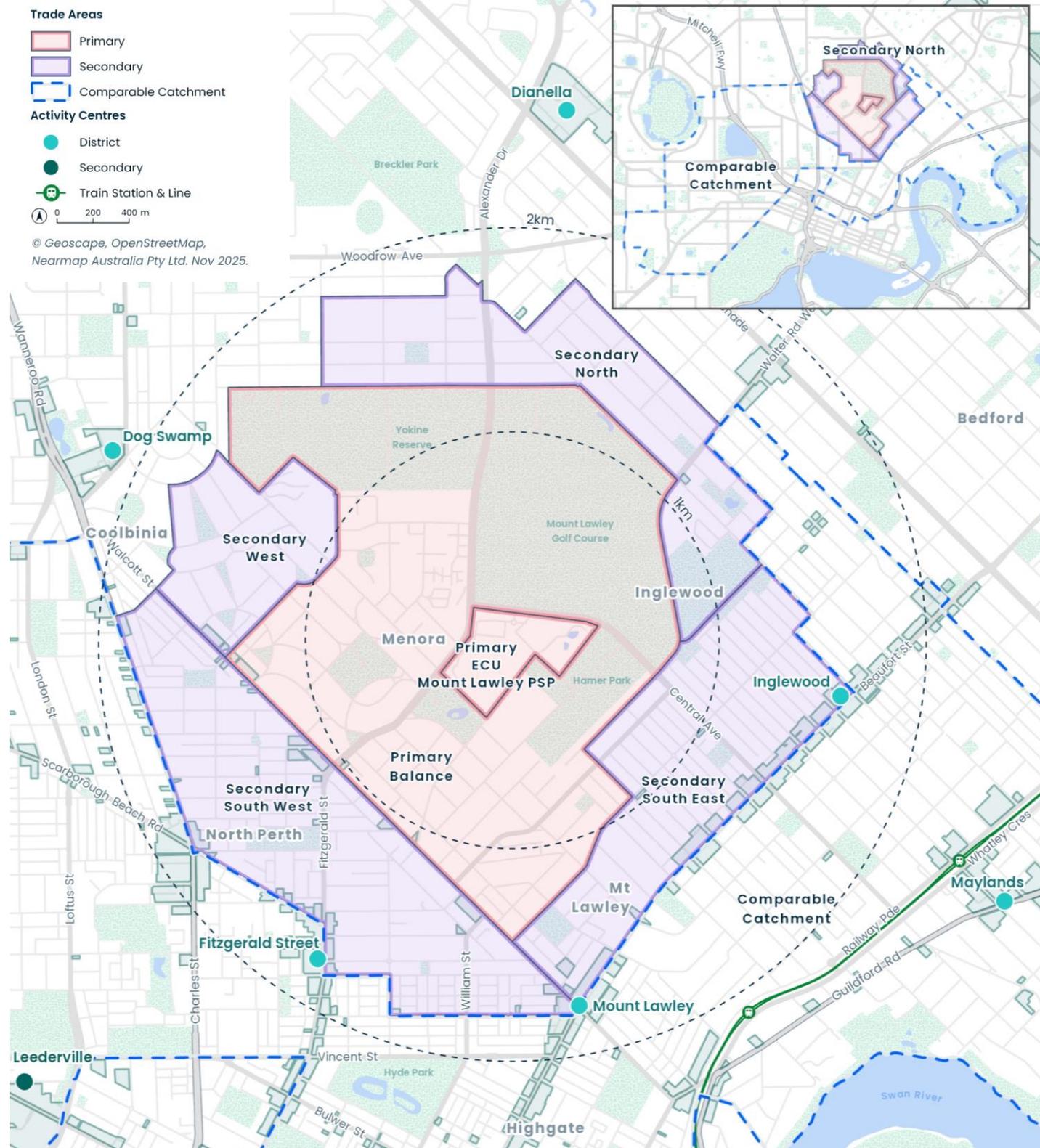
© Geoscape, OpenStreetMap,
Nearmap Australia Pty Ltd. Nov 2025.



Catchment Area Definition

A Main Catchment has been first defined to represent the core market for the proposed retail and commercial uses potentially supported on-site. In doing so, key physical and natural barriers, surrounding existing supply as well as common demographic characteristics that influence the draw of future land uses have been considered. As shown in the adjacent map, the catchment is also further divided into multiple sectors to reflect the above considerations.

- Primary:** The Primary catchment is divided into the masterplan site and the balance of the area bordered by the green breaks to the north, North Street to the south-east, Walcott Street to the south-west and the suburb of Coolbinia towards the north-west.
- Secondary:** Four Secondary sectors have been defined that extend the core catchment close to 2 km in most directions from the subject site.
- Comparable Catchment:** Residents moving into the ECU Mt Lawley Redevelopment are expected to have a demographic profile broadly similar to inner-north Perth residents, given the anticipated introduction of a younger resident population drawn to the area due to proximity to the CBD and access to amenities. This contrasts with the older profile of existing local residents.
- The profile of this catchment is used as a guide for the age profile and spending estimates relevant to the assessment of market demand for retail and other commercial uses on the subject site.



Catchment Area Population

The table to the right outlines the forecast population growth in ECU Mount Lawley PSP Catchment Area over an indicative delivery timeframe to 2042. These forecasts consider historical trends, the level of new dwelling approvals, Government projections and other factors.

- The ECU Mount Lawley Catchment Area is forecast to grow steadily to 2042, with the largest gains in the Primary sector which is underpinned by the proposed in-fill redevelopment of the ECU campus site.
- Population growth in the balance of the Primary sector is expected to be driven by a mix of higher density / in-fill development and the progressive regeneration of households, at a rate of around 0.6% - 0.8% per annum.
- The Secondary catchment area is expected to record population growth averaging 0.9% per annum over the forecast period, with highest rates of growth in the South West and South East sectors.
- Overall, the Catchment Area population is projected to increase from around 19,755 in 2024 to 23,215 in 2036 and 24,710 in 2042. This population growth will support additional demand for population-based services such as convenience retail, health services and community facilities.

Population Forecast

	Population (no.)				Annual Pop Growth (%)			Annual Pop Growth (no.)		
	2024	2030	2036	2042	24-30	30-36	36-42	24-30	30-36	36-42
Primary:										
ECU Mount Lawley PSP	0	105	1,010	1,555	-	57.3%	9.0%	21	181	109
Balance	4,895	5,105	5,320	5,495	0.8%	0.8%	0.6%	42	43	35
Total Primary	4,895	5,210	6,330	7,050	1.3%	4.0%	2.2%	63	224	144
Secondary:										
North	3,820	4,015	4,140	4,235	1.0%	0.6%	0.5%	39	25	19
South East	3,900	4,290	4,550	4,785	1.9%	1.2%	1.0%	78	52	47
South West	6,065	6,605	7,065	7,495	1.7%	1.4%	1.2%	108	92	86
West	1,075	1,105	1,130	1,145	0.6%	0.4%	0.3%	6	5	3
Total Secondary	14,860	16,015	16,885	17,660	1.5%	1.1%	0.9%	231	174	155
Catchment Area	19,755	21,225	23,215	24,710	1.4%	1.8%	1.3%	294	398	299

Note: Population estimates for the ECU Mount Lawley PSP area is based on the medium density scenario.

Source: ABS, WA Tomorrow Medium Series, Urbis

Catchment Population Demographic Characteristics

The demographic profile of the ECU Mount Lawley Catchment Area (based on the ABS 2021 Census) is characterised by high incomes, a professional workforce, and an older demographic profile compared to Greater Perth.

- Within the Primary Catchment Area, the existing (Balance sector) population is markedly older, with 65+ years making up nearly a third of residents. This older demographic is reflected by the inclusion of nearby aged care and retirement living facilities. This area also includes affluent established households with incomes well above the Perth average.
- The secondary catchment area has a demographic profile similar to the wider inner northern suburbs area of Perth (e.g. Comparable Catchment), with above average income levels supported by a largely white collar workforce.
- Different to the more established nature of the wider Mount Lawley area, the ECU Campus redevelopment will likely introduce a new on-site population with a younger, more mixed age profile, including working-age individuals/couples and younger families. There is also expected to be a higher proportion of overseas born residents. This will diversify the demographic base and broaden the demand for convenience retail, food and beverage, and everyday services.

Resident Demographic Profile 2021

	Comparable Catchment	Primary Balance	Secondary	Catchment Area	Greater Perth	Catchment Var'n to Perth
 Per Capita Income	\$65,500	\$62,900	\$64,100	\$63,800	\$48,700	+31.0%
 Average Household Income	\$143,800	\$157,200	\$147,600	\$149,800	\$125,900	+19.0%
 % 0-14 years	15.0%	13.6%	15.6%	15.1%	19.0%	-3.8%
 % 25-39 years	29.9%	11.3%	23.8%	20.7%	22.1%	-1.4%
 % 65+ years	14.5%	31.0%	16.4%	20.0%	15.8%	+4.2%
 % Family Households	57.6%	64.4%	61.8%	62.4%	71.5%	-9.1%
 % White Collar Workers	82.2%	85.3%	84.8%	84.9%	69.1%	+15.8%
 % Born Overseas	37.3%	26.4%	31.2%	30.0%	37.7%	-7.7%

Source: ABS, Urbis

Key Demographic Changes

The table to the right outlines the demographic changes in the ECU Mount Lawley PSP Catchment Area between census periods, compared to Greater Perth. It highlights shifts in key metrics influencing demand for services, such as income levels, age distribution, employment profile, etc.

