City of Melville

Attachment 4

Land Economics Report

Summary Sheet

Land Economics Assessment

City of Melville

Why do a Land Economics Assessment?

Planning for more housing is not just about where growth can occur - **it's about where it is realistically likely to occur**.

A Land Economics Assessment (LEA) tests how the housing market is likely to behave, using real-world data on:

- property values
- construction costs
- buyer demand
- development feasibility.

This helps the City understand which planning changes will translate into real housing outcomes and which changes are unlikely to.

Why this matters for decision-making

The City of Melville is **planning for population growth** to 2050. To meet the State government housing target of an additional 14,000 new dwellings, more homes will need to be **delivered within existing suburbs**.

The LEA helps the City to:

- Focus **growth where the market will respond**
- **Avoid rezoning areas that won't redevelop** and creating unnecessary angst for those communities
- **Reduce underdevelopment** of higher-density sites by setting densities appropriately
- **Improve confidence** in meeting housing targets through long term forecasting
- Clarify why some areas are being prioritised for change.

What did the LEA test?

- How our community lives now and what housing preferences might look like in the future
- Where new housing is realistically likely to be built
- What types of housing are viable in these areas (townhouses to apartments)
- When development is likely to occur
- Whether proposed planning changes align with market demand

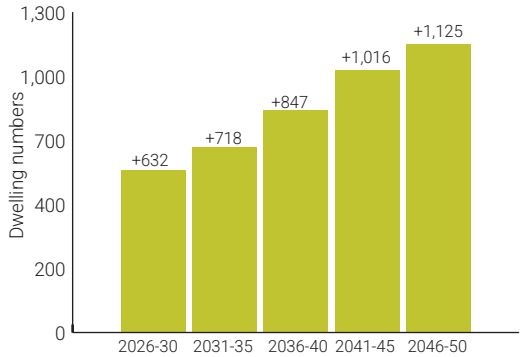
How was the LEA developed?

Independent consultants (Urbis) assessed over 30 "change areas" using:

- Property values, rents and buyer demand
- Access to transport, centres and open space
- Lot sizes, age of housing and redevelopment potential
- Construction costs and development feasibility

This allowed a comparison of:

- **Market readiness** (where development is most likely now)
- **Long-term capacity** (where change could happen over time)



Net dwelling increase across the proposed change areas (2026 - 2050)

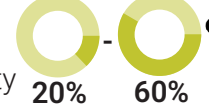
What does the modelling show?

+4,388

Density changes proposed as part of the review of LPS6 are expected to **deliver about 4,388 new homes** by 2050.

This represents only **part** of the City's total growth to 2050, with the rest of the target expected to be **achieved through the City's existing and planned activity centre** (structure plan) **areas**

Not all sites will be redeveloped - most areas will achieve between 20-60% of their theoretical capacity by 2050



Market conditions matter

House prices increased by approx. **80%** (2019 - 2025)

Construction costs increased by approx. **54%**

This **limits** higher-density apartment delivery to certain high value locations.

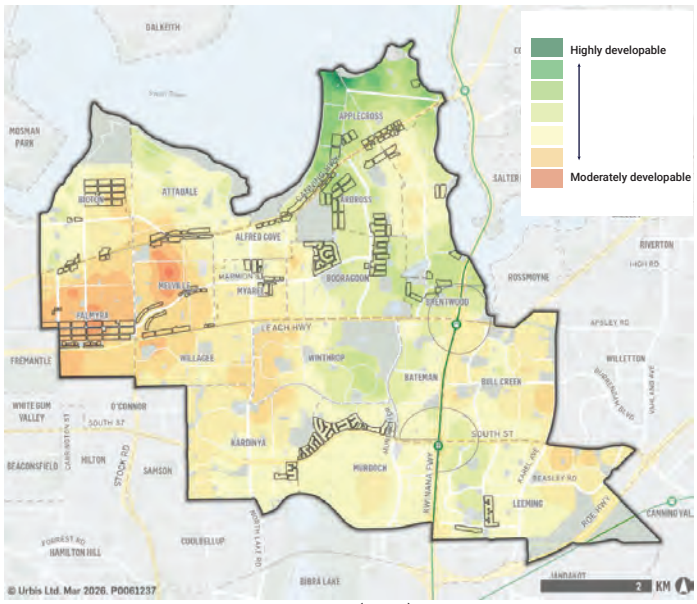
Key findings

1 Growth will be gradual and targeted - not widespread.
Most suburbs identified for change will experience incremental change over decades.

42%

On average, 42% of the infill opportunities created by the scheme review changes are estimated to be delivered by 2050.

2 Not all areas are equally ready for infill.
Development will focus on locations with strong demand and access to services.



Composite scoring mapping (p70)

3 Riverfront and activity centre areas are best placed to deliver apartments.
Applecross, Mount Pleasant and Booragoon have higher land values, strong demand and established apartment markets.

4 Most new housing will be townhouses and low-rise apartments.
Mid- and high-rise buildings are only viable in limited, higher-value locations.

100% **Townhouses and low rise apartments are viable in all change areas in 2025.**

52% **Proportion of change areas where mid rise dwelling are viable in 2025.**

39% **Proportion of change areas where high rise apartments are viable in 2025.**

2041 **Year mid rise apartments become viable in all change areas.**

2046 **Year high rise apartments become viable in all change areas.**

5 The City's approach aligns with market realities.
Proposed change areas focus growth where development is most feasible and likely to occur.

6 Demand for higher density increases over time.
This is driven by:
- affordability pressure
- smaller households
- ageing population and downsizers.

7 Major redevelopment around the train stations is a long-term opportunity.
Bull-Creek and Murdoch have large capacity, but are limited by:
- complex street layouts (culs-de-sacs which are not walkable)
- weaker short and medium-term demand
- need for State investment

Significant change is likely **after 2040.**

Example findings

Proposed change area: Marmion Street, Melville (R20 to R40)

This change area currently has **51 dwellings**.

As a result of the proposed change to R40, the theoretical number of additinoal dwellings that could be built in the area is **137** (169% increase from existing dwellings).

By 2050, the LEA estimates that:
- Number of dwellings will increase by **39%**
- This is represented by an additional **20 dwellings**.

Viability & affordability modelling

Townhouse	Low rise apartment	Mid rise apartment	High rise apartment
Already viable	Already viable	Viable by 2034	Viable by 2040
High affordability	High affordability	Moderate affordability	Moderate affordability

Composite score: 0.34

Success factor scoring:

Low	Proximity to retail (score = 27%)
Mod	Proximity to open space (220m)
Str	Proximity to busses (49m)
Low	Proximity to trains (4,695m)
Mod	Median multiple property values (1.41)
Mod	Median multiple rental values (1.18)
Str	Proportion of stock <15 years old (13.6%)
Low	Proportion of lots >1,000 sqm (2%)

**View the LEA report for further information about the success factors and their scoring.*

For more information, read the full Land Economics Assessment report.

URBIS

CITY OF MELVILLE LAND ECONOMICS ASSESSMENT

Prepared for the City of Melville
May 2026

CONTENTS

EXECUTIVE SUMMARY

This study evaluated how proposed residential density changes across the City can contribute to housing supply targets through a realistic assessment of development feasibility, demand drivers, and locational attributes.

While theoretical capacity modelling identified significant potential uplift across the proposed change areas (equivalent to approximately 6,320 to 12,560 net dwellings), this assessment focuses on forecasting development outcomes that reflect a more probable scenario based on development feasibility, housing demand and locational attributes.

The City had an estimated 42,831 dwellings as at the 2021 Census and is required to achieve a minimum of 58,590 dwellings by 2050 according to State Government targets. Over the next 25 years, the proposed change areas are forecast to deliver around 4,338 additional dwellings across the City of Melville. This represents a meaningful contribution to the State Government's infill housing targets for the City. It is expected that the remainder of dwellings needed to achieve this target will be delivered primarily within activity centres and, to a less extent, other areas across the City.

The rate of uptake will vary between the proposed change areas, reflecting differences in property values, local amenity, lot size patterns, age of housing stock, access to public transport, and redevelopment feasibility. For instance, there are a number of areas that will develop out over longer periods well past 2050 such as Harris Street in Bicton, North Lake Road, Leach Hwy and Marmion Street in Willagee, Melville and Myaree relative to other change areas.

In contrast, changes areas centred around centres such as the Riseley Street North, Bull Creek Local Centre, Farrington Centre and Winthrop Local Centre precincts are anticipated to be largely at build out by 2050, driven by their proximity to amenity.

FORECASTS BY KEY CHANGE AREAS

- **Booragoon Centre East** : Expected to deliver an estimated 350 dwellings over the forecast period, these areas benefit from adjacency to Westfield Booragoon, strong transport connections and an established apartment market.
- **Riseley Centre North and Wireless Hill Vicinity**: Forecast for 600-700 additional dwellings, reflecting moderate but steady redevelopment potential supported by amenity.
- **Brentwood, Mount Pleasant and Applecross:** Forecast to deliver 100-150 dwellings, supported by strong property values.
- **Palmyra and Myaree Corridors**: Expected to contribute around 800-900 dwellings, primarily through small-lot and grouped-housing developments.
- **South Street and Kardinya Precincts**: Combined forecast of 1,300 additional dwellings, supported by local retail amenity, accessibility to public transport and proximity to Murdoch University and the Murdoch Health and Knowledge precinct.
- **Farrington Centre and Bull Creek Local Centre**: estimated to deliver approximately 900 dwellings, supported by the retail and established amenity.
- **Remaining Change Areas** (e.g. Willagee, Bicton): Estimated at 100 dwellings over 25 years, representing incremental redevelopment.

EXECUTIVE SUMMARY (CONT.)

DEVELOPMENT OUTLOOK, TIMING AND AFFORDABILITY

A key factor underpinning the forecasts is the expected demographic changes in the City and the influence of these changes on demand for different dwelling typologies. In line with how other comparable areas have evolved as cities grow, changing demographics (particularly an ageing population) are anticipated to lead to increased demand for smaller dwelling types such as townhouses and apartments.

Based on household formation demand modelling with changing dwelling preferences, future demand across the whole City is estimated at 24,970 dwellings, including 15,870 apartments, by 2050.

Importantly, the anticipated infill across these change areas is expected to support improved housing affordability, particularly in areas with high property values where new medium density can support delivery of dwellings at lower price points than existing detached housing.

OTHER CONSIDERATIONS

While planning and zoning changes establish the framework for future housing growth, this assessment finds that amenity and feasibility will be decisive factors influencing whether, where, and when infill actually occurs.

As such, strategic investment in amenity, transport accessibility, and the public realm will be critical to stimulate infill activity. This includes initiatives such as urban greening, public realm enhancements, infrastructure upgrades, and improved active-transport connections.

Targeted amenity investment in emerging precincts – such as Myaree, Leeming, Brentwood, and Palmyra – will be essential to strengthen market confidence and support infill potential.

CONCLUSIONS

In conclusion, the proposed change areas provide a good mix of both density and scale uplift across a range of different areas across the City and are anticipated to provide a significant level of new housing choice over the coming decades.

High amenity areas and those with connections to key transport nodes / routes are best placed to deliver volume in density across the City over the next 25 years. Areas near to Leach Highway, South Street and centres such as Booragoon, Bull Creek, Kardinya and Farrington Centre are anticipated to see the most development. Beyond 2025, the majority of the change areas will still be able to facilitate development for years to come.

INTRODUCTION

BACKGROUND & APPROACH

The City of Melville is reviewing its current local planning scheme (LPS6). As part of this review, the City is reviewing whether the current local planning scheme can support development to meet State Government dwelling targets.

The State Government's Perth and Peel @ 3.5 million Sub-regional Planning Frameworks set out population and dwelling targets for each local government area. To achieve their current targets, the City of Melville is exploring the adjustment of residential density codes and zonings to facilitate the introduction of infill development in select change areas.

Urbis was engaged initially in 2025 to help understand the expected uptake and feasibility of proposed density change areas over time, providing a clear and transparent analysis of how these changes could contribute towards the City meeting its housing growth targets. After discussions with Elected Members, the City of Melville has updated its list of proposed density change areas. This report seeks to understand the uptake and feasibility of the new list of proposed density change areas.

A study approach was based on seeking to understand:

- The current housing stock by typology across the City;
- Key housing market trends relevant to the City;
- The observed preferences for housing;
- Future housing demand;
- Viability of each proposed change area to accommodate infill development; and
- Anticipated development rates within each of these areas over the period to 2050.

REPORT STRUCTURE

This report is structured as follows.

- **Dwelling Stock Attributes:** Analysis of existing dwelling stock and housing preferences.
- **Market Development and Trends**: Analysis of historical housing trends.
- **Supply and Demand Drivers:** Collation of demographic, population, migration and construction cost data to gain a holistic view of factors influencing data for housing.
- **Demand Modelling:** Modelling of dwelling demand by density over time under two different dwelling preference scenarios.
- **Location Analysis:** Analysis of each proposed change area against the proposed density changes and array of success factors.
- **Affordability Assessment:** An exercise taken to understand the different affordability thresholds for each proposed change area.
- **Implications Analysis and Recommendations:** Synthesis of all above analysis into dwelling forecasts over time.

Appended to this study is the analysis conducted as part of the 2025 report, as well as the testing of development capacity for the Murdoch and Bull Creek station precincts, the Petra Street District Centre and Bull Creek District Centre.

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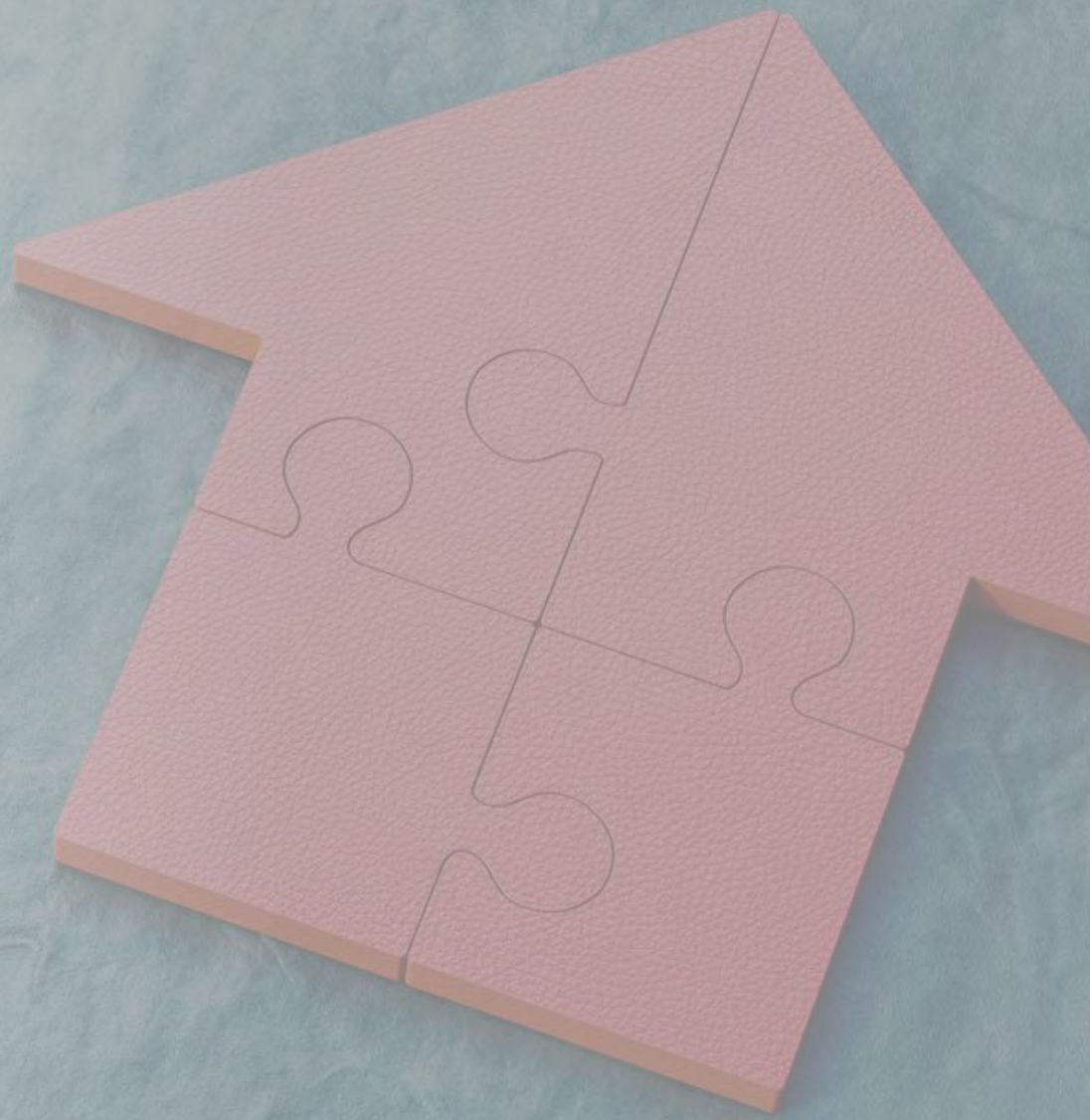
DWELLING STOCK ATTRIBUTES



EXISTING HOUSING STOCK OVERVIEW

As of the 2021 Census, the housing stock in the City comprised primarily of low density single houses (74%), with a small proportion of medium density dwellings (23%), and minimal high density (3%).

'Other' dwellings in the City include caravans, houseboats, cabins, tents, granny flats and housing attached to shops/offices/etc. Of the 72 dwellings in the 'Other' category, 52 are granny flats.

Note, this excludes unoccupied private dwellings, not stated and not applicable. Low rise apartments include one to three storey apartment complexes. Mid and high rise apartments refer to those four or more storeys.

CITY OF MELVILLE HOUSING SNAPSHOT, 2021

		AMOUNT (NO.)	PROPORTION OF HOUSING STOCK (%)
	Population	103,523	-
LOW DENSITY	Single house	31,751	74.2%
MEDIUM DENSITY	Semi Detached and Townhouses	8,235	19.3%
	Low Rise Apartments	1,668	3.9%
HIGH DENSITY	Mid and High Rise Apartments	1,105	2.6%
	Other dwelling types	72	0.2%
	Total	42,831	100.0%

Source: ABS 2021 Census

ESTIMATED HOUSING STOCK

To understand the existing dwelling supply, Urbis built upon the 2021 Census dwelling counts through the synthesis of building completions demolitions data provided by the City of Melville and expected build rates.

Urbis' analysis estimated a growth of 1,678 dwellings from 2021-2025.

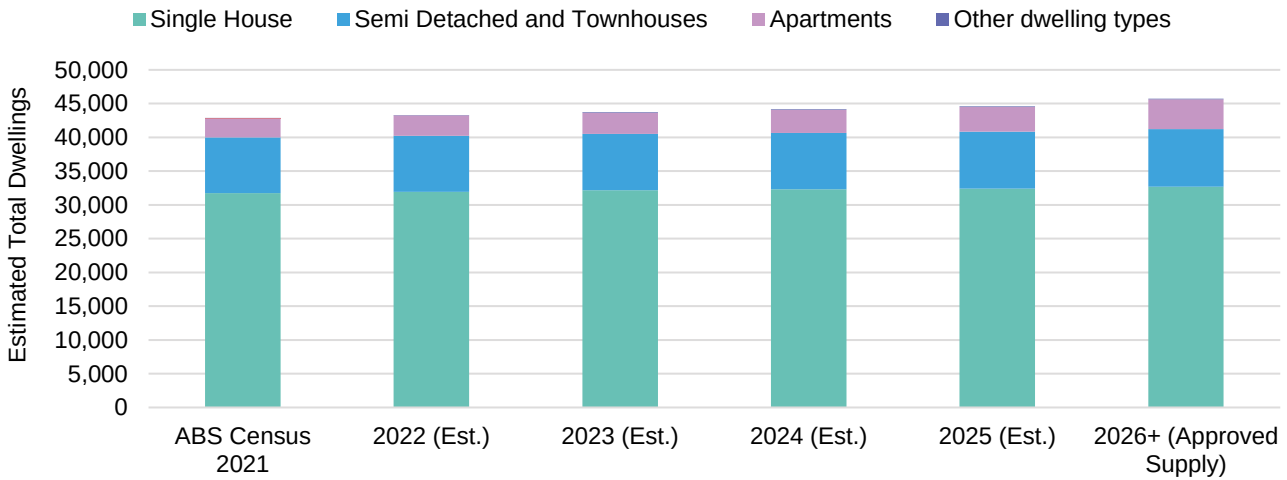
Apartment supply contributed an estimated 49% of new dwelling supply over this period – significantly higher than what the existing stock composition reflects. These developments have been largely concentrated around the Canning Bridge precinct.

Semi detached dwellings contributed to approximately 11% of growth, with single houses accounting for approximately 40%.

There are 1,158 approved dwellings currently which could be delivered beyond 2025, with a majority being apartments.

To be able to reach the dwelling target for the City of Melville as per the Subregional Frameworks, there is a need for approximately 560 dwellings to be built each year. This is higher than the circa 340 built on average between 2021 and 2025. The dwelling target is however achievable, provided appropriate areas are rezoned to have the capacity to be further developed and market conditions allow for more density to be developed in other areas across the City.

ESTIMATED TOTAL DWELLING SUPPLY, CITY OF MELVILLE



DWELLING TYPE	ABS CENSUS 2021	2022 (EST.)	2023 (EST.)	2024 (EST.)	2025 (EST.)	2026+ (APPROVED SUPPLY)
Single House	31,751	31,932	32,174	32,321	32,425	32,706
Semi Detached and Townhouses	8,235	8,288	8,345	8,360	8,406	8,507
Apartments	2,840	3,034	3,145	3,413	3,668	4,444
Other dwelling types	72	73	76	77	77	77
Total	**42,898**	**43,327**	**43,740**	**44,171**	**44,576**	**45,734**

DWELLING TYPE	ABS CENSUS 2021	2022 (EST.)	2023 (EST.)	2024 (EST.)	2025 (EST.)	2026+ (APPROVED SUPPLY)
Single House	74%	74%	74%	73%	73%	71%
Semi Detached and Townhouses	19%	19%	19%	19%	19%	19%
Apartments	7%	7%	7%	8%	8%	10%
Other dwelling types	0%	0%	0%	0%	0%	0%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Source: ABS, City of Melville, Urbis Perth Apartment Essentials
Note 2026+ incorporates dwellings with building applications lodged within the City and known future apartment projects (with several apartment projects slated for completion over the next 1-3 years).*

EXISTING HOUSING STOCK COMPARISONS

Three additional local government areas (LGAs) were profiled to compare the housing stock with the City of Melville. The City of South Perth shares similarities with the City of Melville through its share of riverfront properties, positioning along both Kwinana Freeway and Canning Bridge, and proximity to a major university. The City of Stirling represents a large locality with a similar proximity to the CBD as the City of Melville, north of the Swan River. Lastly, the City of Vincent offers insight into the composition of a CBD-adjacent LGA – illustrating how the dwelling mix may change in Melville over time.

Benchmarking Results

Melville has the highest proportion of single house dwellings amongst the benchmarked LGAs, at 74%.

The benchmarking shows higher density housing becoming more prevalent as proximity to the CBD increases, as observed in the LGAs of South Perth and Vincent. While certain suburbs in Melville are similar to these inner city suburbs (Applecross, Mount Pleasant), many of its suburbs are more disconnected from the CBD.

Infill development from redeveloped single housing lots comprises a significant proportion of medium density development in the City of Stirling, which may offer insight into the future introduction of density in Melville.

HOUSING TYPOLOGY BENCHMARK, 2021

HOUSING TYPOLOGY	MELVILLE	VINCENT	SOUTH PERTH	STIRLING
Population	103,523	36,537	43,405	226,369
Single house	74.2%	45.2%	46.6%	58.1%
Semi-detached group houses / terrace townhouse	19.3%	21.6%	35.7%	32.0%
Units / Low-rise apartments	3.9%	18.6%	10.3%	8.4%
Mid and High Rise Apartments	2.6%	14.6%	7.3%	1.4%
Other dwelling types	0.0%	0.7%	0.0%	0.1%

Source: ABS 2021 Census
Note: This excludes unoccupied private dwellings, not stated and not applicable. Low rise apartments include one to three storey apartment complexes. Mid and high rise apartments refer to those four or more storeys.

HOUSEHOLD ATTRIBUTES

The breakdown of dwelling types in the City is shown in the top right, while the composition of family types within each dwelling type is depicted in the bottom right.

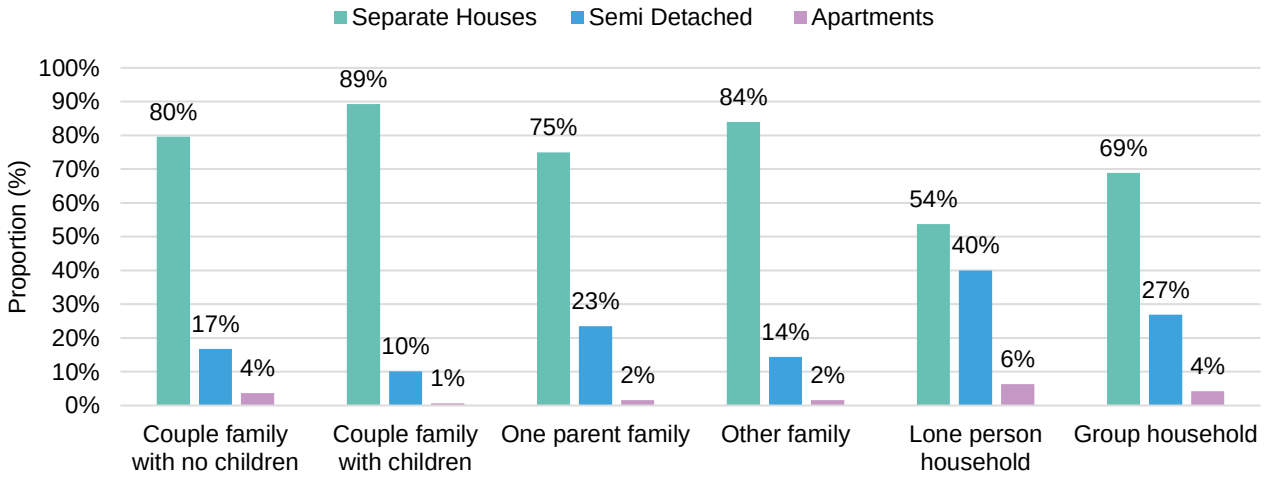
Observed Preference for Dwelling Types

The large proportion of single houses comprise the majority of dwelling stock across the City. Amongst its inhabitants, non-family households are more likely to gravitate to higher density housing than family households.

Despite a higher availability of medium to high density housing, couple families with children seem to have the most rigid dwelling preference, which are indicative of the increased space requirements they have.

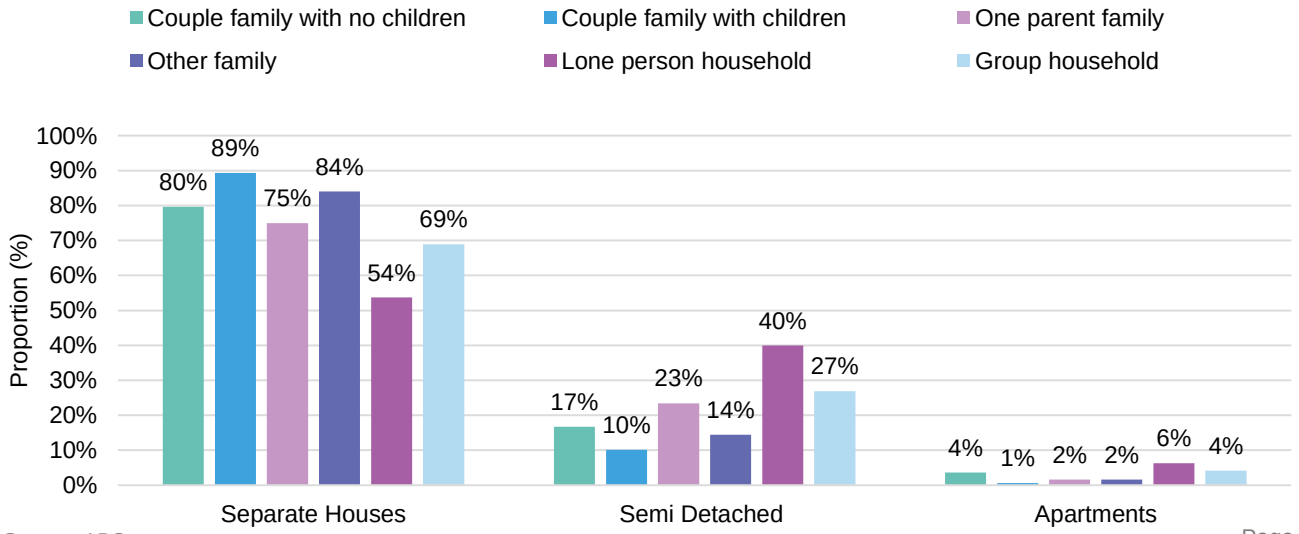
In LGAs where medium to high density housing is more prevalent (South Perth and Vincent), lone person households are observed to prefer this option compared to separate houses.

DWELLING TYPE BY HOUSEHOLD COMPOSITION, CITY OF MELVILLE, 2021



Source: ABS

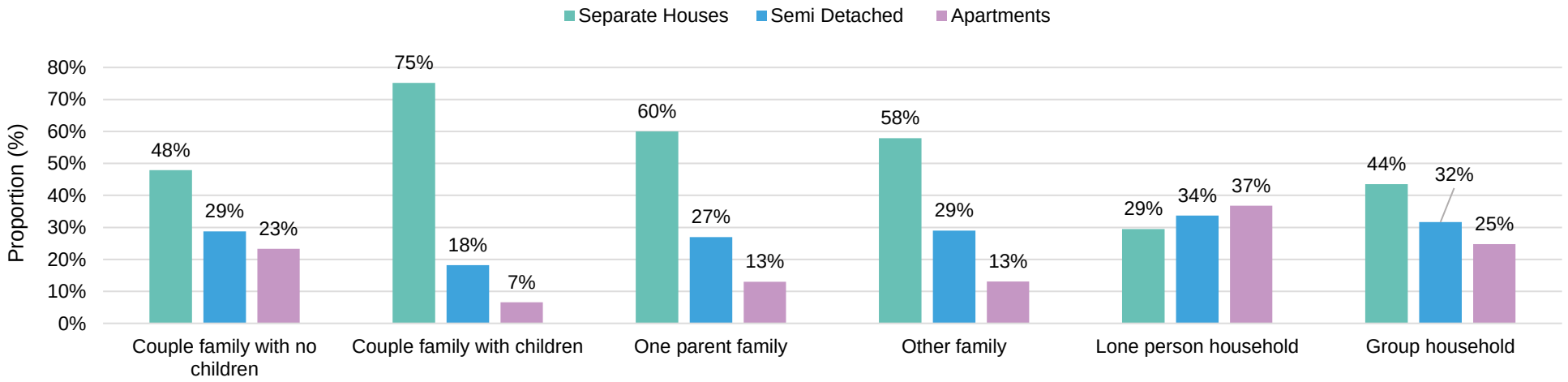
HOUSEHOLD COMPOSITION BY DWELLING TYPE, CITY OF MELVILLE, 2021



Source: ABS

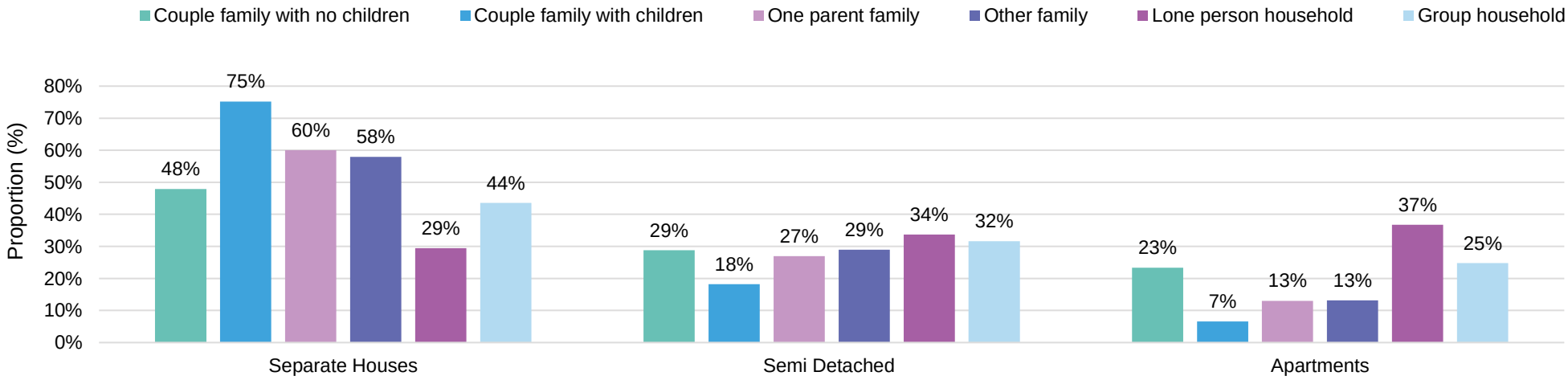
COMPARISON – CITY OF VINCENT

DWELLING TYPE BY HOUSEHOLD COMPOSITION, CITY OF VINCENT, 2021



Source: ABS

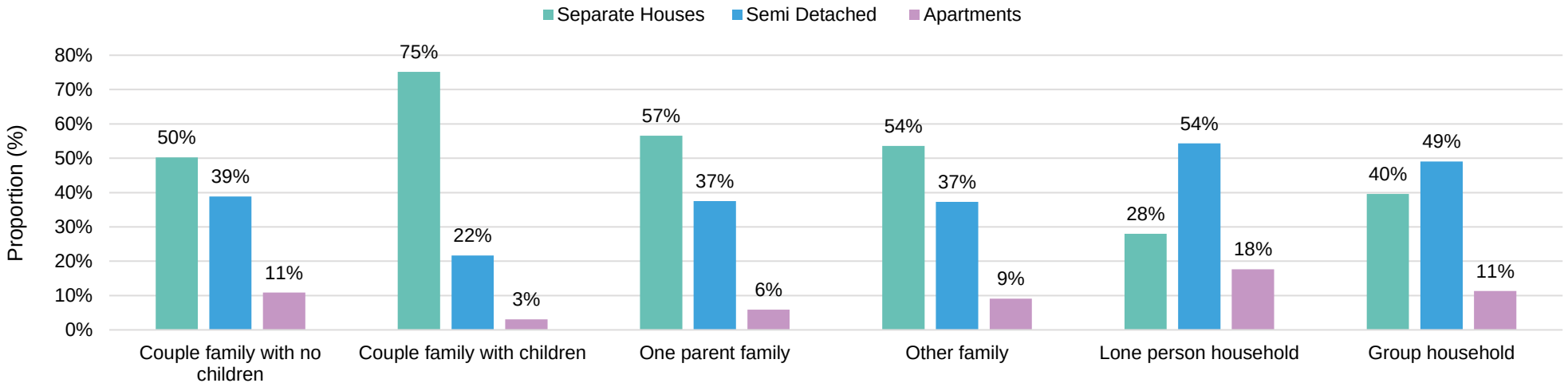
HOUSEHOLD COMPOSITION BY DWELLING TYPE, CITY OF VINCENT, 2021



Source: ABS

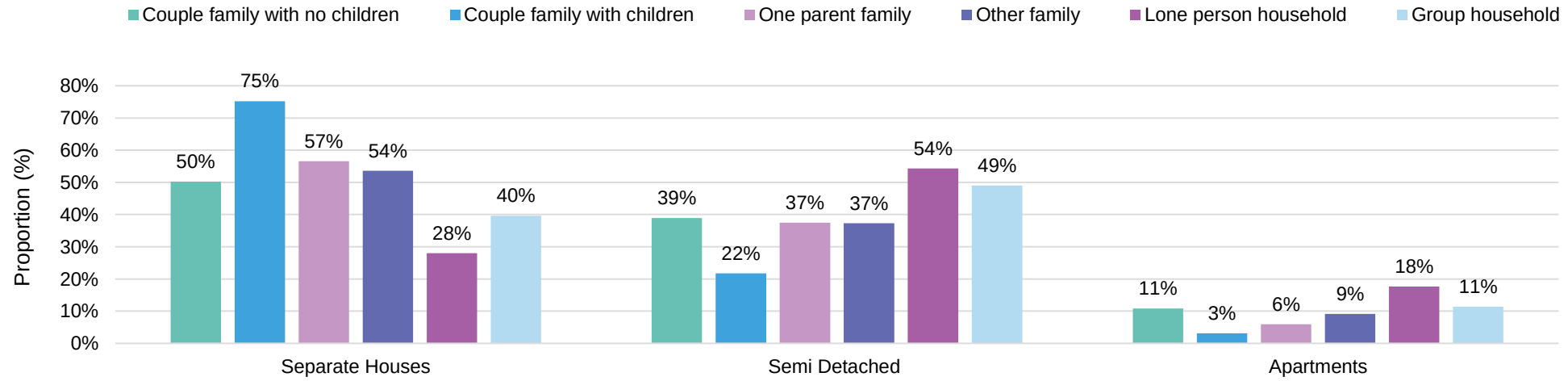
COMPARISON – CITY OF SOUTH PERTH

DWELLING TYPE BY HOUSEHOLD COMPOSITION, CITY OF SOUTH PERTH, 2021



Source: ABS

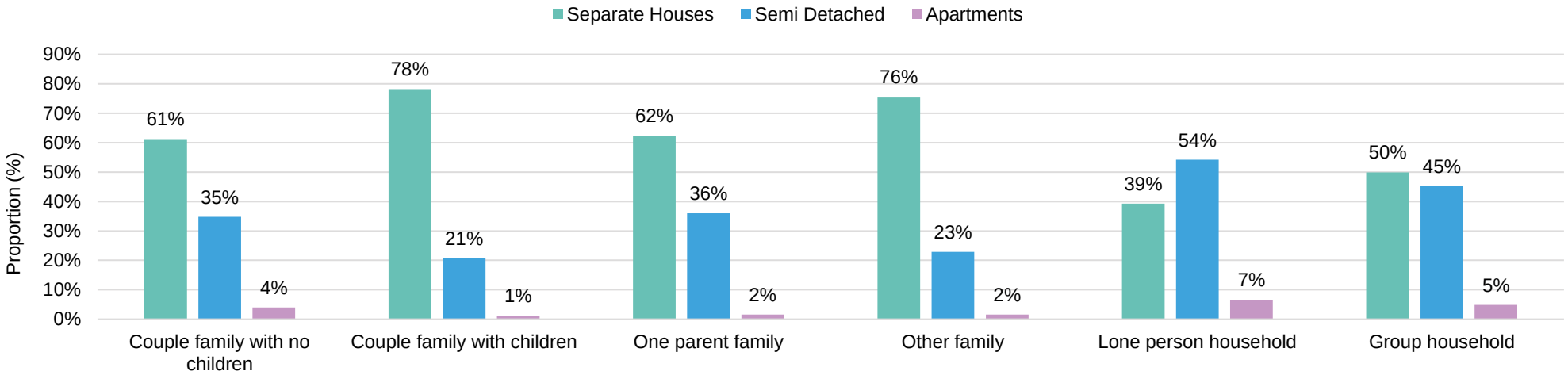
HOUSEHOLD COMPOSITION BY DWELLING TYPE, CITY OF SOUTH PERTH, 2021



Source: ABS

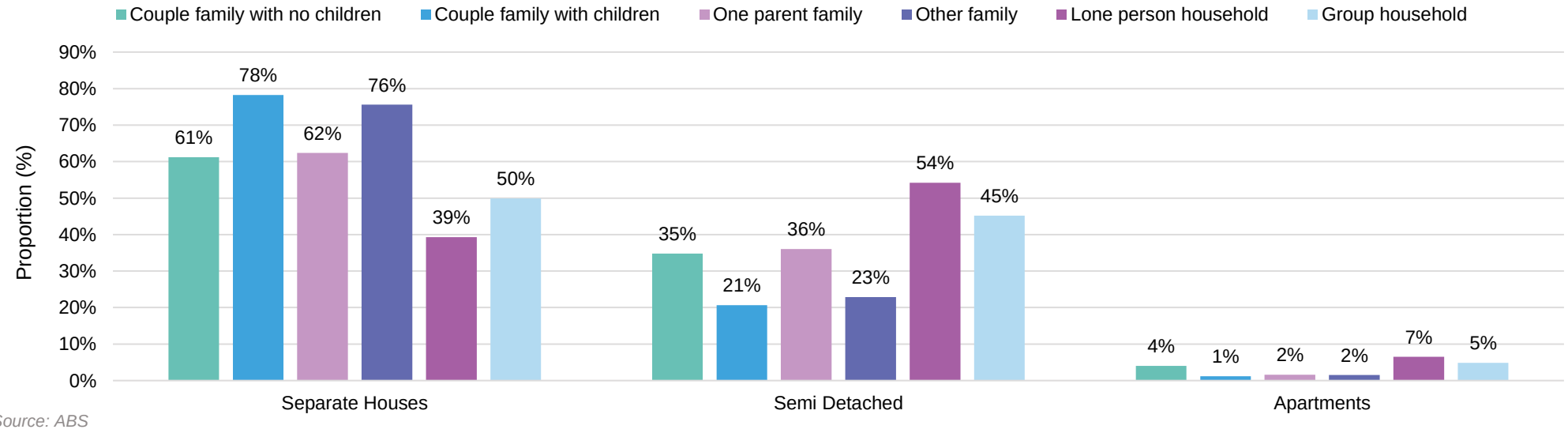
COMPARISON – CITY OF STIRLING

DWELLING TYPE BY HOUSEHOLD COMPOSITION, CITY OF STIRLING, 2021



Source: ABS

HOUSEHOLD COMPOSITION BY DWELLING TYPE, CITY OF STIRLING, 2021



Source: ABS

02

MARKET AND DEVELOPMENT TRENDS

MARKET TRENDS | CITY OF MELVILLE HOUSING TRENDS

SHARP INCREASE IN HOUSE PRICES

After a prolonged period of declining or stagnant property values, house and unit prices have seen significant growth, increasing 80% in the 5 years to 2025, outpacing the Greater Perth market by more than 10%. Unit and apartment prices have lagged, growing 63% and 27% respectively.