- Per capita and household incomes grew strongly, outpacing Greater Perth, which is reinforcing the area's affluent and professional character.
- The age profile continued to skew more to the older age brackets with a marked increase in those 65+ years of age. This change was greater than the rest of Perth, and points to a growing demand for medical and health services and other lifestyle amenities suited to older households.
- 25-39 year olds however are having a greater influence on the age profile of the catchment and this trend is expected to continue as older households regenerate. The masterplan area population is also expected to attract a younger and working population demographic. These are expected to have positive influences on expenditure levels for shopping and services.
- The proportion of overseas-born residents declined marginally, contrasting with broader Perth trends. The trends in the ethnicity of the area is not expected to have a material impact on the change in demand for retail and services.

Key Demographic Changes 2016 - 2021

	Compa- rable	Primary Sector			Total Catchment			Perth		Percentage Growth		
	2021	2016	2021	2016	2021	2016	2021	2016	2021	Comp.	TCA	Perth
Key Metrics:												
Per Capita Income	\$65,500	\$51,900	\$62,900	\$52,400	\$63,900	\$41,100	\$48,700	+21.2%	+21.9%	+18.5%		
Average Household Income	\$143,800	\$140,400	\$157,200	\$130,600	\$149,400	\$109,200	\$125,900	+12.0%	+14.4%	+15.3%		
White Collar Workers	82.2%	89.7%	85.3%	84.4%	84.8%	68.4%	69.1%	-4.4%pts.	+0.4%pts.	+0.8%pts.		
Overseas Born	37.3%	27.2%	26.4%	31.3%	30.3%	38.7%	37.7%	-0.8%pts.	-1.0%pts.	-1.0%pts.		
Age Breakdown:												
Average Age	38.8	44.9	47.6	41.3	42.4	37.5	38.6	+6.0%	+2.6%	+3.0%		
People Aged 0-14	15.0%	14.9%	13.6%	15.4%	14.9%	19.1%	19.0%	-1.3%pts.	-0.6%pts.	-0.1%pts.		
People Aged 15-24	10.6%	16.2%	14.9%	12.6%	11.9%	13.0%	12.1%	-1.3%pts.	-0.8%pts.	-1.0%pts.		
People Aged 25-39	29.9%	10.7%	11.3%	21.0%	20.7%	22.9%	22.1%	+0.6%pts.	-0.3%pts.	-0.8%pts.		
People Aged 40-64	30.0%	31.2%	29.3%	32.6%	32.3%	31.2%	31.1%	-2.0%pts.	-0.3%pts.	-0.1%pts.		
People Aged 65+	14.5%	27.0%	31.0%	18.3%	20.3%	13.8%	15.8%	+4.0%pts.	+2.0%pts.	+1.9%pts.		
Dependency Ratio (% <15 & >64)	41.9%	72.0%	80.3%	50.9%	54.2%	49.0%	53.2%	+8.3%pts.	+3.3%pts.	+4.2%pts.		
Housing Metrics:												
People Per Hectare	28.3	11.4	11.7	20.4	21.6	3.0	3.3	+2.8%	+6.1%	+8.9%		
Owned Outright	25.3%	49.2%	44.0%	35.2%	33.0%	29.0%	29.3%	-5.2%pts.	-2.3%pts.	+0.3%pts.		
Owned w/ Mortgage	30.5%	32.4%	35.8%	33.6%	35.4%	43.3%	43.2%	+3.4%pts.	+1.8%pts.	-0.1%pts.		
Rented	44.2%	18.3%	20.2%	31.2%	31.6%	27.6%	27.5%	+1.9%pts.	+0.5%pts.	-0.2%pts.		

Source: ABS, Urbis

3

Need & Demand Assessment

3.1 Retail

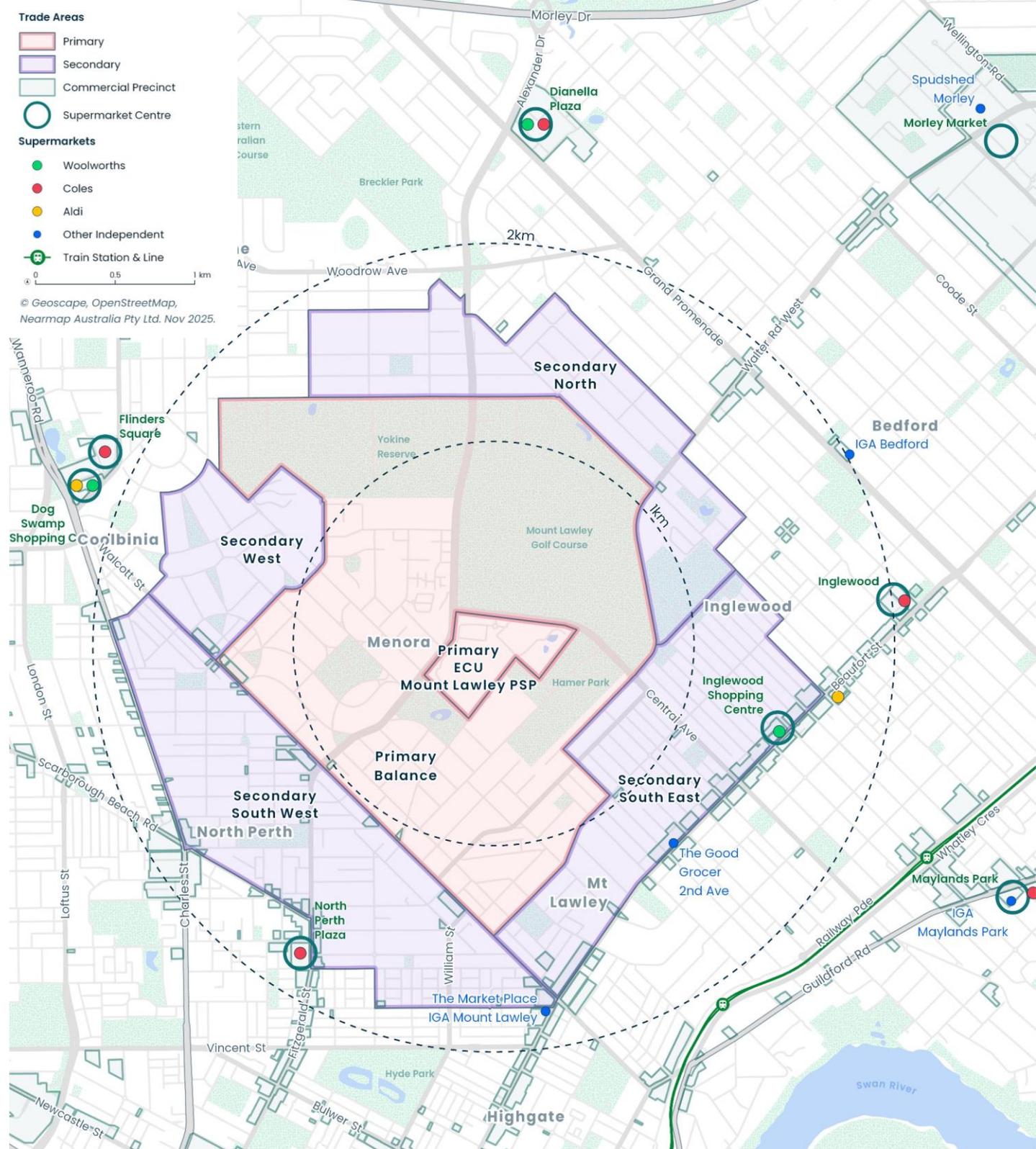
This section of the report outlines the market need and demand for the proposed retail centre within the ECU Mount Lawley masterplan area. This includes assessment of:

- **A convenience-based retail centre, including a small-format supermarket and supporting retail shops and services.**
- **Retail within the broader precinct including the Creative Arts Hub.**

Retail Catchment and Supply

As evidenced by the map to the right, there are limited existing retail centres within the Catchment Area, suggesting a potential supply gap as the ECU Mount Lawley PSP site redevelops to introduce additional population.

- There is currently no significant concentration of retail shops in the catchment, however there are a range of centres and retail nodes on the periphery that cater, to varying degrees, the residents of the catchment.
- Notable existing retail activity centres are located in Yokine (Flinders Square and Dog Swamp Shopping Centre), North Perth (Plaza, Coles), Inglewood (Beaufort Street) and Dianella Plaza.
- The nearest supermarkets to the ECU Mount Lawley PSP site are located at least 1.5 km away, indicating a level of market gap exists in terms of convenient access to this form of shopping.



Resident Retail Spending

Reflective of the demographic profile and generally affluent households, retail spending levels by Catchment Area residents are well above the Perth average across most categories.

Data is shown as at the latest CommBank iQ period in June 2025.

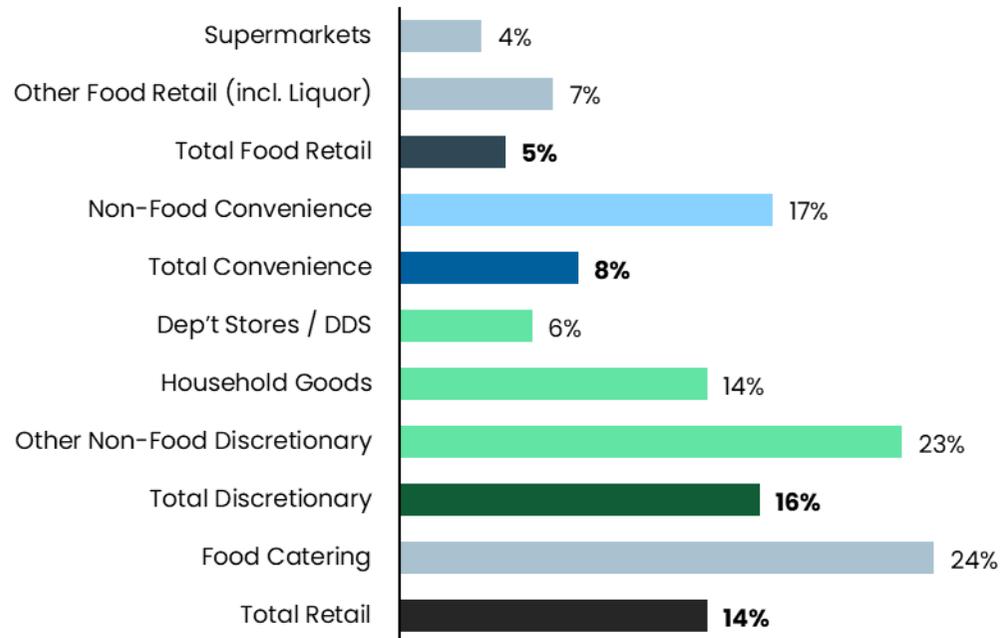
Of note:

- Per capita retail spending levels in the Primary Balance Catchment +19% on the Greater Perth average, with the Secondary Catchment being +12% higher. Overall, the ECU Mount Lawley Catchment Area currently sits 14% above the metropolitan average.
- By category, the Catchment area has a higher spend per capita across the board. Notably high spend is observed in Other Non-Food Discretionary, such as apparel, homewares and electronics, as well as food catering.

Total Retail Spend Per Capita vs Greater Perth, Year to June 2025



Total Trade Area Spend Per Capita vs Greater Perth, June 2025



Note: Other food retail includes food & groceries and liquor while non-food convenience includes general retail and services.
Source: CommBank iQ, Urbis

Retail Spending Market Forecast

The table below outlines the forecast retail spending growth in the ECU Mount Lawley PSP Catchment highlighting the increasing demand across various retail categories.

Unlike population, this analysis starts in 2025, aligning to the latest spending data.

- With the addition of new housing and residents the Primary catchment retail market is forecast to more than double in size from 2025 to 2040.
- By 2042, the Main Catchment Area is expected to reach \$841 million in annual retail spending, up from \$427 million in 2025.
- Supermarket spending is also projected to grow substantially, increasing by around 97% between 2025 and 2042. Total convenience related retail spending is forecast to grow at a similar rate of 61% over the forecast period.

Retail Spending Forecast, 2025–2042 (\$M, Nominal, incl. GST)

	Supermarket	Other Food Retail	Total Food Retail	Non-Food Convenience	Total Convenience	Total Discretionary	Food Catering	Total Retail	Annual Growth
Primary Catchment									
2025	23	12	35	15	50	36	24	110	
2030	27	14	41	18	60	43	29	132	3.8%
2036	38	20	58	26	84	61	43	188	6.1%
2042	50	26	76	34	110	81	58	249	4.8%
Total Secondary									
2025	68	35	103	43	146	99	72	317	
2030	81	42	124	52	176	121	90	387	4.1%
2036	100	51	151	64	216	150	115	481	3.7%
2042	122	62	183	79	262	185	145	592	3.5%
Catchment Area									
2025	90	47	138	58	196	135	96	427	
2030	109	56	165	71	236	164	119	519	4.0%
2036	138	71	210	90	300	211	158	669	4.3%
2042	172	88	259	112	372	266	203	841	3.9%

Note: Forecasts refer to financial years. Other food retail includes food & groceries and liquor while non-food convenience includes general retail and services.
Source: WA Tomorrow Medium Series, ABS, CommBank iQ, Urbis

Catchment Retail Supply

The key retail activity centres in the region of relevance to the proposed retail centre within the ECU Mount Lawley PSP site are outlined in the table to the right. The majority of competing retail is located outside of the defined catchment and 1.5 to 2.0 km from the ECU Mount Lawley PSP site.

- The largest concentrations of shop (retail) floorspace is in:
 - Yokine, including Flinders Square and Dog Swamp shopping centres. These centres combined include Woolworths, Coles and Aldi supermarkets and a range of other shops serving day-to-day retail and services needs.
 - Inglewood that is located along the Beaufort Street shopping strip. This retail precinct also includes the three major supermarket chains and an IGA store as well as other retail and non-retail services.
- There are several other shopping centre based activity centres including Dianella Plaza in the north (Coles and Woolworths) and North Perth Plaza (Coles).
- A new Woolworths anchored retail development is proposed in North Perth.

Local Retail Activity Centre Hierarchy

Activity Centre Location (Shopping Centre Name)	Activity Centre Designation	Distance (Road, km)	Est. Shop GLA (sq. m)	Major Tenants	Est. Supermarket GLA (sq.m)
Inglewood (incl. retail/commercial outlets along Beaufort St.)	District Centre	1.9 km	11,000	Coles, Woolworths, Aldi, IGA	9,200
Fitzgerald St. (Incl. North Perth Plaza)	District Centre	2.0 km	16,200	Coles	2,500
Mount Lawley	District Centre	2.5 km	12,000	IGA	1,400
Dop Swamp (Inc. Dog Swamp and Flinders Square shopping centres)	District Centre	2.6 km	13,500	Coles, Woolworths, Aldi	8,400
Dianella (incl. Dianella Plaza)	District Centre	2.8 km	14,100	Coles, Woolworths	8,200

Source: LUES; Urbis

Proposed Developments

Proposed Development	Address	Distance (Road, km)	Est. GLA (sq.m)
Woolworths North Perth	Cnr Charles St / Scarborough Beach Rd, North Perth	2.1 km	3,500

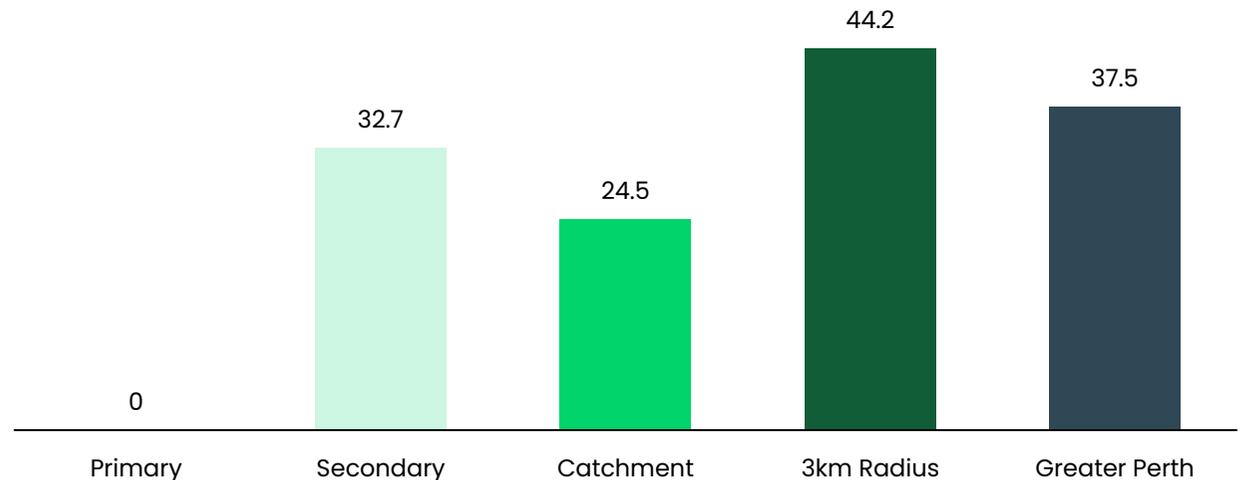
Source: Urbis

Supermarket Supply and Accessibility

Whilst multiple retail offerings exist just beyond the Catchment boundaries, there is a clear gap in the provision of local retail facilities to provide convenient services to future on-site residents.

- Supermarket provision in the ECU Mount Lawley PSP Catchment is below most benchmarks, with no existing supermarket in the Primary Catchment.
- Absence of a Primary Catchment supermarket highlights a clear gap in local access, with residents relying on surrounding centres for grocery needs.
- Moving outside of the Primary, supply is available for the Secondary sectors and residents living within 3km of the ECU Mount Lawley PSP site. This will likely limit the draw of any future retail uses at the PSP to a predominantly local market within the Primary area.
- The ECU Mt Lawley PSP site presents an opportunity to address this gap with a small-format supermarket, improving convenience for local residents and capturing a share of spending currently leaking to nearby areas. A full-line offer may be difficult to sustainably support as the market outside the Primary is well-served.

Supermarket Floorspace per 100 Residents (sq. m), 2025 Estimate



Source: ABS, Urbis Stores Database

Supermarket Potential

Urbis has tested the potential for supermarket floorspace on-site with consideration of the size of the available market, the accessibility of the site and proximity of competing supply.

Given the extent of full-line supermarkets in the region but that the primary trade area will provide a sizeable local market (e.g. +6,000 people) a smaller scale supermarket in the 800-1,200 sq.m range is assessed as supportable at the ECU Mount Lawley PSP.

Of note:

- The ECU Mount Lawley PSP site is expected to include just over 1,500 residents, based on the mid density scenario, and in the Primary catchment overall the population is expected to exceed 7,000. This local market is within the population thresholds that support a small to mid scale supermarket.
- The ~18,000 residents in the Secondary Catchment sectors provide added support for a supermarket however these markets are well served by existing supermarkets and the potential market share and turnover capture by a store on the ECU Mount Lawley PSP site would be low.
- Reflecting the above market dynamics as well as that market support would be further buoyed persons visiting the other on-site uses (e.g. primary school, adjacent high school, adaptive re-use facilities and other commercial uses, a small scale supermarket in the 800 – 1,200 sq.m range would be supportable on the ECU Mount Lawley PSP site. This size of store would cater to top-up and small grocery basket shopping needs and offer a convenient option for local residents.
- A store of this size has the potential to achieve a turnover in the order of \$11.0-\$11.5 million (\$2025, incl. GST) or a productivity level of between \$10,000 and \$12,000 per sq.m, at the time the residential proposed on the ECU Mount Lawley masterplan site is fully developed.