AN ESTABLISHED RESIDENTIAL MARKET

The higher proportion of households owned outright is reflective of the established residential market within the City of Melville, with older families occupying homes that they have managed to pay off.

REDEVELOPMENT OF AGEING STOCK

Due to the absence of readily available land, infill development has occurred through the demolition and redevelopment of the existing aged housing stock.

RISING LAND PREMIUMS

The price per square metre amongst new dwellings across all property types has risen significantly in the last 10 years, with growth amongst houses the most significant (61%).

NEW APARTMENT STOCK

The City of Melville has seen a robust apartment market within its Canning Bridge Activity Centre across the last 5 years, despite increasing construction costs and a challenging market.

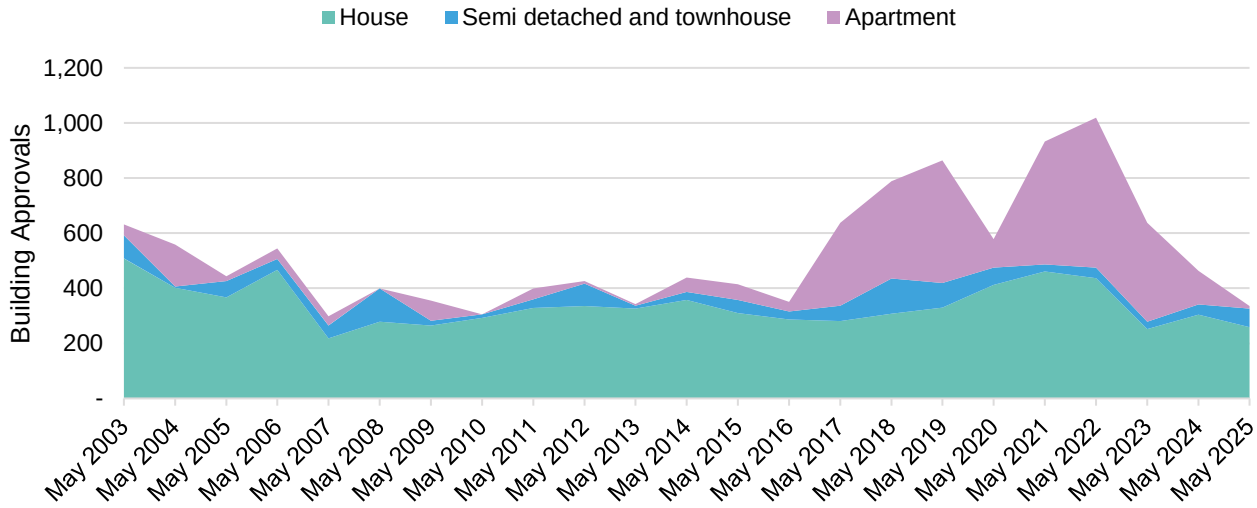
DWELLING APPROVALS

Apartment approvals in the City of Melville have occupied a significantly larger proportion of dwelling approvals since 2017. This was largely driven by the premium waterfront product around the Canning Bridge precinct. Apartment approvals have since declined in 2024 and 2025 as construction costs have continued to rise and developers have focused on delivering projects which already have approval.

It is important to note that construction costs are still considerably high and being able to deliver apartments is becoming increasingly challenging. Furthermore, a majority of the sites that were readily able to be developed from ten years ago have now been developed. As such, it is anticipated that apartment development activity is set to moderate over the coming years.

Single house approvals have remained steady over the last two decades, with semi detached and townhouse product being limited in the City of Melville.

NEW DWELLINGS APPROVALS, CITY OF MELVILLE, MAY 2003-2025



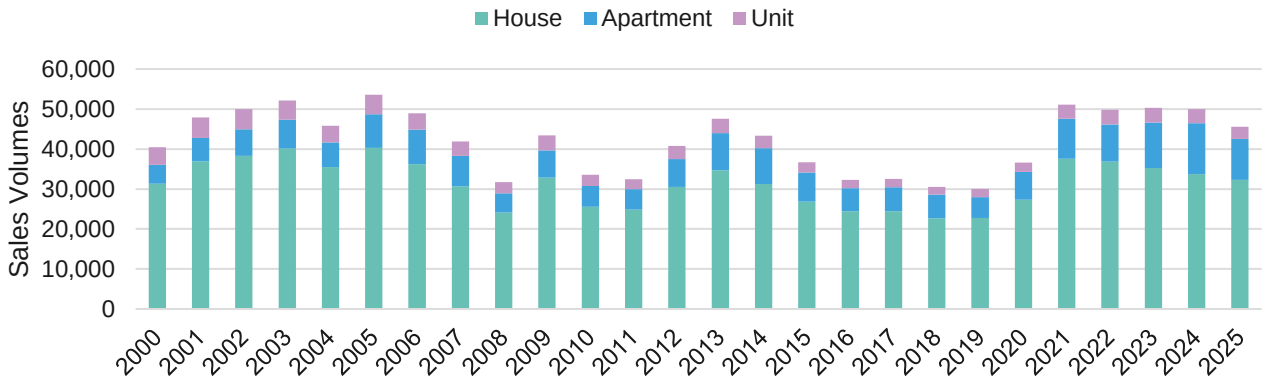
Source: ABS, Urbis

DWELLING SALES

Dwelling sales have been at elevated levels in Greater Perth as a result of first-home-buyer incentives post COVID-19. These sales have been driven by greenfield developments as opposed to infill.

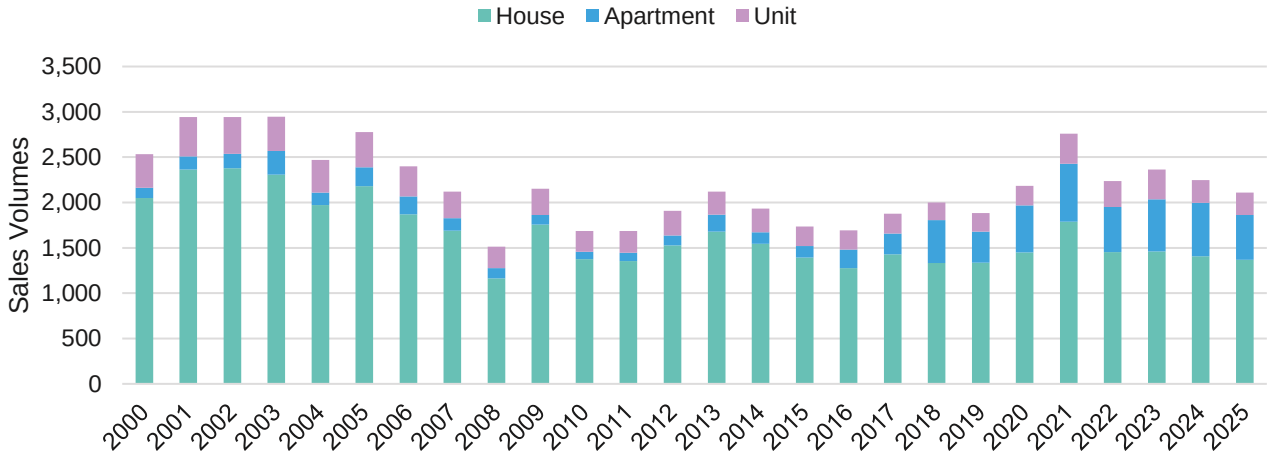
Apartments have become an increasingly large part of dwelling sales in the City of Melville. Which has risen to 23% all sales as of 2025.

DWELLING SALES, GREATER PERTH, 2000-2025



Source: Landgate
Note Landgate only captures settled sales. This does not include sales which have occurred during presales and under construction. Sales that occurred within a development during presales or construction will settle once the building is built. As such, sales volumes in the last 1-3 years are lower than that of previous years.*

DWELLING SALES, CITY OF MELVILLE, 2000-2025



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APARTMENT DEVELOPMENT ACTIVITY

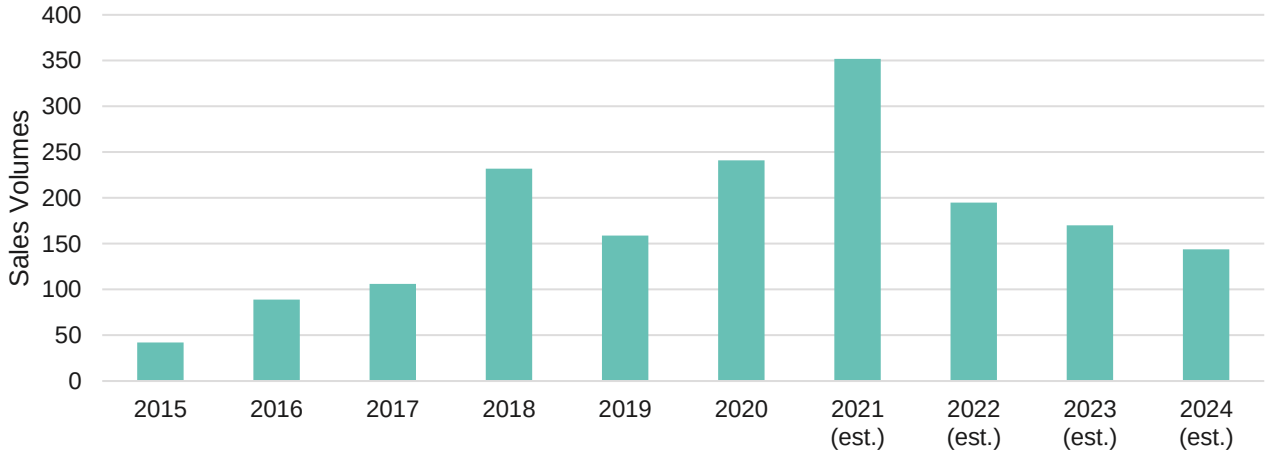
The City of Melville has experienced a sustained period of increased apartment activity since 2015, particularly around the Canning Bridge precinct.

Significant developments in the precinct include the Sabina and The Precinct, and more recently Riviere, Cirque Duet and Romeo.

Due to the riverfront location of the newer product, it has been positioned as premium product.

There has been some apartment activity outside the Canning Bridge precinct, particularly focused in Booragoon around the Westfield Booragoon Shopping Centre and in Palmyra.

APARTMENT SALES, CITY OF MELVILLE, 2015-2024



Source: Landgate, Urbis Perth Apartment Essentials
Landgate only captures settled sales. This does not include sales which have occurred during presales and under construction. Urbis has incorporated sales data from its Apartment Essentials Database to estimate the amount of sales inclusive of unsettled sales.

KEY RECENT DEVELOPMENTS, CITY OF MELVILLE

DEVELOPMENT	NUMBER OF UNITS	YEAR LAUNCHED	ESTIMATED COMPLETION
Cirque	111	2016	2019
Palmyra East	128	2018	2019
The Precinct	192	2016	2020
Sabina	164	2018	2020
Amara City Gardens	124	2018	2022
Grandton	91	2021	2024
Aurora	118	2020	2024
Cirque Duet	93	2022	2025
Riviere Central	63	2021	2025
Riviere East	77	2021	2025
Riviere West	77	2024	2026
Palmyra West	130	2025	2027
Romeo	152	2026	2028

Source: Urbis Apartment Essentials
Note: Includes projects with above 50 dwellings.

03

SUPPLY AND DEMAND DRIVERS

DEMOGRAPHIC ANALYSIS

Within the City of Melville, households and residents generally have higher incomes relative to Greater Perth.

The average age in Melville is higher than in comparison to Greater Perth, with there being a higher proportion of retirees and fewer young to middle-aged adults.

More homes are owned outright (42.1% vs 29.3%), while Greater Perth proportionally has more households that have a mortgage or are being rented.

This data illustrates the long-established resident population, which has seen its population ageing in place in homes that have been purchased and fully paid off.

KEY DEMOGRAPHIC CHARACTERISTICS OF CATCHMENT AREA, ABS CENSUS 2021

	CITY OF MELVILLE	GREATER PERTH
Income:		
Average Household Income	$145,600	$125,900
Average Per Cap. Income	$55,800	$48,700
Gender:		
Male	48.0%	49.4%
Female	52.0%	50.6%
Age Distribution:		
Aged 0-14	17.3%	19.0%
Aged 15-24	12.3%	12.1%
Aged 25-39	17.0%	22.1%
Aged 40-54	19.9%	19.8%
Aged 55-64	12.6%	11.3%
Aged 65+	21.0%	15.8%
Average Age	41.8	37.5
Labour Force:		
Status – employed	62.8%	65.1%
Status – unemployed	3.0%	3.6%
Status - not in the labour force	34.3%	31.3%
White collar occupation	80.4%	69.1%
Blue collar occupation	19.6%	30.9%
Diversity:		
Australian Born	64.3%	62.3%
Overseas Born	35.7%	37.7%
Housing Tenure:		
Owned Outright	42.1%	29.3%
Owned with a Mortgage	36.2%	43.2%
Rented	21.7%	27.5%

Source: ABS Census 2021, Urbis

HOUSEHOLD ATTRIBUTES BENCHMARKING

The family and household composition of the benchmark LGAs are shown, right.

Melville and Stirling have similar proportions of families with no children and families with children, when compared to Vincent and South Perth, which are both slightly more skewed to no-children-families. Melville is observed to have a higher proportion of family households when compared to the other benchmarked LGAs.

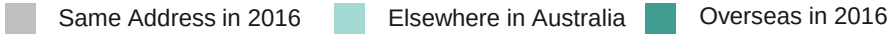
The City of Vincent have the highest proportion of group households and single person households, noticeably with a significantly lower median age, at 36. Families that do inhabit the City of Vincent tend to be younger families without children.

DWELLING, FAMILY AND HOUSEHOLD COMPARISONS BY LGA, ABS CENSUS 2021

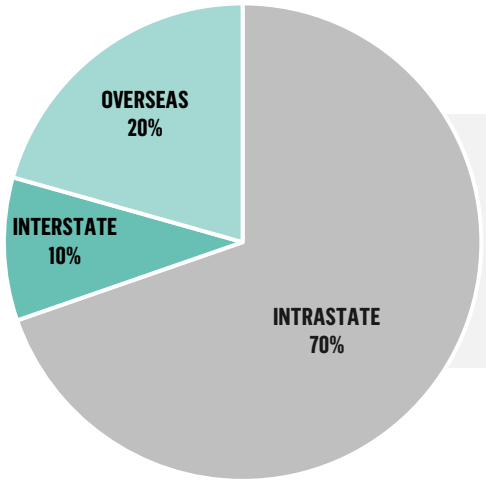
LOCAL AUTHORITY / ATTRIBUTE	MELVILLE	VINCENT	SOUTH PERTH	STIRLING
Median Age	42	36	39	38
Family Composition – Couple Family with No Children	39.2%	48.7%	46.4%	40.7%
Family Composition – Couple Family with Children	47.8%	39.5%	41.4%	44.2%
Family Composition – One Parent Families	13.0%	11.9%	12.2%	15.1%
Household Composition – Family Households	73.0%	57.9%	62.7%	65.0%
Household Composition – Single Person Households	24.3%	33.9%	31.9%	30.7%
Household Composition – Group Households	2.7%	8.1%	5.4%	4.4%

Source: ABS Census 2021
Note Family composition classifies families into different family types and shows the proportion of different family types within the LGA. Excludes "other family". Household composition classifies the type of household within a dwelling and shows the proportion of different household types that occupy dwellings.*

WHO IS MOVING TO MELVILLE?



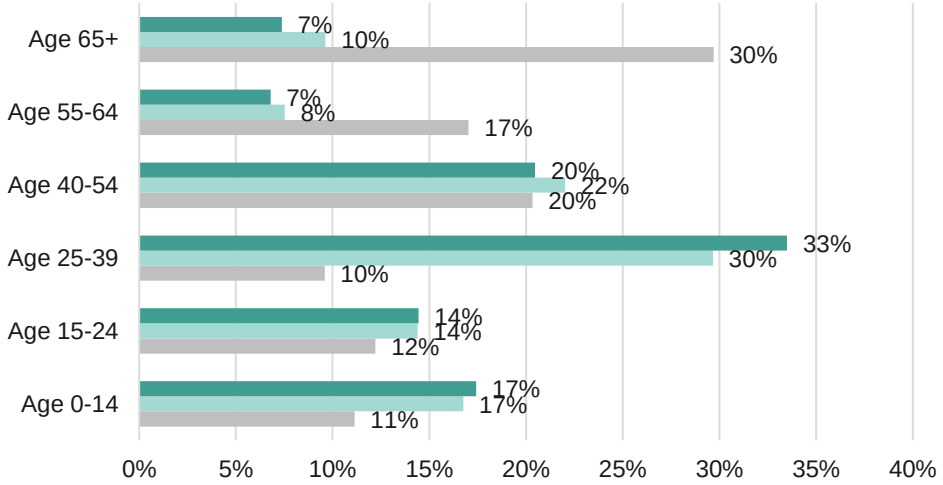
NEIGHBOURING LGAS COMPRISED 30+% OF MOVERS INTO MELVILLE



24,228 GROSS MOVERS INTO MELVILLE LGA (2016-21)

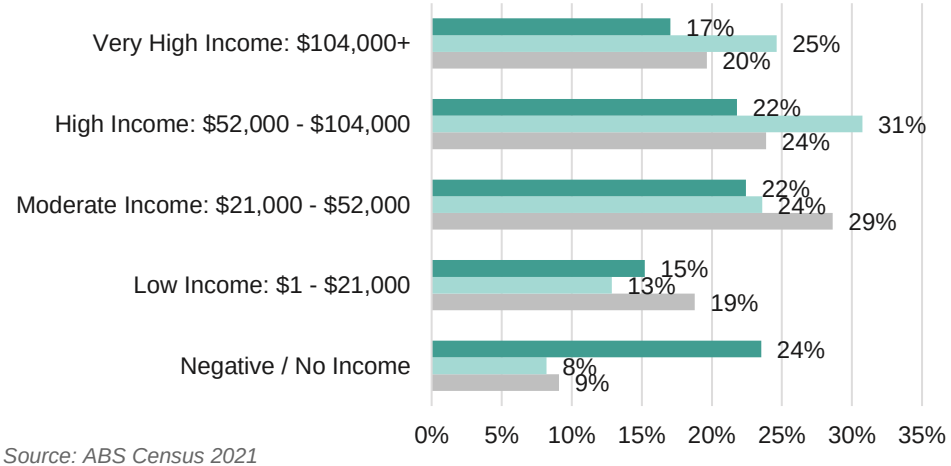
Source: ABS Census 2021

A HIGH SHARE OF MOVERS ARE RELATIVELY YOUNG AT 25-39.



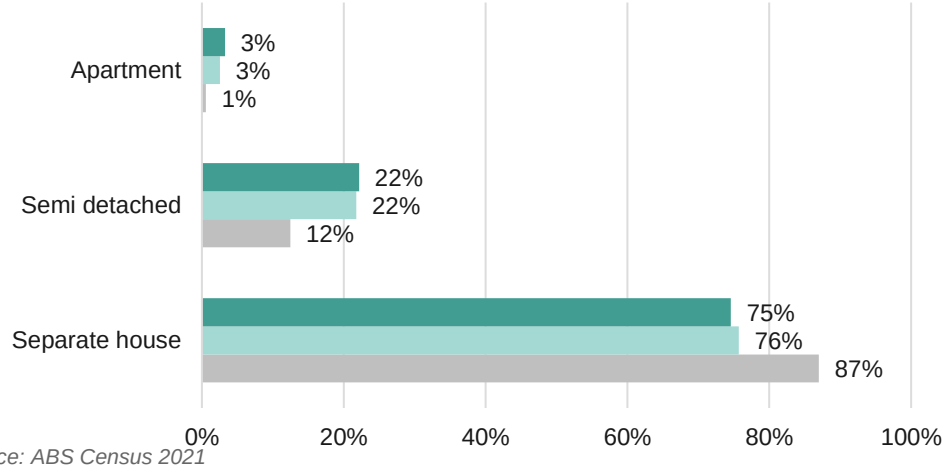
Source: ABS Census 2021

MORE THAN 50% OF MOVERS HAVE HIGH INCOMES.



Source: ABS Census 2021

MEDIUM DENSITY GREW IN POPULARITY AMONGST MOVERS



Source: ABS Census 2021

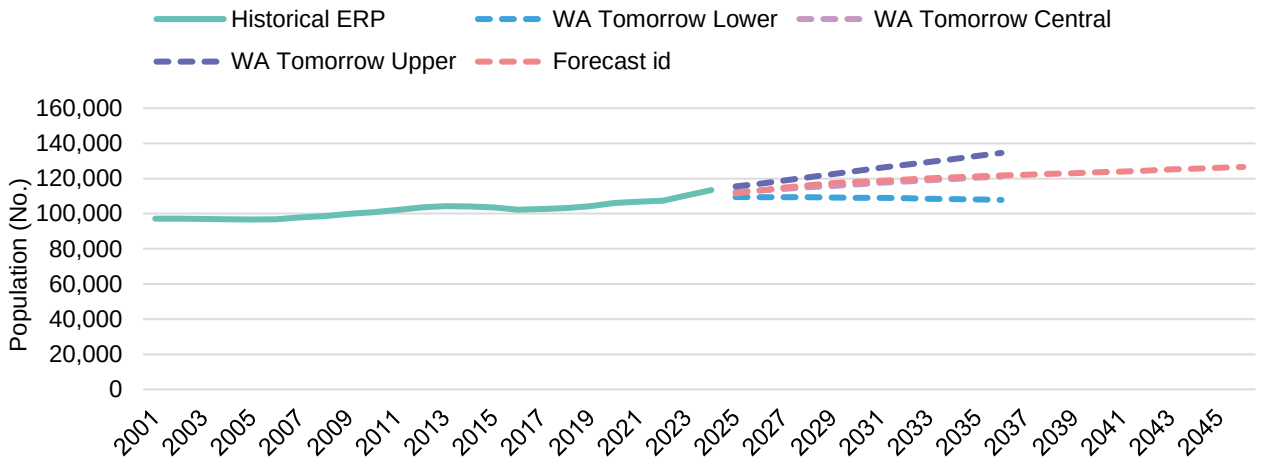
POPULATION PROJECTIONS

Based on the ABS' estimated resident population measure, the City of Melville has seen moderate population growth from 97,202 people in 2001 to 113,404 people in 2024 (equivalent to 0.7% growth per annum). More recently however, the City has seen unprecedented growth in the last 5 years to 2024, growing by 8.7% (equivalent to 1.7% per annum). This is higher compared to other neighbouring predominantly built out LGA's such as the Town of East Fremantle and the City of South Perth which have recorded 5.4% and 7.6% growth over the same period.

Several population forecasts have been included in this analysis to illustrate high and low growth scenarios. The current estimated resident population exceeds that of all the population forecasts, except for the WA Tomorrow Upper Band forecasts, which highlights the significant growth the City has had in the past five years.

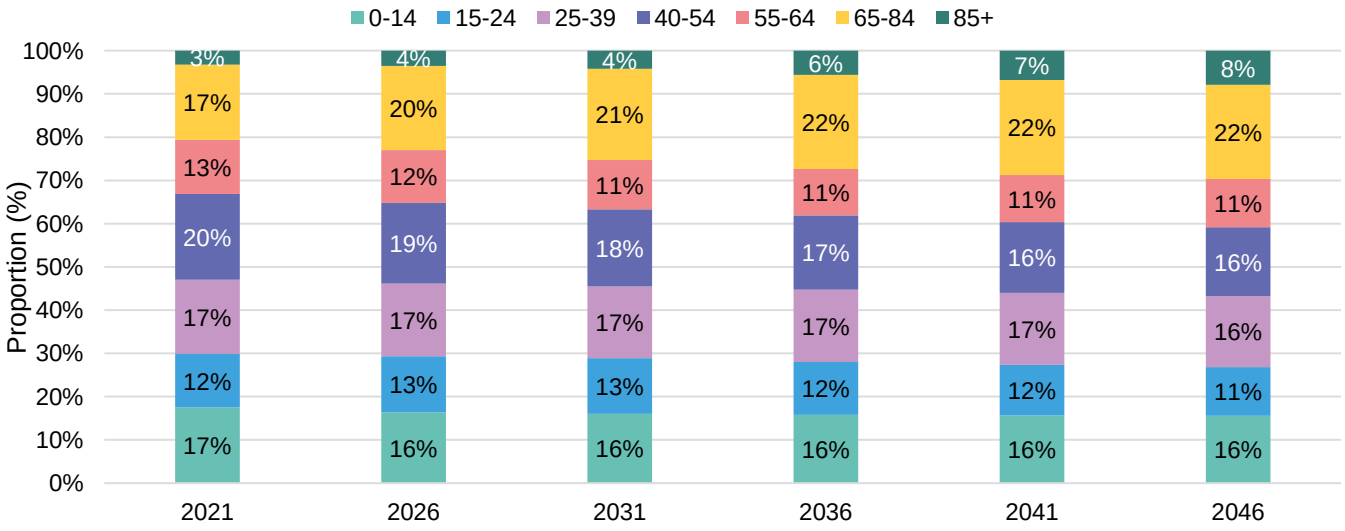
The resident population is expected to age in place, with the proportion of residents older than 64 projected to increase from 20% to 30% between 2021 and 2046. The level of those aged 39 and below is expected to stay relatively constant over the same period.

POPULATION FORECASTS, CITY OF MELVILLE, 2002 – 2046



Source: ABS, WA Tomorrow, Forecast.id

AGE DISTRIBUTION PROJECTIONS, CITY OF MELVILLE, 2021-46



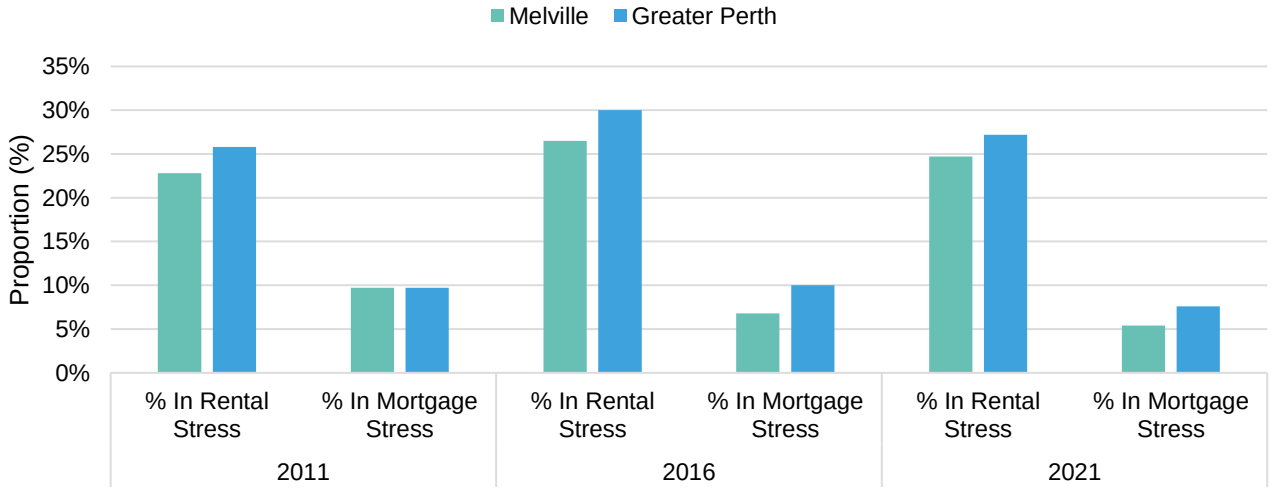
Source: Forecast.id

MORTGAGE AND RENTAL STRESS

Rental stress has edged up between 2011 and 2021 in both the City of Melville (22.8% to 24.7%) and Greater Perth (25.8% to 27.2%). Over the same period, mortgage stress in the City of Melville has eased, while levels across Greater Perth have remained steady.

When contrasted with the average rent and mortgage prices, in the City of Melville, it appears that despite higher average prices than Greater Perth, those living within the LGA are more financially equipped to accommodate them. This is likely due to the more affluent nature of residents residing within the City of Melville.

RENTAL AND MORTGAGE STRESS, CITY OF MELVILLE VS GREATER PERTH, 2011-2021



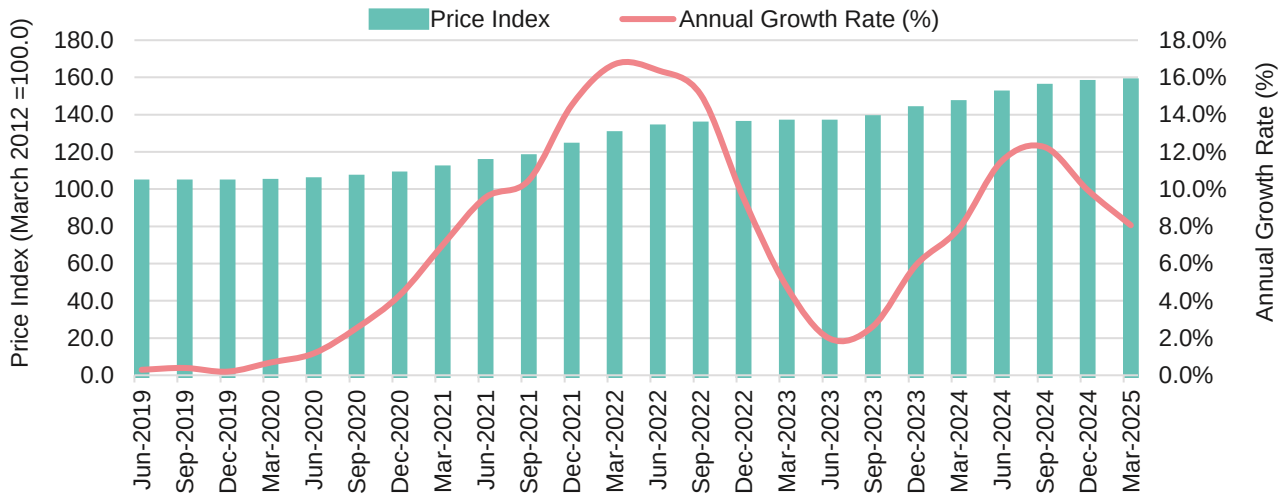
Source: ABS Census 2011, 2016, 2021

CONSTRUCTION COST TRENDS

After many years of seeing minimal construction costs increases in Perth, costs have increased significantly since 2020. This has resulted in the construction cost price index rising from 102 in June of 2019 to 157 in March of 2025.

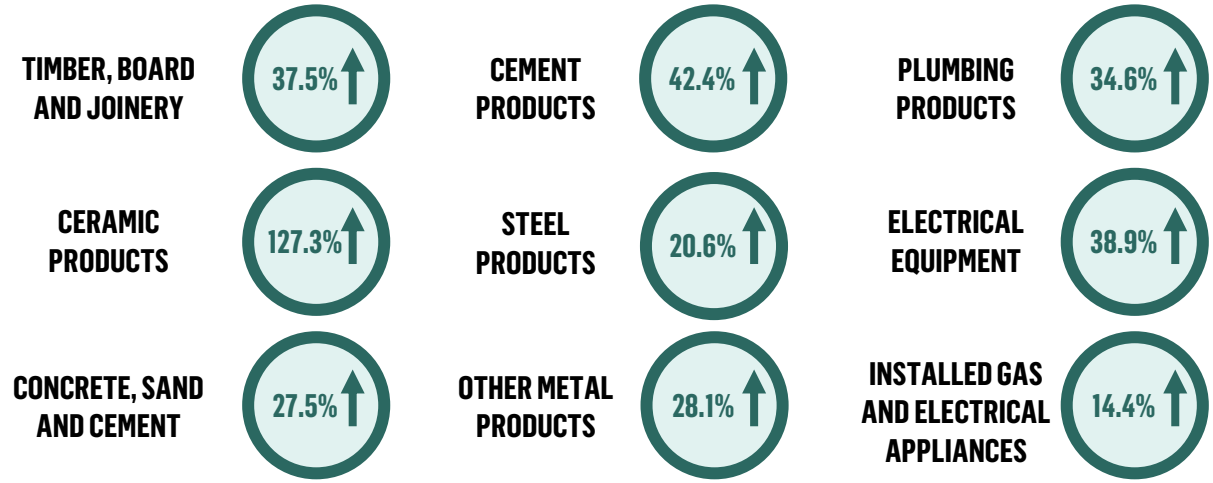
The implications of these significant cost increases have been limited apartment and medium density development across Greater Perth, with the exception of premium and waterfront areas.

ABS PRODUCER PRODUCT INDEX – BUILDING CONSTRUCTION, WESTERN AUSTRALIA, JUNE 2019 – MARCH 2025



Source: ABS

NET PRICING CHANGES FOR HOUSING CONSTRUCTION INPUTS, PERTH, JUNE 2019 – MARCH 2025



Source: ABS

04

HOUSEHOLD DEMAND MODELLING

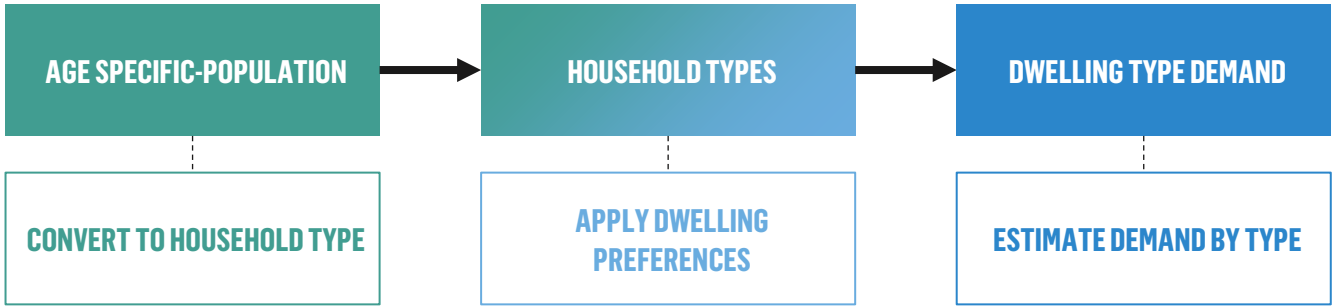
DEMAND MODELLING METHODOLOGY

Housing demand for the City of Melville was modelled using the following multi-stage methodology.

This approach has proven highly effective in estimating local housing demand, by translating age-specific population estimates and projections into household types before applying household-based dwelling preferences. This approach recognises that dwelling demand is directly driven by the growth and changes in household formation, not simply population growth. It also recognises that the application of whole-of-market average household sizes to population estimates fail to properly capture changes in both the age-profile of the population and in household formation rates. The application of dwelling preferences recognises observed behaviour and therefore inherently captures the role of price in decision making.

A key assumption underpinning this analysis is the expected 'dwelling preferences' of different household types. The analysis is thus based on observed preferences – i.e. the status quo – and an alternative 'expected' scenario.

HOUSING DEMAND MODEL OVERVIEW



Source: Urbis

SCENARIOS

Key assumptions from the two demand scenarios modelled are summarised to the right. Factors influencing the best location for different housing product are detailed on the following page.

BASE CASE SCENARIO

LOW DENSITY | MEDIUM DENSITY | HIGH DENSITY

- This scenario assumes current dwelling preferences (by demographic and household cohort) are maintained.
- This scenario is likely unable to be supported as there will likely be insufficient land to provide for the number of new single houses required.
- There is an existing lack of diverse housing options in the City which likely demonstrates that some needs in the community are not being adequately met (e.g. lone and small households within large homes). This scenario likely exacerbates these issues.

ALTERNATIVE SCENARIO

LOW DENSITY | MEDIUM DENSITY | HIGH DENSITY

- This scenario assumes that dwelling preferences shift slowly over time (as has been observed in metropolitan locations across Australia).
- In this scenario, demand for medium density dwellings increases significantly and there is a small increase in demand for high density dwellings. There is however a degree of ability for demand to shift between medium and high density given product similarities (e.g. apartment in low-rise development versus apartment in mid-rise development).

KEY INFLUENCES AND IMPLICATIONS FOR DEMAND

Demand for housing is influenced by a range of factors, many of which are not related to supply directly. Understanding these factors can provide insight into the best locations for infill development.

PRECINCT CHARACTER

The quality of the streetscapes, public realm and private and public amenities (built and natural) have a direct impact on the attractiveness of a location for alternative housing products. In general, areas with comparably more desirable amenities support increased density development demand.

DWELLING AVAILABILITY / APPROPRIATENESS

The availability of appropriate housing in a location directly influences the choice of housing typology. For instance, an area with a large supply of medium density dwellings may limit demand for higher density dwellings that offer comparable product types.

DEVELOPMENT FEASIBILITY

Ultimately, new dwellings will only be delivered in areas where sufficient development return can be achieved. As such, any influences on the viability of development will impact housing demand and choice (e.g. requirements for major infrastructure upgrades).

POPULATION GROWTH

Strong population growth drives growth for housing. Higher levels of growth than anticipated may lead to higher demand for non-detached housing earlier than predicted.

TYPE AND TENURE

People who are renting are, on average, more likely to select medium and high density dwelling types. A high proportion of renters within the local population thus will lead to higher demand for medium and high density dwellings.

DEMOGRAPHIC PROFILE

Demographic changes not anticipated will influence housing demand. For instance, non-Anglo migrants and young adults are more likely to have higher demand for medium and high density dwellings than other demographic cohorts.

HOUSEHOLD AND FAMILY TYPE

Household and family attributes influence dwelling demand. Smaller households such as lone persons and couples with no children, for instance, are more likely demand medium or high density than families with children.

AFFORDABILITY

The affordability (for purchase or rent) of different housing types influences demand considerably. A household is willing to make a trade off for a medium density dwelling, for instance, if it is more affordable than a detached house.

HOUSEHOLD DEMAND SCENARIOS

The demand modelling provides a base case and an alternative dwelling demand scenario. Note, these scenarios do not take into account the land area available for development, but provide information on what dwelling types could be required for the City's population to grow.

Base Case

The base case illustrates what dwelling demand will look like if the population increases in line with assumed growth to 2050, but dwelling preferences remain the same as observed as of 2021.

Alternative Scenario

The alternative scenario illustrates what dwelling demand looks like if dwelling preferences shift to a more diverse household type / dwelling type makeup given the physical constraints of the City, increasing land values and policy objectives. To test alternative outcomes, the alternative scenario assumed that dwelling preferences would, over time, move towards those observed in the City of Vincent. In particular, the modelling assumes that dwelling preferences observed in the City of Melville will slowly transition over time and fully adopt the preferences observed in the City of Vincent by 2050.

MODELLING ASSUMPTIONS

ASSUMPTION VARIABLE	ASSUMPTION	NOTES
Occupancy Rate	92.1%	Based on the 2021 ABS census data for occupied private dwellings the Melville LGA.
Age-Specific Household Composition	As per 2021 levels	The model groups resident projections into household types based on age characteristics.

Source: Urbis, ABS

POPULATION FORECAST ASSUMPTIONS, CITY OF MELVILLE, 2021-2050

PERSONS	2021 ERP	2025	2050
0-4 years	5,235	5,247	7,013
5-14 years	13,435	13,173	15,264
15-19 years	6,775	7,261	7,683
20-24 years	6,460	7,132	8,351
25-34 years	11,485	12,012	15,568
35-44 years	13,890	14,097	15,815
45-54 years	14,155	13,794	14,793
55-64 years	13,370	13,756	15,977
65-74 years	11,895	12,736	15,790
75-84 years	6,695	8,454	15,269
85 years and over	3,415	3,912	11,290
Total Population	**106,810**	**111,574**	**142,810**
Net Increase since 2021	**-**	4,764	36,000

Source: ABS, Forecast.id, Urbis

FUTURE DEMAND

The numbers of dwellings by type across the City of Melville are the assumed starting point for both scenarios. The 2025 number of dwellings shows the current estimated split. Future dwelling numbers for each scenario are based on the household formation and dwelling type preferences.