Supermarket Capacity Assessment, Catchment Area 2025-2042

	TA Spending on Food Retail (Excl. Liquor) (\$M)			
	2025	2030	2036	2042
Sector:				
Primary	31.1	33.0	41.1	47.4
Secondary	91.9	99.0	106.7	113.8
Catchment Area	123.0	132.1	147.8	161.2

	Subject Site Food Retail Market Share			
	2025	2030	2036	2042
Sector:				
Primary	-	10.7%	11.5%	11.9%
Secondary	-	3.4%	3.4%	3.4%
Catchment Area	-	5.3%	5.7%	5.9%

	Supermarket Turnover			
	2025	2030	2036	2042
Sector:				
Turnover from Catchment (\$M, Real)	-	\$6.9	\$8.4	\$9.5
+ Turnover from Beyond Catchment (@15%)	-	\$1.2	\$1.5	\$1.7
Total Supermarket Turnover (\$M, Real)	-	\$8.2	\$9.8	\$11.2
Turnover (\$psm)	-	\$8,170	\$9,840	\$11,160

Note: Food Retail includes expenditure at supermarkets and other food & grocery stores)

Source: WA Tomorrow Medium Series, Urbis Stores Database, Urbis Shopping Centre Benchmarks, ABS, CommBank iQ, Urbis

Other Retail Shops and Total Retail Potential

In addition to the supermarket, there is market support for a range of other shops and services within the ECU Mount Lawley PSP site. Our analysis indicates that there would demand for 1,100 sq.m to 1,200 sq.m of specialty shops, including 900 sq.m to 1,000 sq.m of retail shops and around 200 sq.m of non-retail shops such as banks, real estate agents and other financial / business services.

This is informed from a review of the typical provision of shops provided in local to neighbourhood scale centres anchored by a supermarket between 800 and 1,200 sq.m. This analysis shows that these centres on average provide 1,150 sq.m of specialty shops (retail and non-retail).

Taking into account the location attributes of proposed retail centre, size of trade catchment, on-site demand drivers (e.g. workers, students and other visitors), competing supply in the region and assessed trading potential of the supermarket, the centre could support around 950-1,050 sq.m of specialty shops, including 750-850 sq.m of retail shops.

There is also an opportunity for 1-2 or ~125-175 sq.m of retail shops to support ground level activation for the apartment buildings adjacent the Creative Arts Hub, namely cafes that would cater to the on-site and surrounding resident population as well as workers and visitors of this hub and nearby students.

The 1,950 sqm of retail shops are estimated to have the potential to achieve a retail turnover of \$21.6 million in 2042 (\$2025, incl. GST). This represents an average productivity of approximately \$11,100 per sq.m.

The market shares to support the scale of the centre are modest and average 2.2% across the total catchment, including 4.0% in the Primary catchment.

Around 16% of turnover is estimated to come from beyond the catchment, which takes into account trade sourced from non-resident visitors (e.g. workers and other visitors) to the site as well as the benchmark draw of retail centres anchored by a small scale supermarket.

Potential Retail Floorspace – ECU Mount Lawley PSP

Benchmark Centres		ECU Mount Lawley PSP				
			Super-market	Shops* - Centre	Shops** - Apts	Total
Supermarket	1,000 sq.m	Max	1,200	850	175	2,225
Specialty Shops	1,150 sq.m	Min	800	750	125	1,675
Total Shops	2,150 sq.m	Average	1,000	800	150	1,950

* Excludes non-retail shops, such as travel agents, banks

** Two food & beverage tenancies

Source: Urbis Stores Database; Urbis Shopping Centre Benchmarks

ECU Mount Lawley PSP – Retail Turnover Potential, 2042 (\$2025, incl. GST)

	Resident Retail Spending (\$M)	Market Share	Potential Turnover (\$M)
Primary Catchment	249	4.0%	10.0
Secondary Catchment	592	1.4%	8.1
Total Catchment	841	2.2%	18.1
Beyond the Catchment		16%*	3.5
Total Centre			21.6
Food Shops			17.1
Non-Food Shops			4.6

* Proportion of turnover sourced from markets beyond the catchment

Source: Urbis

3.2 Ancillary Uses

This section of the report outlines the market need and demand for a range of ancillary uses that are likely required to support the needs of a future local community. These uses include:

- **Childcare Centre**
- **Medical / Health**
- **Gym / Fitness Club**

These uses are typically required for residential developments to meet the daily needs of primarily an on-site resident population base, but also workers and visitors. They are generally co-located with the retail centre or in nearby locations to generate cross-usage in creating a local community hub.

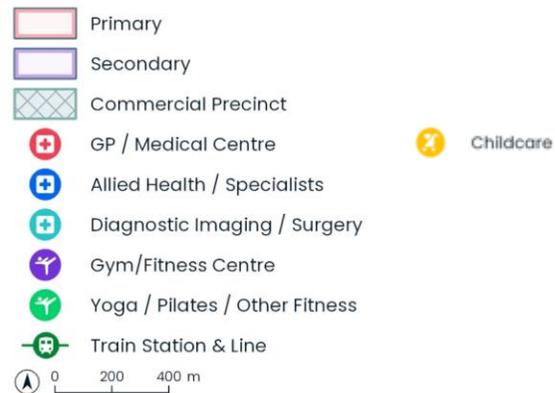
Given the current level of provision, these locally based population services would be considered appropriate within the ECU Mount Lawley PSP development.

Ancillary Uses Supply

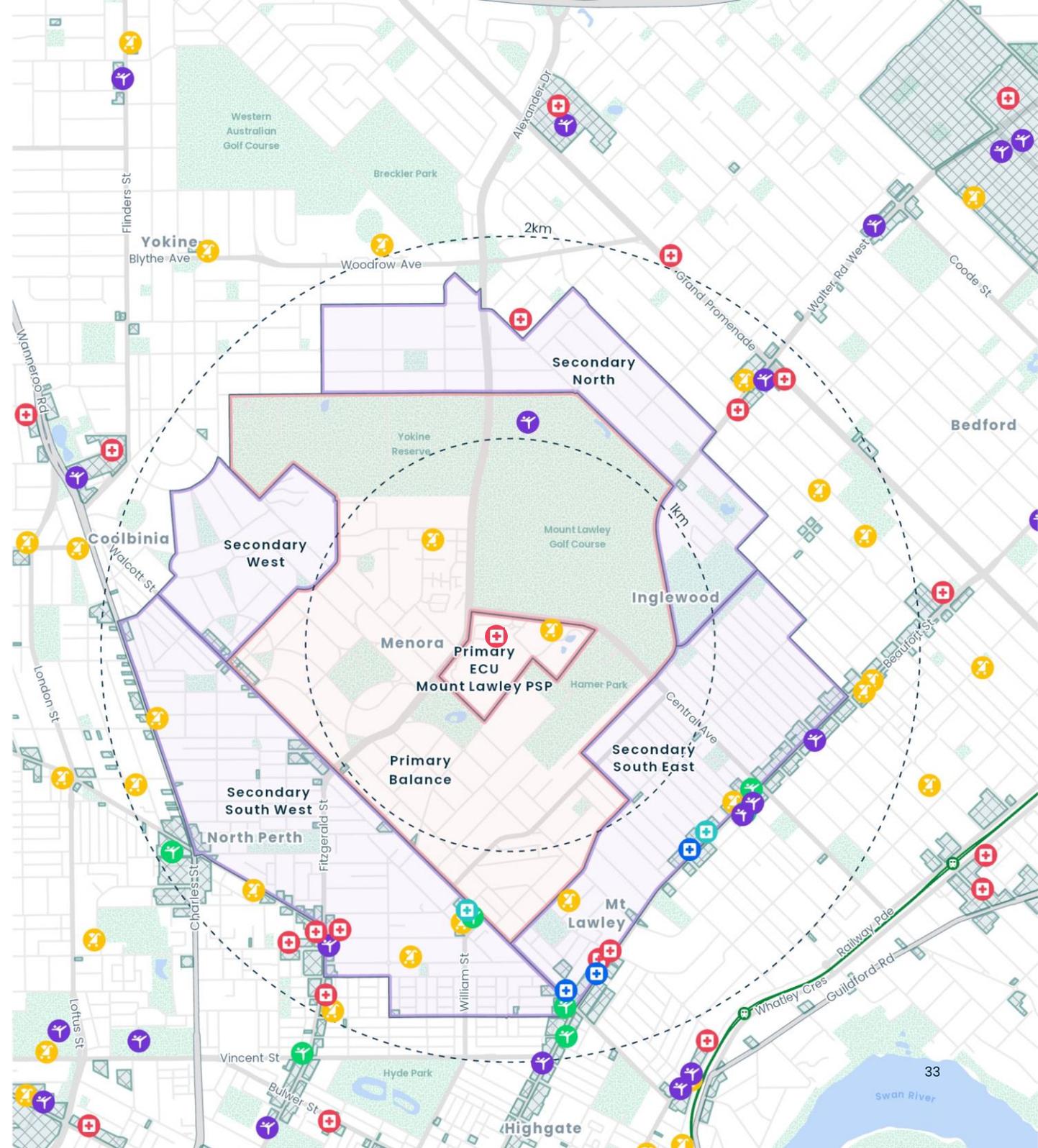
While the wider Catchment area has a range of childcare, medical and wellness services, there is a clear gap in the provision of such services within the Primary area.

- There are around 7 Long Day Care facilities within the Catchment extent, including the existing centre on the ECU Mount Lawley PSP site.
- Medical uses such as medical centres, dentists and day surgeries are mostly concentrated in the Beaufort Street commercial precinct.
- A small health services offering is currently on-site to service primarily ECU students
- There is one public fitness centre in the Primary Catchment at the Stirling Leisure Centre.
- No future supply is noted within any category.

Trade Areas



© Geoscape, OpenStreetMap, Nearmap Australia Pty Ltd. Dec 2025.



Summary of Demand for Ancillary Uses

The forecast demand for each of the ancillary uses assessed in this report and their indicative size/scale supportable on the ECU Mount Lawley PSP site are summarised in the adjacent table.