Base Case

This scenario is highly dependent on new single houses being provided to accommodate additional population growth, with approximately 10,807 additional single dwellings needed between 2025 and 2050. Under this scenario, an additional 4,168 medium density dwellings (units / townhouses) are required, and 669 apartments (which would represent 8-9 medium sized apartment developments).

A net increase of 15,645 dwellings are required under this scenario from the 2025 estimated existing dwellings. This is however considered an unrealistic dwelling target given the changing demographics, particularly ageing population, is anticipated to lead to increasing lone person and couple only households that are increasingly preferring units, townhouses and apartments.

Alternative Scenario

This scenario provides a greater proportion of medium density and high density dwellings to accommodate the same population growth (and assumes a notable level of demolitions of detached housing to accommodate this development).

Under this scenario, approximately 25,000 additional dwellings would be required. Circa 9,325 more dwellings are needed to accommodate the population growth under the alternative scenario when compared to the base case given the alternative scenario better reflects the increasing number of lone person and couple only households that will result from the ageing of the City's residents.

FUTURE DWELLING DEMAND SCENARIOS

DEMAND	YEAR	DETACHED HOUSES	UNITS & TOWNHOUSES	APARTMENTS (3+ STOREY)	TOTAL
Base Case Scenario	2021	30,941	8,878	1,309	41,128
	2025	32,642	9,526	1,416	43,584
	2050	43,450	13,694	2,085	59,229
	Net Demand	*10,808*	*4,168*	*669*	*15,645*
Alternative Scenario	2050	31,423	19,841	17,287	68,552
	Net Demand	*-1,219*	*10,315*	*15,871*	*24,968*
Proportion of Total Dwelling Stock					
Base Case Scenario	2021	75.2%	22.7%	2.1%	100%
	2025	74.9%	23.0%	2.1%	100%
	2050	73.4%	24.4%	2.3%	100%
Alternative Scenario	2050	45.8%	28.9%	25.2%	100%

Source: Urbis, ABS
Note: Dwellings exclude non-private (e.g. short stay accommodation, aged care), unoccupied, and other (e.g. caravan, houseboat)

05

LOCATION ANALYSIS

PROPOSED CHANGE AREAS

The City of Melville in its review of its local planning scheme has identified a number of potential change areas. These areas have been identified as either having:

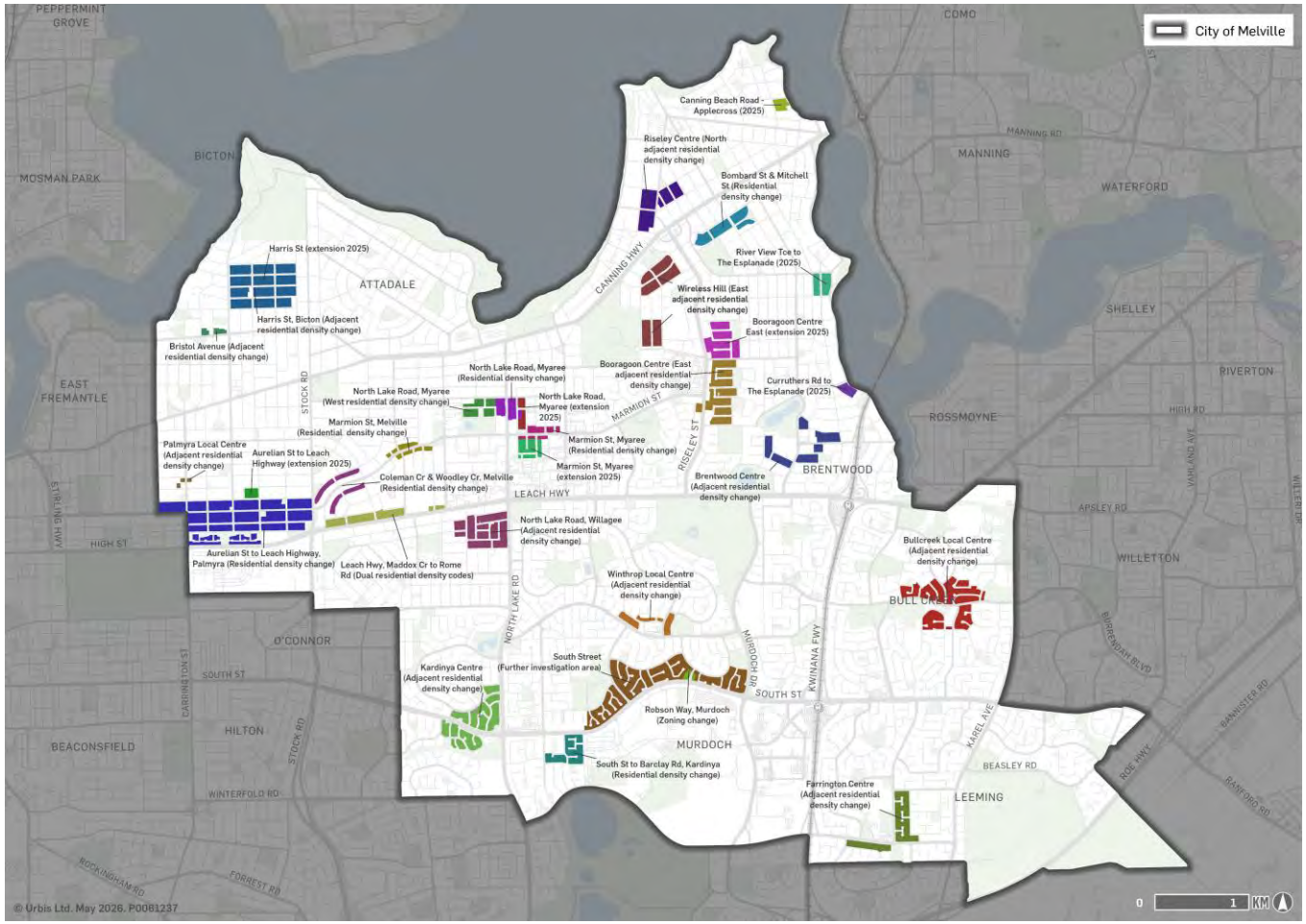
- Potential to support additional density; or
- Potential to be rezoned to a different zone under the planning scheme.

The areas have been identified over the course of the last two years and have been depicted to the right. Proposals were published by the City in 2024 and work is ongoing to refine these with input from a variety of technical reports (including this report). In response to specific requests from the community, the City recommended a number of additional density change areas in 2025.

Following engagement with the City's Elected Members to discuss a variety of additional changes, these proposed density change areas have been refined and are depicted right. The refinement of these areas has included the removal of some areas, inclusion of previously identified opportunity areas and the change in potential R code attributed to particular areas.

The initial proposed density change areas and the analysis of them has been included within the appendices of this report.

PROPOSED CHANGE AREAS, CITY OF MELVILLE



Source: City of Melville, Urbis

PROPOSED CHANGE AREAS

PROPOSED R CODING CHANGES

CHANGE AREA	PROPOSED CHANGES IN R CODING
Aurelian St To Leach Highway (Extension 2025)	R20 to R40
Aurelian St To Leach Highway, Palmyra (Residential Density Change)	R20 to R40
Bombard St & Mitchell St (Residential Density Change)	R20 to R40
Booragoon Centre (East Adjacent Residential Density Change)	R20 to R40 R40 to R40
Booragoon Centre East (Extension 2025)	R20 to R40 R20 to R40
Brentwood Centre (Adjacent Residential Density Change)	R20 to R40 R25 to R40
Bristol Avenue (Adjacent Residential Density Change)	R17.5 to R40
Bull Creek Local Centre (Adjacent Residential Density Change)	R20 to R40
Canning Beach Road - Applecross (2025)	R12.5 to R30
Coleman Cr & Woodley Cr, Melville (Residential Density Change)	R20 to R40
Curruthers Rd To The Esplanade (2025)	R12.5 to R20
Farrington Centre (Adjacent Residential Density Change)	R20 to R40 R30 to R40
Harris Street (Extension 2025)	R15 to R20 R17.5 to R20
Harris St, Bicton (Adjacent Residential Density Change)	R17.5 to R40
Kardinya Centre (Adjacent Residential Density Change)	R20 to R40

CHANGE AREA	PROPOSED CHANGES IN R CODING
Leach Hwy, Maddox Cr To Rome Rd (Dual Residential Density Codes)	R40 to R20/60
Marmion St, Melville (Residential Density Change)	R20 to R40
Marmion St, Myaree (Extension 2025)	R20 to R40
Marmion St, Myaree (Residential Density Change)	R20 to R40
North Lake Road, Myaree (West Adjacent Residential Density Change)	R20 to R40
North Lake Road, Myaree (Extension 2025)	R20 to R40 R25 to R40
North Lake Road, Myaree (Residential Density Change)	R20 to R40
North Lake Road, Willagee (Adjacent Residential Density Change)	R25 to R40
Palmyra Local Centre (Adjacent Residential Density Change)	R20 to R40
Riseley Centre (North Adjacent Residential Density Change)	R15 to R40
River View Tce To The Esplanade (2025)	R12.5 to R20
Robson Way, Murdoch (Zoning Change)	R20 to R40
South St To Barclay Rd, Kardinya (Residential Density Change)	R25 to R40
South Street (Further Investigation Area)	R20 to R40 R25 to R40
Winthrop Local Centre (Adjacent Residential Density Change)	R20 to R40
Wireless Hill (East Adjacent Residential Density Change)	R20 to R40

Source: City of Melville

ANALYSIS APPROACH

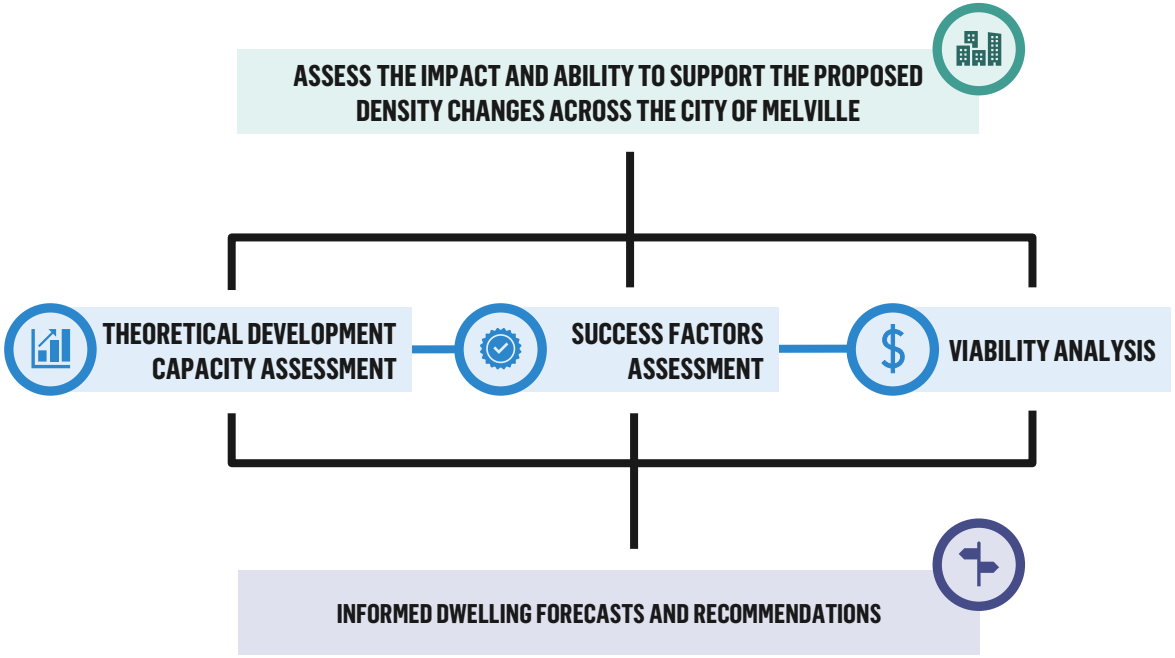
To assess their impact and their ability to support additional density, Urbis assessed the City of Melville's proposed changes in density and zonings. Urbis in their assessment undertook three different methodologies:

- **Theoretical Development Capacity** – to estimate the likely maximum level of development each proposed change area could accommodate;
- **Success Factors Assessment** – to understand the driving factors for each proposed change area to support density; and
- **Viability Modelling** – to understand the viability of different medium and high density typologies in the proposed change areas.

These methodologies have been explained in detail on the following pages and highlight the assumptions that have been used to inform this analysis.

It is important to note that these three methodologies are examined collectively rather than individually and help form the dwelling forecasts and recommendations in the following section of this report.

APPROACH



Source: Urbis

HYPOTHETICAL DEVELOPMENT CAPACITY APPROACH

To understand the scale of the proposed changes in R Codes across the City's proposed change area's, theoretical development capacity modelling was undertaken. Development capacity was assessed through two different approaches;

Approach A – Development of Grouped Dwellings Only

Under the Residential Design Codes Volume 1, development capacity for a site for medium density can be determined by:

Rounding down of dwellings = lot size / average lot size per dwelling

Note that the average lot sizes per dwelling area is a function of the R Codes, with each code having an assigned average lot size.

Approach B – Development of Grouped and Multiple Dwellings

Under the Residential Design Codes Volume 2, development capacity for a site for high density can be determined by:

Rounding down of dwellings = lot size x plot ratio x efficiency factor / average size per dwelling

The challenge is that capacity can increase if sites are amalgamated. For example, two separate 1,000 sq.m sites that are R40 allow 8 dwellings but two amalgamated 1,000 sq.m sites allow 9 dwellings. Because of this, there are numerous scenarios of amalgamation that cannot be tested. However, capacity can be estimated under two scenarios:

- **Scenario One:** No sites are amalgamated; and
- **Scenario Two:** Adjacent sites with the same density coding are amalgamated.

Combining approaches A and B with Scenario's One and Two provides four different capacity scenarios to test the maximum capacity the proposed change areas can deliver. In areas where dual coding applies, the higher R code has been adopted to understand the maximum development threshold. Where a proposed R code change in Scenario's 1B and 2B do not allow for multiple dwellings (proposed to change to a code that is R30 or below), it has been assumed that grouped dwellings have been developed.

SCENARIO 1A

ALL LOTS DEVELOPED AS GROUPED DWELLINGS – NO SITES AMALGAMATED

SCENARIO 1B

ALL LOTS ZONED R40 OR ABOVE DEVELOPED AS MULTIPLE DWELLINGS, REST DEVELOPED AS GROUPED DWELLINGS – NO SITES AMALGAMATED

SCENARIO 2A

ALL LOTS DEVELOPED AS GROUPED DWELLINGS – SITES AMALGAMATED

SCENARIO 2B

ALL LOTS ZONED R40 OR ABOVE DEVELOPED AS MULTIPLE DWELLINGS, REST DEVELOPED AS GROUPED DWELLINGS – SITES AMALGAMATED

DISCLAIMER:

These scenarios represent hypothetical development scenarios and are indicative of potential capacity under each scenario. They do not take into consideration landowner intentions, age of built form, some physical site constraints, building costs and other external factors. Some of these however have been considered as infill success factors and are discussed later within this section. Financial viability for each change area is also discussed later in this report. They also assume an average apartment sizes which can vary and influence maximum dwelling yield. For the purpose of this assessment, an average apartment size of 75 sq.m has been adopted.

HYPOTHETICAL DEVELOPMENT CAPACITY FINDINGS

Analysis of the scenarios highlights the significant differences in capacity under each set of assumptions.

This analysis helped inform the parameters upon which the dwelling forecasts were modelled.

A detailed breakdown of dwelling capacities by scenario and approach can be found on the following pages.

SCENARIO 1A FINDINGS

10,456 Total Development Capacity across Proposed Change Areas

+6,323 Net Additional Dwellings from Existing Count of Dwellings

160% Average Density Uplift across the Proposed Change Areas

SCENARIO 1B FINDINGS

14,751 Total Development Capacity across Proposed Change Areas

+10,718 Net Additional Dwellings from Existing Count of Dwellings

265% Average Density Uplift across the Proposed Change Areas

SCENARIO 2A FINDINGS

12,146 Total Development Capacity across Proposed Change Areas

+8,013 Net Additional Dwellings from Existing Count of Dwellings

204% Average Density Uplift across the Proposed Change Areas

SCENARIO 2B FINDINGS

16,693 Total Development Capacity across Proposed Change Areas

+12,560 Net Additional Dwellings from Existing Count of Dwellings

313% Average Density Uplift across the Proposed Change Areas

Source: Urbis

DEVELOPMENT CAPACITY FINDINGS

CHANGE AREA	EXISTING DWELLINGS	SCENARIO 1A		SCENARIO 1B		SCENARIO 2A		SCENARIO 2B	
		DWELLING CAPACITY	UPLIFT FROM EXISTING DWELLINGS	DWELLING CAPACITY	UPLIFT FROM EXISTING DWELLINGS	DWELLING CAPACITY	UPLIFT FROM EXISTING DWELLINGS	DWELLING CAPACITY	UPLIFT FROM EXISTING DWELLINGS
Aurelian St To Leach Highway (Extension 2025)	30	57	190%	84	280%	69	130%	97	223%
Aurelian St To Leach Highway, Palmyra (Residential Density Change)	559	1,666	298%	2,413	432%	1,911	242%	2,693	382%
Bombard St & Mitchell St (Residential Density Change)	110	280	255%	422	384%	331	201%	466	324%
Booragoon Centre (East Adjacent Residential Density Change)	213	537	252%	826	388%	648	204%	915	330%
Booragoon Centre East (Extension 2025)	153	349	228%	504	329%	417	173%	587	284%
Brentwood Centre (Adjacent Residential Density Change)	149	393	264%	587	394%	462	210%	651	337%
Bristol Avenue (Adjacent Residential Density Change)	19	52	274%	73	384%	60	216%	84	342%
Bull Creek Local Centre (Adjacent Residential Density Change)	285	819	287%	1,135	398%	897	215%	1,267	345%
Canning Beach Road - Applecross (2025)	14	52	371%	52	371%	59	321%	59	321%

Source: Urbis

DEVELOPMENT CAPACITY FINDINGS

CHANGE AREA	EXISTING DWELLINGS	SCENARIO 1A		SCENARIO 1B		SCENARIO 2A		SCENARIO 2B	
		DWELLING CAPACITY	UPLIFT FROM EXISTING DWELLINGS	DWELLING CAPACITY	UPLIFT FROM EXISTING DWELLINGS	DWELLING CAPACITY	UPLIFT FROM EXISTING DWELLINGS	DWELLING CAPACITY	UPLIFT FROM EXISTING DWELLINGS
Coleman Cr & Woodley Cr, Melville (Residential Density Change)	99	186	188%	282	285%	237	139%	335	238%
Curruthers Rd To The Esplanade (2025)	19	33	174%	33	174%	40	111%	40	111%
Farrington Centre (Adjacent Residential Density Change)	156	458	294%	629	403%	509	226%	718	360%
Harris Street (Extension 2025)	387	468	121%	468	121%	557	44%	557	44%
Harris St, Bicton (Adjacent Residential Density Change)	4	6	150%	10	250%	9	125%	12	200%
Kardinya Centre (Adjacent Residential Density Change)	223	649	291%	947	425%	746	235%	1,052	372%
Leach Hwy, Maddox Cr To Rome Rd (Dual Residential Density Codes)	146	431	295%	492	337%	497	240%	559	283%
Marmion St, Melville (Residential Density Change)	51	112	220%	162	318%	132	159%	189	271%
Marmion St, Myaree (Extension 2025)	58	150	259%	217	374%	180	210%	254	338%
Marmion St, Myaree (Residential Density Change)	42	122	290%	174	414%	137	226%	195	364%
North Lake Road, Myaree (West Adjacent Residential Density Change)	73	162	222%	254	348%	203	178%	286	292%
North Lake Road, Myaree (Extension 2025)	37	80	216%	116	314%	95	157%	135	265%

Source: Urbis

DEVELOPMENT CAPACITY FINDINGS

CHANGE AREA	EXISTING DWELLINGS	SCENARIO 1A		SCENARIO 1B		SCENARIO 2A		SCENARIO 2B	
		DWELLING CAPACITY	UPLIFT FROM EXISTING DWELLINGS	DWELLING CAPACITY	UPLIFT FROM EXISTING DWELLINGS	DWELLING CAPACITY	UPLIFT FROM EXISTING DWELLINGS	DWELLING CAPACITY	UPLIFT FROM EXISTING DWELLINGS
North Lake Road, Myaree (Residential Density Change)	61	161	264%	239	392%	193	216%	272	346%
North Lake Road, Willagee (Adjacent Residential Density Change)	210	511	243%	724	345%	606	182%	856	298%
Palmyra Local Centre (Adjacent Residential Density Change)	7	24	343%	36	514%	27	286%	39	457%
Riseley Centre (North Adjacent Residential Density Change)	129	409	317%	607	471%	466	261%	656	409%
River View Tce To The Esplanade (2025)	52	60	115%	60	115%	84	62%	84	62%
Robson Way, Murdoch (Zoning Change)	6	35	583%	50	833%	37	517%	52	767%
South St To Barclay Rd, Kardinya (Residential Density Change)	99	264	267%	377	381%	306	209%	432	336%
South Street (Further Investigation Area)	455	1,223	269%	1,737	382%	1,428	214%	2,017	343%
Winthrop Local Centre (Adjacent Residential Density Change)	59	174	295%	244	414%	195	231%	275	366%
Wireless Hill (East Adjacent Residential Density Change)	223	532	239%	794	356%	608	173%	859	285%

Source: Urbis

INFILL DEVELOPMENT SUCCESS FACTORS

Market demand at a suburb level for different housing typologies is influenced by a broad set of market factors, policy settings, locational attributes and landowner intentions.

There are a number of broad key success factors that influence whether a location is attractive for infill development (outside of policy controls). Urbis have identified these factors in the table to the right as the key infill development success factors. These are based on Urbis' experience working with developers to identify site and understand and track feasibility of developments. They are also informed by literature exploring the factors influencing infill outcomes. A summary of the literature can be found on the following page, with a more detailed summary located in the appendix.

Ideal locations for infill development will combine a number of these characteristics.

This framework can provide a guide to whether suburbs or localities are likely to be favourable to developers and attractive to prospective buyers.

These success factors have been quantified on the following pages where possible and have then informed a success factor rating which has been assigned to each proposed change area.

INFILL DEVELOPMENT SUCCESS FACTORS

CRITERIA	DESCRIPTION
Retail	One benefit of higher density living is often good access to a wide variety of entertainment, recreation, retail and service facilities. This is due to the critical mass of the denser population being able to support a wide range of facilities that may not be available in low density areas.
Access to public open space	Given the fact that higher density dwellings typically have less outdoor space and do not feature backyards, ready access to quality public space within comfortable walking distance that is safe and well maintained can be a decisive factor for many potential buyers.
Access to public transport and major roadways	Medium and high density options located within close proximity to train stations and other high frequency public transport support more intensive forms of development. Being within walking distance of a train station is particularly attractive to workers commuting into the CBD or other places of employment.
Views / aspect	Views of attractive natural amenities can be a powerful attractor for potential buyers, while a lack of views can be a deal breaker if there is substantial competition in the area. A northerly aspect is also a positive factor in influencing apartment demand.
Established property values	Medium and high density dwellings compete not just with traditional housing, Given 'space' is a key trade off for living in a smaller dwelling, the value of other housing types is a considerable factor influencing viability of higher density dwellings. If the price of a detached dwelling is equivalent to a new apartment or townhouse price, it is unlikely that the apartment or townhouse development will offer a significant value proposition to purchasers.
Rental Prices	Rental prices play a crucial role in shaping the delivery of density in urban areas. When rental prices are high, it often signals strong demand for housing in a particular area. High rental prices can also make it financially viable to invest in housing and make a good return on investment.
Age of Stock	Medium and high density are likely to be developed from vacant sites or sites with older stock. Housing stock that is older is more likely to be demolished and redeveloped into new stock.
Proportion of lots Greater than than 1,000 sq.m (%)	Lots that are over 1,000 sq.m have higher potential to be developed into density given their size allows for development to occur.

Source: Urbis

INFILL DEVELOPMENT SUCCESS FACTORS LITERATURE REVIEW

The high-level literature review identified that the key land use factors examined are important considerations in influencing the development of higher-density outcomes and broader land use change. These factors are consistently referenced in the literature as shaping development feasibility, market behaviour and planning outcomes, and therefore provide a sound basis for informing this assessment.

Views and visual aspects were the only factor not identified through the literature review. This is largely because this consideration is specific to the Perth apartment market and is not commonly addressed in the broader body of literature reviewed. It is also important to recognise that views and visual amenity are inherently subjective and cannot be reliably or consistently quantified. As a result, this factor has not been incorporated into the remainder of the assessment, which focuses on factors that can be more objectively measured and compared.

INFILL DEVELOPMENT SUCCESS FACTORS LITERATURE REVIEW

SOURCE	PROXIMITY TO RETAIL	ACCESS TO PUBLIC OPEN SPACE	ACCESS TO PUBLIC TRANSPORT AND MAJOR ROADWAYS	VIEWS / ASPECT	ESTABLISHED PROPERTY VALUES	RENTAL PRICES	AGE OF STOCK	PROPORTION OF LOTS SIZED LESS THAN 1,000 SQ.M
Lee, Bun Song, Eui-Chul Chung, and Yong Hyun Kim. 2005. “Dwelling Age, Redevelopment, and Housing Prices: The Case of Apartment Complexes in Seoul.” The Journal of Real Estate Finance and Economics 30 (1): 55–80.				Based on current market conditions in Perth and developer feedback.	●		●	
Allan, Andrew, Ali Soltani, Mohammad Hamed Abdi, and Melika Zarei. 2022. "Driving Forces behind Land Use and Land Cover Change: A Systematic and Bibliometric Review" Land 11, no. 8: 1222.	●	●	●		●	●		
Nuissl, H., and Siedentop, S. 2021. Urbanisation and Land Use Change. In: Weith, T., Barkmann, T., Gaasch, N., Rogga, S., Strauß, C., Zscheischler, J. (eds) Sustainable Land Management in a European Context. Human-Environment Interactions, vol 8. Springer, Cham.	●		●		●			
Bourne, L. S. 1969. “Location Factors in the Redevelopment Process: A Model of Residential Change.” Land Economics 45, no. 2 : 183–93.	●	●	●		●	●	●	●
Rowley, S. and Phibbs, P. (2012) Delivering diverse and affordable housing on infill development sites, AHURI Final Report No.193. Melbourne: Australian Housing and Urban Research Institute.	●		●		●	●		●

Source: Various

PROXIMITY TO RETAIL

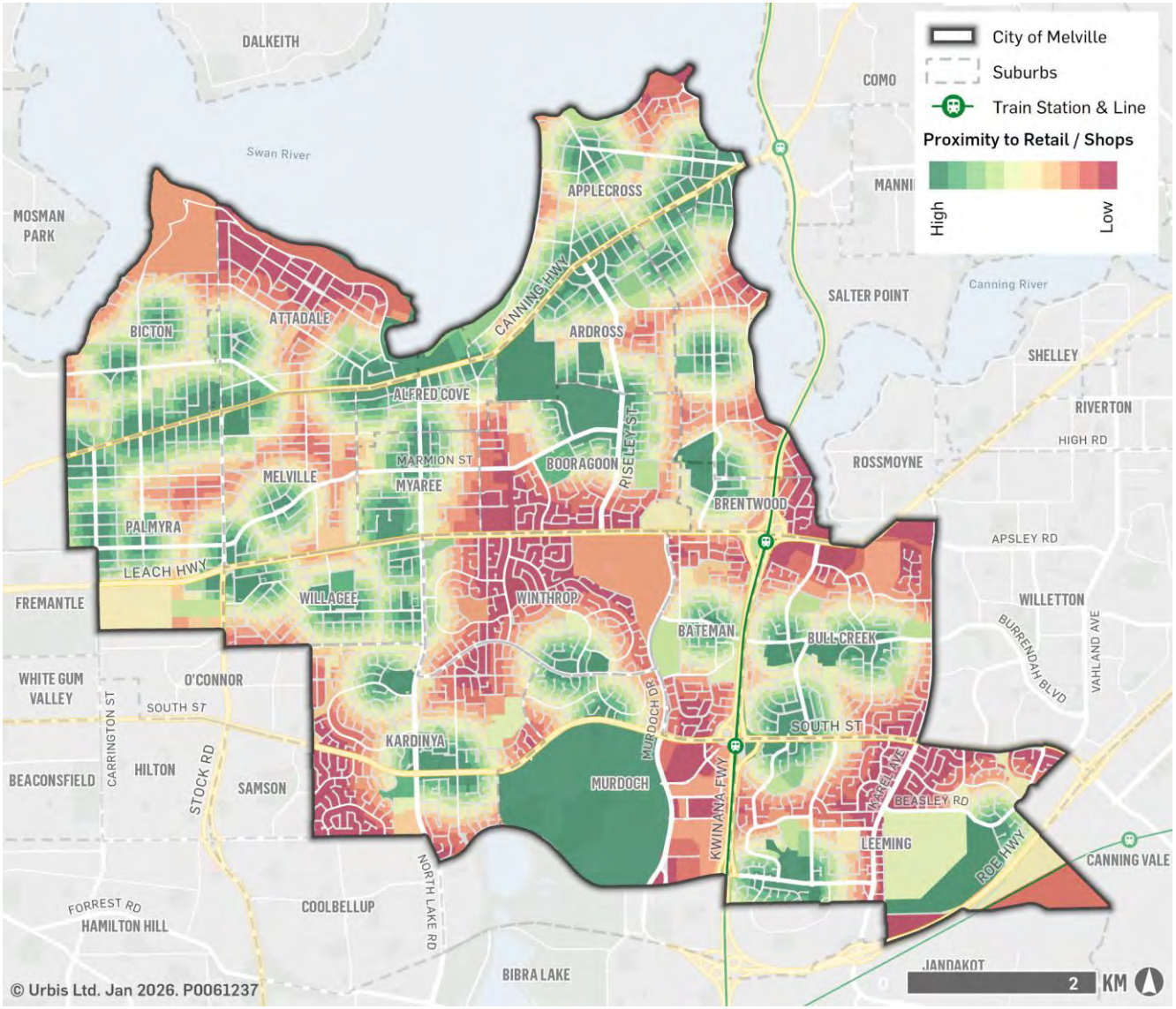
The following map illustrates the relative accessibility to retail within the City of Melville.

The major retail precincts are:

- Canning Bridge Activity Centre;
- Westfield Booragoon;
- Riseley Street Activity Centre;
- Melville Shopping Centre;
- Kardinya Park;
- Bull Creek Central;
- Hulme Court;
- Leeming Forum and;
- Petra Street.

Proximity to retail within this map has been determined based on an individual lot's proximity to the closest shop retail floorspace (as per DPLH's Land Use Employment Survey) and the size of the most proximate retail in square metres. Using these variables each lot has been scored with a proximity to retail percentage value.

RETAIL PROXIMITY HEAT MAP, CITY OF MELVILLE



Source: Urbis, DPLH Land Use Employment Survey

PROXIMITY TO OPEN SPACE

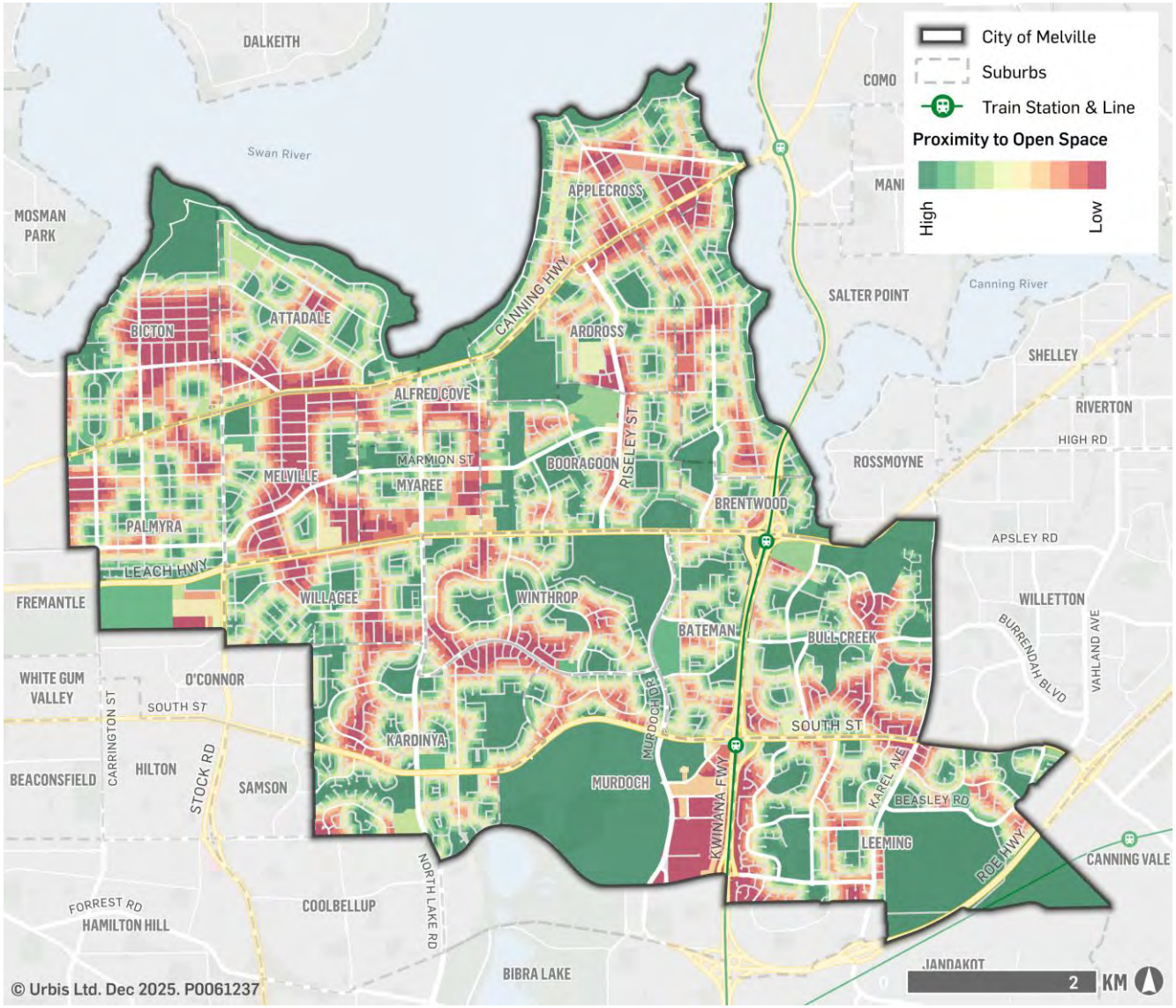
The following map illustrates accessibility to open space within the City of Melville.

Major sources of open space include:

- Point Walter (Bicton);
- Attadale Foreshore;
- Murdoch University (Murdoch);
- Applecross Foreshore;
- Tompkins Park (Applecross);
- Piney Lakes (Winthrop);
- Wireless Hill (Ardross) and;
- Melville Glades Golf Club (Leeming)

There are additionally two areas of open space under development at 13 The Esplanade to 64 Kishorn Road and 31 Moreau Mews to 50-52 Kishorn Road which will largely resolve the low public open space access around the Canning Bridge Activity Centre in the near term.

OPEN SPACE PROXIMITY HEAT MAP, CITY OF MELVILLE



Source: Urbis

PROXIMITY TO PUBLIC TRANSPORT – BUSES

The following map illustrates the bus routes and stops within the City of Melville, and how proximal each lot in the City is to them.

The major bus routes within the City of Melville include those that run east to west, along:

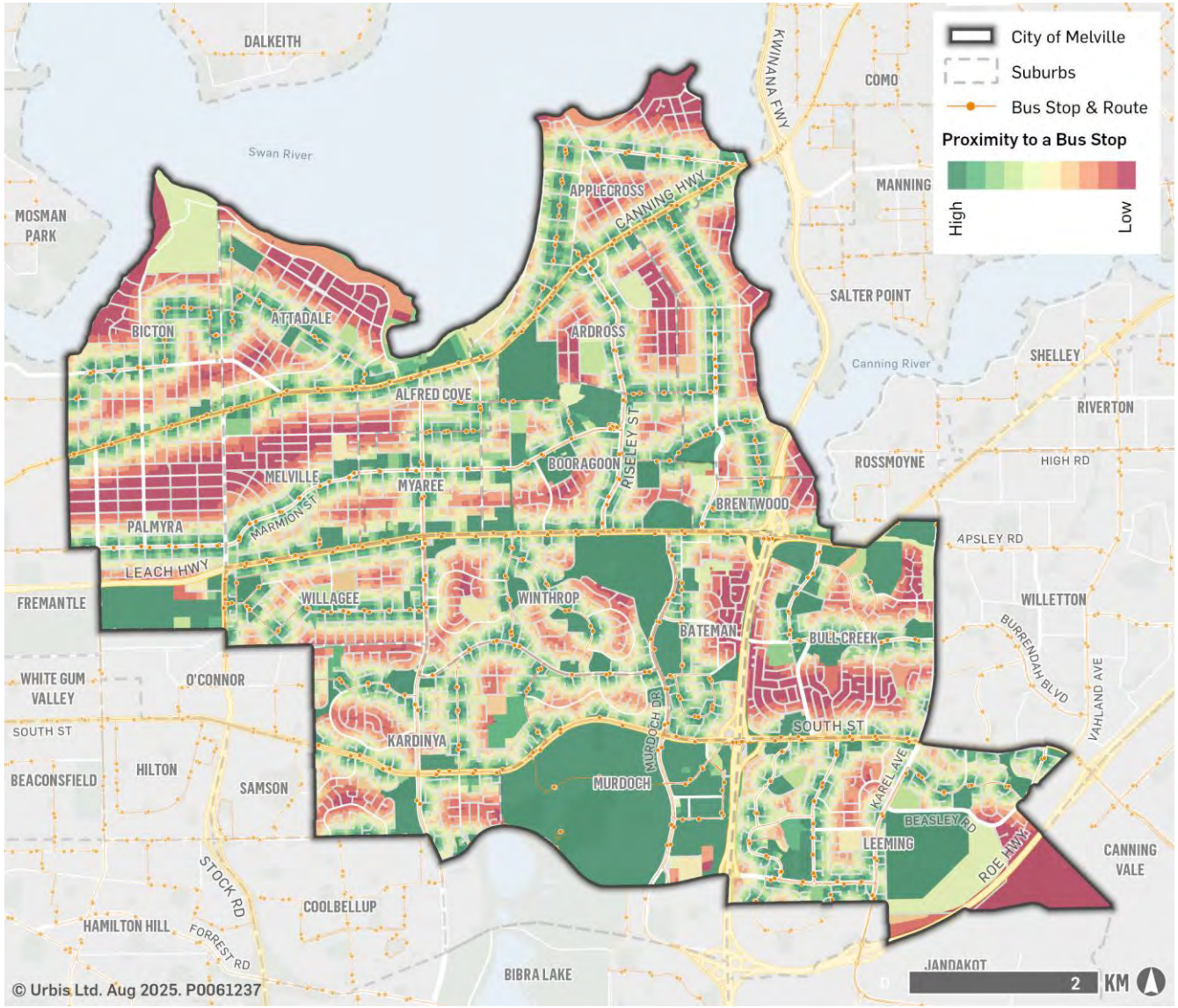
- Canning Highway (connects Applecross/Mount Pleasant to Bicton/Palmyra;
- Leach Highway (connects Brentwood/Bateman to Palmyra/Willagee and;
- South Street (connects Bull Creek/Leeming to Kardinya).

The City of Melville has lower north-south accessibility, however notable bus routes include those along:

- North Lake Road (connects Alfred Cove through to Kardinya);
- Riseley Street (connects Ardross to Winthrop) and;
- Reynolds Road (connect Ardross to Brentwood).

Notable low proximity zones include the area between Canning Highway and Leach Highway, as well as the area between Parry Avenue and South Street as buses predominantly service the major arterial roads.