In conducting demand forecast for these uses, the following key factors have been considered:

- Total population growth on-site and across the catchment area as the underlying demand driver
- Age-specific growth estimates for uses that are more driven by certain age cohorts, including childcare (i.e. 0-5 years) and gym/fitness (i.e. primarily 15+ years)
- Typical provision benchmarks for each of the uses, referencing the Perth Land Use Survey (PLUS) data where available, but also Urbis' in-house provision data

On the above basis, the following key conclusions can be drawn:

- There is solid market support for all the identified ancillary uses, driven by the subject PSP development
- All the ancillary uses are anticipated to cater primarily to the needs of the future local community and provide convenient access to services to residents, workers and visitors

Forecast Market Demand in Catchment & Indicative Size/Scale Requirements

Ancillary Use	Forecast Demand 2024-42	Metric	Indicative Size/Scale Supportable in ECU Mt Lawley PSP
Childcare Centre	+90-110 places	Long Day Care places	1,200 – 1,500 sq.m (for ~100 places)
Medical / Health	+800 sq.m	GP medical centre floorspace	400-600 sq.m (for ~10-15 GPs with allied health services)
Gym / Fitness	+730 members	Gym membership	400-500 sq.m (for ~300-400 members)

Source: ABS; WA Tomorrow; ACEQUA; PLUS 2017; Deloitte; Urbis

4 Employment Strategy

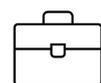
Local Employment Profile

The employment profile of local residents is summarised adjacent. For the purpose of analysis, a local area has been defined to include the local and surrounding Statistical Areas Level 2 (SA2s) of Mount Lawley–Inglewood, Yokine–Coolbinia Menora and North Perth.

The local employment profile is reflective of a well-established inner-city area with an older existing resident population base. Key characteristics include:

- Relatively **lower labour force participation** (employed residents as a share of total working age population i.e. 15+ years) at 63%, slightly below the Greater Perth average of around 65%.
- **High representation of residents in white collar occupations** at 81%. As mentioned in section 2 (pg. 20), this proportion is even higher for the local Mount Lawley area (Primary catchment) at 85%.
- **Low jobs containment** (residents who live and work in the same area as a share of total employed residents) at just 14%, suggesting most residents travel beyond the area for work
- **Average jobs sufficiency** (residents who live and work in the same area as a share of total jobs provided) at 25%, indicating most jobs are filled by those who live outside the area
- **Low unemployment rate** at just under 3% (June 2025).

Local Area¹ Resident Employment Profile Overview 2021



24,400
Total Resident
Workers



13,400
Total Local Jobs
Available



63%
Labour Force
Participation



81%
In White Collar
Occupations



14%
Jobs
Containment



25%
Jobs
Sufficiency



3%
Avg. Unemployment
Rate (June 2025)

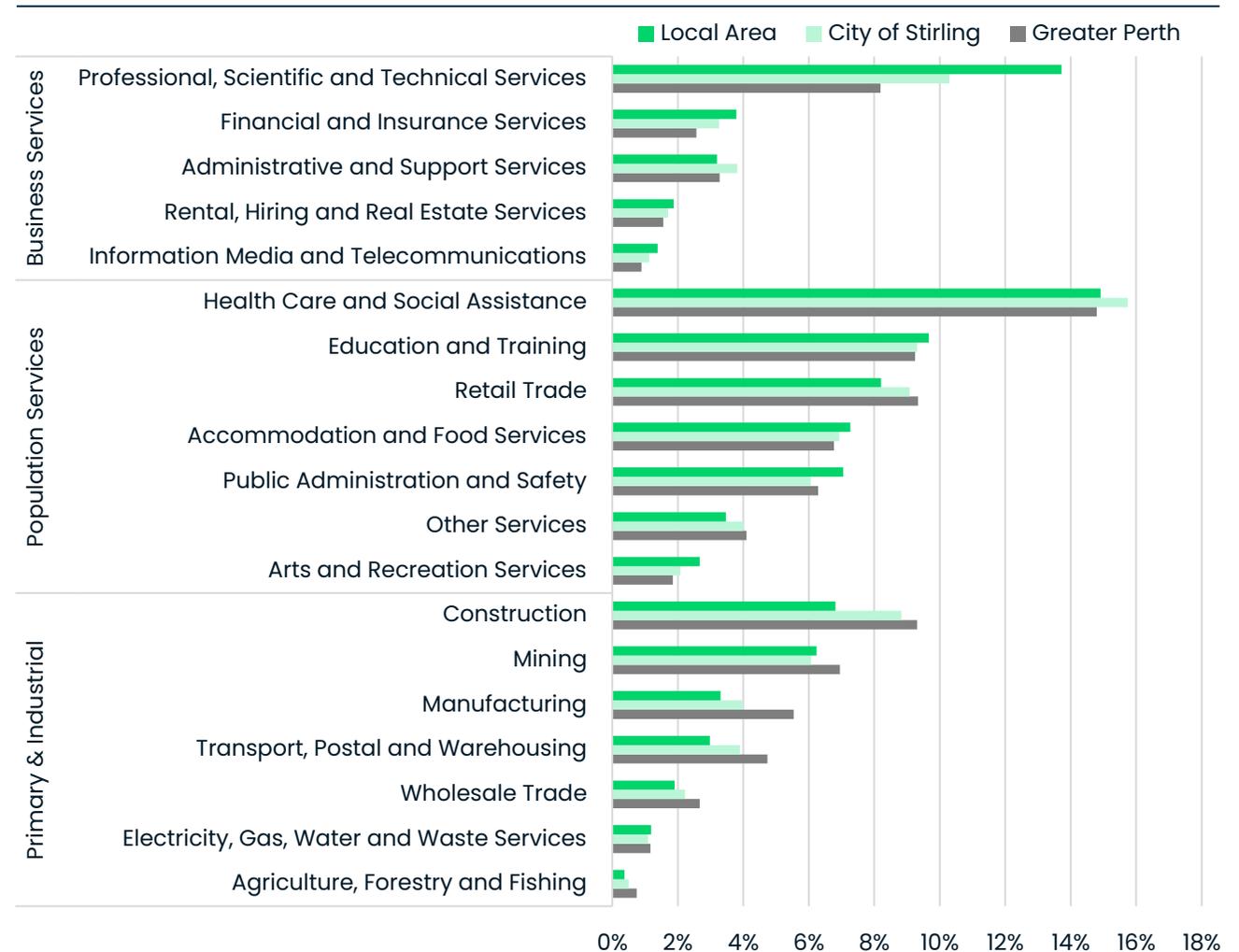
1. Defined to include the local Statistical Areas Level 2 (SA2s) of Mount Lawley–Inglewood, Yokine–Coolbinia Menora and North Perth.
Source: ABS, Federal Department of Employment and Workplace Relations; Urbi

Resident Employment by Industry

As mentioned, the employment profile of the local area and its immediate surrounds is reflective of a well established, older population base. Based on the 2021 ABS Census data, key characteristics of local resident workers are summarised as follows.

- More than a half (53%) of employed residents are engaged in Population Services, consistent with the rest of Greater Perth at 52%.
- Services such as healthcare, education/training, retail trade, etc. are amongst the top sectors for local residents.
- Higher proportion of those in Business Services sectors (24% vs. 16% for Greater Perth), reflective of the large white collar population and contributing to the high-income levels.
- Those employed in Professional, Scientific and Technical Services account for 14% of total local resident workers, well above the Greater Perth average of 8%.
- In comparison, those in Primary and Industrial sector employment represent a much lower share relative to the metropolitan benchmark (23% vs. 31%).