BUS STOP PROXIMITY HEAT MAP, CITY OF MELVILLE



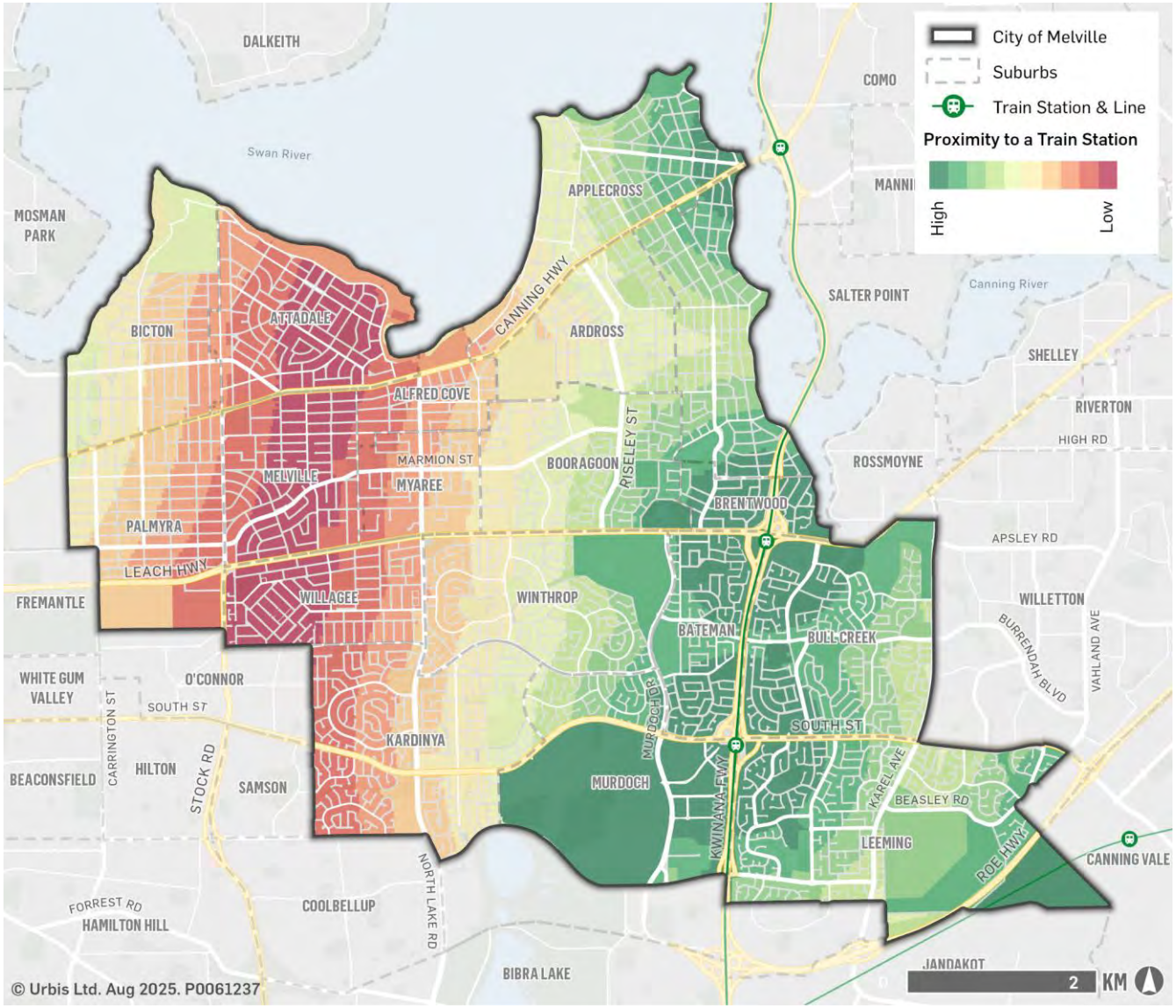
Source: Urbis

PROXIMITY TO PUBLIC TRANSPORT – TRAINS

The following map illustrates the train lines and stations within the City of Melville, and how proximal each lot in the City is to them. This heat map also factors in proximity to stations outside of the LGA.

The Mandurah train line travels along Kwinana Freeway and is the primary servicing train line for the City of Melville. Bus stations are co-located with each train station to facilitate east-west accessibility. As distance from the Mandurah line increases, the proximity score decreases, up until Bicton/Palmyra, which then become closer to the Fremantle line.

TRAIN LINE PROXIMITY HEAT MAP, CITY OF MELVILLE



Source: Urbis

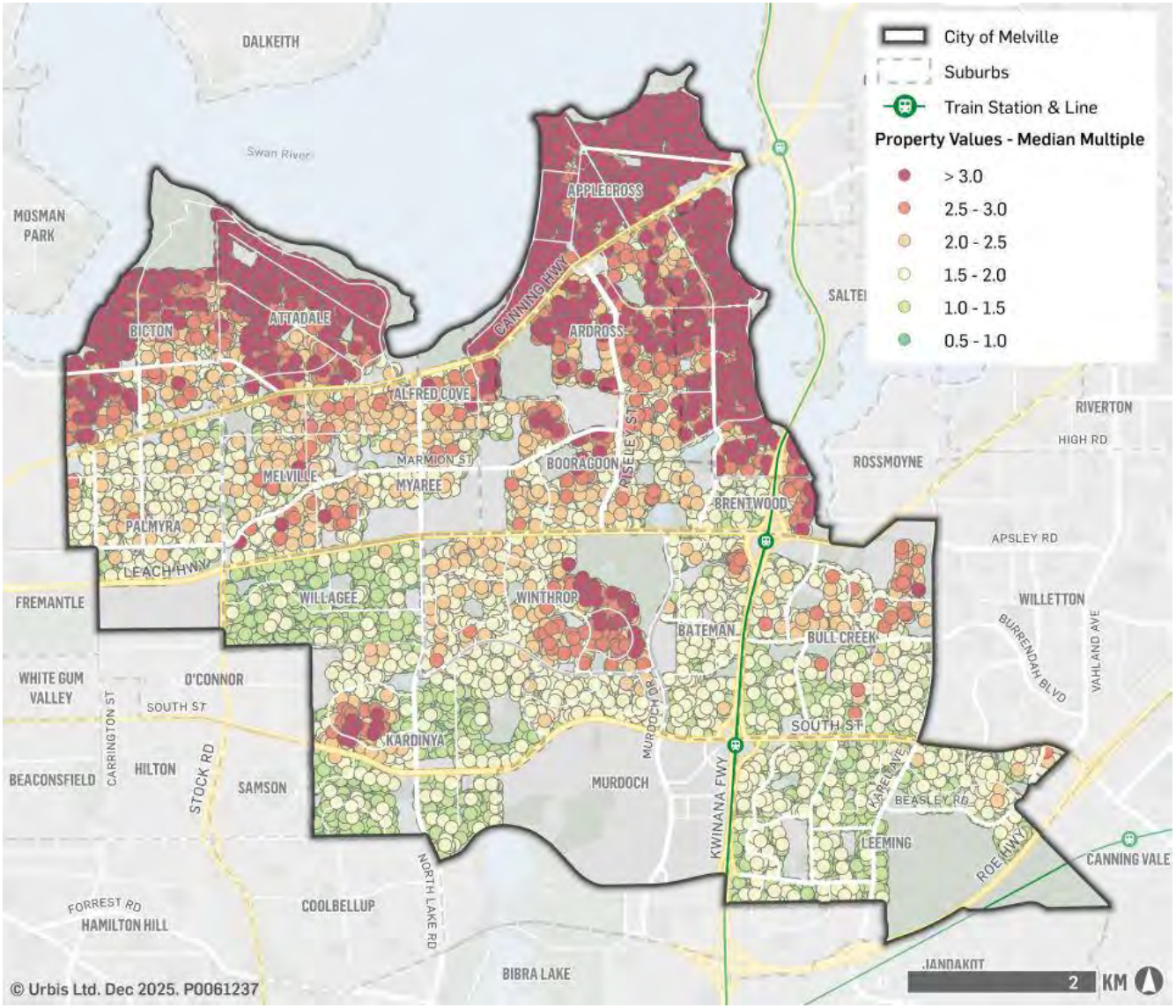
PROPERTY PRICES MAPPING

The following map illustrates the property values of each lot in the City of Melville relative to the median price of Greater Perth (e.g. a median multiple of 3 represents that prices are generally three times more than Perth-wide averages in that area).

Several trends emerged from the analysis of the median multiple scores. Areas along the water are typically more expensive, while areas further inland are priced relatively lower.

Suburbs such as Applecross and Mount Pleasant notably have the higher concentrations of lots with high median multiple scores, further south and inland had relatively lower median multiples scores. Willagee has a higher concentration of lots with lower median multiple scores relative to the Greater Perth given it has older stock and a higher proportion of unit dwellings.

MEDIAN MULTIPLE PROPERTY VALUES HEAT MAP, CITY OF MELVILLE



Source: Urbis, Landgate

RENTAL DATA

Houses (Separate Houses)

An analysis of rental data shows that the City of Melville is significantly more costly to rent when compared to Greater Perth prices.

Suburbs such as Applecross, Attadale and Mount Pleasant are significantly more expensive due to their waterfront location. Suburbs further inland or with older housing stock are typically more affordable.

Mount Pleasant and Brentwood have seen significant rental price growth in the last year.

Units (Units, Townhouses and Apartments)

Unit rents within the City of Melville are more consistent with Greater Perth prices, showing similar growth and yields. Applecross, is the primary source of rentals in the City of Melville, comprising over 25% of total listings.

RENTAL DATA, SUBURBS WITHIN THE CITY OF MELVILLE, AS AT MAY 2025

	House				Unit			
	Current Year Median Rent price	1yr Median Rent Growth (Direct)	Current Yield	Current Year Number of Listings	Current Year Median Rent price	1yr Median Rent Growth (Direct)	Current Yield	Current Year Number of Listings
Alfred Cove	$755	0.7%	2.7%	44	$525	-11%	4%	7
Applecross	$950	5.6%	1.8%	145	$700	17%	4%	101
Ardross	$895	11.9%	2.6%	64	$750	7%	5%	10
Attadale	$890	11.3%	2.5%	95	$650	3%	5%	34
Bateman	$750	7.1%	2.9%	31	$600	-11%	4%	2
Bicton	$800	0.0%	2.5%	74	$650	23%	5%	37
Booragoon	$850	9.0%	3.1%	79	$700	8%	5%	29
Brentwood	$750	15.4%	3.6%	22	$650	18%	5%	2
Bull Creek	$800	6.7%	3.1%	80	$638	-2%	4%	9
Kardinya	$765	9.3%	3.6%	114	$620	19%	5%	18
Leeming*	$800	6.7%	3.4%	115	$590	9%	5%	5
Melville	$800	6.7%	3.0%	92	$700	20%	5%	15
Mount Pleasant	$975	21.9%	2.7%	128	$780	11%	4%	47
Murdoch	$795	1.3%	3.4%	13	$670	-2%	5%	2
Myaree	$788	7.1%	3.4%	27	$680	5%	6%	8
Palmyra	$750	4.2%	3.6%	94	$650	18%	5%	63
Willagee	$730	4.3%	4.0%	78	$650	18%	6%	15
Winthrop	$870	2.4%	2.9%	72	$325	-50%	3%	1
City of Melville	$800	6.7%	3.0%	1,350	$675	13%	5%	403
Greater Perth	$680	6.3%	4.5%	32,630	$650	14%	6%	10,475

Source: Urbis, PriceFinder
Note Located partially within City of Melville.*

SUCCESS FACTORS SCORING

INFILL SUCCESS FACTOR SCORING, PROPOSED CHANGE AREAS

PROPOSED CHANGE AREAS	SCORE / DEVELOPMENT VIABILITY	AVERAGE OF PROXIMITY TO RETAIL AND SIZE OF NEAREST RETAIL	AVERAGE OF PROXIMITY TO OPEN SPACE (METRES)	AVERAGE OF PROXIMITY TO BUSES (METRES)	AVERAGE OF PROXIMITY TO TRAINS (METRES)	MEDIAN MULTIPLE PROPERTY VALUES RELATIVE TO GREATER PERTH	MEDIAN MULTIPLE RENTAL VALUES RELATIVE TO GREATER PERTH	PROPORTION OF STOCK LESS THAN 15 YEARS OLD (%)	PROPORTION OF LOTS GREATER THAN THAN 1,000 SQ.M (%)
Scoring Measures	**-**	**Greater than 80% = Strong, Between 50% - 80% = Moderate, Less than 50% = Low**	**Less than 200m = Strong, Between 200-500m = Moderate, More than 500m = Low**	**Less than 200m = Strong, Between 200-500m = Moderate, More than 500m = Low**	**Less than 1.5km = Strong, between 1.5-3km = Moderate, More than 3km = Low**	**Greater than 1.8 = Strong, Between 1.4 - 1.8 = Moderate, Less than 1.4 = Low**	**Greater than 1.3 = Strong, Between 1.1 - 1.3 = Moderate, Less than 1.1 = Low**	**Less than 15% = Strong, Between 15-30% = Moderate, More than 30% = Low**	**More than 40% = Strong (More Available Sites to Develop), Between 20-40% = Moderate, Less than 20% = Low (Less Available Sites to Develop)**
Aurelian St To Leach Highway (Extension 2025)	Score	5%	205	178	3,696	1.60	1.10	0.0%	13.3%
	Development Viability	Low	Moderate	Strong	Low	Moderate	Moderate	Strong	Low
Aurelian St To Leach Highway, Palmyra (Residential Density Change)	Score	37%	91	118	3,729	1.37	1.10	2.9%	34.1%
	Development Viability	Low	Strong	Strong	Low	Low	Moderate	Strong	Moderate
Bombard St & Mitchell St (Residential Density Change)	Score	38%	76	267	1,862	2.06	1.39	8.7%	26.4%
	Development Viability	Low	Strong	Moderate	Moderate	Strong	Strong	Strong	Moderate
Booragoon Centre East (Adjacent Residential Density Change)	Score	100%	115	148	1,802	1.71	1.32	35.0%	2.8%
	Development Viability	Strong	Strong	Strong	Moderate	Moderate	Strong	Low	Low
Booragoon Centre East (Extension 2025)	Score	100%	136	129	2,181	1.87	1.25	59.1%	0.7%
	Development Viability	Strong	Strong	Strong	Moderate	Strong	Moderate	Strong	Low
Brentwood Centre (Adjacent Residential Density Change)	Score	100%	108	188	819	1.72	1.39	61.0%	18.1%
	Development Viability	Strong	Strong	Strong	Moderate	Strong	Moderate	Low	Low

Source: Urbis, Pricefinder, Landgate, Department of Planning Lands and Heritage

SUCCESS FACTORS SCORING

INFILL SUCCESS FACTOR SCORING, PROPOSED CHANGE AREAS

PROPOSED CHANGE AREAS	SCORE / DEVELOPMENT VIABILITY	AVERAGE OF PROXIMITY TO RETAIL AND SIZE OF NEAREST RETAIL	AVERAGE OF PROXIMITY TO OPEN SPACE (METRES)	AVERAGE OF PROXIMITY TO BUSES (METRES)	AVERAGE OF PROXIMITY TO TRAINS (METRES)	MEDIAN MULTIPLE PROPERTY VALUES RELATIVE TO GREATER PERTH	MEDIAN MULTIPLE RENTAL VALUES RELATIVE TO GREATER PERTH	PROPORTION OF STOCK LESS THAN 15 YEARS OLD (%)	PROPORTION OF LOTS GREATER THAN THAN 1,000 SQ.M (%)
Scoring Measures	**-**	**Greater than 80% = Strong, Between 50% - 80% = Moderate, Less than 50% = Low**	**Less than 200m = Strong, Between 200-500m = Moderate, More than 500m = Low**	**Less than 200m = Strong, Between 200-500m = Moderate, More than 500m = Low**	**Less than 1.5km = Strong, between 1.5-3km = Moderate, More than 3km = Low**	**Greater than 1.8 = Strong, Between 1.4 - 1.8 = Moderate, Less than 1.4 = Low**	**Greater than 1.3 = Strong, Between 1.1 - 1.3 = Moderate, Less than 1.1 = Low**	**Less than 15% = Strong, Between 15-30% = Moderate, More than 30% = Low**	**More than 40% = Strong (More Available Sites to Develop), Between 20-40% = Moderate, Less than 20% = Low (Less Available Sites to Develop)**
Bristol Avenue (Adjacent Residential Density Change)	Score	88%	89	50	2,881	2.58	1.18	0.0%	31.6%
	Development Viability	Strong	Strong	Strong	Strong	Moderate	Strong	Low	Low
Bull Creek Local Centre (Adjacent Residential Density Change)	Score	75%	130	131	1,442	1.48	1.18	0.0%	3.5%
	Development Viability	Strong	Strong	Strong	Moderate	Strong	Moderate	Strong	Moderate
Canning Beach Road - Applecross (2025)	Score	20%	56	253	861	7.03	1.40	30.0%	35.7%
	Development Viability	Moderate	Strong	Strong	Strong	Moderate	Moderate	Low	Low
Coleman Cr & Woodley Cr, Melville (Residential Density Change)	Score	70%	182	87	4,527	1.52	1.18	2.1%	5.1%
	Development Viability	Moderate	Moderate	Moderate	Strong	Strong	Strong	Strong	Moderate
Curruthers Rd To The Esplanade (2025)	Score	61%	41	162	1,215	3.55	1.43	73.3%	63.2%
	Development Viability	Strong	Strong	Strong	Low	Moderate	Moderate	Strong	Strong

Source: Urbis, Pricefinder, Landgate, Department of Planning Lands and Heritage

SUCCESS FACTORS SCORING

INFILL SUCCESS FACTOR SCORING, PROPOSED CHANGE AREAS

PROPOSED CHANGE AREAS	SCORE / DEVELOPMENT VIABILITY	AVERAGE OF PROXIMITY TO RETAIL AND SIZE OF NEAREST RETAIL	AVERAGE OF PROXIMITY TO OPEN SPACE (METRES)	AVERAGE OF PROXIMITY TO BUSES (METRES)	AVERAGE OF PROXIMITY TO TRAINS (METRES)	MEDIAN MULTIPLE PROPERTY VALUES RELATIVE TO GREATER PERTH	MEDIAN MULTIPLE RENTAL VALUES RELATIVE TO GREATER PERTH	PROPORTION OF STOCK LESS THAN 15 YEARS OLD (%)	PROPORTION OF LOTS GREATER THAN THAN 1,000 SQ.M (%)
Scoring Measures	**-**	**Greater than 80% = Strong, Between 50% - 80% = Moderate, Less than 50% = Low**	**Less than 200m = Strong, Between 200-500m = Moderate, More than 500m = Low**	**Less than 200m = Strong, Between 200-500m = Moderate, More than 500m = Low**	**Less than 1.5km = Strong, between 1.5-3km = Moderate, More than 3km = Low**	**Greater than 1.8 = Strong, Between 1.4 - 1.8 = Moderate, Less than 1.4 = Low**	**Greater than 1.3 = Strong, Between 1.1 - 1.3 = Moderate, Less than 1.1 = Low**	**Less than 15% = Strong, Between 15-30% = Moderate, More than 30% = Low**	**More than 40% = Strong (More Available Sites to Develop), Between 20-40% = Moderate, Less than 20% = Low (Less Available Sites to Develop)**
Farrington Centre (Adjacent residential density change)	Score	100%	91	77	1,495	1.30	1.18	0.0%	2.6%
	Development Viability	Moderate	Strong	Strong	Low	Strong	Strong	Moderate	Moderate
Harris St (Extension 2025)	Score	61%	409	99	3,443	2.29	1.18	46.0%	35.1%
	Development Viability	Strong	Strong	Strong	Moderate	Strong	Strong	Low	Moderate
Harris St, Bicton (Adjacent Residential Density Change)	Score	100%	528	64	3,367	0.00	1.18	0.0%	0.0%
	Development Viability	Moderate	Moderate	Strong	Low	Moderate	Moderate	Low	Low
Kardinya Centre (Adjacent Residential Density Change)	Score	100%	96	159	3,648	1.45	1.13	0.9%	4.0%
	Development Viability	Low	Moderate	Strong	Moderate	Strong	Strong	Moderate	Moderate
Leach Hwy, Maddox Cr To Rome Rd (Dual Residential Density Codes)	Score	41%	195	55	4,752	1.28	1.07	20.4%	2.1%
	Development Viability	Moderate	Strong	Strong	Low	Moderate	Moderate	Strong	Low
Marmion St, Melville (Residential Density Change)	Score	27%	220	49	4,695	1.41	1.18	13.6%	2.0%
	Development Viability	Moderate	Strong	Strong	Strong	Strong	Strong	Low	Strong

Source: Urbis, Pricefinder, Landgate, Department of Planning Lands and Heritage

SUCCESS FACTORS SCORING

INFILL SUCCESS FACTOR SCORING, PROPOSED CHANGE AREAS

PROPOSED CHANGE AREAS	SCORE / DEVELOPMENT VIABILITY	AVERAGE OF PROXIMITY TO RETAIL AND SIZE OF NEAREST RETAIL	AVERAGE OF PROXIMITY TO OPEN SPACE (METRES)	AVERAGE OF PROXIMITY TO BUSES (METRES)	AVERAGE OF PROXIMITY TO TRAINS (METRES)	MEDIAN MULTIPLE PROPERTY VALUES RELATIVE TO GREATER PERTH	MEDIAN MULTIPLE RENTAL VALUES RELATIVE TO GREATER PERTH	PROPORTION OF STOCK LESS THAN 15 YEARS OLD (%)	PROPORTION OF LOTS GREATER THAN THAN 1,000 SQ.M (%)
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Marmion St, Myaree (Extension 2025)	Score	100%	120	149	3,425	1.44	1.16	46.3%	6.9%
	Development Viability	Strong	Strong	Strong	Strong	Low	Moderate	Strong	Low
Marmion St, Myaree (Residential Density Change)	Score	100%	124	80	3,379	1.43	1.16	32.5%	7.1%
	Development Viability	Moderate	Moderate	Strong	Low	Strong	Moderate	Low	Moderate
North Lake Road, Myaree (West Adjacent Residential Density Change)	Score	100%	48	246	4,044	1.48	1.11	11.9%	0.0%
	Development Viability	Strong	Low	Strong	Low	Strong	Moderate	Strong	Low
North Lake Road, Myaree (Extension 2025)	Score	100%	48	100	3,590	1.78	1.16	41.4%	0.0%
	Development Viability	Low	Strong	Strong	Low	Low	Low	Moderate	Low

Source: Urbis, Pricefinder, Landgate, Department of Planning Lands and Heritage

SUCCESS FACTORS SCORING

INFILL SUCCESS FACTOR SCORING, PROPOSED CHANGE AREAS

PROPOSED CHANGE AREAS	SCORE / DEVELOPMENT VIABILITY	AVERAGE OF PROXIMITY TO RETAIL AND SIZE OF NEAREST RETAIL)	AVERAGE OF PROXIMITY TO OPEN SPACE (METRES)	AVERAGE OF PROXIMITY TO BUSES (METRES)	AVERAGE OF PROXIMITY TO TRAINS (METRES)	MEDIAN MULTIPLE PROPERTY VALUES RELATIVE TO GREATER PERTH	MEDIAN MULTIPLE RENTAL VALUES RELATIVE TO GREATER PERTH	PROPORTION OF STOCK LESS THAN 15 YEARS OLD (%)	PROPORTION OF LOTS GREATER THAN THAN 1,000 SQ.M (%)
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North Lake Road, Myaree (Residential density change)	Score	100%	117	112	3,749	1.53	1.16	32.7%	6.6%
	Development Viability	Low	Moderate	Strong	Low	Moderate	Moderate	Strong	Low
North Lake Road, Willagee (Adjacent Residential Density Change)	Score	28%	75	169	3,874	1.53	1.07	61.3%	2.9%
	Development Viability	Strong	Strong	Strong	Low	Moderate	Moderate	Low	Low
Palmyra Local Centre (Adjacent Residential Density Change)	Score	87%	116	313	3,019	3.08	1.10	0.0%	57.1%
	Development Viability	Strong	Strong	Strong	Low	Moderate	Moderate	Low	Low
Riseley Centre (North Adjacent Residential Density Change)	Score	84%	91	145	2,365	3.08	1.40	6.5%	39.1%
	Development Viability	Strong	Strong	Strong	Moderate	Strong	Strong	Strong	Moderate
River View Tce to The Esplanade (2025)	Score	2%	91	253	1,824	3.66	1.43	2.2%	7.7%
	Development Viability	Low	Strong	Moderate	Moderate	Strong	Strong	Strong	Low

Source: Urbis, Pricefinder, Landgate, Department of Planning Lands and Heritage

SUCCESS FACTORS SCORING

INFILL SUCCESS FACTOR SCORING, PROPOSED CHANGE AREAS

PROPOSED CHANGE AREAS	SCORE / DEVELOPMENT VIABILITY	AVERAGE OF PROXIMITY TO RETAIL AND SIZE OF NEAREST RETAIL	AVERAGE OF PROXIMITY TO OPEN SPACE (METRES)	AVERAGE OF PROXIMITY TO BUSES (METRES)	AVERAGE OF PROXIMITY TO TRAINS (METRES)	MEDIAN MULTIPLE PROPERTY VALUES RELATIVE TO GREATER PERTH	MEDIAN MULTIPLE RENTAL VALUES RELATIVE TO GREATER PERTH	PROPORTION OF STOCK LESS THAN 15 YEARS OLD (%)	PROPORTION OF LOTS GREATER THAN THAN 1,000 SQ.M (%)
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Robson Way, Murdoch (Zoning change)	Score	100%	76	83	1,372	0.00	1.17	0.0%	33.3%
	Development Viability	Strong	Strong	Strong	Strong	Low	Moderate	Strong	Moderate
South St to Barclay Rd, Kardinya (Residential Density Change)	Score	100%	106	187	2,684	1.29	1.13	3.4%	10.1%
	Development Viability	Strong	Strong	Strong	Moderate	Low	Moderate	Strong	Low
South Street (Further Investigation Area)	Score	74%	125	121	1,792	1.42	1.13	13.9%	1.8%
	Development Viability	Moderate	Strong	Strong	Moderate	Moderate	Moderate	Strong	Low
Winthrop Local Centre (Adjacent Residential Density Change)	Score	100%	194	159	2,016	1.42	1.28	0.0%	0.0%
	Development Viability	Strong	Strong	Moderate	Moderate	Strong	Strong	Moderate	Low
Wireless Hill (East Adjacent Residential Density Change)	Score	100%	115	294	2,747	2.57	1.18	35.8%	14.5%
	Development Viability	Moderate	Strong	Strong	Moderate	Strong	Moderate	Moderate	Low

Source: Urbis, Pricefinder, Landgate, Department of Planning Lands and Heritage

VIABILITY MODELLING APPROACH

To assess the economic viability of different dwelling types over time, the following methodology was employed.

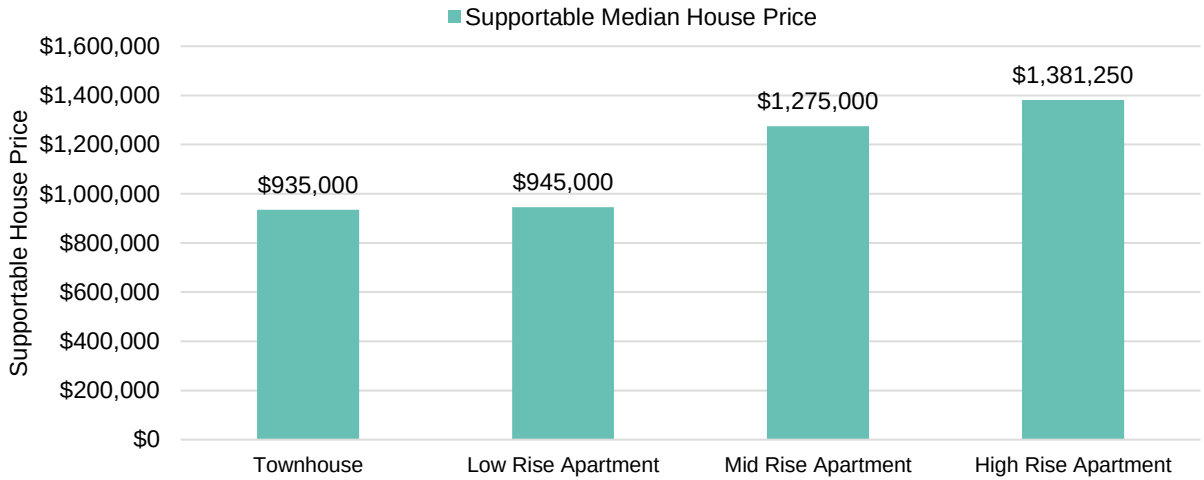
1. **Price Point Viability**: The current supportable median house prices for viability of the relevant housing typologies were estimated based on median house prices in areas with recent infill development and informed by Urbis' understanding of development feasibility. To be able to deliver these typologies, the median house price of the area needs to be in line or higher than these supportable prices to ensure they offer an alternative at a lower price point relative to houses that is still feasible for development.
2. **Median House Values**: The median house value for each proposed change was estimated based on historical sales prices.
3. **Price Growth**: A price growth rate of 5.4% per annum, based on a 20-year historical growth rate for Perth was applied to the median house values for each area on an annual basis to 2050.
4. **Viability Threshold for Apartments**: To estimate the increase in the supportable median house price for density viability, a 20-year historical construction price index growth rate of 3.9% was applied on an annual basis to 2050.

This methodology provides a complementary framework for understanding the economic viability of various dwelling types over time by estimating, based on historical growth averages, when different typologies could be viable for development.

An example analysis has been depicted above with a summary for each change area provided on the following page.

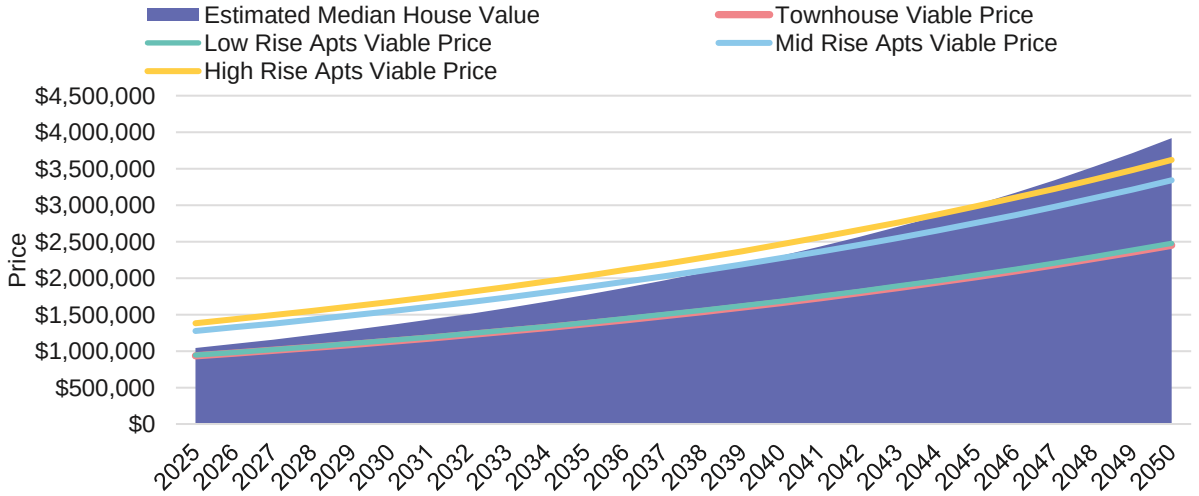
Note, there are other factors that influence viability of infill development which were explored in the previous pages. As such, an area considered to have the sufficient property prices to support, for example, high rise development, does not necessarily imply that high rise development will occur.

SUPPORTABLE MEDIAN HOUSE PRICES FOR DEVELOPMENT



Source: ABS, Pricefinder, Urbis Perth Apartment Essentials
n.b. low rise represents one to three storeys, mid-rise represents four to eight storeys and high-rise represents those greater than eight storeys.

EXAMPLE VIABILITY ANALYSIS



Source: ABS, Pricefinder

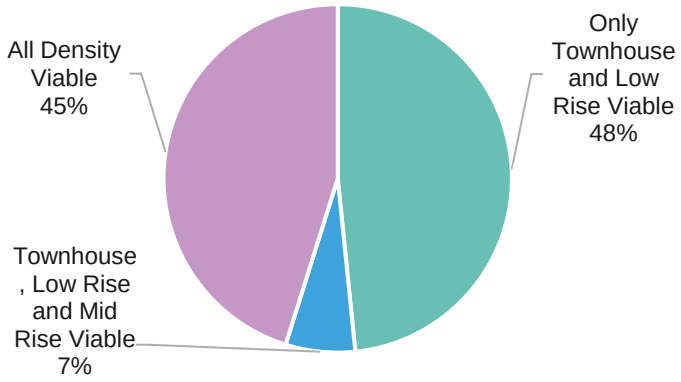
VIABILITY MODELLING FINDINGS

The viability modeling process found that townhouses and low rise apartments are viable in all of the proposed change areas – which is a reflection of relatively high property values in each change area.

Suburbs such as Leeming and Myaree are expected to take longer for higher density to become viable. Following the implementation of the proposed changes, the market is not expected to respond immediately. Instead, development activity is likely to concentrate in areas where demand and feasibility are already well established, such as areas within or near the Canning Bridge Activity Centre and the Booragoon Centre.

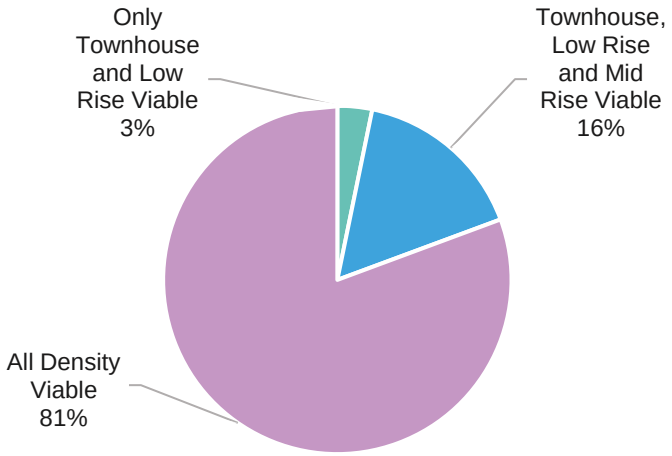
In locations where infill development is less established—such as Leeming—significant developer uptake may not materialise in the short to medium term, even where projects are technically feasible.

VIABILITY BY DENSITY TYPE, CHANGE AREAS, 2030



Source: ABS, Pricefinder, Urbis Perth Apartment Essentials

VIABILITY BY DENSITY TYPE, CHANGE AREAS, 2040



Source: ABS, Pricefinder, Urbis Perth Apartment Essentials
n.b. low rise represents one to three storeys, mid-rise represents four to eight storeys and high-rise represents those greater than eight storeys.

KEY STATISTICS

100% Townhouses and Low Rise Apartment viable in all change areas as at 2025.

48% Proportion of change areas where mid rise and beyond are not yet viable

61% Proportion of change areas where high rise apartments are not yet viable

5-6 Typical year lag in between mid rise and high rise viability

2041 Year mid rise apartments become viable in all change areas

2046 Year high rise apartments become viable in all change areas

VIABILITY MODELLING

VIABILITY MODELLING, PROPOSED CHANGE AREAS

CHANGE AREA	EST. MEDIAN HOUSE VALUE	ESTIMATED YEAR TYPOLOGY VIABLE			
		TOWNHOUSE	LOW RISE APARTMENT	MID RISE APARTMENT	HIGH RISE APARTMENT
Aurelian St To Leach Highway (Extension 2025)	$1,280,625	Already Viable	Already Viable	Already Viable	2031
Aurelian St To Leach Highway, Palmyra (Residential Density Change)	$1,095,871	Already Viable	Already Viable	2036	2041
Bombard St & Mitchell St (Residential Density Change)	$1,647,992	Already Viable	Already Viable	2037	2042
Booragoon Centre (East Adjacent Residential Density Change)	$1,368,135	Already Viable	Already Viable	Already Viable	2026
Booragoon Centre East (Extension 2025)	$1,498,061	Already Viable	Already Viable	Already Viable	Already Viable
Brentwood Centre (Adjacent Residential Density Change)	$1,376,043	Already Viable	Already Viable	Already Viable	2026
Bristol Avenue (Adjacent Residential Density Change)	$2,064,795	Already Viable	Already Viable	Already Viable	Already Viable
Bull Creek Local Centre (Adjacent Residential Density Change)	$1,187,333	Already Viable	Already Viable	2030	2036
Canning Beach Road - Applecross (2025)	$5,626,133	Already Viable	Already Viable	Already Viable	Already Viable
Coleman Cr & Woodley Cr, Melville (Residential Density Change)	$1,215,830	Already Viable	Already Viable	Already Viable	Already Viable
Curruthers Rd To The Esplanade (2025)	$2,842,185	Already Viable	Already Viable	Already Viable	Already Viable
Farrington Centre (Adjacent Residential Density Change)	$1,040,645	Already Viable	Already Viable	2040	2045
Harris St (Extension 2025)	$1,832,480	Already Viable	Already Viable	Already Viable	Already Viable

Source: ABS Producer Price Index, Pricefinder, Urbis

VIABILITY MODELLING

VIABILITY MODELLING, PROPOSED CHANGE AREAS

CHANGE AREA	EST. MEDIAN HOUSE VALUE	ESTIMATED YEAR TYPOLOGY VIABLE			
		TOWNHOUSE	LOW RISE APARTMENT	MID RISE APARTMENT	HIGH RISE APARTMENT
Harris St, Bicton (Adjacent Residential Density Change)	$1,832,480	Already Viable	Already Viable	Already Viable	Already Viable
Kardinya Centre (Adjacent Residential Density Change)	$1,162,550	Already Viable	Already Viable	2032	2037
Leach Hwy, Maddox Cr To Rome Rd (Dual Residential Density Codes)	$1,020,074	Already Viable	Already Viable	2041	2046
Marmion St, Melville (Residential Density Change)	$1,125,552	Already Viable	Already Viable	2034	2040
Marmion St, Myaree (Extension 2025)	$1,148,031	Already Viable	Already Viable	2033	2038
Marmion St, Myaree (Residential Density Change)	$1,141,364	Already Viable	Already Viable	2033	2039
North Lake Road, Alfred Cove (Adjacent Residential Density Change)	$1,183,101	Already Viable	Already Viable	2031	2036
North Lake Road, Myaree (Extension 2025)	$1,424,925	Already Viable	Already Viable	Already Viable	Already Viable
North Lake Road, Myaree (Residential Density Change)	$1,224,867	Already Viable	Already Viable	2028	2034
North Lake Road, Willagee (Adjacent Residential Density Change)	$1,224,867	Already Viable	Already Viable	2028	2034
Palmyra Local Centre (Adjacent Residential Density Change)	$2,467,322	Already Viable	Already Viable	Already Viable	Already Viable
Riseley Centre (North Adjacent Residential Density Change)	$2,467,322	Already Viable	Already Viable	Already Viable	Already Viable
River View Tce To The Esplanade (2025)	$2,927,637	Already Viable	Already Viable	Already Viable	Already Viable

Source: ABS Producer Price Index, Pricefinder, Urbis

VIABILITY MODELLING

VIABILITY MODELLING, PROPOSED CHANGE AREAS

CHANGE AREA	EST. MEDIAN HOUSE VALUE	ESTIMATED YEAR TYPOLOGY VIABLE			
		TOWNHOUSE	LOW RISE APARTMENT	MID RISE APARTMENT	HIGH RISE APARTMENT
Robson Way, Murdoch (Zoning Change)	$1,134,747	Already Viable	Already Viable	2040	2045
South St To Barclay Rd, Kardinya (Residential Density Change)	$1,031,658	Already Viable	Already Viable	2033	2038
South Street (Further Investigation Area)	$1,134,747	Already Viable	Already Viable	2040	2046
Winthrop Local Centre (Adjacent Residential Density Change)	$1,134,747	Already Viable	Already Viable	2034	2039
Wireless Hill (East Adjacent Residential Density Change)	$2,053,664	Already Viable	Already Viable	Already Viable	Already Viable

Source: ABS Producer Price Index, Pricefinder, Urbis

06

AFFORDABILITY ASSESSMENT

AFFORDABLE HOUSING BENCHMARKING METHODOLOGY

Infill development can help support affordability if appropriate development outcomes are delivered. To support an understanding of how affordability could be influenced by the proposed planning scheme changes, an assessment of affordability outcomes was undertaken.

Purchase price affordability benchmarks were identified for each proposed change area using the financial affordability methodology from the WA Housing Authority's Housing Affordability Report. The assumptions used to follow this methodology are as follows.

- The estimated affordable purchase price for each area are assessed based on the average household income per annum from the ABS Census 2021 for each area (based on statistical areas, SA1s).
- The Principal & Interest Rate refers to the Variable; Owner-occupier Interest Rate recorded by the Reserve Bank of Australia as at June 2025.
- A 30-year loan term was adopted based on the Housing Affordability report methodology.
- A threshold of 30% of median household income to service mortgage repayments was adopted based on the Housing Affordability report.
- The estimated affordable purchase price assumes the buyer has a 20% deposit on top of the borrowed amount.
- The prices provided for each dwelling typology are based on average current market prices for each product.
- Ratings were applied based on the following criteria:
  - **High**: anticipated infill development market price for typology is equivalent to less than 80% of the affordable purchase price benchmark;
  - **Moderate**: anticipated infill development market price for typology is equivalent to 80%-100% of the affordable purchase price benchmark; and
  - **Low**: anticipated infill development market price for typology is higher than the affordable purchase price benchmark.

An example analysis has been depicted above with a summary for each change area provided on the following pages.

HOUSEHOLD INCOME BANDS & AFFORDABLE PURCHASE PRICES EXAMPLE

	AFFORDABILITY EXAMPLE
Item	**Income Band**
Household Income	$175,455
Max % of household income to service mortgage	30%
Maximum mortgage repayments (p.a.)	$52,637
Maximum monthly repayments (calculated)	$4,386
Principal & Interest Rate Variable; Owner-occupier RBA June 2025	5.73%
Loan Term (years)	30
Maximum borrowing capacity	$753,281
Plus 20% deposit	$188,320
Total Affordable Purchase Price	**$941,601**

Typology	Market Price	% Relative to Affordable Purchase Price	Opportunity
Grouped Dwelling Price	$748,000	79%	High
Low Rise Apartment Price	$756,000	80%	Moderate
Mid Rise Apartment Price	$988,125	105%	Low
High Rise Apartment Price	$1,070,469	114%	Low

Source: Western Australian Housing Authority – Housing Affordability Report 2016; ABS; APRA; Pricefinder; RBA; Urbis

AFFORDABILITY ASSESSMENT FINDINGS

The affordability assessment revealed that on average across the proposed change areas, the affordable purchase price for residents is $904,095.

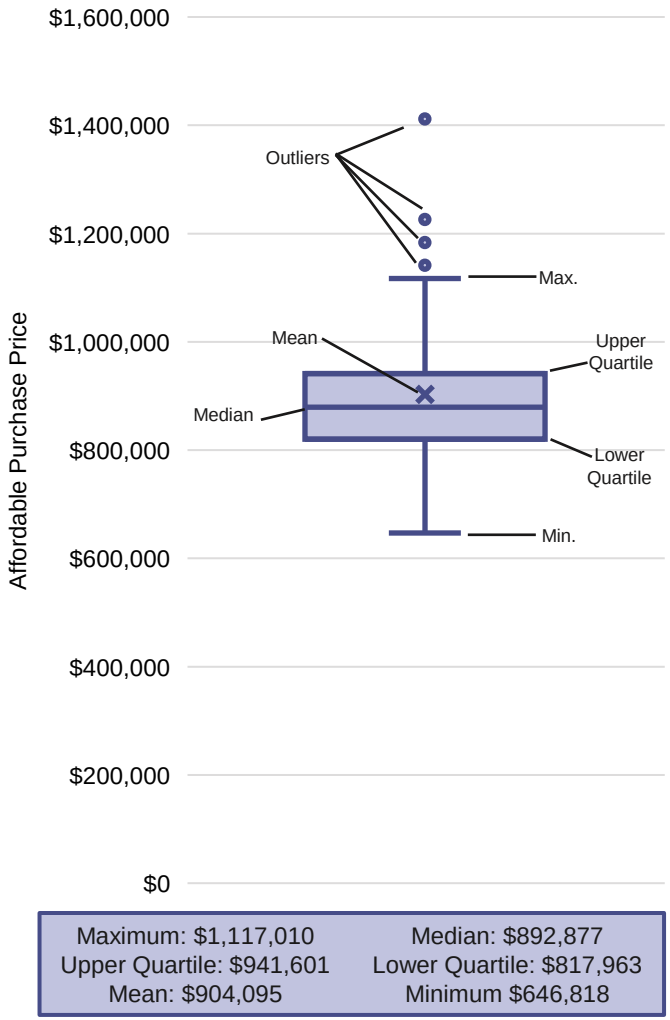
The development of townhouses and low rise apartments in many of these locations are anticipated to support affordability outcomes. This is particularly the case within areas with higher established house prices.

As higher rise apartments are typically more costly to develop and require higher selling prices, their impact on affordability is lower; with only waterfront areas with the relatively highest property values anticipated to see high rise apartments available below the affordability benchmark. Nonetheless, many of these apartments are anticipated to be more affordable than established house prices in these locations.

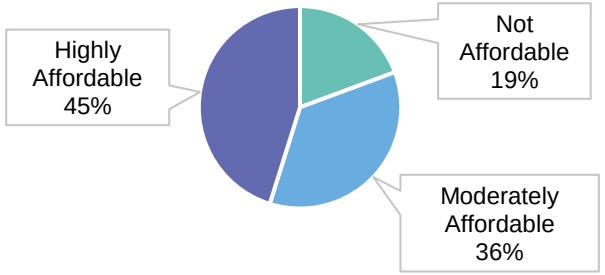
This analysis has demonstrated that the changes in R coding could facilitate the development of more affordable product such as grouped dwellings and low rise apartments across most of the proposed change areas.

Note, the development of these typologies in each of the change areas and the market pricing is subject to landowner intentions, market fundamentals and other external factors however should they be developed, they would provide some level of affordability.

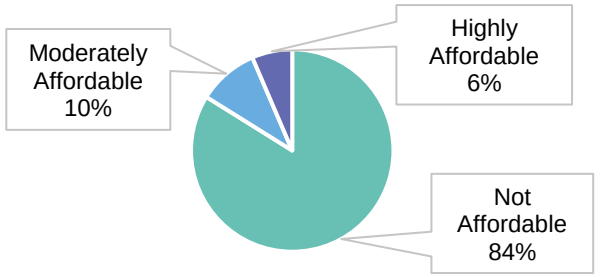
AFFORDABLE PURCHASE PRICES ACROSS PROPOSED CHANGE AREAS



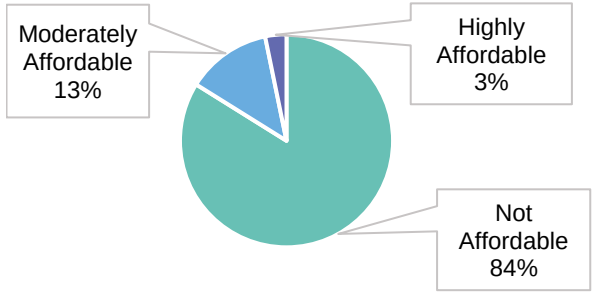
TOWNHOUSE AND LOW RISE APARTMENT AFFORDABILITY ACROSS PROPOSED CHANGE AREAS



MID RISE APARTMENT AFFORDABILITY ACROSS PROPOSED CHANGE AREAS



HIGH RISE APARTMENT AFFORDABILITY ACROSS PROPOSED CHANGE AREAS



Source: Western Australian Housing Authority – Housing Affordability Report 2016; ABS; APRA; Pricefinder; RBA; Urbis

AFFORDABILITY MODELLING

AFFORDABILITY MODELLING, PROPOSED CHANGE AREAS

PROPOSED CHANGE AREAS	AVERAGE HOUSEHOLD INCOME (2025 ADJUSTED)	AFFORDABLE PURCHASE PRICE	ESTIMATED MEDIAN HOUSE VALUE	TOWNHOUSE AFFORDABILITY	LOW RISE APARTMENT AFFORDABILITY	MID RISE APARTMENT AFFORDABILITY	HIGH RISE APARTMENT AFFORDABILITY
Aurelian St To Leach Highway (Extension 2025)	$125,179	$671,789	$1,280,625	Low	Low	Low	Low
Aurelian St To Leach Highway, Palmyra (Residential Density Change)	$125,179	$671,789	$1,095,871	Low	Low	Low	Low
Bombard St & Mitchell St (Residential Density Change)	$167,057	$896,531	$1,647,992	Moderate	Moderate	Low	Low
Booragoon Centre (East Adjacent Residential Density Change)	$161,269	$865,469	$1,368,135	Moderate	Moderate	Low	Low
Booragoon Centre East (Extension 2025)	$212,680	$1,141,372	$1,498,061	High	High	Moderate	Moderate
Brentwood Centre (Adjacent Residential Density Change)	$152,417	$817,963	$1,376,043	Moderate	Moderate	Low	Low
Bristol Avenue (Adjacent Residential Density Change)	$156,956	$842,325	$2,064,795	Moderate	Moderate	Low	Low
Bull Creek Local Centre (Adjacent Residential Density Change)	$174,774	$725,386	$1,187,333	High	High	Moderate	Moderate
Canning Beach Road - Applecross (2025)	$228,455	$1,226,031	$5,626,133	High	High	High	Moderate
Coleman Cr & Woodley Cr, Melville (Residential Density Change)	$166,376	$892,877	$1,215,830	Moderate	Moderate	Low	Low
Curruthers Rd To The Esplanade (2025)	$220,511	$1,183,397	$2,842,185	High	High	Moderate	Moderate

Source: ABS, RBA, Urbis
Note Average Household Income has been derived from SA1' s and has been inflated by the growth in the Wage Price Index to reflect current income levels.*

AFFORDABILITY MODELLING

AFFORDABILITY MODELLING, PROPOSED CHANGE AREAS

PROPOSED CHANGE AREAS	AVERAGE HOUSEHOLD INCOME (2025 ADJUSTED)	AFFORDABLE PURCHASE PRICE	ESTIMATED MEDIAN HOUSE VALUE	TOWNHOUSE AFFORDABILITY	LOW RISE APARTMENT AFFORDABILITY	MID RISE APARTMENT AFFORDABILITY	HIGH RISE APARTMENT AFFORDABILITY
Farrington Centre (Adjacent Residential Density Change)	$183,626	$985,453	$1,040,645	High	High	Moderate	Low
Harris St (Extension 2025)	$175,455	$941,601	$1,832,480	High	High	Low	Low
Harris St, Bicton (Adjacent Residential Density Change)	$175,455	$941,601	$1,832,480	High	High	Low	Low
Kardinya Centre (Adjacent Residential Density Change)	$166,376	$791,774	$1,162,550	Moderate	Moderate	Low	Low
Leach Hwy, Maddox Cr To Rome Rd (Dual Residential Density Codes)	$170,689	$916,021	$1,020,074	High	High	Low	Low
Marmion St, Melville (Residential Density Change)	$208,140	$1,117,010	$1,125,552	High	High	Moderate	Moderate
Marmion St, Myaree (Extension 2025)	$156,048	$837,453	$1,148,031	Moderate	Moderate	Low	Low
Marmion St, Myaree (Residential Density Change)	$169,554	$909,930	$1,141,364	High	Moderate	Low	Low
North Lake Road, Myaree (West Residential Density Change)	$136,869	$734,522	$1,183,101	Low	Low	Low	Low
North Lake Road, Myaree (Extension 2025)	$136,869	$734,522	$1,424,925	Low	Low	Low	Low

Source: ABS, RBA, Urbis
Note Average Household Income has been derived from SA1' s and has been inflated by the growth in the Wage Price Index to reflect current income levels*

AFFORDABILITY MODELLING

AFFORDABILITY MODELLING, PROPOSED CHANGE AREAS

PROPOSED CHANGE AREAS	AVERAGE HOUSEHOLD INCOME (2025 ADJUSTED)	AFFORDABLE PURCHASE PRICE	ESTIMATED MEDIAN HOUSE VALUE	TOWNHOUSE AFFORDABILITY	LOW RISE APARTMENT AFFORDABILITY	MID RISE APARTMENT AFFORDABILITY	HIGH RISE APARTMENT AFFORDABILITY
North Lake Road, Myaree (Residential Density Change)	$136,869	$734,522	$1,224,867	Low	Low	Low	Low
Palmyra Local Centre (Adjacent Residential Density Change)	$154,460	$828,926	$1,128,972	Moderate	Moderate	Low	Low
Riseley Centre (North Adjacent Residential Density Change)	$172,958	$928,202	$2,467,322	High	High	Low	Low
River View Tce To The Esplanade (2025)	$263,069	$1,411,793	$2,927,637	High	High	High	High
Robson Way, Murdoch (Zoning Change)	$154,119	$827,099	$1,134,747	Moderate	Moderate	Low	Low
South St To Barclay Rd, Kardinya (Residential Density Change)	$120,526	$646,818	$1,031,658	Low	Low	Low	Low
South Street (Further Investigation Area)	$158,318	$849,634	$1,134,747	Moderate	Moderate	Low	Low
Winthrop Local Centre (Adjacent Residential Density Change)	$171,710	$921,503	$1,134,747	High	High	Low	Low
Wireless Hill (East Adjacent Residential Density Change)	$180,335	$967,791	$2,053,664	High	High	Low	Low

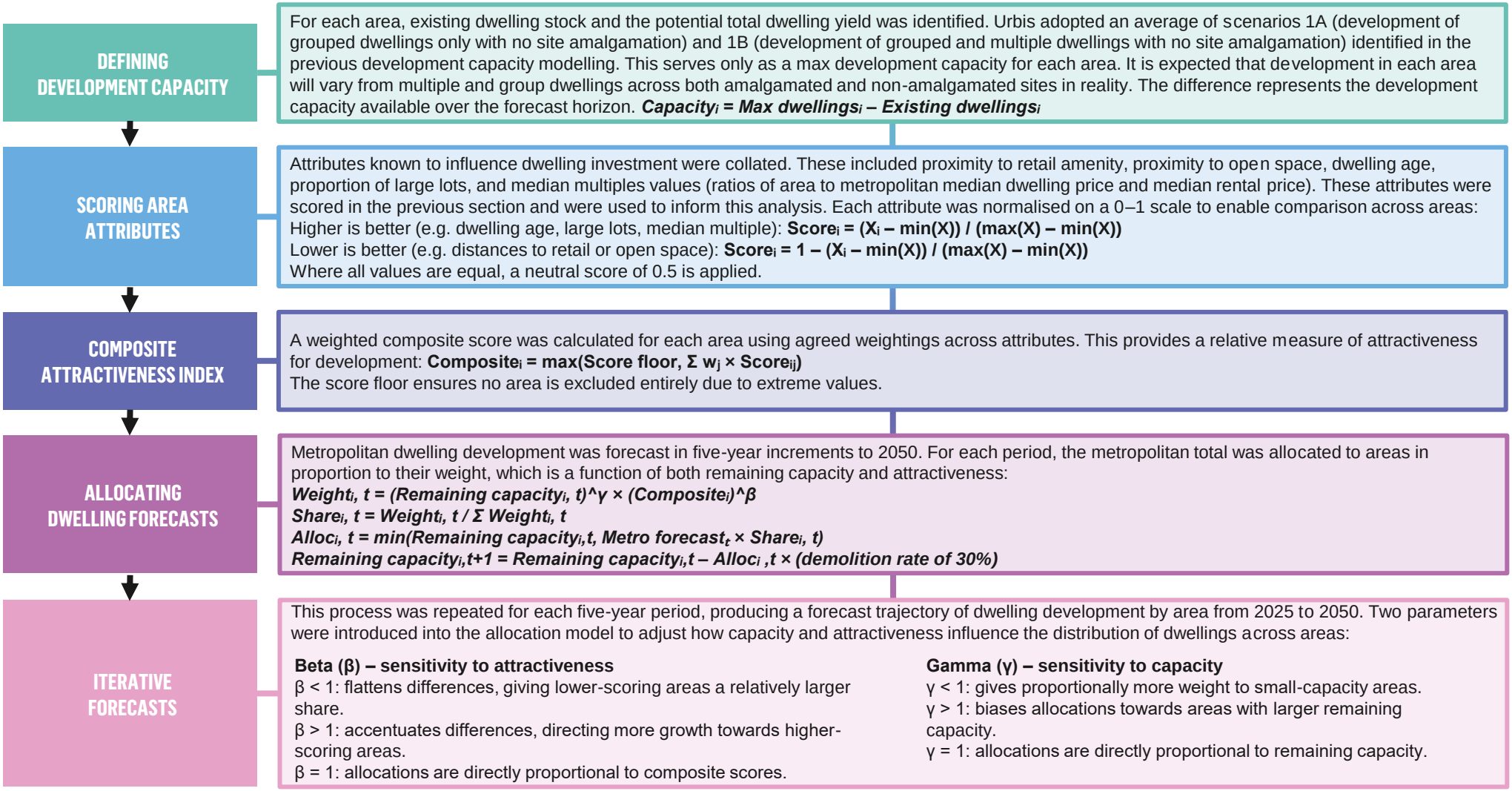
Source: ABS, RBA, Urbis
Note Average Household Income has been derived from SA1' s and has been inflated by the growth in the Wage Price Index to reflect current income levels*

07

IMPLICATIONS ANALYSIS AND RECOMMENDATIONS

DEVELOPMENT FORECASTING APPROACH

To forecast dwelling development in the proposed change areas, Urbis applied a structured capacity-constrained allocation model. This approach links metropolitan-wide dwelling forecasts to individual areas by considering both the development capacity and the relative attractiveness of each area for investment.



Source: Urbis

COMPOSITE SCORING

The composite scoring process found the Canning Beach Road – Applecross change area as the most attractive location for infill development, with a composite score of 0.78. In contrast, areas such as Harris Street in Bicton and Leach Highway were considered least desirable for infill development.

The composite scoring was calculated through the application of weightings which reflected those factors expected to most influence infill development activity. This is based on Urbis' experience supporting infill development across Perth and other capital cities for more than 30 years.

COMPOSITE SCORING

CHANGE AREA	COMPOSITE SCORE
Aurelian St To Leach Highway (Extension 2025)	0.40
Aurelian St To Leach Highway, Palmyra (Residential Density Change)	0.41
Bombard St & Mitchell St (Residential Density Change)	0.48
Booragoon Centre (East Adjacent Residential Density Change)	0.49
Booragoon Centre East (Extension 2025)	0.43
Brentwood Centre (Adjacent Residential Density Change)	0.43
Bristol Avenue (Adjacent Residential Density Change)	0.55
Bull Creek Local Centre (Adjacent Residential Density Change)	0.52
Canning Beach Road - Applecross (2025)	0.78
Coleman Cr & Woodley Cr, Melville (Residential Density Change)	0.46
Curruthers Rd To The Esplanade (2025)	0.46
Farrington Centre (Adjacent Residential Density Change)	0.54
Harris St (Extension 2025)	0.36
Harris St, Bicton (Adjacent Residential Density Change)	0.38
Kardinya Centre (Adjacent Residential Density Change)	0.50
Leach Hwy, Maddox Cr To Rome Rd (Dual Residential Density Codes)	0.38
Marmion St, Melville (Residential Density Change)	0.42
Marmion St, Myaree (Extension 2025)	0.40
Marmion St, Myaree (Residential Density Change)	0.44
North Lake Road, Alfred Cove (Adjacent Residential Density Change)	0.45
North Lake Road, Myaree (Extension 2025)	0.44
North Lake Road, Myaree (Residential Density Change)	0.44
North Lake Road, Willagee (Adjacent Residential Density Change)	0.31
Palmyra Local Centre (Adjacent Residential Density Change)	0.39
Riseley Centre (North Adjacent Residential Density Change)	0.61
River View Tce To The Esplanade (2025)	0.61
Robson Way, Murdoch (Zoning Change)	0.49
South St To Barclay Rd, Kardinya (Residential Density Change)	0.47
South Street (Further Investigation Area)	0.48
Winthrop Local Centre (Adjacent Residential Density Change)	0.56
Wireless Hill (East Adjacent Residential Density Change)	0.41

Source: Urbis

PARAMETER WEIGHTINGS

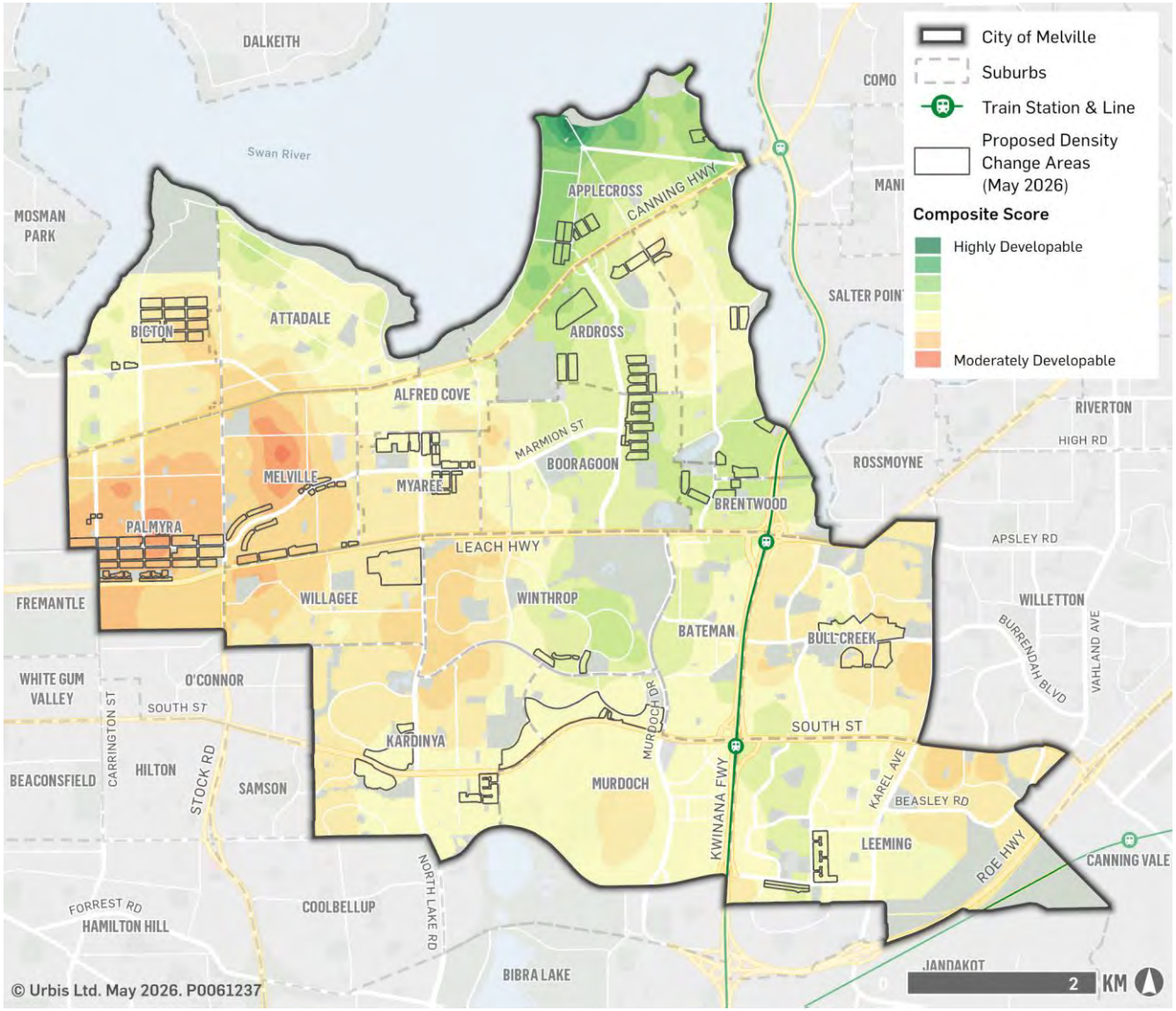
- **5%** Average of Proximity to Retail Score (%)
- **5%** Average of Proximity to Open Space (metres)
- **5%** Average of Proximity to Trains (metres)
- **5%** Average of Proximity to Buses (metres)
- **10%** Average of Area per Lot (sq.m)
- **40%** Median Multiple Property Values relative to Greater Perth
- **5%** Median Multiple Rental Values relative to Greater Perth
- **15%** Proportion of Stock Less than 15 years old (%)
- **10%** Proportion of lots less than 1,000 sq.m (%)

COMPOSITE SCORE MAPPING

Composite scoring for SA1's within the Melville LGA was undertaken to understand the relative developability of different parts of the City to support medium and high density. This analysis directly compares different SA1's in the City with each other based on the attributes known to influence dwelling investment (as highlighted in Section 5 of this report).

Areas close to activity centres, transport amenity and the Swan River scored as highly developable in comparison to other areas of the City. Areas such as Melville, Palmyra, Willagee and Alfred Cove have seen medium density predominantly, however they are not as well positioned to take advantage of success factors which support medium and high density development.

COMPOSITE SCORING MAP, CITY OF MELVILLE



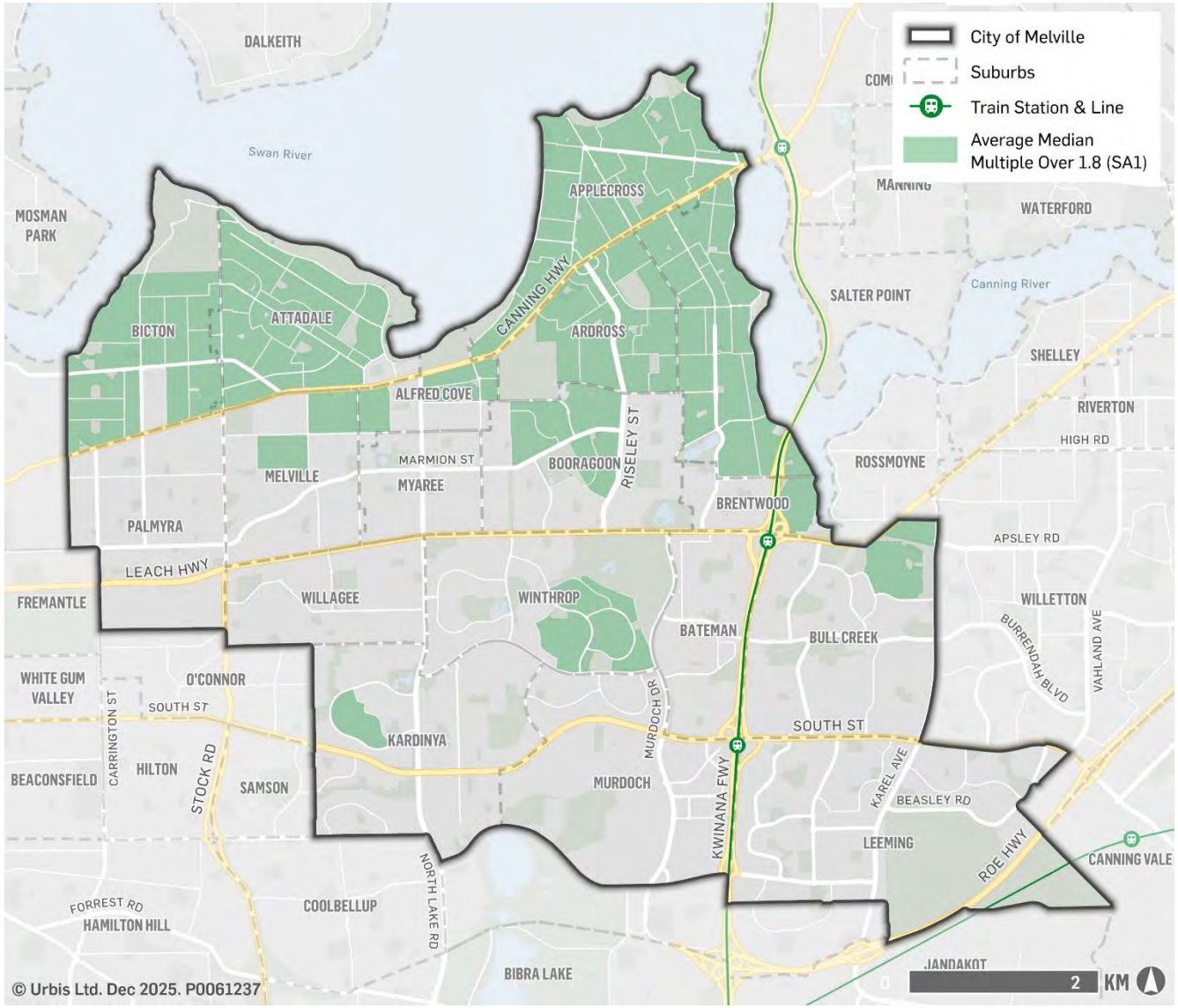
Source: Urbis

HIGH DENSITY DEVELOPMENT MAPPING

An average median multiple property value for each SA1 within the City of Melville was calculated. The SA1's with an average median multiple property value over 1.8 have been depicted in the map to right. These areas have property values high enough to support mid and high rise apartment development theoretically in line with the modelling in Section 5.

However, while these areas may support mid and high rise apartment development from a financial viability perspective, it is important to note that many of these areas such as Bicton, Attadale, Brentwood and Ardross currently lack the market depth to be able support development. Areas such as Mount Pleasant and Applecross, that have historically delivered this product, are expected to continue to deliver until their capacity runs out in the medium term, whereby these other areas may start to see more development. Winthrop and Kardinya have some pockets that could support viability from a financial perspective however they lack other fundamental locational attributes such as access to views and market depth, with their being a very limited market for apartments there currently.

SA1'S WITH AN AVERAGE MEDIAN MULTIPLE PROPERTY VALUE OVER 1.8, CITY OF MELVILLE



Source: Urbis, Pricefinder

REALISTIC RATE OF DEVELOPMENT

There are a number of factors which will influence whether the proposed zoning supports the scale of development capable to be delivered within each change area.

Key factors noted below, were core considerations when projecting development rates within each change area.

DEVELOPER INTENTIONS AND SITE CONSTRAINTS

The proposed zoning changes do not imply that sites are developed to their maximum yield. Due to factors such as land owner intentions, site attributes and market drivers, many areas within the City of Melville (and other LGAs) have predominantly experienced single and grouped dwellings (i.e. townhouses) rather than multiple dwellings (i.e. apartments) which would deliver a higher dwelling yield.

The lower rate of multiple dwelling applications versus grouped and single dwelling applications is reflected in a small sample size of data captured by the City of Melville below for January 2025 to September 2025.'

NO. SITES BY APPLICATION LODGED	ARDROSS	MELVILLE	WILLAGEE
Single	6 (60%)	9 (60%)	9 (50%)
Grouped	4 (40%)	6 (40%)	9 (50%)
Multiple	0 (0%)	0 (0%)	0 (0%)

Source: City of Melville

DEVELOPMENT FEASIBILITY AND AFFORDABILITY

There are a range of factors that may inhibit the ability of developers to deliver density.

Construction prices can constrain the ability of developers to develop at a desired rate, which may cause periods of inactivity. This consideration has been particularly relevant since COVID-19 which resulted in significant cost increases and capacity constraints.

It is also likely that developers will not always be able to secure suitably sized lots for infill development, with the same being true for their ability to coordinate the amalgamation of lots. A more probable outcome is that there will continue to be fragmented development outcomes across these change areas and low levels of site amalgamation.

TIME LAG

From the implementation of the proposed changes, the market is unlikely to react instantly. It is likely that developer activity will likely be induced around areas with proven interest and feasibility, such as the Canning Bridge Activity Centre and the Booragoon Centre.

For places where infill development is less proven (such as Leeming) developer activity may not occur at scale despite being feasible.

FORECAST DWELLING OUTCOMES

Taking into account the varied factors influencing development outcomes, Urbis projected development rates across all the change areas.

Overall, this analysis indicates that these areas could deliver approximately 4,388 additional dwellings (net) by 2050. It is anticipated that these dwellings would be delivered as a mix of grouped and multiple dwellings, occurring across both non-amalgamated and amalgamated sites within the proposed change areas.

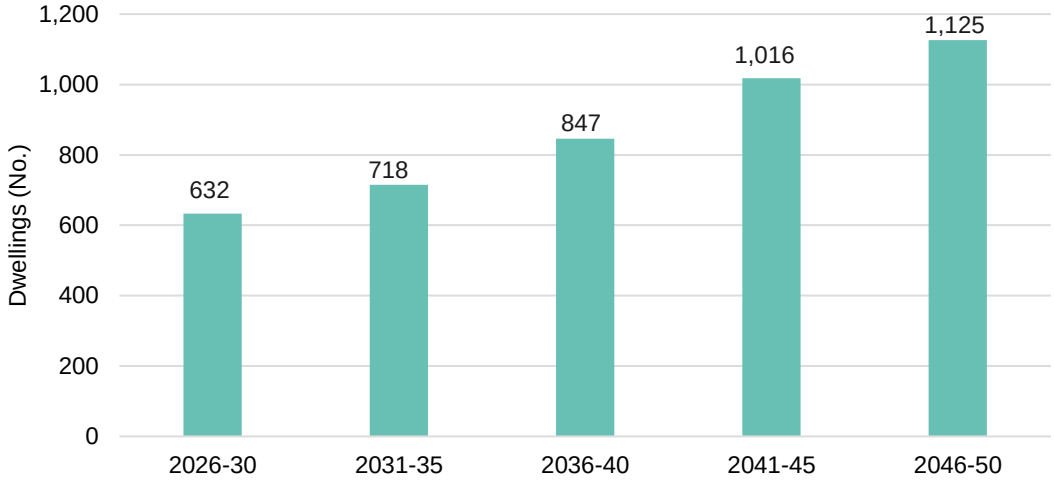
Development rates are anticipated to increase over time, reflecting rising land and property values, demographic shifts favouring infill living, the increasing desirability of established suburbs relative to outer-suburban locations, and the progressive reduction in greenfield land supply across the metropolitan area.

In comparison to other local governments such as the City of Nedlands and the City of Wanneroo, the redevelopment assumptions adopted for Melville are relatively optimistic (for example, these local governments have assumed that only around 30% and 26% respectively of rezoned sites will redevelop over a 20–25 year period).

Notwithstanding this comparison, there are several reasons to anticipate stronger redevelopment outcomes in the City of Melville, including:

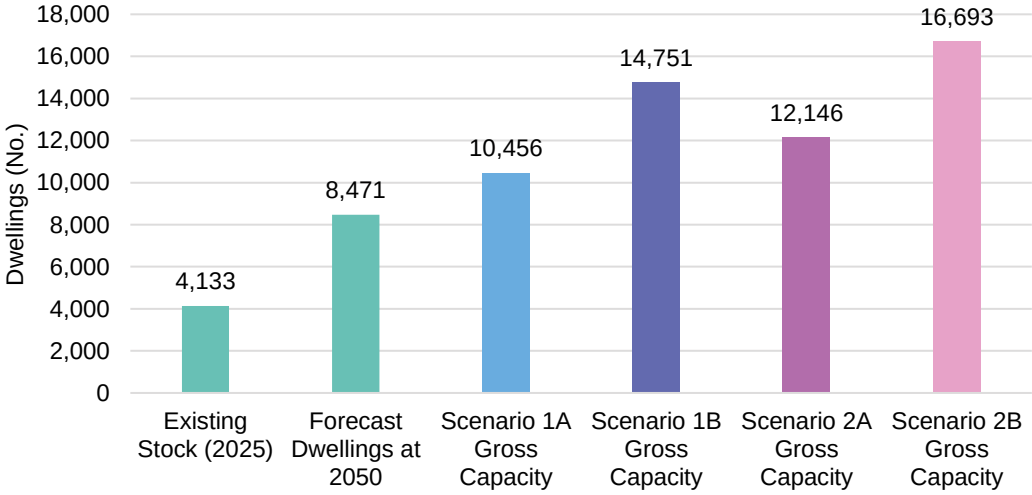
- Several of the change areas function as extensions of existing activity centres, where proximity to retail, employment and services continues to support stronger development interest and market absorption;
- The City of Melville has historically experienced higher levels of infill development than comparable inner-metropolitan local government (with an estimated increase of approximately 1,600 dwellings between 2021 and 2025, including around 1,000 apartments or grouped dwellings) which indicates established feasibility within many areas of the City for infill development;
- Where density settings have aligned with market conditions in Perth, redevelopment has occurred at rates closer to theoretical capacity, as seen in locations such as East Perth, Claisebrook and Nollamara, where favourable zoning, parcel characteristics and price points have supported sustained infill delivery; and
- Many of the change areas contain lot configurations and sizes that are conducive to incremental redevelopment (allowing both individual lot redevelopment and amalgamation opportunities).

NET DWELLING INCREASE ACROSS THE PROPOSED CHANGE AREAS, 2026 – 2050



Source: Urbis

FORECASTED DWELLINGS ACROSS THE PROPOSED CHANGE AREAS AND DEVELOPMENT CAPACITY



Source: Urbis

DWELLING TARGETS

The City of Melville's Local Planning Strategy (2016) and Local Housing Strategy (2018) estimate where dwelling growth is expected to occur in the City to 2031, in response to its dwelling targets set out in the Perth and Peel @ 3.5 million Sub-regional Framework. The City has now extrapolated the estimates to 2050 and has undertaken a review to track the progress of delivery in these areas to 2025.

A majority of development is expected to be delivered across activity centres and the Canning Highway Corridor (11,424 dwellings) with the remainder of development to be delivered across other areas of the City (7,056).

The upzoning of the proposed change areas is anticipated to deliver an additional 4,388 dwellings between 2025 and 2050 based on Urbis' forecasting. As such, the change areas will play a key role in helping the City achieving the State Governments infill targets.