Local Area Employed Residents by Industry 2021



Source: ABS; Urbis

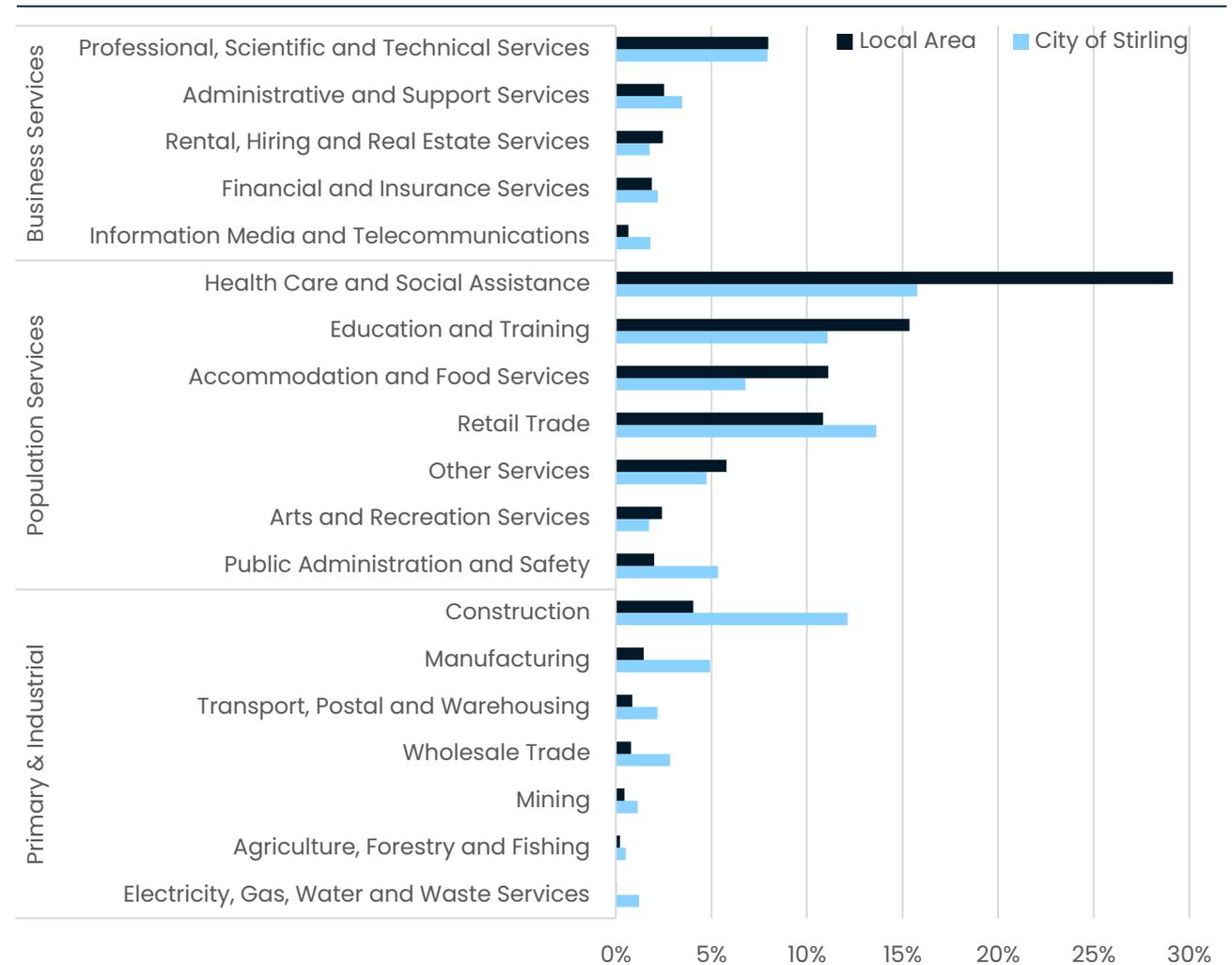
Local Jobs by Industry

Reflective of the presence of major medical and education facilities in the area, but also the older resident market base, local jobs are heavily skewed towards population services.

Specifically,

- **Health Care and Social Assistance** is the largest employing sector in the local area, contributing around 29% of total jobs supported. For context, the wider City of Stirling has about 16% jobs in this sector.
- Such high concentration of health related jobs is primarily driven by the presence of major medical facilities, such as St John of God Mount Lawley Hospital, The Park Private Hospital, alongside other local medical/health services.
- **Education and Training, Accommodation and Food Services and Retail Trade** are the other three key sectors that generate employment opportunities locally. Again, this reflects the established nature of the local population base and the relevant services required (e.g. schools, childcare, food catering and other general retail).

Mount Lawley Local Jobs by Industry 2021



Source: ABS; Urbis

Estimated Employment Creation

Based on the above assessment on the demand for the range of proposed retail/commercial and other community uses, the supportable (or proposed) size for each is summarised in the adjacent table. To assess the number of jobs likely created, a workspace ratio or jobs density assumption has been applied to each relevant land use, referencing primarily the PLUS employment data as well as other sources.

Key insights are summarised below.

- In total, between approximately 399 and 429 direct jobs are likely supported on-site on an ongoing basis, at capacity.
- These jobs sit across a range of retail (supermarket and other shops), education (childcare, primary school), health and wellbeing (medical centre, gym/fitness club) services.
- There will also be potentially significant job opportunities created via the adaptive re-use of the WAAPA facilities, ECU library and admin building, including the expansion of the Mount Lawley Senior High School and proposed establishment of a Creative Arts Hubs, providing arts and cultural service related job opportunities.

Estimated Total Direct Ongoing Jobs Supported On-site at Capacity

Proposed Use	Indicative Size	Workspace Ratio/Jobs Density Assumption	Est. Jobs Supported
Supermarket	800-1,200 sq.m	29 sq.m/job	28-41
Other Specialty Shops	1,100-1,200 sq.m	20 sq.m/job	55-60
Childcare Centre	100 places (1,200-1,500 sq.m)	60 sq.m/job	24-30
Medical Centre	400-600 sq.m	40 sq.m/job	10-15
Gym/Fitness Club	400-500 sq.m	80 sq.m/job	5-6
Proposed Primary School	540 students	1 staff per 16 students	34
WAAPA Facilities-Adaptive Re-use Assumptions	13,130 sq.m		
Mount Lawley Senior High School Expansion (for cultural and art purposes, e.g. auditorium, performing arts space, etc.)	6,565 sq.m	140 sq.m/job	47
Creative Arts Hub	6,565 sq.m	140 sq.m/job	47
ECU Library & Admin Building-Adaptive Re-use	20,800 sq.m	140 sq.m/job	149
Total			399-429

Source: DevelopmentWA; PLUS 2017; Urbis

On-going Economic Benefits

The on-going employment and economic benefits associated with the daily operation of the proposed retail/commercial and community uses are assessed, based on REMPLAN modelling, the Perth Land Use Survey (PLUS) and Urbis' in-house datasets and knowledge. A detailed description of the benefits modelling, alongside key definitions and assumptions are presented in **Appendix D**. Key insights are summarised below:

- Upon full delivery and operation of the proposed developments, the estimated direct on-site jobs at 399-429 would be able to generate another 119-124 indirect jobs elsewhere within Western Australia through the local and regional supply chain.
- In total, up to 553 total on-going jobs (direct and indirect) could be supported at capacity as a result of the ECU Mount Lawley Redevelopment.
- The on-going operating and management of the proposed uses is estimated to be able to contribute between around \$66.1 million and \$70.4 million per annum in direct and indirect GVA to the Western Australian economy on an on-going basis.

The above assessment highlights the ability of the ECU Mount Lawley PSP site to create long-term economic impact and support the on-going provision of employment opportunities to local residents, including future on-site residents. Importantly, those future jobs will be well aligned with the current jobs market locally in providing the needed services for a steadily growing population over the longer term.

Annual Average On-going Economic Benefits from Operation at Capacity



Ongoing jobs supported on-site

518-553 total jobs*



399-429

Direct jobs*



119-124

Indirect jobs*



Gross value added to the State economy

\$66.1-\$70.4 million total GVA p.a. (2025 dollar)



\$46.0-\$49.4 million

Direct GVA p.a.



\$20.1-\$21.0 million

Indirect GVA p.a.

**Note: Include all full-time, part-time and casual jobs; GVA = Gross Value Added, Indirect benefits refer to Supply Chain effects but not Consumption Effects. A full description of the methodology and key assumptions applied are included in Appendix D.*

Source: DevelopmentWA; REMPLAN; Urbis

5 Net Benefits Test

Introduction and Net Benefit Test Guidelines

A Net Benefit Test (NB Test) has been undertaken for the proposed provision of new retail shops and services within the ECU Mount Lawley PSP site.

The needs assessment determined market potential for between 1,675 sq.m and 2,225 sq.m of shop/retail floorspace within the ECU Mount Lawley PSP including:

- A small format supermarket (800 sq.m – 1,200 sq.m in size).
- Between 875 sq.m and 1,025 sq.m of retail specialty shops, including:
 - 750 sq.m to 850 sq.m in the supermarket anchored retail centre at the northern end of the site (near the Alexander Drive and Central Avenue intersection).
 - 125 to 175 sq.m for cafes at the base of the planned apartment buildings.

For the purposes of the NB Test, the mid point of the floorspace range has been adopted. That is, a total shop/retail floorspace of 1,950 sq.m, including a 1,000 sq.m supermarket.

The assessment of trading impacts from the proposed shop/retail floorspace are undertaken for financial year 2036, the assumed opening year of the retail centre and other retail shops within the PSP. At this time, the primary school, repurposing of the WAAPA, the Library and Admin buildings and about half of the residential housing are assumed to be completed.

As a result, the assessed trading impacts will be slightly higher than would eventually occur, recognising the full benefit of the demand generated from the new housing, in terms of offsetting impacts, would not yet be fully realised. As outlined later in this section of the report, given the scale of impacts that are expected to occur on other activity centres are minor (average of ~1% across the relevant centres), the conclusions regarding the sustainability of the impacts on other centres would not be materially affected.

As per the guidelines set out in State Planning Policy 4.2, the Net Benefit Test is required to assess:

- *The potential impacts and benefits to the community from the proposed retail development within the ECU Mount Lawley PSP on existing and planned activity centres in the locality. This considers:*
 - *The supportable retail / commercial floorspace for an appropriate service population. Refer to Section 3 of this report.*
 - *The implications for and optimal use of public and private infrastructure and services provided or planned in the locality.*
 - *The overall costs and benefits of the proposal to the community, considering the objectives, outcomes and measures of SPP 4.2.*
- *The potential loss and/or gain of services and any associated detriment / benefit to the community caused by the proposed retail development.*

The assessment considers impacts and benefits in relation to all activity centres that may be affected by the proposed retail development, including all relevant activity centres in terms of the type of retail offer that will be provided in and relative proximity to the subject retail development.

In this regard, the impacts are assessed for activity centres located within about 3 km from the ECU Mount Lawley PSP site. This area largely includes District and Neighbourhood scale activity centres which would be the most competitive with the supermarket / convenience based offer proposed for the ECU Mount Lawley PSP.

Approach and Methodology to Assess Trading Impacts

Trading impact assessments help to evaluate whether the potential benefit to the local community through the increase in retail floorspace from a proposed development, is greater than the potential impact of additional floorspace on the long-term sustainability of other existing and planned centres in the hierarchy.

Trading impact assessments involve the development of base case forecast turnover levels (i.e. forecast turnover for existing and future developments under the scenario that the proposed development is not operating). These forecasts are then compared against a 'development scenario' (i.e. forecast turnover for existing and future developments under the scenario that the proposed development is operating). The development scenario is compared to the base case scenario to estimate the potential change to turnover levels if the proposed development is approved.

An impact assessment is expected to provide an indication of the trading environment and average trading conditions within which retailers operate, and implications for likely turnover declines or gains on average for the retailers involved. Because an impact assessment forecasts how groups of people are likely to alter their shopping behaviour in response to a given change in the competitive environment, it is not possible to estimate individual retailer impacts or each group of retailers in each location.