CITY OF MELVILLE DWELLING TARGETS ANALYSIS

AREA	2011-2025 INCREASE (ACTUAL)	TARGETED ADDITIONAL DWELLINGS 2011-2031	TARGETED ADDITIONAL DWELLINGS 2011-2050
Canning Bridge	1,325	2,500	4,200
Melville City Centre	193	900	1,512
Riseley Centre	95	300	504
Willagee	272	1,200	2,016
Murdoch	0	700	1,176
Melville District Centre	26	500	840
Canning Highway Corridor	92	700	1,176
Other areas (Remainder of the City)	2,101	4,200	7,056
Total	**4,104**	**11,000**	**18,480 (overall target)**

Source: City of Melville, Department of Planning, Lands and Heritage Perth and Peel @3.5 million
Note Extrapolated target is for between the years of 2011 and 2050*

NET DWELLING INCREASES ACROSS PROPOSED CHANGE AREAS

CHANGE AREA	NET DWELLINGS 2026-30	NET DWELLINGS 2031-35	NET DWELLINGS 2036-40	NET DWELLINGS 2041-45	NET DWELLINGS 2046-50
Aurelian St To Leach Highway (Extension 2025)	2	2	1	1	1
Aurelian St To Leach Highway, Palmyra (Residential Density Change)	108	116	126	135	147
Bombard St & Mitchell St (Residential Density Change)	18	20	22	24	27
Booragoon Centre (East Adjacent Residential Density Change)	37	43	52	61	74
Booragoon Centre East (Extension 2025)	18	18	18	17	17
Brentwood Centre (Adjacent Residential Density Change)	23	23	23	22	22
Bristol Avenue (Adjacent Residential Density Change)	3	4	4	5	5
Bull Creek Local Centre (Adjacent Residential Density Change)	60	79	106	142	195
Canning Beach Road - Applecross (2025)	4	7	11	16	0
Coleman Cr & Woodley Cr, Melville (Residential Density Change)	9	9	9	9	9
Curruthers Rd To The Esplanade (2025)	1	1	1	0	0
Farrington Centre (Adjacent Residential Density Change)	34	43	57	76	104
Harris St (Extension 2025)	4	3	2	2	1
Harris St, Bicton (Adjacent Residential Density Change)	0	0	0	0	0
Kardinya Centre (Adjacent Residential Density Change)	47	57	71	88	111
Leach Hwy, Maddox Cr To Rome Rd (Dual Residential Density Codes)	19	17	15	13	11
Marmion St, Melville (Residential Density Change)	5	5	4	3	3
Marmion St, Myaree (Extension 2025)	7	6	5	5	4
Marmion St, Myaree (Residential Density Change)	7	7	6	6	6
North Lake Road, Alfred Cove (Adjacent Residential Density Change)	9	9	9	8	8
North Lake Road, Myaree (Extension 2025)	4	3	3	3	2
North Lake Road, Myaree (Residential Density Change)	9	9	8	8	7
North Lake Road, Willagee (Adjacent Residential Density Change)	20	14	10	7	4
Palmyra Local Centre (Adjacent Residential Density Change)	1	1	1	0	0
Riseley Centre (North Adjacent Residential Density Change)	37	54	83	128	76
River View Tce To The Esplanade (2025)	1	1	1	1	1
Robson Way, Murdoch (Zoning Change)	2	2	2	2	2
South St To Barclay Rd, Kardinya (Residential Density Change)	16	17	19	20	22
South Street (Further Investigation Area)	85	104	131	164	209
Winthrop Local Centre (Adjacent Residential Density Change)	13	16	20	25	33
Wireless Hill (East Adjacent Residential Density Change)	29	28	27	25	24
Total	**632**	**718**	**847**	**1,016**	**1,125**

Source: Urbis

FORECASTED DWELLINGS AND DEVELOPMENT CAPACITY

CHANGE AREA	EXISTING STOCK (2025)	FORECAST DWELLINGS AT 2050	SCENARIO 1A GROSS CAPACITY	SCENARIO 1B GROSS CAPACITY	SCENARIO 2A GROSS CAPACITY	SCENARIO 2B GROSS CAPACITY
Aurelian St to Leach Highway (extension 2025)	30	37	57	84	69	97
Aurelian St to Leach Highway, Palmyra (Residential density change)	559	1,191	1,666	2,413	1,911	2,693
Bombard St & Mitchell St (Residential density change)	110	221	280	422	331	466
Booragoon Centre (East adjacent residential density change)	213	480	537	826	648	915
Booragoon Centre East (extension 2025)	153	241	349	504	417	587
Brentwood Centre (Adjacent residential density change)	149	262	393	587	462	651
Bristol Avenue (Adjacent residential density change)	19	40	52	73	60	84
Bullcreek Local Centre (Adjacent Residential Density Change)	285	867	819	1,135	897	1,267
Canning Beach Road - Applecross (2025)	14	52	52	52	59	59
Coleman Cr & Woodley Cr, Melville (Residential density change)	99	144	186	282	237	335
Curruthers Rd to The Esplanade (2025)	19	22	33	33	40	40
Farrington Centre (Adjacent residential density change)	156	470	458	629	509	718
Harris St (extension 2025)	387	399	468	468	557	557
Harris St, Bicton (Adjacent residential density change)	4	4	6	10	9	12
Kardinya Centre (Adjacent Residential Density Change)	223	597	649	947	746	1,052
Leach Hwy, Maddox Cr to Rome Rd (Dual residential density codes)	146	221	431	492	497	559
Marmion St, Melville (Residential density change)	51	71	112	162	132	189
Marmion St, Myaree (extension 2025)	58	85	150	217	180	254
Marmion St, Myaree (Residential density change)	42	74	122	174	137	195
North Lake Road, Alfred Cove (Adjacent Residential Density Change)	73	116	162	254	203	286
North Lake Road, Myaree (extension 2025)	37	52	80	116	95	135
North Lake Road, Myaree (Residential density change)	61	102	161	239	193	272
North Lake Road, Willagee (Adjacent Residential Density Change)	215	270	512	727	606	856
Palmyra Local Centre (Adjacent residential density change)	7	10	24	36	27	39
Riseley Centre (North adjacent residential density change)	129	507	409	607	466	656
River View Tce to The Esplanade (2025)	52	57	60	60	84	84
Robson Way, Murdoch (Zoning change)	6	16	35	50	37	52
South St to Barclay Rd, Kardinya (Residential density change)	99	193	264	377	306	432
South Street (Further investigation area)	455	1,148	1,223	1,737	1,428	2,017
Winthrop Local Centre (Adjacent Residential Density Change)	59	166	174	244	195	275
Wireless Hill (East adjacent residential density change)	223	356	532	794	608	859
	4,133	**8,471**	**10,456**	**14,751**	**12,146**	**16,693**

Source: Urbis

FORECASTED DWELLINGS INCREASE AND BUILD OUT CAPACITY BETWEEN 2025 AND 2050

CHANGE AREA	DWELLING INCREASE (NO.)	DWELLING INCREASE (%)	CAPACITY	INDICATIVE BUILDOUT PROPORTION
Aurelian St to Leach Highway (extension 2025)	7	24%	41	18%
Aurelian St to Leach Highway, Palmyra (Residential density change)	632	113%	1,481	43%
Bombard St & Mitchell St (Residential density change)	111	102%	241	46%
Booragoon Centre (East adjacent residential density change)	267	125%	469	57%
Booragoon Centre East (extension 2025)	88	58%	274	32%
Brentwood Centre (Adjacent residential density change)	113	76%	341	33%
Bristol Avenue (Adjacent residential density change)	21	109%	44	48%
Bullcreek Local Centre (Adjacent Residential Density Change)	582	204%	692	>80%
Canning Beach Road - Applecross (2025)	38	271%	38	>80%
Coleman Cr & Woodley Cr, Melville (Residential density change)	45	47%	135	34%
Curruthers Rd to The Esplanade (2025)	3	15%	14	21%
Farrington Centre (Adjacent residential density change)	314	201%	388	>80%
Harris St (extension 2025)	12	3%	81	15%
Harris St, Bicton (Adjacent residential density change)	0	10%	4	10%
Kardinya Centre (Adjacent Residential Density Change)	374	168%	575	65%
Leach Hwy, Maddox Cr to Rome Rd (Dual residential density codes)	75	50%	316	23%
Marmion St, Melville (Residential density change)	20	39%	86	23%
Marmion St, Myaree (extension 2025)	27	48%	126	22%
Marmion St, Myaree (Residential density change)	32	74%	106	29%
North Lake Road, Alfred Cove (Adjacent Residential Density Change)	43	59%	135	32%
North Lake Road, Myaree (extension 2025)	15	42%	61	26%
North Lake Road, Myaree (Residential density change)	41	68%	139	30%
North Lake Road, Willagee (Adjacent Residential Density Change)	55	25%	405	14%
Palmyra Local Centre (Adjacent residential density change)	3	48%	23	15%
Riseley Centre (North adjacent residential density change)	378	294%	379	>80%
River View Tce to The Esplanade (2025)	5	7%	8	47%
Robson Way, Murdoch (Zoning change)	10	197%	37	32%
South St to Barclay Rd, Kardinya (Residential density change)	94	95%	222	42%
South Street (Further investigation area)	693	152%	1,025	67%
Winthrop Local Centre (Adjacent Residential Density Change)	107	180%	150	71%
Wireless Hill (East adjacent residential density change)	133	59%	440	30%

Source: Urbis
** This is a comparison of forecasted dwellings and the average between the development capacity for Scenario's 1A and 1B.*

08

APPENDICES

PROPOSED CHANGE AREAS – TOTAL AREA

CHANGE AREA	TOTAL AREA OF LOTS (HA)
Aurelian St To Leach Highway (Extension 2025)	1.5
Aurelian St To Leach Highway, Palmyra (Residential Density Change)	42.3
Bombard St & Mitchell St (Residential Density Change)	7.3
Booragoon Centre (East Adjacent Residential Density Change)	14.4
Booragoon Centre East (Extension 2025)	9.3
Brentwood Centre (Adjacent Residential Density Change)	10.2
Bristol Avenue (Adjacent Residential Density Change)	1.3
Bull Creek Local Centre (Adjacent Residential Density Change)	20.7
Canning Beach Road - Applecross (2025)	1.8
Coleman Cr & Woodley Cr, Melville (Residential Density Change)	5.3
Curruthers Rd To The Esplanade (2025)	1.8
Farrington Centre (Adjacent Residential Density Change)	11.2
Harris St (Extension 2025)	25.5
Harris St, Bicton (Adjacent Residential Density Change)	0.2
Kardinya Centre (Adjacent Residential Density Change)	16.5
Leach Hwy, Maddox Cr To Rome Rd (Dual Residential Density Codes)	7.5
Marmion St, Melville (Residential Density Change)	3.0
Marmion St, Myaree (Extension 2025)	4.0
Marmion St, Myaree (Residential Density Change)	3.1
North Lake Road, Alfred Cove (Adjacent Residential Density Change)	4.5
North Lake Road, Myaree (Extension 2025)	2.1
North Lake Road, Myaree (Residential Density Change)	4.3
North Lake Road, Willagee (Adjacent Residential Density Change)	14.2
Palmyra Local Centre (Adjacent Residential Density Change)	0.6
Riseley Centre (North Adjacent Residential Density Change)	10.3
River View Tce To The Esplanade (2025)	3.8
Robson Way, Murdoch (Zoning Change)	0.8
South St To Barclay Rd, Kardinya (Residential Density Change)	6.8
South Street (Further Investigation Area)	31.5
Winthrop Local Centre (Adjacent Residential Density Change)	4.3
Wireless Hill (East Adjacent Residential Density Change)	13.6
Total	**284.0**

Source: Urbis

INFILL DEVELOPMENT SUCCESS FACTORS LITERATURE REVIEW

INFILL DEVELOPMENT SUCCESS FACTORS LITERATURE REVIEW

SOURCE	LAND USE FACTOR/S	DESCRIPTION
Lee, Bun Song, Eui-Chul Chung, and Yong Hyun Kim. 2005. "Dwelling Age, Redevelopment, and Housing Prices: The Case of Apartment Complexes in Seoul." The Journal of Real Estate Finance and Economics 30 (1): 55–80.	Age of Stock	The article highlighted that as dwellings age, the option value associated with redeveloping a site increases over time. As buildings become older, they often experience functional obsolescence and require higher maintenance costs, which reduces the relative value of retaining the existing structure. When this occurs alongside rising land values, the underlying land becomes a more significant component of the property's total value. In these circumstances, redevelopment becomes increasingly attractive, as the potential return from replacing the existing building with a higher-value or more intensive use is likely to outweigh the benefits of maintaining the current dwelling. As a result, older structures are more likely to be demolished and replaced, particularly in locations where land values are growing and planning settings allow for greater development intensity.
Allan, Andrew, Ali Soltani, Mohammad Hamed Abdi, and Melika Zarei. 2022. "Driving Forces behind Land Use and Land Cover Change: A Systematic and Bibliometric Review" Land 11, no. 8: 1222.	Accessibility to Retail, Accessibility to Open Space, Transport Accessibility, Property Values and Rent Prices	This paper is based on reviewing the literature in the past 10 years on the drivers of land use and land cover change (LULCC) in urban areas. From their review, Allan et al highlighted that there are four main driving themes which drive land use change; urban growth factors, policy and regulation factors, economic and financial factors and contextual factors. These themes then have sub-themes and actual land use factors attributed to them which drive land use change. Accessibility to retail, accessibility to open space, transport accessibility, property values and rent prices were all identified as land use factors that help drive land use change.
Nuissl, H., and Siedentop, S. 2021. Urbanisation and Land Use Change. In: Weith, T., Barkmann, T., Gaasch, N., Rogga, S., Strauß, C., Zscheischler, J. (eds) Sustainable Land Management in a European Context. Human-Environment Interactions, vol 8. Springer, Cham.	Accessibility to Retail, Transport Accessibility, Property Values	This literature highlights the role of land use change in driving urbanisation. It identifies land values, proximity to urban centres and transport, demographic factors and policy measures as key influences on land use change. Together, these factors shape the attractiveness and viability of different locations, guiding where land use change is most likely to occur and how urban development evolves over time.
Bourne, L. S. 1969. "Location Factors in the Redevelopment Process: A Model of Residential Change." Land Economics 45, no. 2 : 183–93.	Accessibility, Property Values, Rental Prices, Age of Stock and Lot Sizes	The paper examines factors influencing redevelopment in large metropolitan areas, identifying three key spatial levels: region, area and site. Regional factors relate to the broader urban structure and accessibility, area-level factors reflect neighbourhood conditions and socio-economic characteristics such as rent and income, and site-level factors focus on individual property attributes such as land costs, size and land availability.
Rowley, S. and Phibbs, P. (2012) Delivering diverse and affordable housing on infill development sites, AHURI Final Report No.193. Melbourne: Australian Housing and Urban Research Institute.	Accessibility to Retail, Transport Accessibility, Property Values, Rental Prices and Lot Sizes	Using Perth and Sydney as case studies and a comparison of extremes in relation to the delivery of density, this study highlights what the barriers to infill development are and makes some suggestions to enable the delivery of diverse and affordable housing. The report identifies several barriers limiting housing delivery on infill sites in these cities, including complex planning regulations, lengthy approvals, fragmented land ownership, high land and construction costs, and community opposition to higher density. Infrastructure constraints and feasibility challenges further discourage development. To enable delivery, the report recommends clearer and more consistent zoning, streamlined planning processes, improved infrastructure coordination, and the use of government land, incentives, and partnerships to support affordable housing outcomes.

Source: Various

2025 REPORT

2025 REPORT FINDINGS

The following pages have been extracted from the 2025 report and collectively document all previous investigations undertaken by the City as part of the local planning scheme review process. These pages consolidate the full suite of analysis prepared to inform the proposed density change areas examined during 2024 and 2025.

In addition, the material includes investigations into the potential upzoning of the Petra Street and Bull Creek District Centres, the Murdoch and Bull Creek Train Station precincts, and a number of identified opportunity areas. The opportunity areas referenced in this material have since been formally adopted as part of the 2026 review of this report.

PROPOSED CHANGE AREAS

The City of Melville in its review of its local planning scheme has identified a number of potential change areas. These areas have been identified as either having:

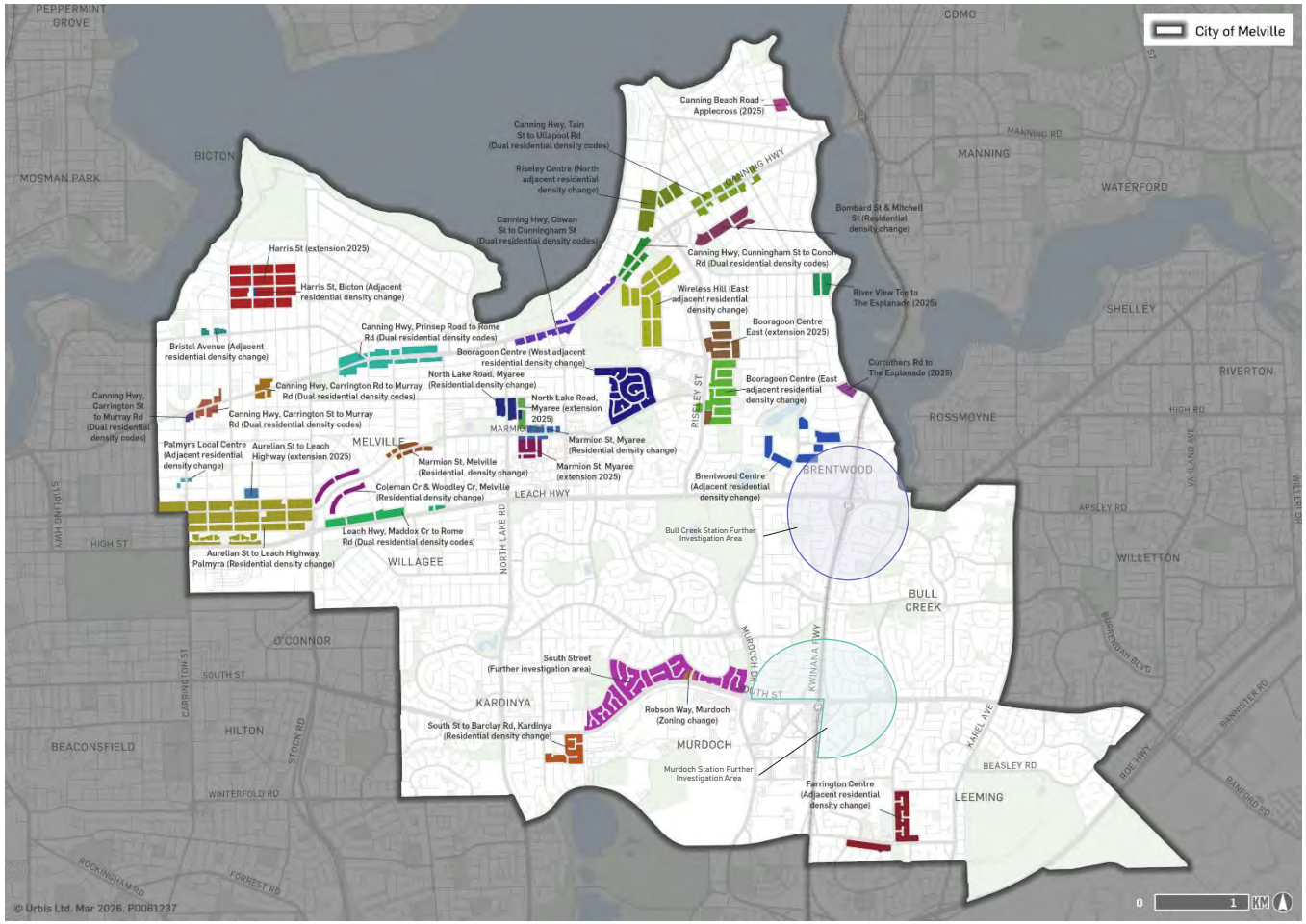
- Potential to support additional density; or
- Potential to be rezoned to a different zone under the planning scheme.

The areas have been identified over the course of the last two years and have been depicted to the right. Proposals were published by the City in 2024 and work is ongoing to refine these with input from a variety of technical reports (including this report). In response to specific requests from the community, the City has recommended a number of additional density change areas, in addition to those previously advertised, these being denoted with 2025.

Urbis understands that at the time of preparing this report the City is engaged with the City's Elected Members to discuss a variety of additional changes, including possible removal of some areas and inclusion of others. At the request of the City, a number of potential 'opportunity areas' in the southern portion of Melville have been considered in the attached appendix and may ultimately form part of the City's recommended approach. As a result, the body of this report focuses on the density changes advertised in 2024, as well as the '2025' changes made in response.

The Murdoch Station and Bull Creek Station Further Investigation Area's (FIA's) have been partially included in some analysis however it is acknowledged that these areas are privy to further discussion and analysis by the City. Development capacity modelling for the station precincts and the South Street FIA can be found in the appendix of this report.

PROPOSED CHANGE AREAS, CITY OF MELVILLE



Source: City of Melville, Urbis

PROPOSED CHANGE AREAS

PROPOSED R CODING CHANGES

CHANGE AREA	PROPOSED CHANGES IN R CODING
Aurelian St To Leach Highway (Extension 2025)	R20 to R40
Aurelian St To Leach Highway, Palmyra (Residential Density Change)	R20 to R40
Bombard St & Mitchell St (Residential Density Change)	R20 to R40
Booragoon Centre (East Adjacent Residential Density Change)	R20 to R50 R40 to R50
Booragoon Centre (West Adjacent Residential Density Change)	R20 to R40 R20 to R60 R20 to R100 R40 to R60 R40 to R100
Booragoon Centre East (Extension 2025)	R20 to R40 R20 to R50 R40 to R50
Brentwood Centre (Adjacent Residential Density Change)	R20 to R40 R25 to R40
Bristol Avenue (Adjacent Residential Density Change)	R17.5 to R40
Bull Creek Station Catchment (Further Investigation Area)	To Be Determined
Canning Beach Road - Applecross (2025)	R12.5 to R30
Canning Hwy, Carrington St To Murray Rd (Dual Residential Density Codes)	R30/40 to R40/80 R40 to R40/80 R50 to R40/80
Canning Hwy, Cowan St To Cunningham St (Dual Residential Density Codes)	R20 to R60 R20 to R20/60
Canning Hwy, Cunningham St To Conon Rd (Dual Residential Density Codes)	R40 to R80 R40 to R40/80
Canning Hwy, Prinsep Road To Rome Rd (Dual Residential Density Codes)	R30/40 to R40 R30/40 to R40/80 R40 to R40/80

CHANGE AREA	PROPOSED CHANGES IN R CODING
Canning Hwy, Tain St To Ullapool Rd (Dual Residential Density Codes)	R40/60 to R40/100 R60 to R40/80 R60 to R40/100
Coleman Cr & Woodley Cr, Melville (Residential Density Change)	R20 to R40
Curruthers Rd To The Esplanade (2025)	R12.5 to R20
Farrington Centre (Adjacent Residential Density Change)	R20 to R40 R30 to R40
Harris Street (Extension 2025)	R15 to R20 R17.5 to R20 R20 to R40
Harris St, Bicton (Adjacent Residential Density Change)	R17.5 to R40
Leach Hwy, Maddox Cr To Rome Rd (Dual Residential Density Codes)	R40 to R20/60
Marmion St, Melville (Residential Density Change)	R20 to R40
Marmion St, Myaree (Extension 2025)	R20 to R40
Marmion St, Myaree (Residential Density Change)	R20 to R40
Murdoch Station Catchment (Further Investigation Area)	To Be Determined
North Lake Road, Myaree (Extension 2025)	R20 to R40 R25 to R40
North Lake Road, Myaree (Residential Density Change)	R20 to R40
Palmyra Local Centre (Adjacent Residential Density Change)	R20 to R40
Riseley Centre (North Adjacent Residential Density Change)	R15 to R40
River View Tce To The Esplanade (2025)	R12.5 to R20
Robson Way, Murdoch (Zoning Change)	R20 to R40
South St To Barclay Rd, Kardinya (Residential Density Change)	R25 to R40
South Street (Further Investigation Area)	To Be Determined
Wireless Hill (East Adjacent Residential Density Change)	R20 to R40

Source: City of Melville

Note the R code change for the Murdoch and Bull Creek Station Precincts is yet to be properly determined yet by the City. Development capacity modelling for these precincts can be found in the appendix of this report based on indicative changes from the City however these are preliminary and have been done for research purposes only.*

HYPOTHETICAL DEVELOPMENT CAPACITY FINDINGS

Analysis of the scenarios highlights the significant differences in capacity under each set of assumptions.

This analysis helped inform the parameters upon which the dwelling forecasts were modelled.

A detailed breakdown of dwelling capacities by scenario and approach can be found on the following pages.

SCENARIO 1A FINDINGS

11,787 Total Development Capacity across Proposed Change Areas

+8,002 Net Additional Dwellings from Existing Count of Dwellings

218% Average Density Uplift across the Proposed Change Areas

SCENARIO 1B FINDINGS

15,806 Total Development Capacity across Proposed Change Areas

+12,021 Net Additional Dwellings from Existing Count of Dwellings

327% Average Density Uplift across the Proposed Change Areas

SCENARIO 2A FINDINGS

13,295 Total Development Capacity across Proposed Change Areas

+9,510 Net Additional Dwellings from Existing Count of Dwellings

260% Average Density Uplift across the Proposed Change Areas

SCENARIO 2B FINDINGS

17,479 Total Development Capacity across Proposed Change Areas

+13,694 Net Additional Dwellings from Existing Count of Dwellings

374% Average Density Uplift across the Proposed Change Areas

Source: Urbis

Note This analysis excludes FIAs given they have not had a proposed change to the R codings.*

DEVELOPMENT CAPACITY FINDINGS

CHANGE AREA	EXISTING DWELLINGS	SCENARIO 1A		SCENARIO 1B		SCENARIO 2A		SCENARIO 2B	
		DWELLING CAPACITY	UPLIFT FROM EXISTING DWELLINGS	DWELLING CAPACITY	UPLIFT FROM EXISTING DWELLINGS	DWELLING CAPACITY	UPLIFT FROM EXISTING DWELLINGS	DWELLING CAPACITY	UPLIFT FROM EXISTING DWELLINGS
Aurelian St to Leach Highway (extension 2025)	30	57	90%	84	180%	69	130%	97	223%
Aurelian St to Leach Highway, Palmyra (Residential density change)	559	1,666	198%	2,413	332%	1,911	242%	2,693	382%
Bombard St & Mitchell St (Residential density change)	110	280	155%	422	284%	331	201%	466	324%
Booragoon Centre (East adjacent residential density change)	213	732	244%	826	288%	795	273%	917	331%
Booragoon Centre (West adjacent residential density change)	246	1,060	331%	1,458	493%	1,162	372%	1,582	543%
Booragoon Centre East (extension 2025)	166	475	186%	564	240%	537	223%	658	296%
Brentwood Centre (Adjacent residential density change)	149	393	164%	587	294%	462	210%	651	337%
Bristol Avenue (Adjacent residential density change)	19	52	174%	73	284%	60	216%	84	342%
Canning Beach Road - Applecross (2025)	14	52	271%	52	271%	59	321%	59	321%
Canning Hwy, Carrington St to Murray Rd (Dual residential density codes)	72	561	679%	718	897%	583	710%	750	942%

Source: Urbis

DEVELOPMENT CAPACITY FINDINGS

CHANGE AREA	EXISTING DWELLINGS	SCENARIO 1A		SCENARIO 1B		SCENARIO 2A		SCENARIO 2B	
		DWELLING CAPACITY	UPLIFT FROM EXISTING DWELLINGS	DWELLING CAPACITY	UPLIFT FROM EXISTING DWELLINGS	DWELLING CAPACITY	UPLIFT FROM EXISTING DWELLINGS	DWELLING CAPACITY	UPLIFT FROM EXISTING DWELLINGS
Canning Hwy, Cowan St To Cunningham St (Dual Residential Density Codes)	126	550	337%	630	400%	617	390%	690	448%
Canning Hwy, Cunningham St To Conon Rd (Dual Residential Density Codes)	81	372	359%	483	496%	409	405%	523	546%
Canning Hwy, Prinsep Road To Rome Rd (Dual Residential Density Codes)	182	951	423%	1,256	590%	1,026	464%	1,337	635%
Canning Hwy, Tain St To Ullapool Rd (Dual Residential Density Codes)	122	731	499%	1,006	725%	768	530%	1,046	757%
Coleman Cr & Woodley Cr, Melville (Residential Density Change)	99	186	88%	282	185%	237	139%	335	238%
Curruthers Rd To The Esplanade (2025)	19	33	74%	33	74%	40	111%	40	111%
Farrington Centre (Adjacent Residential Density Change)	156	458	194%	629	303%	509	226%	718	360%
Harris St (Extension 2025)	387	468	21%	468	21%	557	44%	557	44%
Harris St, Bicton (Adjacent Residential Density Change)	4	6	50%	10	150%	9	125%	12	200%
Leach Hwy, Maddox Cr To Rome Rd (Dual Residential Density Codes)	146	431	195%	492	237%	497	240%	559	283%
Marmion St, Melville (Residential Density Change)	51	112	120%	162	218%	132	159%	189	271%
Marmion St, Myaree (Extension 2025)	58	150	159%	217	274%	180	210%	254	338%

Source: Urbis

DEVELOPMENT CAPACITY FINDINGS

CHANGE AREA	EXISTING DWELLINGS	SCENARIO 1A		SCENARIO 1B		SCENARIO 2A		SCENARIO 2B	
		DWELLING CAPACITY	UPLIFT FROM EXISTING DWELLINGS	DWELLING CAPACITY	UPLIFT FROM EXISTING DWELLINGS	DWELLING CAPACITY	UPLIFT FROM EXISTING DWELLINGS	DWELLING CAPACITY	UPLIFT FROM EXISTING DWELLINGS
Marmion St, Myaree (Residential Density Change)	42	122	190%	174	314%	137	226%	195	364%
North Lake Road, Myaree (Extension 2025)	37	80	116%	116	214%	95	157%	135	265%
North Lake Road, Myaree (Residential Density Change)	61	161	164%	239	292%	193	216%	272	346%
Palmyra Local Centre (Adjacent Residential Density Change)	7	24	243%	36	414%	27	286%	39	457%
Riseley Centre (North Adjacent Residential Density Change)	129	409	217%	607	371%	466	261%	656	409%
River View Tce To The Esplanade (2025)	52	60	15%	60	15%	84	62%	84	62%
Robson Way, Murdoch (Zoning Change)	6	35	483%	50	733%	37	517%	52	767%
South St To Barclay Rd, Kardinya (Residential Density Change)	99	264	167%	377	281%	306	209%	432	336%
Wireless Hill (East Adjacent Residential Density Change)	343	856	150%	1,282	274%	983	187%	1388	305%

Source: Urbis

SUCCESS FACTORS SCORING

INFILL SUCCESS FACTOR SCORING, PROPOSED CHANGE AREAS

PROPOSED CHANGE AREAS	SCORE / DEVELOPMENT VIABILITY	AVERAGE OF PROXIMITY TO RETAIL AND SIZE OF NEAREST RETAIL	AVERAGE OF PROXIMITY TO OPEN SPACE (METRES)	AVERAGE OF PROXIMITY TO BUSES (METRES)	AVERAGE OF PROXIMITY TO TRAINS (METRES)	MEDIAN MULTIPLE PROPERTY VALUES RELATIVE TO GREATER PERTH	MEDIAN MULTIPLE RENTAL VALUES RELATIVE TO GREATER PERTH	PROPORTION OF STOCK LESS THAN 15 YEARS OLD (%)	PROPORTION OF LOTS GREATER THAN THAN 1,000 SQ.M (%)
Scoring Measures	**-**	**Greater than 80% = Strong, Between 50% - 80% = Moderate, Less than 50% = Low**	**Less than 200m = Strong, Between 200-500m = Moderate, More than 500m = Low**	**Less than 200m = Strong, Between 200-500m = Moderate, More than 500m = Low**	**Less than 1.5km = Strong, between 1.5-3km = Moderate, More than 3km = Low**	**Greater than 1.8 = Strong, Between 1.4 - 1.8 = Moderate, Less than 1.4 = Low**	**Greater than 1.3 = Strong, Between 1.1 - 1.3 = Moderate, Less than 1.1 = Low**	**Less than 15% = Strong, Between 15-30% = Moderate, More than 30% = Low**	**More than 40% = Strong (More Available Sites to Develop), Between 20-40% = Moderate, Less than 20% = Low (Less Available Sites to Develop)**
Aurelian St To Leach Highway (Extension 2025)	Score	5%	205	178	3,696	1.60	1.10	0.0%	13.3%
	Development Viability	Low	Moderate	Strong	Low	Moderate	Moderate	Strong	Low
Aurelian St To Leach Highway, Palmyra (Residential Density Change)	Score	37%	91	118	3,729	1.37	1.10	2.9%	34.1%
	Development Viability	Low	Strong	Strong	Low	Low	Moderate	Strong	Moderate
Bombard St & Mitchell St (Residential Density Change)	Score	38%	76	267	1,862	2.06	1.39	8.7%	26.4%
	Development Viability	Low	Strong	Moderate	Moderate	Strong	Strong	Strong	Moderate
Booragoon Centre East (Adjacent Residential Density Change)	Score	100%	115	148	1,802	1.71	1.32	35.0%	2.8%
	Development Viability	Strong	Strong	Strong	Moderate	Moderate	Strong	Low	Low
Booragoon Centre West (Adjacent Residential Density Change)	Score	100%	119	126	2,643	2.14	1.25	1.2%	8.1%
	Development Viability	Strong	Strong	Strong	Moderate	Strong	Moderate	Strong	Low
Booragoon Centre East (Extension 2025)	Score	100%	137	122	2,147	1.85	1.25	54.0%	1.8%
	Development Viability	Strong	Strong	Strong	Moderate	Strong	Moderate	Low	Low

Source: Urbis, Pricefinder, Landgate, Department of Planning Lands and Heritage

SUCCESS FACTORS SCORING

INFILL SUCCESS FACTOR SCORING, PROPOSED CHANGE AREAS

PROPOSED CHANGE AREAS	SCORE / DEVELOPMENT VIABILITY	AVERAGE OF PROXIMITY TO RETAIL AND SIZE OF NEAREST RETAIL	AVERAGE OF PROXIMITY TO OPEN SPACE (METRES)	AVERAGE OF PROXIMITY TO BUSES (METRES)	AVERAGE OF PROXIMITY TO TRAINS (METRES)	MEDIAN MULTIPLE PROPERTY VALUES RELATIVE TO GREATER PERTH	MEDIAN MULTIPLE RENTAL VALUES RELATIVE TO GREATER PERTH	PROPORTION OF STOCK LESS THAN 15 YEARS OLD (%)	PROPORTION OF LOTS GREATER THAN THAN 1,000 SQ.M (%)
Scoring Measures	**-**	**Greater than 80% = Strong, Between 50% - 80% = Moderate, Less than 50% = Low**	**Less than 200m = Strong, Between 200-500m = Moderate, More than 500m = Low**	**Less than 200m = Strong, Between 200-500m = Moderate, More than 500m = Low**	**Less than 1.5km = Strong, between 1.5-3km = Moderate, More than 3km = Low**	**Greater than 1.8 = Strong, Between 1.4 - 1.8 = Moderate, Less than 1.4 = Low**	**Greater than 1.3 = Strong, Between 1.1 - 1.3 = Moderate, Less than 1.1 = Low**	**Less than 15% = Strong, Between 15-30% = Moderate, More than 30% = Low**	**More than 40% = Strong (More Available Sites to Develop), Between 20-40% = Moderate, Less than 20% = Low (Less Available Sites to Develop)**
Brentwood Centre (Adjacent Residential Density Change)	Score	100%	108	188	819	1.72	1.39	61.0%	18.1%
	Development Viability	Strong	Strong	Strong	Strong	Moderate	Strong	Low	Low
Bristol Avenue (Adjacent Residential Density Change)	Score	88%	89	50	2,881	2.58	1.18	0.0%	31.6%
	Development Viability	Strong	Strong	Strong	Moderate	Strong	Moderate	Strong	Moderate
Bull Creek Station Catchment (Further Investigation Area)	Score	59%	89	172	477	1.64	1.15	38.2%	8.3%
	Development Viability	Moderate	Strong	Strong	Strong	Moderate	Moderate	Low	Low
Canning Beach Road - Applecross (2025)	Score	20%	56	253	861	7.03	1.40	30.0%	35.7%
	Development Viability	Low	Strong	Moderate	Strong	Strong	Strong	Moderate	Moderate
Canning Hwy, Carrington St To Murray Rd (Dual Residential Density Codes)	Score	81%	161	57	3,165	1.67	1.14	9.5%	40.3%
	Development Viability	Strong	Strong	Strong	Low	Moderate	Moderate	Strong	Strong
Canning Hwy, Cowan St To Cunningham St (Dual Residential Density Codes)	Score	59%	55	78	3,539	1.94	1.37	22.0%	27.8%
	Development Viability	Moderate	Strong	Strong	Low	Strong	Strong	Moderate	Moderate

Source: Urbis, Pricefinder, Landgate, Department of Planning Lands and Heritage

SUCCESS FACTORS SCORING

INFILL SUCCESS FACTOR SCORING, PROPOSED CHANGE AREAS

PROPOSED CHANGE AREAS	SCORE / DEVELOPMENT VIABILITY	AVERAGE OF PROXIMITY TO RETAIL AND SIZE OF NEAREST RETAIL	AVERAGE OF PROXIMITY TO OPEN SPACE (METRES)	AVERAGE OF PROXIMITY TO BUSES (METRES)	AVERAGE OF PROXIMITY TO TRAINS (METRES)	MEDIAN MULTIPLE PROPERTY VALUES RELATIVE TO GREATER PERTH	MEDIAN MULTIPLE RENTAL VALUES RELATIVE TO GREATER PERTH	PROPORTION OF STOCK LESS THAN 15 YEARS OLD (%)	PROPORTION OF LOTS GREATER THAN THAN 1,000 SQ.M (%)
Scoring Measures	**-**	**Greater than 80% = Strong, Between 50% - 80% = Moderate, Less than 50% = Low**	**Less than 200m = Strong, Between 200-500m = Moderate, More than 500m = Low**	**Less than 200m = Strong, Between 200-500m = Moderate, More than 500m = Low**	**Less than 1.5km = Strong, between 1.5-3km = Moderate, More than 3km = Low**	**Greater than 1.8 = Strong, Between 1.4 - 1.8 = Moderate, Less than 1.4 = Low**	**Greater than 1.3 = Strong, Between 1.1 - 1.3 = Moderate, Less than 1.1 = Low**	**Less than 15% = Strong, Between 15-30% = Moderate, More than 30% = Low**	**More than 40% = Strong (More Available Sites to Develop), Between 20-40% = Moderate, Less than 20% = Low (Less Available Sites to Develop)**
Canning Hwy, Cunningham St To Conon Rd (Dual Residential Density Codes)	Score	100%	93	37	2,857	2.19	1.33	47.1%	29.6%
	Development Viability	Strong	Strong	Strong	Moderate	Strong	Strong	Low	Moderate
Canning Hwy, Prinsep Road To Rome Rd (Dual Residential Density Codes)	Score	71%	297	81	4,679	1.71	1.24	34.2%	15.9%
	Development Viability	Moderate	Moderate	Strong	Low	Moderate	Moderate	Low	Low
Canning Hwy, Tain St To Ullapool Rd (Dual Residential Density Codes)	Score	48%	227	44	1,707	1.94	1.40	26.7%	33.6%
	Development Viability	Low	Moderate	Strong	Moderate	Strong	Strong	Moderate	Moderate
Coleman Cr & Woodley Cr, Melville (Residential Density Change)	Score	70%	182	87	4,527	1.52	1.18	2.1%	5.1%
	Development Viability	Moderate	Strong	Strong	Low	Moderate	Moderate	Strong	Low
Curruthers Rd To The Esplanade (2025)	Score	61%	41	162	1,215	3.55	1.43	73.3%	63.2%
	Development Viability	Moderate	Strong	Strong	Strong	Strong	Strong	Low	Strong
Farrington Centre (Adjacent Residential Density Change)	Score	100%	91	77	1,495	1.30	1.18	0.0%	2.6%
	Development Viability	Strong	Strong	Strong	Strong	Low	Moderate	Strong	Low

Source: Urbis, Pricefinder, Landgate, Department of Planning Lands and Heritage

SUCCESS FACTORS SCORING

INFILL SUCCESS FACTOR SCORING, PROPOSED CHANGE AREAS

PROPOSED CHANGE AREAS	SCORE / DEVELOPMENT VIABILITY	AVERAGE OF PROXIMITY TO RETAIL AND SIZE OF NEAREST RETAIL	AVERAGE OF PROXIMITY TO OPEN SPACE (METRES)	AVERAGE OF PROXIMITY TO BUSES (METRES)	AVERAGE OF PROXIMITY TO TRAINS (METRES)	MEDIAN MULTIPLE PROPERTY VALUES RELATIVE TO GREATER PERTH	MEDIAN MULTIPLE RENTAL VALUES RELATIVE TO GREATER PERTH	PROPORTION OF STOCK LESS THAN 15 YEARS OLD (%)	PROPORTION OF LOTS GREATER THAN THAN 1,000 SQ.M (%)
Scoring Measures	**-**	**Greater than 80% = Strong, Between 50% - 80% = Moderate, Less than 50% = Low**	**Less than 200m = Strong, Between 200-500m = Moderate, More than 500m = Low**	**Less than 200m = Strong, Between 200-500m = Moderate, More than 500m = Low**	**Less than 1.5km = Strong, between 1.5-3km = Moderate, More than 3km = Low**	**Greater than 1.8 = Strong, Between 1.4 - 1.8 = Moderate, Less than 1.4 = Low**	**Greater than 1.3 = Strong, Between 1.1 - 1.3 = Moderate, Less than 1.1 = Low**	**Less than 15% = Strong, Between 15-30% = Moderate, More than 30% = Low**	**More than 40% = Strong (More Available Sites to Develop), Between 20-40% = Moderate, Less than 20% = Low (Less Available Sites to Develop)**
Harris St (Extension 2025)	Score	61%	409	99	3,443	2.29	1.18	46.0%	35.1%
	Development Viability	Moderate	Moderate	Strong	Low	Strong	Moderate	Low	Moderate
Harris St, Bicton (Adjacent Residential Density Change)	Score	100%	528	64	3,367	2.29	1.18	0.0%	0.0%
	Development Viability	Strong	Low	Strong	Low	Strong	Moderate	Strong	Low
Leach Hwy, Maddox Cr To Rome Rd (Dual Residential Density Codes)	Score	41%	195	55	4,752	1.28	1.07	20.4%	2.1%
	Development Viability	Low	Strong	Strong	Low	Low	Low	Moderate	Low
Marmion St, Melville (Residential Density Change)	Score	27%	220	49	4,695	1.41	1.18	13.6%	2.0%
	Development Viability	Low	Moderate	Strong	Low	Moderate	Moderate	Strong	Low

Source: Urbis, Pricefinder, Landgate, Department of Planning Lands and Heritage

SUCCESS FACTORS SCORING

INFILL SUCCESS FACTOR SCORING, PROPOSED CHANGE AREAS

PROPOSED CHANGE AREAS	SCORE / DEVELOPMENT VIABILITY	AVERAGE OF PROXIMITY TO RETAIL AND SIZE OF NEAREST RETAIL)	AVERAGE OF PROXIMITY TO OPEN SPACE (METRES)	AVERAGE OF PROXIMITY TO BUSES (METRES)	AVERAGE OF PROXIMITY TO TRAINS (METRES)	MEDIAN MULTIPLE PROPERTY VALUES RELATIVE TO GREATER PERTH	MEDIAN MULTIPLE RENTAL VALUES RELATIVE TO GREATER PERTH	PROPORTION OF STOCK LESS THAN 15 YEARS OLD (%)	PROPORTION OF LOTS GREATER THAN THAN 1,000 SQ.M (%)
Scoring Measures	**-**	**Greater than 80% = Strong, Between 50% - 80% = Moderate, Less than 50% = Low**	**Less than 200m = Strong, Between 200-500m = Moderate, More than 500m = Low**	**Less than 200m = Strong, Between 200-500m = Moderate, More than 500m = Low**	**Less than 1.5km = Strong, between 1.5-3km = Moderate, More than 3km = Low**	**Greater than 1.8 = Strong, Between 1.4 - 1.8 = Moderate, Less than 1.4 = Low**	**Greater than 1.3 = Strong, Between 1.1 - 1.3 = Moderate, Less than 1.1 = Low**	**Less than 15% = Strong, Between 15-30% = Moderate, More than 30% = Low**	**More than 40% = Strong (More Available Sites to Develop), Between 20-40% = Moderate, Less than 20% = Low (Less Available Sites to Develop)**
Marmion St, Myaree (Extension 2025)	Score	100%	120	149	3,425	1.44	1.16	46.3%	6.9%
	Development Viability	Strong	Strong	Strong	Low	Moderate	Moderate	Low	Low
Marmion St, Myaree (Residential Density Change)	Score	100%	124	80	3,379	1.43	1.16	32.5%	7.1%
	Development Viability	Strong	Strong	Strong	Low	Moderate	Moderate	Low	Low
Murdoch Station Catchment (Further Investigation Area)	Score	74%	134	143	535	1.40	1.17	19.9%	5.4%
	Development Viability	Strong	Strong	Strong	Strong	Moderate	Moderate	Moderate	Low
North Lake Road, Myaree (Extension 2025)	Score	100%	48	100	3,590	1.78	1.16	41.4%	0.0%
	Development Viability	Strong	Strong	Strong	Low	Moderate	Moderate	Low	Low
North Lake Road, Myaree (Residential Density Change)	Score	100%	117	112	3,749	1.53	1.16	32.7%	6.6%
	Development Viability	Strong	Strong	Strong	Low	Moderate	Moderate	Low	Low

Source: Urbis, Pricefinder, Landgate, Department of Planning Lands and Heritage

SUCCESS FACTORS SCORING

INFILL SUCCESS FACTOR SCORING, PROPOSED CHANGE AREAS

PROPOSED CHANGE AREAS	SCORE / DEVELOPMENT VIABILITY	AVERAGE OF PROXIMITY TO RETAIL AND SIZE OF NEAREST RETAIL	AVERAGE OF PROXIMITY TO OPEN SPACE (METRES)	AVERAGE OF PROXIMITY TO BUSES (METRES)	AVERAGE OF PROXIMITY TO TRAINS (METRES)	MEDIAN MULTIPLE PROPERTY VALUES RELATIVE TO GREATER PERTH	MEDIAN MULTIPLE RENTAL VALUES RELATIVE TO GREATER PERTH	PROPORTION OF STOCK LESS THAN 15 YEARS OLD (%)	PROPORTION OF LOTS GREATER THAN THAN 1,000 SQ.M (%)
Scoring Measures	**-**	**Greater than 80% = Strong, Between 50% - 80% = Moderate, Less than 50% = Low**	**Less than 200m = Strong, Between 200-500m = Moderate, More than 500m = Low**	**Less than 200m = Strong, Between 200-500m = Moderate, More than 500m = Low**	**Less than 1.5km = Strong, between 1.5-3km = Moderate, More than 3km = Low**	**Greater than 1.8 = Strong, Between 1.4 - 1.8 = Moderate, Less than 1.4 = Low**	**Greater than 1.3 = Strong, Between 1.1 - 1.3 = Moderate, Less than 1.1 = Low**	**Less than 15% = Strong, Between 15-30% = Moderate, More than 30% = Low**	**More than 40% = Strong (More Available Sites to Develop), Between 20-40% = Moderate, Less than 20% = Low (Less Available Sites to Develop)**
Palmyra Local Centre (Adjacent Residential Density Change)	Score	87%	116	313	3,019	1.41	1.10	0.0%	57.1%
	Development Viability	Strong	Strong	Moderate	Low	Moderate	Moderate	Strong	Strong
Riseley Centre (North Adjacent Residential Density Change)	Score	84%	91	145	2,365	3.08	1.40	6.5%	39.1%
	Development Viability	Strong	Strong	Strong	Moderate	Strong	Strong	Strong	Moderate
River View Tce To The Esplanade (2025)	Score	2%	91	253	1,824	3.66	1.43	2.2%	7.7%
	Development Viability	Low	Strong	Moderate	Moderate	Strong	Strong	Strong	Low
Robson Way, Murdoch (Zoning Change)	Score	100%	76	83	1,372	1.29	1.17	0.0%	33.3%
	Development Viability	Strong	Strong	Strong	Strong	Low	Moderate	Strong	Moderate
South St To Barclay Rd, Kardinya (Residential Density Change)	Score	100%	106	187	2,684	1.29	1.13	3.4%	10.1%
	Development Viability	Strong	Strong	Strong	Moderate	Low	Moderate	Strong	Low
South Street (Further Investigation Area)	Score	74%	125	121	1,792	1.42	1.13	13.9%	1.8%
	Development Viability	Moderate	Strong	Strong	Moderate	Moderate	Moderate	Strong	Low
Wireless Hill (East Adjacent Residential Density Change)	Score	100%	105	293	2,841	2.53	1.32	29.9%	15.8%
	Development Viability	Strong	Strong	Moderate	Moderate	Strong	Strong	Moderate	Low

Source: Urbis, Pricefinder, Landgate, Department of Planning Lands and Heritage

VIABILITY MODELLING FINDINGS

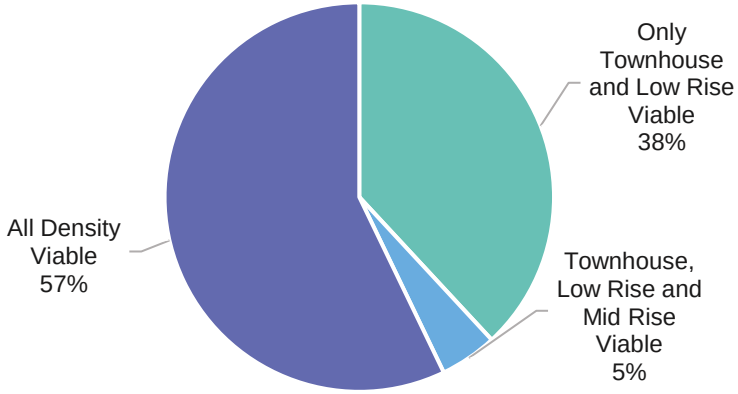
The viability modeling process found that townhouses and low rise apartments are viable in all proposed change areas – which is a reflection of relatively high property values in each change area.

Suburbs near the Canning Bridge Activity Centre and/or Swan River such as Applecross, Mount Pleasant, Bicton were estimated to be more viable to support high density relative to other areas.

Suburbs such as Leeming and Palmyra are expected to take longer for higher density to become viable. Following the implementation of the proposed changes, the market is not expected to respond immediately. Instead, development activity is likely to concentrate in areas where demand and feasibility are already well established, such as the Canning Bridge Activity Centre and the Booragoon Centre.

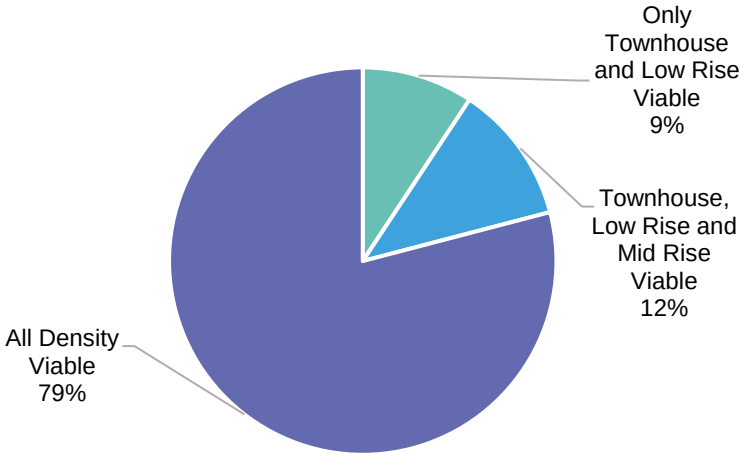
In locations where infill development is less established—such as Leeming—significant developer uptake may not materialise in the short to medium term, even where projects are technically feasible.

VIABILITY BY DENSITY TYPE, CHANGE AREAS, 2030



Source: ABS, Pricefinder, Urbis Perth Apartment Essentials

VIABILITY BY DENSITY TYPE, CHANGE AREAS, 2040



Source: ABS, Pricefinder, Urbis Perth Apartment Essentials
n.b. low rise represents one to three storeys, mid-rise represents four to eight storeys and high-rise represents those greater than eight storeys.

KEY STATISTICS

100% Townhouses and Low Rise Apartment viable in all change areas as at 2025.

42% Proportion of change areas where mid rise and beyond are not yet viable

56% Proportion of change areas where high rise apartments are not yet viable

4-6 Typical year lag in between mid rise and high rise viability

2041 Year mid rise apartments become viable in all change areas

2046 Year high rise apartments become viable in all change areas

VIABILITY MODELLING

VIABILITY MODELLING, PROPOSED CHANGE AREAS

CHANGE AREA	EST. MEDIAN HOUSE VALUE	ESTIMATED YEAR TYPOLOGY VIABLE			
		TOWNHOUSE	LOW RISE APARTMENT	MID RISE APARTMENT	HIGH RISE APARTMENT
Aurelian St To Leach Highway (Extension 2025)	$1,280,625	Already Viable	Already Viable	Already Viable	2031
Aurelian St To Leach Highway, Palmyra (Residential Density Change)	$1,095,871	Already Viable	Already Viable	2037	2042
Bombard St & Mitchell St (Residential Density Change)	$1,647,992	Already Viable	Already Viable	Already Viable	Already Viable
Booragoon Centre (East Adjacent Residential Density Change)	$1,368,135	Already Viable	Already Viable	Already Viable	2026
Booragoon Centre (West Adjacent Residential Density Change)	$1,714,235	Already Viable	Already Viable	Already Viable	Already Viable
Booragoon Centre East (Extension 2025)	$1,482,325	Already Viable	Already Viable	Already Viable	Already Viable
Brentwood Centre (Adjacent Residential Density Change)	$1,376,043	Already Viable	Already Viable	Already Viable	2026
Bristol Avenue (Adjacent Residential Density Change)	$2,064,795	Already Viable	Already Viable	Already Viable	Already Viable
Bull Creek Station Catchment (Further Investigation Area)	$1,311,585	Already Viable	Already Viable	Already Viable	2029
Canning Beach Road - Applecross (2025)	$5,626,133	Already Viable	Already Viable	Already Viable	Already Viable
Canning Hwy, Carrington St To Murray Rd (Dual Residential Density Codes)	$1,339,390	Already Viable	Already Viable	Already Viable	2028
Canning Hwy, Cowan St To Cunningham St (Dual Residential Density Codes)	$1,549,512	Already Viable	Already Viable	Already Viable	Already Viable
Canning Hwy, Cunningham St To Conon Rd (Dual Residential Density Codes)	$1,753,643	Already Viable	Already Viable	Already Viable	Already Viable
Canning Hwy, Prinsep Road To Rome Rd (Dual Residential Density Codes)	$1,365,778	Already Viable	Already Viable	Already Viable	2026
Canning Hwy, Tain St To Ullapool Rd (Dual Residential Density Codes)	$1,551,428	Already Viable	Already Viable	Already Viable	Already Viable

Source: ABS Producer Price Index, Pricefinder, Urbis

VIABILITY MODELLING

VIABILITY MODELLING, PROPOSED CHANGE AREAS

CHANGE AREA	EST. MEDIAN HOUSE VALUE	ESTIMATED YEAR TYPOLOGY VIABLE			
		TOWNHOUSE	LOW RISE APARTMENT	MID RISE APARTMENT	HIGH RISE APARTMENT
Coleman Cr & Woodley Cr, Melville (Residential Density Change)	$1,215,830	Already Viable	Already Viable	2029	2034
Curruthers Rd To The Esplanade (2025)	$2,842,185	Already Viable	Already Viable	Already Viable	Already Viable
Farrington Centre (Adjacent Residential Density Change)	$1,040,645	Already Viable	Already Viable	2038	2045
Harris St (Extension 2025)	$1,832,480	Already Viable	Already Viable	Already Viable	Already Viable
Harris St, Bicton (Adjacent Residential Density Change)	$1,832,480	Already Viable	Already Viable	Already Viable	Already Viable
Leach Hwy, Maddox Cr To Rome Rd (Dual Residential Density Codes)	$1,020,074	Already Viable	Already Viable	2041	2046
Marmion St, Melville (Residential Density Change)	$1,125,552	Already Viable	Already Viable	2034	2040
Marmion St, Myaree (Extension 2025)	$1,148,031	Already Viable	Already Viable	2033	2038
Marmion St, Myaree (Residential Density Change)	$1,141,364	Already Viable	Already Viable	2033	2039
Murdoch Station Catchment (Further Investigation Area)	$1,117,143	Already Viable	Already Viable	2035	2040
North Lake Road, Myaree (Extension 2025)	$1,424,925	Already Viable	Already Viable	Already Viable	Already Viable
North Lake Road, Myaree (Residential Density Change)	$1,224,867	Already Viable	Already Viable	2028	2037
Palmyra Local Centre (Adjacent Residential Density Change)	$1,128,972	Already Viable	Already Viable	2034	2039

Source: ABS Producer Price Index, Pricefinder, Urbis

VIABILITY MODELLING

VIABILITY MODELLING, PROPOSED CHANGE AREAS

CHANGE AREA	EST. MEDIAN HOUSE VALUE	ESTIMATED YEAR TYPOLOGY VIABLE			
		TOWNHOUSE	LOW RISE APARTMENT	MID RISE APARTMENT	HIGH RISE APARTMENT
Riseley Centre (North Adjacent Residential Density Change)	$2,467,322	Already Viable	Already Viable	Already Viable	Already Viable
River View Tce To The Esplanade (2025)	$2,927,637	Already Viable	Already Viable	Already Viable	Already Viable
Robson Way, Murdoch (Zoning Change)	$1,031,658	Already Viable	Already Viable	2040	2046
South St To Barclay Rd, Kardinya (Residential Density Change)	$1,031,658	Already Viable	Already Viable	2040	2046
South Street (Further Investigation Area)	$1,134,747	Already Viable	Already Viable	2034	2039
Wireless Hill (East Adjacent Residential Density Change)	$2,021,970	Already Viable	Already Viable	Already Viable	Already Viable

Source: ABS Producer Price Index, Pricefinder, Urbis

AFFORDABILITY ASSESSMENT FINDINGS

The affordability assessment revealed that on average across the proposed change areas, the affordable purchase price for residents is $910,468 – which is higher than the estimated average property values in these areas.

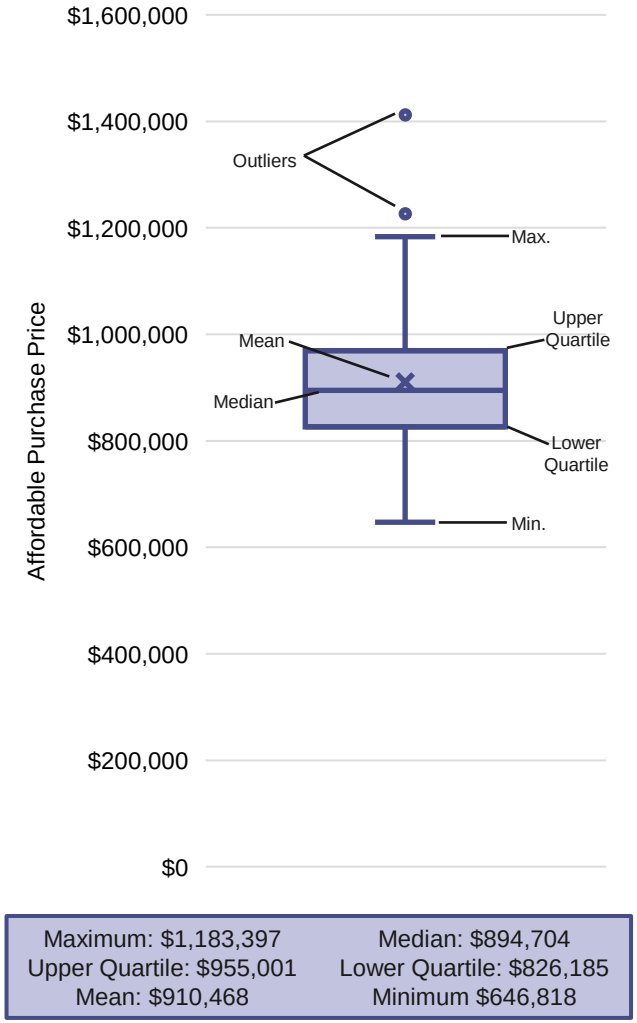
The development of townhouses and low rise apartments in many of these locations are anticipated to support affordability outcomes. This is particularly the case within areas with higher established house prices.

As higher rise apartments are typically more costly to develop and require higher selling prices, their impact on affordability is lower; with only waterfront areas with the relatively highest property values anticipated to see high rise apartments available below the affordability benchmark. Nonetheless, many of these apartments are anticipated to be more affordable than established house prices in these locations.

This analysis has demonstrated that the changes in R coding could facilitate the development of more affordable product such as grouped dwellings and low rise apartments across most of the proposed change areas.

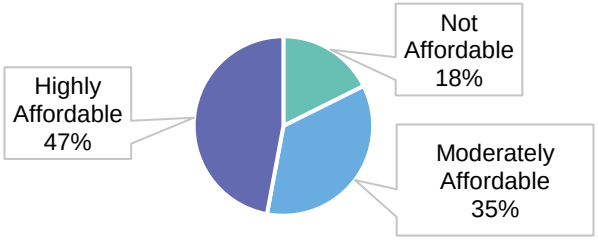
Note, the development of these typologies in each of the change areas and the market pricing is subject to landowner intentions, market fundamentals and other external factors however should they be developed, they would provide some level of affordability.

AFFORDABLE PURCHASE PRICES ACROSS PROPOSED CHANGE AREAS

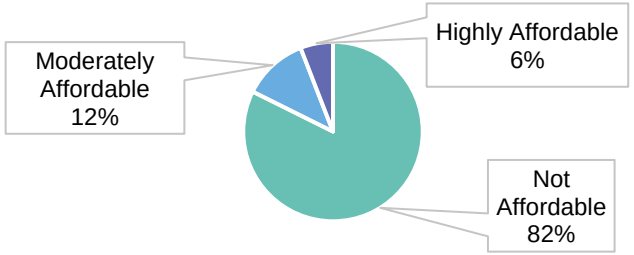


Maximum: $1,183,397	Median: $894,704
Upper Quartile: $955,001	Lower Quartile: $826,185
Mean: $910,468	Minimum $646,818

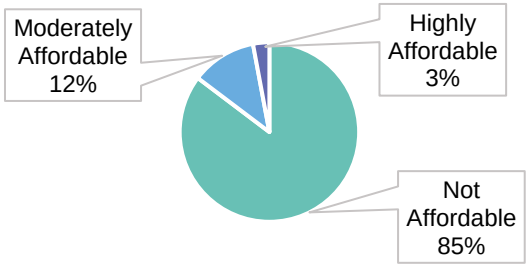
TOWNHOUSE AND LOW RISE APARTMENT AFFORDABILITY ACROSS PROPOSED CHANGE AREAS



MID RISE APARTMENT AFFORDABILITY ACROSS PROPOSED CHANGE AREAS



HIGH RISE APARTMENT AFFORDABILITY ACROSS PROPOSED CHANGE AREAS



Source: Western Australian Housing Authority – Housing Affordability Report 2016; ABS; APRA; Pricefinder; RBA; Urbis

AFFORDABILITY MODELLING

AFFORDABILITY MODELLING, PROPOSED CHANGE AREAS

PROPOSED CHANGE AREAS	AVERAGE HOUSEHOLD INCOME (2025 ADJUSTED)	AFFORDABLE PURCHASE PRICE	ESTIMATED MEDIAN HOUSE VALUE	TOWNHOUSE AFFORDABILITY	LOW RISE APARTMENT AFFORDABILITY	MID RISE APARTMENT AFFORDABILITY	HIGH RISE APARTMENT AFFORDABILITY
Aurelian St To Leach Highway (Extension 2025)	$125,179	$671,789	$1,280,625	Low	Low	Low	Low
Aurelian St To Leach Highway, Palmyra (Residential Density Change)	$125,179	$671,789	$1,095,871	Low	Low	Low	Low
Bombard St & Mitchell St (Residential Density Change)	$167,057	$896,531	$1,647,992	Moderate	Moderate	Low	Low
Booragoon Centre (East Adjacent Residential Density Change)	$161,269	$865,469	$1,368,135	Moderate	Moderate	Low	Low
Booragoon Centre (West Adjacent Residential Density Change)	$161,269	$865,469	$1,714,235	Moderate	Moderate	Low	Low
Booragoon Centre East (Extension 2025)	$212,680	$1,141,372	$1,482,325	High	High	Moderate	Moderate
Brentwood Centre (Adjacent Residential Density Change)	$152,417	$817,963	$1,376,043	Moderate	Moderate	Low	Low
Bristol Avenue (Adjacent Residential Density Change)	$156,956	$842,325	$2,064,795	Moderate	Moderate	Low	Low
Bull Creek Station Catchment (Further Investigation Area)	$135,166	$725,386	$1,311,585	Low	Low	Low	Low
Canning Beach Road - Applecross (2025)	$228,455	$1,226,031	$5,626,133	High	High	High	Moderate
Canning Hwy, Carrington St To Murray Rd (Dual Residential Density Codes)	$128,130	$687,625	$1,339,390	Low	Low	Low	Low
Canning Hwy, Cowan St To Cunningham St (Dual Residential Density Codes)	$197,699	$1,060,977	$1,549,512	High	High	Moderate	Low

Source: ABS, RBA, Urbis
Note Average Household Income has been derived from SA1' s and has been inflated by the growth in the Wage Price Index to reflect current income levels.*

AFFORDABILITY MODELLING

AFFORDABILITY MODELLING, PROPOSED CHANGE AREAS

PROPOSED CHANGE AREAS	AVERAGE HOUSEHOLD INCOME (2025 ADJUSTED)	AFFORDABLE PURCHASE PRICE	ESTIMATED MEDIAN HOUSE VALUE	TOWNHOUSE AFFORDABILITY	LOW RISE APARTMENT AFFORDABILITY	MID RISE APARTMENT AFFORDABILITY	HIGH RISE APARTMENT AFFORDABILITY
Canning Hwy, Cunningham St To Conon Rd (Dual Residential Density Codes)	$181,470	$973,881	$1,753,643	High	High	Low	Low
Canning Hwy, Prinsep Road To Rome Rd (Dual Residential Density Codes)	$160,701	$862,424	$1,365,778	Moderate	Moderate	Low	Low
Canning Hwy, Tain St To Ullapool Rd (Dual Residential Density Codes)	$177,952	$955,001	$1,551,428	High	High	Low	Low
Coleman Cr & Woodley Cr, Melville (Residential Density Change)	$166,376	$892,877	$1,215,830	Moderate	Moderate	Low	Low
Curruthers Rd To The Esplanade (2025)	$220,511	$1,183,397	$2,842,185	High	High	Moderate	Moderate
Farrington Centre (Adjacent Residential Density Change)	$183,626	$985,453	$1,040,645	High	High	Moderate	Low
Harris St (Extension 2025)	$175,455	$941,601	$1,832,480	High	High	Low	Low
Harris St, Bicton (Adjacent Residential Density Change)	$175,455	$941,601	$1,832,480	High	High	Low	Low
Leach Hwy, Maddox Cr To Rome Rd (Dual Residential Density Codes)	$170,689	$916,021	$1,020,074	High	High	Low	Low
Marmion St, Melville (Residential Density Change)	$208,140	$1,117,010	$1,125,552	High	High	Moderate	Moderate

Source: ABS, RBA, Urbis
Note Average Household Income has been derived from SA1' s and has been inflated by the growth in the Wage Price Index to reflect current income levels*

AFFORDABILITY MODELLING

AFFORDABILITY MODELLING, PROPOSED CHANGE AREAS

PROPOSED CHANGE AREAS	AVERAGE HOUSEHOLD INCOME (2025 ADJUSTED)	AFFORDABLE PURCHASE PRICE	ESTIMATED MEDIAN HOUSE VALUE	TOWNHOUSE AFFORDABILITY	LOW RISE APARTMENT AFFORDABILITY	MID RISE APARTMENT AFFORDABILITY	HIGH RISE APARTMENT AFFORDABILITY
Marmion St, Myaree (extension 2025)	$156,048	$837,453	$1,148,031	Moderate	Moderate	Low	Low
Marmion St, Myaree (Residential density change)	$169,554	$909,930	$1,141,364	High	Moderate	Low	Low
Murdoch Station Catchment (Further investigation area)	$153,438	$823,444	$1,117,143	Moderate	Moderate	Low	Low
North Lake Road, Myaree (extension 2025)	$176,704	$948,301	$1,424,925	High	High	Low	Low
North Lake Road, Myaree (Residential density change)	$136,869	$734,522	$1,224,867	Low	Low	Low	Low
Palmyra Local Centre (Adjacent residential density change)	$154,460	$828,926	$1,128,972	Moderate	Moderate	Low	Low
Riseley Centre (North adjacent residential density change)	$172,958	$928,202	$2,467,322	High	High	Low	Low
River View Tce to The Esplanade (2025)	$263,069	$1,411,793	$2,927,637	High	High	High	High
Robson Way, Murdoch (Zoning change)	$154,119	$827,099	$1,031,658	Moderate	Moderate	Low	Low
South St to Barclay Rd, Kardinya (Residential density change)	$120,526	$646,818	$1,031,658	Low	Low	Low	Low
South Street (Further investigation area)	$158,318	$849,634	$1,134,747	Moderate	Moderate	Low	Low
Wireless Hill (East adjacent residential density change)	$180,335	$967,791	$2,021,970	High	High	Low	Low

Source: ABS, RBA, Urbis
Note Average Household Income has been derived from SA1' s and has been inflated by the growth in the Wage Price Index to reflect current income levels*

COMPOSITE SCORING

The composite scoring process found the Canning Beach Road – Applecross change area as the most attractive location for infill development, with a composite score of 0.78. In contrast, areas such as Leach Highway were considered least desirable for infill development.

The composite scoring was calculated through the application of weightings which reflected those factors expected to most influence infill development activity. This is based on Urbis' experience supporting infill development across Perth and other capital cities for more than 30 years.

COMPOSITE SCORING

CHANGE AREA	COMPOSITE SCORE
Aurelian St To Leach Highway (Extension 2025)	0.33
Aurelian St To Leach Highway, Palmyra (Residential Density Change)	0.34
Bombard St & Mitchell St (Residential Density Change)	0.42
Booragoon Centre (East Adjacent Residential Density Change)	0.42
Booragoon Centre (West Adjacent Residential Density Change)	0.50
Booragoon Centre East (Extension 2025)	0.37
Brentwood Centre (Adjacent Residential Density Change)	0.36
Bristol Avenue (Adjacent Residential Density Change)	0.49
Canning Beach Road - Applecross (2025)	0.78
Canning Hwy, Carrington St To Murray Rd (Dual Residential Density Codes)	0.40
Canning Hwy, Cowan St To Cunningham St (Dual Residential Density Codes)	0.41
Canning Hwy, Cunningham St To Conon Rd (Dual Residential Density Codes)	0.39
Canning Hwy, Prinsep Road To Rome Rd (Dual Residential Density Codes)	0.34
Canning Hwy, Tain St To Ullapool Rd (Dual Residential Density Codes)	0.39
Coleman Cr & Woodley Cr, Melville (Residential Density Change)	0.39
Curruthers Rd To The Esplanade (2025)	0.41
Farrington Centre (Adjacent Residential Density Change)	0.47
Harris St (Extension 2025)	0.30
Harris St, Bicton (Adjacent Residential Density Change)	0.45
Leach Hwy, Maddox Cr To Rome Rd (Dual Residential Density Codes)	0.30
Marmion St, Melville (Residential Density Change)	0.34
Marmion St, Myaree (Extension 2025)	0.33
Marmion St, Myaree (Residential Density Change)	0.37
North Lake Road, Myaree (Extension 2025)	0.37
North Lake Road, Myaree (Residential Density Change)	0.37
Palmyra Local Centre (Adjacent Residential Density Change)	0.33
Riseley Centre (North Adjacent Residential Density Change)	0.53
River View Tce To The Esplanade (2025)	0.57
Robson Way, Murdoch (Zoning Change)	0.49
South St To Barclay Rd, Kardinya (Residential Density Change)	0.40
Wireless Hill (East Adjacent Residential Density Change)	0.42

Source: Urbis

PARAMETER WEIGHTINGS

5% Average of Proximity to Retail Score (%)

5% Average of Proximity to Open Space (metres)

5% Average of Proximity to Trains (metres)

5% Average of Proximity to Buses (metres)

10% Average of Area per Lot (sq.m)

40% Median Multiple Property Values relative to Greater Perth

5% Median Multiple Rental Values relative to Greater Perth

15% Proportion of Stock Less than 15 years old (%)

10% Proportion of lots less than 1,000 sq.m (%)

FORECAST DWELLING OUTCOMES

Taking into account the varied factors influencing development outcomes, Urbis projected development rates across all the change areas.

Overall, this analysis indicates that these areas could deliver approximately 5,073 additional dwellings (net) by 2050. It is anticipated that these dwellings would be delivered as a mix of grouped and multiple dwellings, occurring across both non-amalgamated and amalgamated sites within the proposed change areas.

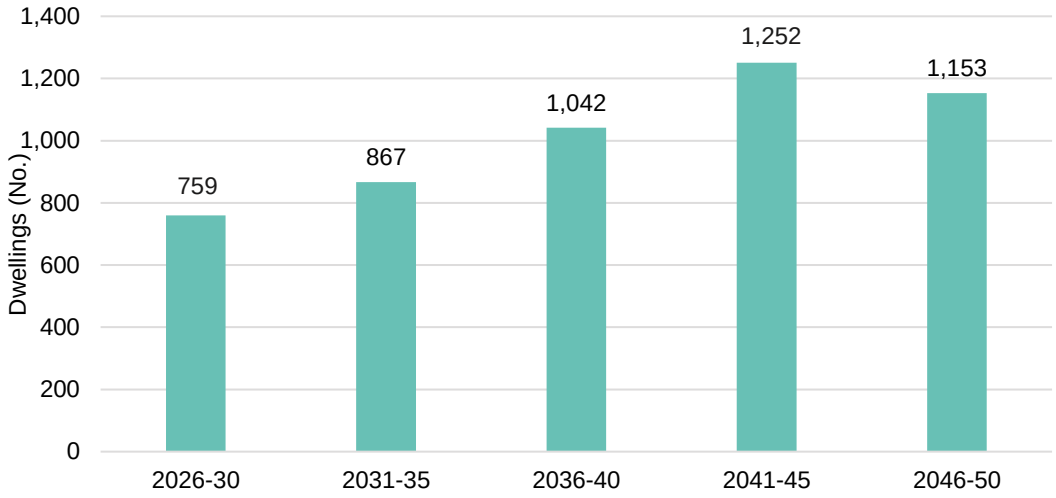
Development rates are anticipated to increase over time, reflecting rising land and property values, demographic shifts favouring infill living, the increasing desirability of established suburbs relative to outer-suburban locations, and the progressive reduction in greenfield land supply across the metropolitan area.

In comparison to other local governments such as the City of Nedlands and the City of Wanneroo, the redevelopment assumptions adopted for Melville are relatively optimistic (for example, these local governments have assumed that only around 30% and 26% respectively of rezoned sites will redevelop over a 20–25 year period).

Notwithstanding this comparison, there are several reasons to anticipate stronger redevelopment outcomes in the City of Melville, including::

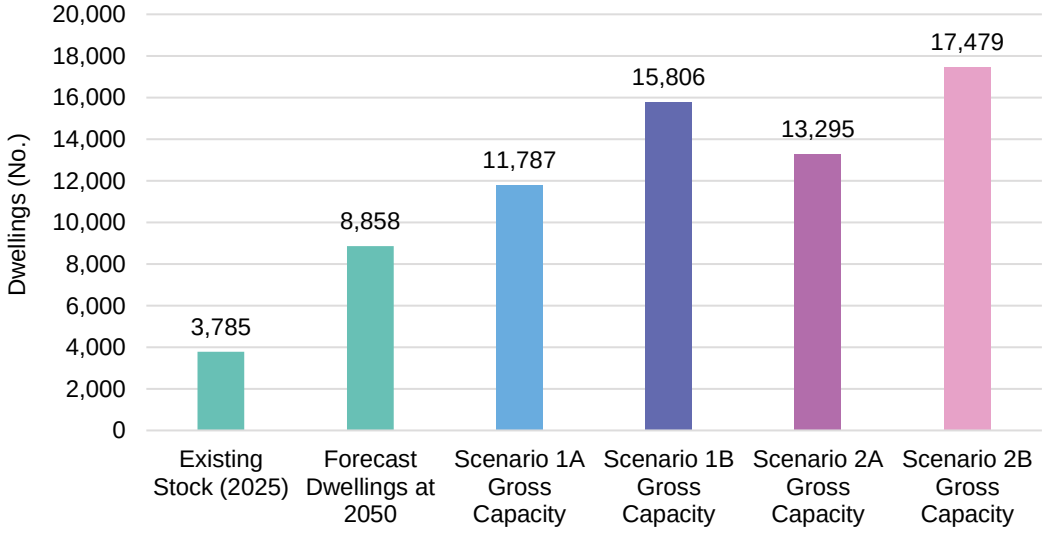
- Several of the change areas function as extensions of existing activity centres, where proximity to retail, employment and services continues to support stronger development interest and market absorption;
- The City of Melville has historically experienced higher levels of infill development than comparable inner-metropolitan local government (with an estimated increase of approximately 1,600 dwellings between 2021 and 2025, including around 1,000 apartments or grouped dwellings) which indicates established feasibility within many areas of the City for infill development;
- Where density settings have aligned with market conditions in Perth, redevelopment has occurred at rates closer to theoretical capacity, as seen in locations such as East Perth, Claisebrook and Nollamara, where favourable zoning, parcel characteristics and price points have supported sustained infill delivery; and
- Many of the change areas contain lot configurations and sizes that are conducive to incremental redevelopment (allowing both individual lot redevelopment and amalgamation opportunities).

NET DWELLING INCREASE ACROSS THE PROPOSED CHANGE AREAS, 2026 – 2050



Source: Urbis

FORECASTED DWELLINGS ACROSS THE PROPOSED CHANGE AREAS AND DEVELOPMENT CAPACITY



Source: Urbis

NET DWELLING INCREASES ACROSS PROPOSED CHANGE AREAS

CHANGE AREA	NET DWELLINGS 2026-30	NET DWELLINGS 2031-35	NET DWELLINGS 2036-40	NET DWELLINGS 2041-45	NET DWELLINGS 2046-50
Aurelian St To Leach Highway (Extension 2025)	2	2	1	1	1
Aurelian St To Leach Highway, Palmyra (Residential Density Change)	101	101	102	100	100
Bombard St & Mitchell St (Residential Density Change)	18	20	23	26	29
Booragoon Centre (East Adjacent Residential Density Change)	45	52	62	74	88
Booragoon Centre (West Adjacent Residential Density Change)	100	148	225	344	196
Booragoon Centre East (Extension 2025)	24	25	25	25	26
Brentwood Centre (Adjacent Residential Density Change)	23	22	21	20	19
Bristol Avenue (Adjacent Residential Density Change)	4	4	5	6	7
Canning Beach Road - Applecross (2025)	5	9	19	4	0
Canning Hwy, Carrington St To Murray Rd (Dual Residential Density Codes)	43	49	56	63	72
Canning Hwy, Cowan St To Cunningham St (Dual Residential Density Codes)	36	41	47	54	63
Canning Hwy, Cunningham St To Conon Rd (Dual Residential Density Codes)	25	26	28	29	31
Canning Hwy, Prinsep Road To Rome Rd (Dual Residential Density Codes)	61	59	58	55	53
Canning Hwy, Tain St To Ullapool Rd (Dual Residential Density Codes)	57	64	72	81	92
Coleman Cr & Woodley Cr, Melville (Residential Density Change)	9	9	9	9	9
Curruthers Rd To The Esplanade (2025)	1	1	1	1	1
Farrington Centre (Adjacent Residential Density Change)	34	43	57	74	99
Harris St (Extension 2025)	4	3	2	2	1
Harris St, Bicton (Adjacent Residential Density Change)	0	0	0	0	0
Leach Hwy, Maddox Cr To Rome Rd (Dual Residential Density Codes)	18	14	11	9	7
Marmion St, Melville (Residential Density Change)	5	4	4	3	2
Marmion St, Myaree (Extension 2025)	7	6	5	4	3
Marmion St, Myaree (Residential Density Change)	7	6	6	6	5
North Lake Road, Myaree (Extension 2025)	4	4	3	3	3
North Lake Road, Myaree (Residential Density Change)	9	8	8	7	7
Palmyra Local Centre (Adjacent Residential Density Change)	1	1	1	0	0
Riseley Centre (North Adjacent Residential Density Change)	37	54	82	123	83
River View Tce To The Esplanade (2025)	1	1	1	1	2
Robson Way, Murdoch (Zoning Change)	3	3	4	5	6
South St To Barclay Rd, Kardinya (Residential Density Change)	16	17	18	19	20
Wireless Hill (East Adjacent Residential Density Change)	59	71	86	104	128
Total	759	867	1,042	1,252	1,153

Source: Urbis

FORECASTED DWELLINGS AND DEVELOPMENT CAPACITY

CHANGE AREA	EXISTING STOCK (2025)	FORECAST DWELLINGS AT 2050	SCENARIO 1A GROSS CAPACITY	SCENARIO 1B GROSS CAPACITY	SCENARIO 2A GROSS CAPACITY	SCENARIO 2B GROSS CAPACITY
Aurelian St To Leach Highway (Extension 2025)	30	37	57	84	69	97
Aurelian St To Leach Highway, Palmyra (Residential Density Change)	559	1,063	1,666	2,413	1,911	2,693
Bombard St & Mitchell St (Residential Density Change)	110	226	280	422	331	466
Booragoon Centre (East Adjacent Residential Density Change)	213	534	732	826	795	917
Booragoon Centre (West Adjacent Residential Density Change)	246	1,259	1,060	1,458	1,179	1,591
Booragoon Centre East (Extension 2025)	166	291	475	564	537	658
Brentwood Centre (Adjacent Residential Density Change)	149	254	393	587	462	651
Bristol Avenue (Adjacent Residential Density Change)	19	45	52	73	60	84
Canning Beach Road - Applecross (2025)	14	51	52	52	59	59
Canning Hwy, Carrington St To Murray Rd (Dual Residential Density Codes)	72	355	561	718	583	750
Canning Hwy, Cowan St To Cunningham St (Dual Residential Density Codes)	126	367	550	630	617	690
Canning Hwy, Cunningham St To Conon Rd (Dual Residential Density Codes)	81	220	372	483	409	523
Canning Hwy, Prinsep Road To Rome Rd (Dual Residential Density Codes)	182	468	951	1,256	1,026	1,337
Canning Hwy, Tain St To Ullapool Rd (Dual Residential Density Codes)	122	488	731	1,006	768	1,046
Coleman Cr & Woodley Cr, Melville (Residential Density Change)	99	144	186	282	237	335
Curruthers Rd To The Esplanade (2025)	19	24	33	33	40	40
Farrington Centre (Adjacent Residential Density Change)	156	463	458	629	509	718
Harris St (Extension 2025)	387	399	468	468	557	557
Harris St, Bicton (Adjacent Residential Density Change)	4	4	6	10	9	12
Leach Hwy, Maddox Cr To Rome Rd (Dual Residential Density Codes)	146	205	431	492	497	559
Marmion St, Melville (Residential Density Change)	51	69	112	162	132	189
Marmion St, Myaree (Extension 2025)	58	83	150	217	180	254
Marmion St, Myaree (Residential Density Change)	42	72	122	174	137	195
North Lake Road, Myaree (Extension 2025)	37	54	80	116	95	135
North Lake Road, Myaree (Residential Density Change)	61	100	161	239	193	272
Palmyra Local Centre (Adjacent Residential Density Change)	7	10	24	36	27	39
Riseley Centre (North Adjacent Residential Density Change)	129	508	409	607	466	656
River View Tce To The Esplanade (2025)	52	58	60	60	84	84
Robson Way, Murdoch (Zoning Change)	6	27	35	50	37	52
South St To Barclay Rd, Kardinya (Residential Density Change)	99	189	264	377	306	432
Wireless Hill (East Adjacent Residential Density Change)	343	791	856	1,282	983	1,388
Total	**3,785**	**8,858**	**11,787**	**15,806**	**13,295**	**17,479**

Source: Urbis

FORECASTED DWELLINGS INCREASE AND BUILD OUT CAPACITY BETWEEN 2025 AND 2050

CHANGE AREA	DWELLING INCREASE (NO.)	DWELLING INCREASE (%)	INDICATIVE BUILDOUT PROPORTION*
Aurelian St To Leach Highway (Extension 2025)	7	23%	17%
Aurelian St To Leach Highway, Palmyra (Residential Density Change)	504	90%	34%
Bombard St & Mitchell St (Residential Density Change)	116	106%	48%
Booragoon Centre (East Adjacent Residential Density Change)	321	151%	57%
Booragoon Centre (West Adjacent Residential Density Change)	1013	412%	>80%
Booragoon Centre East (Extension 2025)	125	75%	35%
Brentwood Centre (Adjacent Residential Density Change)	105	70%	31%
Bristol Avenue (Adjacent Residential Density Change)	26	138%	60%
Canning Beach Road - Applecross (2025)	37	271%	>80%
Canning Hwy, Carrington St To Murray Rd (Dual Residential Density Codes)	283	392%	50%
Canning Hwy, Cowan St To Cunningham St (Dual Residential Density Codes)	241	190%	52%
Canning Hwy, Cunningham St To Conon Rd (Dual Residential Density Codes)	139	170%	40%
Canning Hwy, Prinsep Road To Rome Rd (Dual Residential Density Codes)	286	157%	31%
Canning Hwy, Tain St To Ullapool Rd (Dual Residential Density Codes)	366	299%	49%
Coleman Cr & Woodley Cr, Melville (Residential Density Change)	45	46%	33%
Curruthers Rd To The Esplanade (2025)	5	20%	27%
Farrington Centre (Adjacent Residential Density Change)	307	197%	79%
Harris St (Extension 2025)	12	3%	15%
Harris St, Bicton (Adjacent Residential Density Change)	0	29%	29%
Leach Hwy, Maddox Cr To Rome Rd (Dual Residential Density Codes)	59	42%	19%
Marmion St, Melville (Residential Density Change)	18	37%	22%
Marmion St, Myaree (Extension 2025)	25	43%	20%
Marmion St, Myaree (Residential Density Change)	30	72%	29%
North Lake Road, Myaree (Extension 2025)	17	43%	26%
North Lake Road, Myaree (Residential Density Change)	39	65%	28%
Palmyra Local Centre (Adjacent Residential Density Change)	3	51%	16%
Riseley Centre (North Adjacent Residential Density Change)	379	294%	>80%
River View Tce To The Esplanade (2025)	6	12%	75%
Robson Way, Murdoch (Zoning Change)	21	365%	60%
South St To Barclay Rd, Kardinya (Residential Density Change)	90	90%	40%
Wireless Hill (East Adjacent Residential Density Change)	448	130%	62%

Source: Urbis

** This is a comparison of forecasted dwellings and the average between the development capacity for Scenario's 1A and 1B.*

DISTRICT CENTRES AND STATION PRECINCTS FINDINGS

DISTRICT CENTRES AND STATION PRECINCTS

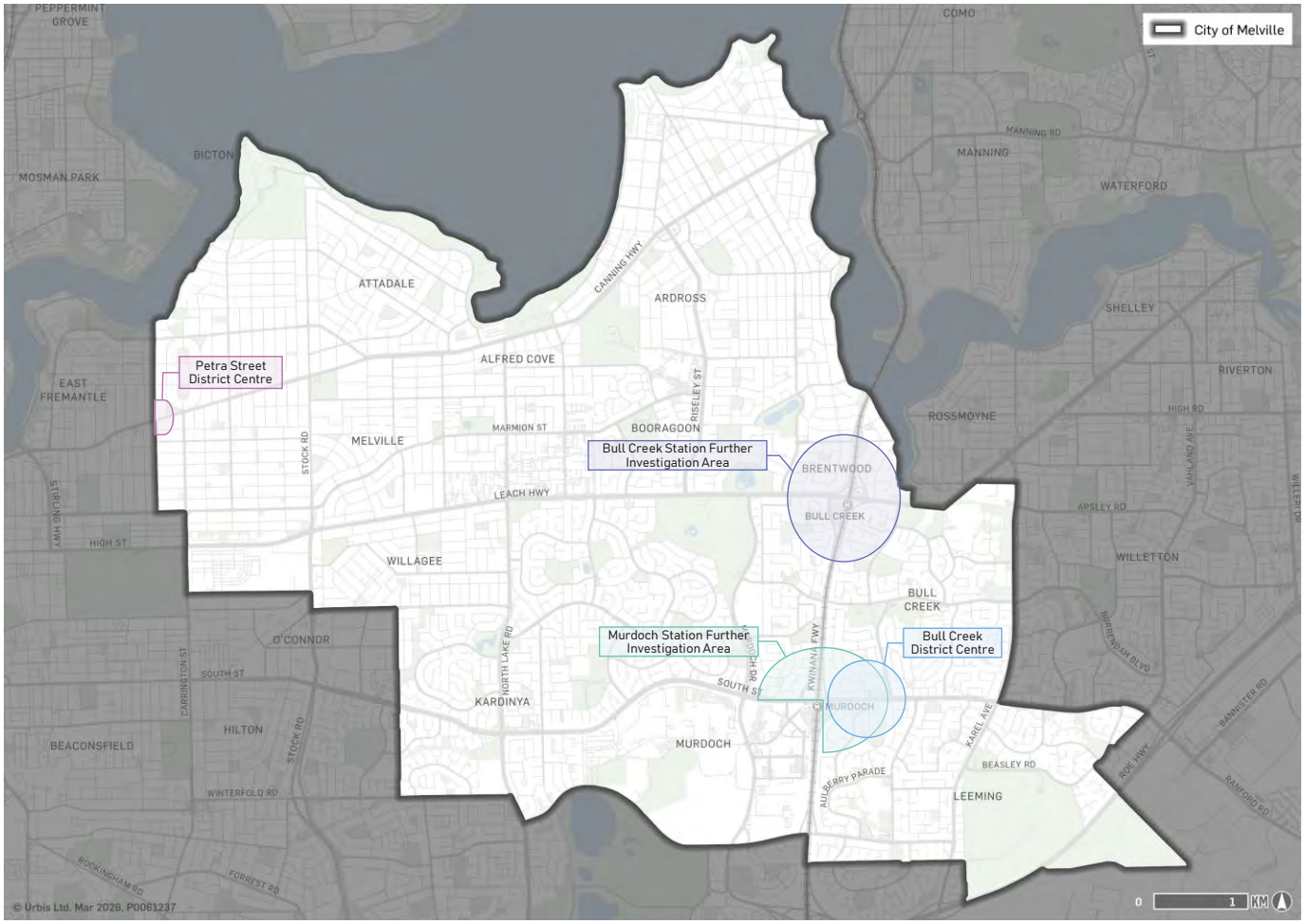
Urbis was also engaged to assess and test the development capacity of the following district centre areas and train station precincts to be able to potentially support density in the medium to long term:

- Petra Street District Centre;
- Bull Creek District Centre;
- Murdoch Station Further Investigation Area; and
- Bull Creek Further Investigation Area.