Therefore, in any impact assessment of this type, it is not possible to estimate impacts on any specific individual retailer. The impact on any one individual retailer or any small group of retailers in a given location would depend on many factors (e.g. retailer profitability), some of which are within their control. The actions taken by retailers will determine the eventual impact on each, and furthermore, the actions they take will determine the eventual impact on the other retailers involved.

All these factors need to be kept in mind when considering the likely impact of any relocation and expansion of a retailer within the existing retail network. Existing retailers are not passive participants but rather play a major role in the eventual impact which they will experience.

Shopper behaviour is influenced by a range of factors. Decisions regarding where to shop are based on several judgments including, relative accessibility, availability of particular retailers, convenience, variety, car parking, and others. As a result, residents like to spread their purchases across a wide variety of shopping centres and areas and use the full range of facilities available to satisfy their needs.

The method of analysis used to assess the impacts on individual centres from a retail development is based on a 'competitive usage' model. This model is based on the principle that if shoppers choose to direct some of their retail expenditure to the subject development proposal, then they will reduce their expenditure at other centres in a similar proportion to their usage of each centre or location (reflected by each centre's market share from the various trade area sectors). In assessing the potential impacts on other centres in the hierarchy we have adopted a 'turnover allocation approach'.

The assessment of impacts on specific retail centres requires an estimate of the existing turnover and level of usage of centres in the trade area and beyond. The model estimates the degree to which various shopping locations within and beyond the trade area are used for retail shopping, by allocating a proportion of turnover to each trade area sector (i.e. source of sales). These estimates result in market share calculations for each competitive centre, and thereby form the basis on which the impact of the proposed retail development is distributed to all other centres used by residents of the trade area for retail shopping. This is commonly referred to as the 'one-off' impact.

It is also relevant to consider the dollar impacts in relation to the turnover that would potentially be generated by these and other shopping centres over the intervening period. The impact analysis, therefore, details the turnover change, or net impact, which is expected for each centre/location, expressed as a reduction in turnover and as a percentage of the turnover level for each centre.

Market Share and Turnover Potential of Retail Shops

Based on the analysis and considerations outlined in Section 3 of this report, in financial year 2036 (the assumed opening year of the retail offer within the ECU Mount Lawley PSP area), the 1,950 sq.m of retail shops are estimated to achieve a turnover of \$18.6 million, including \$14.7 million by food tenants and \$4.0 million by non-food tenants.

The assessed level of turnover is in line with benchmarks for comparable centres anchored by a small format supermarket and access to other non-resident drivers of demand.

The resident market shares to support this level of turnover are, on average, 2.3% across the total catchment and 4.6% in the Primary catchment (including the ECU Mount Lawley PSP area) and 1.5% in the Secondary catchment.

These are relatively low market shares that indicate the diversion of trade from existing activity centres will be generally modest.

Turnover Potential – Retail Shops, 2036 (\$2025, incl. GST)

	Resident Retail Spending (\$M)	Market Share (%)	Potential Turnover (\$M)
Primary Catchment	188	4.6%	8.6
Secondary Catchment	481	1.5%	7.0
Total Catchment	669	2.3%	15.6
Beyond the Catchment		16%*	3.0
Total Centre			18.6

* Proportion of turnover sourced from markets beyond the catchment. As noted on Page 31, this takes into account trade sourced from non-resident visitors (e.g. workers and other visitors) to the site, with reference to the benchmark draw of retail centres anchored by a small scale supermarket.
Source: Urbis

Estimated Trading Impacts on Other Centres

Any new retail development will inevitably have trading impacts on other centres (existing / planned) and the key consideration is to understand the extent to which these impacts influence the long-term sustainability of the retail network of activity centres. There is also importantly a need to balance these turnover impacts with the benefit for the community from a more competitive marketplace, consumer choice and new employment opportunities.

The estimated trading impacts on the existing and planned future retail centres network as a result of the proposed new retail floorspace within the ECU Mount Lawley PSP are outlined in the table below. This table shows two measures of impact as follows:

- The **one-off trading impact** in the opening year of trade for the new retail centre / floorspace, i.e. in the assumed 2036 financial year.
- The **change in turnover from the existing level in 2025 and 2036**. This is the most important consideration given it takes into account the benefit of

market growth in improving the performance and overall sustainability of other activity centres.

The key findings from the impact analysis are as follows:

- The modest level of trading impacts are not expected to be detrimental to the sustainability of any individual activity centre.
- In fact, the forecast market growth is estimated to offset the assessed impacts for all centres, indicating they are expected to be 'better off' performance wise even with the proposed addition of new retail floorspace in the ECU Mount Lawley PSP site.
- The modest impacts reflect the benefit of the addition of around 1,600 residents in the ECU Mount Lawley PSP site and that to a significant degree the new retail shops and services will cater to this new population base as well as the workers, students and visitors associated with the other uses within the PSP.

Estimated Turnover Impact, \$2025

	Retail Turnover (\$2025M)			Impact (2036)		Change (2025-36)	
	Current (2025)	'Without Development' (2036)	'With Development' (2036)	(\$M)	(%)	(\$M)	(%)
Existing Centres:							
Dog Swamp (Yokine)	138.0	162.7	159.4	-3.3	-2.0%	+21.5	+15.5%
Mount Hawthorn	116.8	135.5	133.8	-1.7	-1.2%	+17.0	+14.6%
North Perth (Coles)	105.3	123.3	121.2	-2.0	-1.7%	+15.9	+15.1%
Mount Lawley	137.7	158.2	156.6	-1.6	-1.0%	+18.9	+13.8%
Dianella	104.8	121.6	120.1	-1.5	-1.2%	+15.3	+14.6%
Inglewood	165.9	191.3	188.3	-3.0	-1.6%	+22.4	+13.5%
Morley	547.0	610.8	609.4	-1.4	-0.2%	+62.3	+11.4%
Proposed Centres:							
Woolworths North Perth		63.7	62.4	-1.3	-2.0%	+62.4	+0.0%
<i>Other / Future Centres</i>				-3.0			
Total Impact				-18.6			

Source: Urbis

Economic and Community Benefits

The economic and employment benefits of the proposed new retail floorspace within the ECU Mount Lawley PSP site are estimated based on REMPLAN modelling, the Perth Land Use Survey (PLUS) and Urbis' in-house datasets and knowledge. These benefits will accrue during both the construction phase and on-going operation basis.

Through the creation of new construction and ongoing jobs, the development investment and operational activities of the retail shops and services, further employment and economic benefits will be realised through multiplier effects. The methodology is explained further in Appendix D to this report.

The key findings are as follows:

In terms of the **construction phase** benefits (retail uses only):

- The total construction cost specific to the development of the new retail uses is estimated at approximately \$15.6 million* (excluding GST or ~\$17.2 million including GST), with an assumed two-year construction period.
- During the construction phase, the project is estimated to support:
 - A short term boost in employment with 24 direct and indirect total jobs (i.e. full-time, part-time and casual jobs) for each year of construction during the construction period; and
 - \$4.7 million direct and indirect annualised Gross Value Added (GVA) to the catchment and WA economy.

In terms of the **ongoing operation** benefits:

- The development of the retail shops within the PSP will generate a requirement for ongoing employment, estimated to be 95 direct and indirect jobs per annum; and
- The ongoing activities of the retail shops are also estimated to provide \$10.7 million in direct and indirect GVA per annum.

**Note: based on an average construction cost of \$8,000 per sq.m for supermarket based shopping centre in a suburban Perth location as per Rawlinsons Construction Cost Guide 2025 (incl. standard finishes, fit-out, electrical and plumbing), and a total retail floorspace assumption of 1,950 sq.m*

Construction Phase Benefits – Annualised

	Direct Effect	Indirect Effect	Total Effect
Direct Output (\$M)	\$8.6	\$6.6	\$15.2
Employment (Total Jobs**)	12	12	24
Gross Value Added (\$M)	\$2.4	\$2.3	\$4.7

Operation Phase Benefits – Annualised

	Direct Effect	Indirect Effect	Total Effect
Direct Output (\$M)	\$13.6	\$5.9	\$19.5
Employment (Total Jobs**)	82	13	95
Gross Value Added (\$M)	\$8.1	\$2.6	\$10.7

***Note: Include all full-time, part-time and casual jobs; GVA = Gross Value Added, Indirect benefits refer to Supply Chain effects but not Consumption Effects. A full description of the methodology and key assumptions applied are included in Appendix D.*

Source: DevelopmentWA; Rawlinsons; REMPLAN; Urbis

Economic and Community Benefits (Cont'd)

The proposed new retail shops and services within the ECU Mount Lawley PSP are expected to have range of benefits for the community as outlined in the table to the right.

Ultimately, the community will be better off with the proposed retail components of the PSP.

Net Community Benefits

Benefit	Assessment Findings
Increased Consumer Choice	<ul style="list-style-type: none"> The proposed retail centre will provide opportunity for a new supermarket and complementary shops and services that will provide a highly convenient option for essential day-to-day shopping needs for residents in the PSP and local catchment. The retail shops will also provide increased choice and price competition for the local community. The shops will also provide amenities that will have a positive impact on attracting other businesses and workers.
Increased Employment Opportunities	<ul style="list-style-type: none"> The construction and ongoing operation of the retail shops will generate additional employment opportunities for the local and wider communities. Retail shops are also an important employer for young workers and people looking to re-enter the workforce. With the PSP and area generally expected to attract younger single/couple households and families (with children that will mature to working age) the retail shops are well aligned with the future demographics of the area.
Enhanced Access and Low Trading Impacts	<ul style="list-style-type: none"> Without the provision of shops within the PSP area, the new residents would need to travel up to 2 km to undertake basic shopping needs. The proposed shops provide important local access for these and nearby residents. Given the scale of retail shops proposed within the PSP (1,725 sq.m) and that they will be supported to a significant degree by the new residents, workers, students and visitors in the PSP, the trading impacts on other activity centres in the region of relevance is expected to be low. The level of impacts would not result in any loss of shops and services and the development would materially increase services provided to the community.
Community Engagement	<ul style="list-style-type: none"> The range of uses proposed within the PSP will support increased community engagement, particularly in terms of the primary school, retail shops and Creative Arts Hub. Other uses such as medical / allied health uses and gym / fitness club will also add to the PSP serving as a key community hub.

Key Findings and Conclusions

The Net Benefit Test indicates that there is market need for the proposed retail shops and services within the ECU Mount Lawley PSP. Furthermore, the proposed retail facilities would not have an adverse impact on the existing or planned future activity centres and not cause any loss of shops and services provided to the community. Rather, the retail shops would provide a range of benefits for the community through convenient access to more retail floorspace serving essential day-to-day shopping needs and provide important amenities for the workers and other visitors.

The key findings of the Net Benefit Test include:

Market Need and Demand

- **Retail Gap and Need.** From the ECU Mount Lawley PSP the closest retail facilities are up to 2 km away. The proposed new retail shops would provide convenient access to essential day-to-day shopping requirements for residents of the PSP as well as residents elsewhere in the catchment.
- **Growing Retail Market.** Annual retail expenditure by catchment residents is forecast to increase by \$414 million (or nearly doubling) over the period to 2042. The growth in retail expenditure will drive increasing demand for additional retail floorspace to serve the catchment residents. Nearly 15% of the growth in retail demand will be generated by residents moving into the new housing in the PSP area, highlighting the importance of the proposed new retail shops in the PSP in serving this market.
- **Amenities for Workers / Visitors.** The proposed retail shops will also provide important amenities for workers, students and visitors of the other commercial and community uses proposed within the PSP (e.g. primary school, Creative Arts Hub).

Trading Impacts and Community Benefits

- **Low Impacts.** The proposed 1,950 sq.m of retail floorspace is expected to have only modest impacts on other activity centres in the region of relevance to the ECU Mount Lawley PSP. On the identified affected centres, the average one-off impact in 2036 is estimated at around 1%. Accordingly, the trading impacts are not expected to be detrimental to the sustainability of any individual activity centre
- **Market Growth to Offset Impacts.** With the low impacts of generally between 1.0% and 2.0% on any individual centre and forecast market growth, the retail turnover of each assessed centre in 2036 (the assumed opening year of the retail development within the PSP) is estimated to be significantly higher than the current levels in 2025. As a result, each centre is expected to be 'better off' performance wise even with the proposed addition of new retail floorspace in the ECU Mount Lawley PSP.
- **A Gain in Shops and Services.** Reflecting the low level of impacts no loss of retail shops and services are expected as a result of the proposed new retail floorspace within the PSP. Furthermore, the proposed retail shops and services will broaden the range and choice of shops available to consumers.
- **Other Benefits.** The proposed retail shops and services will also provide other benefits for the community including:
 - Increased employment opportunities in the short and longer term through the construction phase and ongoing operation of the retail shops.
 - Improve the liveability of the new residential development within the PSP with convenient access to retail shops and services and provide important amenities for local workers, students and visitors.

In conclusion, the proposed retail shops and services is expected to provide a significant range of demonstrable benefits for the community whilst maintaining a sustainable activity centre hierarchy.

Appendices

Appendix A Key On-site Population Forecast Assumptions

People per Dwelling / Average Household Size Assumptions

People per dwelling or average household size has been assessed for each dwelling type (apartment, household and student housing) based on the ABS Census data, reflecting the average dwelling size at a metropolitan level. These assumptions have been applied to the dwelling yields for the ECU Mount Lawley Masterplan area to estimate on-site population capacity

	1-bed	2-bed	3-bed
Apartment	1.2	1.5	2.1
Townhouse	1.2	1.6	2.2

Source: Urbis analysis of ABS data

Appendix B ECU Mount Lawley Redevelopment Dwelling Sales Forecast

The density scenarios for the ECU Mount Lawley development have been reviewed to inform the likely sales rates for each product type. The review is based on looking at the market share that the broader area could achieve of all Perth sales, as well as sales rates that the development could achieve compared to surrounding competition.

In doing so, a sales modelling has been carried out, based on an assessment of historical and forecast lot sales and dwelling approvals across all of Perth and based on historical trends and future supply, forecasting market shares for the corridor, sub-corridor (Mount Lawley – Inglewood SA2) and the ECU Mount Lawley site. In the long term, dwelling approvals and sales are aligned. As such, approvals have been used as a proxy to inform sales rates for this analysis.

This modelling indicated that the ECU Mount Lawley development could be sold out over a 13-year period by 2042, assuming sales commencing in 2030. It is forecast that the medium density component of the development could sell out over an assumed 7-year period. The apartment products are anticipated to sell over a longer time period (13 years), given the higher yield of apartments in comparison to medium density products. All scenarios are expected to have similar timeframes, with yearly sales peaking in 2032 and gradually declining to 2042.

Note: development period is influenced by sales rate of apartments and may change.

Forecast Dwelling Sales Rates

	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042
Townhouses	9%	12%	17%	16%	16%	16%	14%						
Apartments	6%	7%	9%	9%	9%	9%	8%	8%	8%	8%	8%	8%	2%

Forecast Total Dwelling Sales by Scenario

Scenario	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042
Low	48	107	180	252	324	395	462	509	555	600	645	690	700
Medium	64	142	237	331	425	517	605	673	739	806	871	936	951
High	74	164	274	383	490	597	699	781	861	941	1,020	1,098	1,116

Source: ABS, DevelopmentWA, Urbis

Appendix C Forecast Catchment Population by Age

Sector	Year	0 to 4	5 to 14	15 to 24	25 to 39	40 to 59	60 and over
Primary Masterplan Site	2021	0	0	0	0	0	0
	2025	0	0	0	0	0	0
	2030	5	10	10	28	24	19
	2035	38	72	94	224	196	158
Primary Balance	2021	150	474	697	533	1,092	1,756
	2025	166	477	745	547	1,124	1,865
	2030	166	474	790	519	1,167	1,990
	2035	164	468	799	536	1,191	2,126
Total Primary	2021	150	474	697	533	1,092	1,756
	2025	166	477	745	547	1,124	1,865
	2030	171	484	800	547	1,191	2,009
	2035	202	540	894	760	1,387	2,284
Secondary North	2021	154	337	354	749	909	1,047
	2025	175	351	398	810	978	1,162
	2030	176	346	425	803	1,014	1,252
	2035	174	337	420	822	1,024	1,343
Secondary South East	2021	200	380	414	798	1,007	772
	2025	231	423	481	885	1,105	890
	2030	243	443	533	908	1,180	988
	2035	251	451	546	959	1,229	1,076
Secondary South West	2021	293	567	590	1,581	1,514	1,088
	2025	316	602	675	1,728	1,623	1,243
	2030	328	614	753	1,786	1,733	1,394
	2035	342	619	771	1,902	1,820	1,540
Secondary West	2021	43	175	145	165	349	223
	2025	45	164	144	160	341	224
	2030	44	161	150	153	350	245
	2035	43	158	148	154	352	269
Total Secondary	2021	690	1,459	1,503	3,293	3,779	3,130
	2025	767	1,540	1,699	3,584	4,047	3,520
	2030	790	1,565	1,861	3,650	4,277	3,879
	2035	810	1,565	1,884	3,836	4,425	4,228
Total Catchment	2021	840	1,933	2,200	3,826	4,871	4,886
	2025	933	2,017	2,443	4,131	5,171	5,385
	2030	961	2,050	2,661	4,197	5,467	5,888
	2035	1,012	2,104	2,778	4,596	5,812	6,513

Source: ABS, Urbis, WA Tomorrow Medium Series

Appendix D REMPLAN Methodology, definitions & assumptions

The REMPLAN Methodology & Key Assumptions

Analysis presented in the Economic Impact Assessment section uses REMPLAN economic modelling to assess current and potential economic impacts. REMPLAN is an Input-Output model that captures inter-industry relationships within an economy. It can assess the area-specific direct and flow-on implications across industry sectors in terms of employment, wages and salaries, output and value-added, allowing for analysis of impacts at the State of Victoria level.

Key points regarding the workings or terminology of the model are as follows:

- REMPLAN uses either the value of investment or employment generation as the primary input. For this analysis, the estimated direct employment figures have been used to model other relevant benefits.
- Outputs from the modelling include indirect employment generated through the project and economic Gross Value Added (GVA) at the State level.
- Employment and GVA are presented on an annualised basis. Construction phase benefits accrue each year the project is under construction. On-going benefits accrue each year of operation.
- Employment generated is calculated on a total jobs basis (i.e. including all full-time, part-time and casual jobs).
- Both the direct and indirect benefits are modelled for employment and value added:
 - *Direct* refers to the effect felt within the industry as a result of the investment. For example, the construction phase will directly result in the creation of construction jobs.
 - *Indirect* effects are those felt within industries that supply goods to the industries directly affected.
- It should be noted that the results presented in this report are estimates only based on the existing state of economic activity in the area. Due to the static nature of input-output modelling, they have the potential to overstate the actual effects. Nonetheless, the analysis still reflects the fact that employment growth will be positive for the State and the local area.
- Urbis consider that in the absence of the proposed development it is unlikely that similar projects would be undertaken within the same period, and therefore the investments and all associated benefits can be considered *additional*.

Definitions

Construction cost is the estimated investment value for the development over the anticipated delivery period, measured in constant 2025 dollars (i.e. excluding inflation) including GST.

Gross Value Added or GVA is a measure of the value of goods and services produced in an area, industry or sector of an economy during a certain period of time. In this case, GVA represents the total economic contribution of the investment (wages, gross operating profit and net taxes). GVA is measured in constant dollars (i.e. excluding inflation) including GST.

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Project Code	P0046094
Report number	Final

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