An indicative boundary for these areas has been shown to the right. These indicative boundaries have been estimated based on discussion with City of Melville officers and having regard to the catchments and densities recommended under State Planning Policy 4.2.

The determined dwelling capacity for each areas has been done on the basis that these areas are delivered exclusively as medium and high density to test the maximum capacity the proposed change areas can deliver at these assumed zonings.

DISTRICT CENTRES AND STATION PRECINCTS



Source: Urbis

DISCLAIMER:

The scenarios for these district centres represent hypothetical development scenarios and are indicative of potential capacity under each scenario. They do not take into consideration landowner intentions, age of built form, some physical site constraints building costs and other external factors. They also assume an average apartment sizes which can vary and influence maximum dwelling yield.

PETRA STREET AND BULL CREEK DISTRICT CENTRE DEVELOPMENT CAPACITY

To undertake this assessment of the district centres, it has been assumed that immediately surrounding the centres there is a provision of RAC zoned sites (with a height limit of nine storeys) with density then scaling down from R100 down to R40 the further from the centre.

Assuming the R code changes suggested by the City of Melville, the Petra Street and Bull Creek District Centres have the capacity to support significant development theoretically.

As district centres however, there is further consideration that needs to be taken regarding the upzoning of these areas. Whilst the upzoning of these district centres could create broader mixed use outcomes and support density, there are complexities around the existing uses. There would need to be considerations around the interface of the existing district centre with Canning Highway at Petra Street and how this would change. At Bull Creek there would need to be considerations around linkages with Murdoch Station and the interface with South Street.

Furthermore, depending on the zoning applied to these areas, sites could comprise varying extents of commercial uses such as office and retail which would reduce the potential dwellings delivered in these areas.

It is recommended that the City undertakes further investigation around the rezoning of these areas as they do have significant potential. There are however complexities and other considerations which need to be recognised, particularly a range of place and market attributes which make these areas more appropriate for long term upzoning (2040+).

SCENARIO 1A - PETRA STREET DISTRICT CENTRE DWELLING CAPACITY

369 Total Development Capacity

+318 Net Additional Dwellings from Existing Count of Dwellings

624% Density Uplift

SCENARIO 1A - BULL CREEK DISTRICT CENTRE DWELLING CAPACITY

2,625 Total Development Capacity

+2,096 Net Additional Dwellings from Existing Count of Dwellings

396% Density Uplift

SCENARIO 1B - PETRA STREET DISTRICT CENTRE DWELLING CAPACITY

504 Total Development Capacity

+453 Net Additional Dwellings from Existing Count of Dwellings

888% Density Uplift

SCENARIO 1B - BULL CREEK DISTRICT CENTRE DWELLING CAPACITY

4,876 Total Development Capacity

+4,347 Net Additional Dwellings from Existing Count of Dwellings

822% Density Uplift

Source: Urbis, City of Melville

Note Given this is a high level assessment, Scenario's 1A and 1B as defined earlier in this report have only been considered for this analysis. Where a proposed R code change in Scenario 1B does not allow for multiple dwellings (proposed to change to a code that is R30 or below), it has been assumed that grouped dwellings have been developed. The Bull Creek District Centre is inclusive of the RAC zoned land and the land the lots that don't overlap with the boundary defined for the Murdoch Station Further Investigation Area.*

BULL CREEK AND MURDOCH STATION PRECINCTS DEVELOPMENT CAPACITY

Based on the advice of the City of Melville, this exercise has assumed that on average across the station precincts there is an upzoning to a three storey height limit (with the exception of the Bull Creek District Centre which is reflective of the zonings in the exercise on the previous page).

Assuming the R code changes suggested by the City of Melville, there is capacity to support significant development theoretically. Although there is clear strategic alignment in having increased density around these rail stations, the timing, form and delivery of this outcome is complex. The nature and form of existing development (cul-de-sac and curvilinear streets) would make significant redevelopment challenging, with pedestrian accessibility restricted by road layout and significant barriers through Freeway interchanges.

A review of land economics and viability success factors for these stations by Urbis and HUPP in late 2025 highlighted that for these stations to support quality density aligned to State Government policy expectations, the market conditions need to improve and the area may need significant intervention. There are limited examples where effective redevelopment around stations in Perth has occurred without substantial intervention, with redevelopment authorities and / or DevelopmentWA driving many station precinct redevelopments in Perth. Given these factors it is not recommended that the Bull Creek and Murdoch Station precincts relied upon to meet dwelling targets in the short to medium term.

SCENARIO 1A – BULL CREEK STATION PRECINCT DWELLING CAPACITY

4,213 Total Development Capacity

+3,342 Net Additional Dwellings from Existing Count of Dwellings

384% Density Uplift

SCENARIO 1A – MURDOCH STATION PRECINCT DWELLING CAPACITY

5,055 Total Development Capacity

+4,242 Net Additional Dwellings from Existing Count of Dwellings

522% Density Uplift

SCENARIO 1B – BULL CREEK STATION PRECINCT DWELLING CAPACITY

4,745 Total Development Capacity

+3,874 Net Additional Dwellings from Existing Count of Dwellings

445% Density Uplift

SCENARIO 1B – MURDOCH STATION PRECINCT DWELLING CAPACITY

7,948 Total Development Capacity

+7,135 Net Additional Dwellings from Existing Count of Dwellings

822% Density Uplift

Source: Urbis, City of Melville

Note Given this is a high level assessment, Scenario's 1A and 1B as defined earlier in this report have only been considered for this analysis. This exercise is inclusive of the overlap in the Bull Creek District Centre land.*

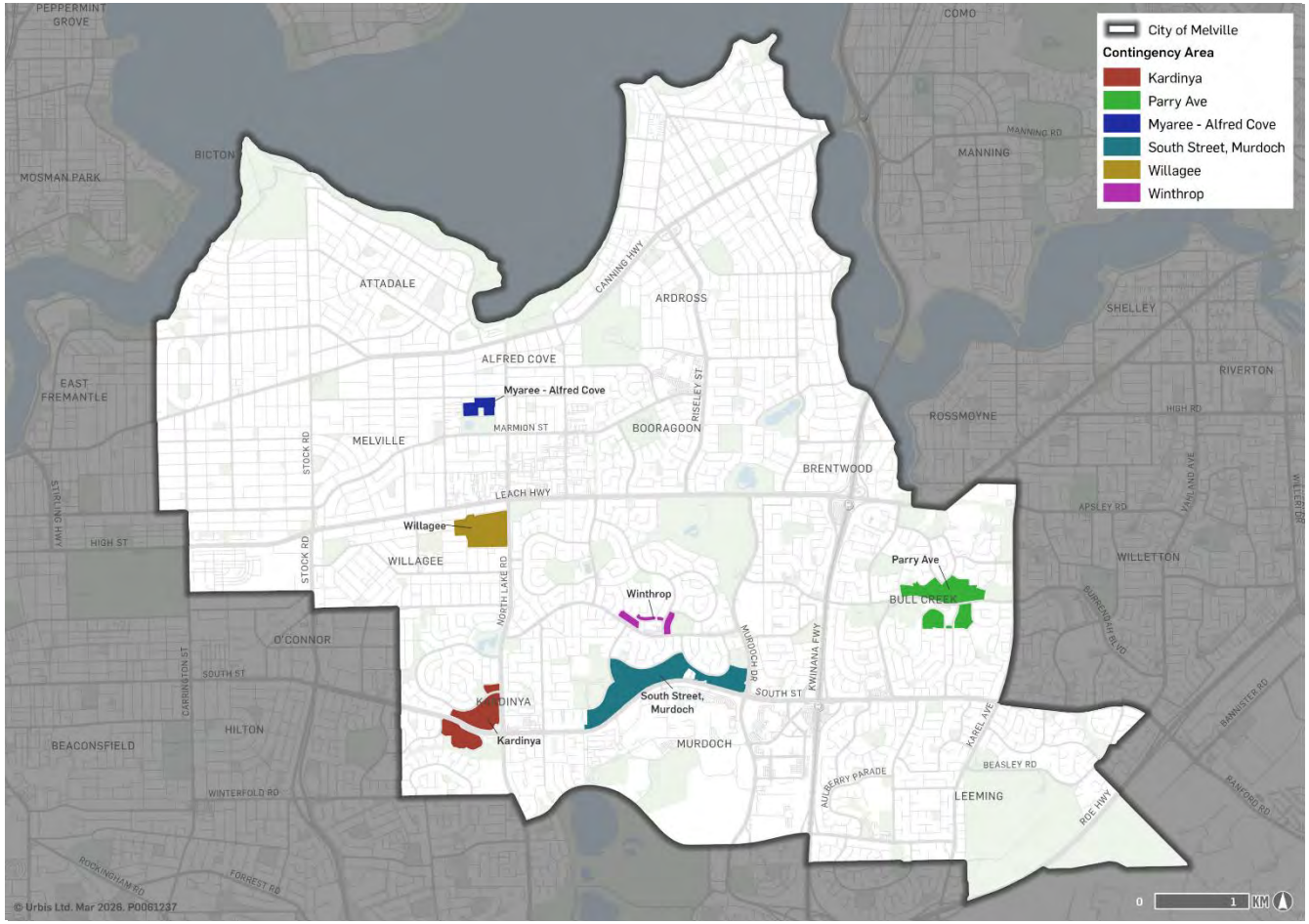
OPPORTUNITY AREA FINDINGS

OPPORTUNITY AREAS

The City of Melville have identified six opportunity areas for review. These areas are understood to be for consideration in addition to or instead of some of the proposed change areas modelled earlier on in this report.

The following pages provide a high level assessment of these opportunity areas and their development capacity. To undertake this assessment, the City of Melville advised Urbis to assume that these opportunity areas would be rezoned to R40.

OPPORTUNITY AREAS



Source: Urbis, City of Melville

OPPORTUNITY AREAS DEVELOPMENT CAPACITY

The rezoning of the opportunity areas to R40 could support an additional 2,226 dwellings under scenario 1A and 3,731 dwellings under scenario 1B.

A detailed breakdown of dwelling capacities by scenario and approach can be found on the following pages.

The average of these two scenarios has formed the basis of development forecasts conducted on the following pages. Additionally, the opportunity areas have been scored using the same approach within the body of this report to support the development forecasting conducting. This can be found on the following page.

SCENARIO 1A – OPPORTUNITY AREAS DWELLING CAPACITY

3,539 Total Development Capacity across Proposed Change Areas

+2,226 Net Additional Dwellings from Existing Count of Dwellings

170% Average Density Uplift across the opportunity Areas

SCENARIO 1B – OPPORTUNITY AREAS DWELLING CAPACITY

5,044 Total Development Capacity across Proposed Change Areas

+3,731 Net Additional Dwellings from Existing Count of Dwellings

284% Average Density Uplift across the opportunity Areas

Source: Urbis, City of Melville
Note Given this is a high level assessment, Scenario's 1A and 1B as defined earlier in this report have only been considered for this analysis.*

DISCLAIMER:

These scenarios represent hypothetical development scenarios and are indicative of potential capacity under each scenario. They do not take into consideration landowner intentions, age of built form, some physical site constraints building costs and other external factors. They also assume an average apartment sizes which can vary and influence maximum dwelling yield.

OPPORTUNITY AREAS DEVELOPMENT CAPACITY

OPPORTUNITY AREAS DEVELOPMENT CAPACITY

OPPORTUNITY AREA	EXISTING DWELLINGS	SCENARIO 1A - GROUP DWELLINGS, NO SITES AMALGAMATED			SCENARIO 1B - MULTIPLE DWELLINGS, NO SITES AMALGAMATED		
		TOTAL DEVELOPMENT CAPACITY	NET DWELLING INCREASE	UPLIFT FROM EXISTING DWELLINGS	TOTAL DEVELOPMENT CAPACITY	NET DWELLING INCREASE	UPLIFT FROM EXISTING DWELLINGS
Kardinya	223	649	426	191%	947	724	325%
Myaree - Alfred Cove	73	162	89	122%	254	181	248%
Parry Ave	285	819	534	187%	1,135	850	298%
South Street Further Investigation Area	458	1,223	765	167%	1,737	1,279	279%
Willagee	215	512	297	138%	727	512	238%
Winthrop	59	174	115	195%	244	185	314%

Source: Urbis, City of Melville
Note Given this is a high level assessment, Scenario's 1A and 1B as defined earlier in this report have only been considered for this analysis.*

OPPORTUNITY AREAS SUCCESS FACTOR SCORING

A success factor assessment of the opportunity areas revealed that these areas can potentially support the development of infill. Typically, they have strong connections to retail, open space and some mode of public transport. Property values may push timeframes for development back and lots may need to be amalgamated to deliver greater density outcomes. Otherwise, the upzoning in these opportunity areas will likely result in townhouse or battle axe development.

Willagee is the only area which does not have favourable infill development success factors. Further north of the identified opportunity area in Willagee has seen successful infill development in recent years however this was delivered by national developer Satterley in what was previously open space. Development on existing residential otherwise will likely prove more difficult given lot size constraints and the age of existing stock.

INFILL SUCCESS FACTOR SCORING, OPPORTUNITY AREAS

PROPOSED CHANGE AREAS	SCORE / DEVELOPMENT VIABILITY	AVERAGE OF PROXIMITY TO RETAIL AND SIZE OF NEAREST RETAIL	AVERAGE OF PROXIMITY TO OPEN SPACE (METRES)	AVERAGE OF PROXIMITY TO BUSES (METRES)	AVERAGE OF PROXIMITY TO TRAINS (METRES)	MEDIAN MULTIPLE PROPERTY VALUES RELATIVE TO GREATER PERTH	MEDIAN MULTIPLE RENTAL VALUES RELATIVE TO GREATER PERTH	PROPORTION OF STOCK LESS THAN 15 YEARS OLD (%)	PROPORTION OF LOTS MORE THAN 1,000 SQ.M (%)
Scoring Measures	**-**	**Greater than 80% = Strong, Between 50% - 80% = Moderate, Less than 50% = Low**	**Less than 200m = Strong, Between 200-500m = Moderate, More than 500m = Low**	**Less than 200m = Strong, Between 200-500m = Moderate, More than 500m = Low**	**Less than 1.5km = Strong, between 1.5-3km = Moderate, More than 3km = Low**	**Greater than 1.8 = Strong, Between 1.4 - 1.8 = Moderate, Less than 1.4 = Low**	**Greater than 1.3 = Strong, Between 1.1 - 1.3 = Moderate, Less than 1.1 = Low**	**Less than 15% = Strong, Between 15-30% = Moderate, More than 30% = Low**	**More than 40% = Strong (More Available Sites to Develop), Between 20-40% = Moderate, Less than 20% = Low (Less Available Sites to Develop)**
Kardinya	Score	100%	96	159	3,648	1.45	1.13	0.9%	4.0%
	Development Viability	Strong	Strong	Strong	Low	Moderate	Moderate	Strong	Low
Myaree – Alfred Cove	Score	100%	48	246	4,044	1.48	1.13	11.9%	0.0%
	Development Viability	Strong	Strong	Moderate	Low	Moderate	Moderate	Strong	Low
Parry Ave	Score	75%	130	131	1,442	1.48	1.18	0.0%	3.5%
	Development Viability	Moderate	Strong	Strong	Strong	Moderate	Moderate	Strong	Low
South Street (Further Investigation Area)	Score	74%	125	121	1,792	1.42	1.13	13.9%	1.8%
	Development Viability	Moderate	Strong	Strong	Moderate	Moderate	Moderate	Strong	Low
Willagee	Score	30%	74	170	3,872	1.21	1.07	61.3%	2.8%
	Development Viability	Low	Strong	Strong	Low	Low	Low	Low	Low
Winthrop	Score	100%	194	159	2,016	1.82	1.28	0.0%	0.0%
	Development Viability	Strong	Strong	Strong	Moderate	Strong	Moderate	Strong	Low

Source: Urbis, Pricefinder, Landgate, Department of Planning Lands and Heritage

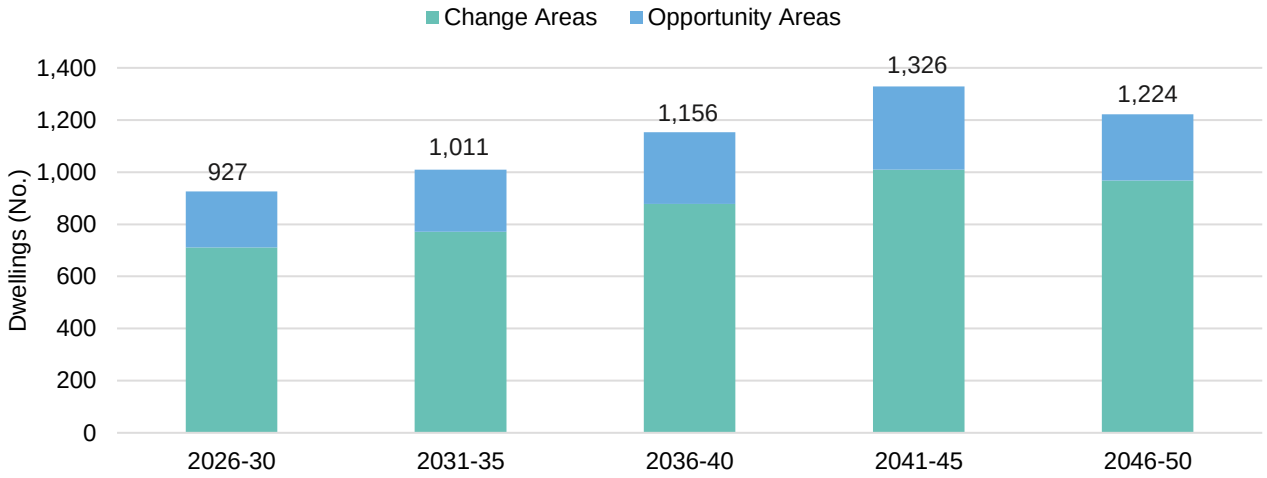
OPPORTUNITY AREA DEVELOPMENT SCENARIO FORECASTS

Urbis undertook scenario modelling for projected development rates across all the change areas and the opportunity areas. It is acknowledged that including these opportunity areas may impact demand within other areas of the City.

Overall, this analysis found that these areas would be anticipated to deliver approximately 5,634 new dwellings (net) by 2050. It is anticipated that the opportunity areas would contribute an additional 1,301 dwellings. In comparison to the modelling within the body of this report, the proposed change areas would deliver 735 less dwellings should the opportunity areas be rezoned. Of those 735 dwellings, It is expected that approximately 68% of these dwellings would not be developed in change areas along Canning Highway and around Booragoon (including Wireless Hill).

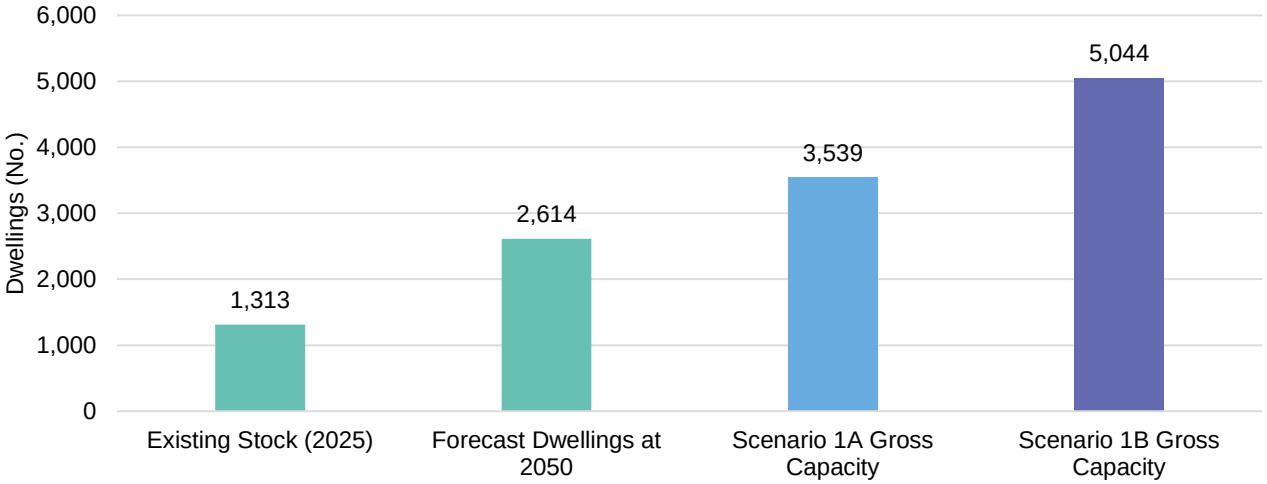
The development rates of the opportunity areas are anticipated to increase over time as other better positioned and more favourable areas of development begin to develop out such as Booragoon and the Riseley Activity Centre beyond 2045.

NET DWELLINGS ACROSS THE PROPOSED CHANGE AREAS AND OPPORTUNITY AREAS, 2026 – 2050



Source: Urbis

FORECAST DWELLINGS ACROSS THE OPPORTUNITY AREAS AND DEVELOPMENT CAPACITY



Source: Urbis

NET DWELLING INCREASES ACROSS PROPOSED CHANGE AND OPPORTUNITY AREAS

CHANGE AREA	2026-30	2031-35	2036-40	2041-45	2046-50
Aurelian St To Leach Highway (Extension 2025)	2	1	1	1	0
Aurelian St To Leach Highway, Palmyra (Residential Density Change)	96	92	89	84	80
Bombard St & Mitchell St (Residential Density Change)	17	18	19	20	21
Booragoon Centre (East Adjacent Residential Density Change)	42	47	53	59	66
Booragoon Centre (West Adjacent Residential Density Change)	94	133	193	282	181
Booragoon Centre East (Extension 2025)	23	22	21	20	18
Brentwood Centre (Adjacent Residential Density Change)	21	19	17	16	14
Bristol Avenue (Adjacent Residential Density Change)	3	3	4	4	5
Canning Beach Road - Applecross (2025)	4	8	15	11	0
Canning Hwy, Carrington St To Murray Rd (Dual Residential Density Codes)	41	43	47	50	54
Canning Hwy, Cowan St To Cunningham St (Dual Residential Density Codes)	34	36	39	42	46
Canning Hwy, Cunningham St To Conon Rd (Dual Residential Density Codes)	23	23	23	22	22
Canning Hwy, Prinsep Road To Rome Rd (Dual Residential Density Codes)	58	53	50	45	41
Canning Hwy, Tain St To Ullapool Rd (Dual Residential Density Codes)	53	57	61	65	70
Coleman Cr & Woodley Cr, Melville (Residential Density Change)	8	8	7	7	6
Curruthers Rd To The Esplanade (2025)	1	1	1	0	0
Farrington Centre (Adjacent Residential Density Change)	31	38	47	58	74
Harris St (Extension 2025)	4	3	2	1	1
Harris St, Bicton (Adjacent Residential Density Change)	0	0	0	0	0
Leach Hwy, Maddox Cr To Rome Rd (Dual Residential Density Codes)	17	13	10	7	5
Marmion St, Melville (Residential Density Change)	5	4	3	2	2
Marmion St, Myaree (Extension 2025)	7	5	4	3	2
Marmion St, Myaree (Residential Density Change)	6	6	5	4	4
North Lake Road, Myaree (Extension 2025)	4	3	3	2	2
North Lake Road, Myaree (Residential Density Change)	8	7	6	5	5
Palmyra Local Centre (Adjacent Residential Density Change)	1	1	1	0	0
Riseley Centre (North Adjacent Residential Density Change)	35	47	67	96	134
River View Tce To The Esplanade (2025)	1	1	1	1	1
Robson Way, Murdoch (Zoning Change)	3	3	3	4	4
South St To Barclay Rd, Kardinya (Residential Density Change)	15	15	15	14	14
Wireless Hill (East Adjacent Residential Density Change)	55	63	73	83	97
Kardinya Opportunity Area	44	49	57	65	76
Myaree - Alfred Cove Opportunity Area	8	8	7	6	6
Parry Ave Opportunity Area	57	69	87	108	79
South Street Further Investigation Area	77	88	101	115	83
Willagee Opportunity Area	17	10	6	3	2
Winthrop Opportunity Area	12	14	18	21	9
Total	**927**	**1,011**	**1,156**	**1,326**	**1,224**

Source: Urbis

FORECASTED DWELLINGS AND DEVELOPMENT CAPACITY

CHANGE AREA	EXISTING STOCK (2025)	FORECAST DWELLINGS AT 2050	SCENARIO 1A GROSS CAPACITY	SCENARIO 1B GROSS CAPACITY
Aurelian St To Leach Highway (Extension 2025)	30	35	57	84
Aurelian St To Leach Highway, Palmyra (Residential Density Change)	559	1,000	1,666	2,413
Bombard St & Mitchell St (Residential Density Change)	110	204	280	422
Booragoon Centre (East Adjacent Residential Density Change)	213	479	732	826
Booragoon Centre (West Adjacent Residential Density Change)	246	1,129	1,060	1,458
Booragoon Centre East (Extension 2025)	166	270	475	564
Brentwood Centre (Adjacent Residential Density Change)	149	236	393	587
Bristol Avenue (Adjacent Residential Density Change)	19	39	52	73
Canning Beach Road - Applecross (2025)	14	52	52	52
Canning Hwy, Carrington St To Murray Rd (Dual Residential Density Codes)	72	307	561	718
Canning Hwy, Cowan St To Cunningham St (Dual Residential Density Codes)	126	323	550	630
Canning Hwy, Cunningham St To Conon Rd (Dual Residential Density Codes)	81	194	372	483
Canning Hwy, Prinsep Road To Rome Rd (Dual Residential Density Codes)	182	428	951	1,256
Canning Hwy, Tain St To Ullapool Rd (Dual Residential Density Codes)	122	428	731	1,006
Coleman Cr & Woodley Cr, Melville (Residential Density Change)	99	135	186	282
Curruthers Rd To The Esplanade (2025)	19	22	33	33
Farrington Centre (Adjacent Residential Density Change)	156	405	458	629
Harris St (Extension 2025)	387	397	468	468
Harris St, Bicton (Adjacent Residential Density Change)	4	5	6	10
Leach Hwy, Maddox Cr To Rome Rd (Dual Residential Density Codes)	146	198	431	492
Marmion St, Melville (Residential Density Change)	51	66	112	162
Marmion St, Myaree (Extension 2025)	58	79	150	217
Marmion St, Myaree (Residential Density Change)	42	66	122	174
North Lake Road, Myaree (Extension 2025)	37	50	80	116
North Lake Road, Myaree (Residential Density Change)	61	93	161	239
Palmyra Local Centre (Adjacent Residential Density Change)	7	10	24	36
Riseley Centre (North Adjacent Residential Density Change)	129	508	409	607
River View Tce To The Esplanade (2025)	52	56	60	60
Robson Way, Murdoch (Zoning Change)	6	22	35	50
South St To Barclay Rd, Kardinya (Residential Density Change)	99	172	264	377
Wireless Hill (East Adjacent Residential Density Change)	343	714	856	1,282
Kardinya Opportunity Area	223	514	649	947
Myaree - Alfred Cove Opportunity Area	73	108	162	254
Parry Ave Opportunity Area	285	685	819	1,135
South Street Further Investigation Area	458	922	1,223	1,737
Willagee Opportunity Area	215	251	512	727
Winthrop Opportunity Area	59	133	174	244
Total	**5,098**	**10,737**	**15,326**	**20,850**

FORECASTED DWELLINGS INCREASE AND BUILD OUT CAPACITY BETWEEN 2025 AND 2050

CHANGE AREA	DWELLING INCREASE (NO.)	DWELLING INCREASE (%)	INDICATIVE BUILDOUT PROPORTION
Aurelian St To Leach Highway (Extension 2025)	5	19%	14%
Aurelian St To Leach Highway, Palmyra (Residential Density Change)	441	79%	30%
Bombard St & Mitchell St (Residential Density Change)	95	85%	39%
Booragoon Centre (East Adjacent Residential Density Change)	267	125%	47%
Booragoon Centre (West Adjacent Residential Density Change)	883	359%	>80%
Booragoon Centre East (Extension 2025)	104	62%	29%
Brentwood Centre (Adjacent Residential Density Change)	87	58%	26%
Bristol Avenue (Adjacent Residential Density Change)	19	103%	45%
Canning Beach Road - Applecross (2025)	38	271%	>80%
Canning Hwy, Carrington St To Murray Rd (Dual Residential Density Codes)	235	326%	41%
Canning Hwy, Cowan St To Cunningham St (Dual Residential Density Codes)	197	157%	43%
Canning Hwy, Cunningham St To Conon Rd (Dual Residential Density Codes)	113	140%	33%
Canning Hwy, Prinsep Road To Rome Rd (Dual Residential Density Codes)	247	135%	27%
Canning Hwy, Tain St To Ullapool Rd (Dual Residential Density Codes)	306	251%	41%
Coleman Cr & Woodley Cr, Melville (Residential Density Change)	36	37%	27%
Curruthers Rd To The Esplanade (2025)	3	15%	21%
Farrington Centre (Adjacent Residential Density Change)	248	159%	64%
Harris St (Extension 2025)	11	3%	12%
Harris St, Bicton (Adjacent Residential Density Change)	0	21%	21%
Leach Hwy, Maddox Cr To Rome Rd (Dual Residential Density Codes)	52	36%	17%
Marmion St, Melville (Residential Density Change)	16	30%	18%
Marmion St, Myaree (Extension 2025)	21	36%	17%
Marmion St, Myaree (Residential Density Change)	25	58%	23%
North Lake Road, Myaree (Extension 2025)	14	35%	21%
North Lake Road, Myaree (Residential Density Change)	31	53%	23%
Palmyra Local Centre (Adjacent Residential Density Change)	3	41%	13%
Riseley Centre (North Adjacent Residential Density Change)	379	294%	>80%
River View Tce To The Esplanade (2025)	5	8%	52%
Robson Way, Murdoch (Zoning Change)	17	274%	45%
South St To Barclay Rd, Kardinya (Residential Density Change)	73	74%	33%
Wireless Hill (East Adjacent Residential Density Change)	371	108%	51%
Kardinya Opportunity Area	291	131%	51%
Myaree - Alfred Cove Opportunity Area	35	48%	26%
Parry Ave Opportunity Area	400	140%	58%
South Street Further Investigation Area	464	101%	45%
Willagee Opportunity Area	38	17%	9%
Winthrop Opportunity Area	74	126%	50%
Total	**5,639**	**111%**	**43%**

Source: Urbis

Note This is a comparison of forecasted dwellings and the average between the development capacity for Scenario's 1A and 1B.*

DEFINITIONS

Detached Housing

The ABS define **separate houses** as:

"This is a house which is separated from other dwellings by a space of at least half a metre. A separate house may have a flat attached to it, such as a granny flat or converted garage (the flat is categorised under Flat or apartment - see below). The number of storeys of separate houses is not recorded.
Also included in this category are occupied accommodation units in manufactured home estates which are identified as separate houses."

Medium Density Housing

The ABS defines **Semi-detached, row or terrace house and townhouse** as:

"These dwellings have their own private grounds and no other dwelling above or below them. They are either attached in some structural way to one or more dwellings or are separated from neighbouring dwellings by less than half a metre."

Apartments

The ABS defines **apartments** as:

"This category includes all dwellings in blocks of flats or apartments. These dwellings do not have their own private grounds and usually share a common entrance foyer or stairwell. This category also includes flats attached to houses such as granny flats, and houses converted into two or more flats."

Non-Private Dwellings

The ABS defines **Non-Private Dwellings** as:

"NPDs are those dwellings, not included above, that provide a communal or transitory type of accommodation. They are classified according to their function for the variable Type of Non-Private Dwelling (NPDD). NPDs include hotels, motels, guest houses, prisons, religious and charitable institutions, boarding schools, defence establishments, hospitals and other communal dwellings."

Unoccupied Private Dwellings

The ABS defines **Unoccupied Private Dwellings** as:

"These are structures built specifically for living purposes which are habitable, but unoccupied on Census night. Vacant houses, holiday homes, huts and cabins (other than seasonal workers' quarters) are counted as unoccupied private dwellings. Also included are newly completed dwellings not yet occupied, dwellings which are vacant because they are due for demolition or repair, and dwellings to let."

Other dwelling types include and are defined by the ABS as:

- **Caravan:** "*Includes all occupied caravans, regardless of where they are located. Occupied campervans are also included."*
- **Cabin, houseboat:** "*This includes all occupied cabins and houseboats. Cabins are self-contained and not intended for long-term residential use. This includes occupied cabins located in residential parks or set up as temporary accommodation. A houseboat is an occupied mobile dwelling (intended for use on water). It is not typically intended for long-term use, although it could be currently used on a permanent or semi-permanent basis. Occupied houseboats are treated as occupied private dwellings regardless of location. Separate houses in caravan or residential parks or marinas occupied by managers or caretakers are not included in this category."*
- **Improvised home, tent, sleepers out:** "*These include sheds, tents, humpies and other improvised dwellings that were occupied on Census night. This category includes people sleeping-out, including those sleeping on the streets, in abandoned buildings, under bridges or in cars."*
- **House or flat attached to a shop, office etc.:** *"A house or flat attached to a shop, office, factory or any other non-residential structure is included in this category."*

Not Stated

The ABS defines **Not stated** as:

"Not stated means the question wasn't answered on the Census form."

Not Applicable

*The ABS defines **Not applicable** as:*

"Not applicable means the question wasn't applicable to the person so they did not need to respond."

This includes the categories Non-private dwellings and Migratory, off-shore and shipping SA1.

Statistical Area Level 1 (SA1)

A Statistical Area Level 1 (SA1) is the smallest geographic unit designed by the Australian Bureau of Statistics (ABS) for releasing Census data. Built from aggregated Mesh Blocks, they typically contain 200 to 800 people (averaging 400) to ensure high-detail data reporting.

COVID-19 AND THE POTENTIAL IMPACT ON DATA INFORMATION

The data and information that informs and supports our opinions, estimates, surveys, forecasts, projections, conclusion, judgments, assumptions and recommendations contained in this report (Report Content) are predominantly generated over long periods, and is reflective of the circumstances applying in the past. Significant economic, health and other local and world events can, however, take a period of time for the market to absorb and to be reflected in such data and information. In many instances a change in market thinking and actual market conditions as at the date of this report may not be reflected in the data and information used to support the Report Content.

The recent international outbreak of the Novel Coronavirus (COVID-19), which the World Health Organisation declared a global health emergency in January 2020 and pandemic on 11 March 2020, has and continues to cause considerable business uncertainty which in turn materially impacts market conditions and the Australian and world economies more broadly.

The uncertainty has and is continuing to impact the Australian real estate market and business operations. The full extent of the impact on the real estate market and more broadly on the Australian economy and how long that impact will last is not known and it is not possible to accurately and definitively predict. Some business sectors, such as the retail, hotel and tourism sectors, have reported material impacts on trading performance. For example, Shopping Centre operators are reporting material reductions in foot traffic numbers, particularly in centres that ordinarily experience a high proportion of international visitors.

The data and information that informs and supports the Report Content is current as at the date of this report and (unless otherwise specifically stated in the Report) does not necessarily reflect the full impact of the COVID-19 Outbreak on the Australian economy, the asset(s) and any associated business operations to which the report relates. It is not possible to ascertain with certainty at this time how the market and the Australian economy more broadly will respond to this unprecedented event and the various programs and initiatives governments have adopted in attempting to address its impact. It is possible that the market conditions applying to the asset(s) and any associated business operations to which the report relates and the business sector to which they belong has been, and may be further, materially impacted by the COVID-19 Outbreak within a short space of time and that it will have a longer lasting impact than we have assumed. Clearly, the COVID-19 Outbreak is an important risk factor you must carefully consider when relying on the report and the Report Content.

Where we have sought to address the impact of the COVID-19 Outbreak in the Report, we have had to make estimates, assumptions, conclusions and judgements that (unless otherwise specifically stated in the Report) are not directly supported by available and reliable data and information. Any Report Content addressing the impact of the COVID-19 Outbreak on the asset(s) and any associated business operations to which the report relates or the Australian economy more broadly is (unless otherwise specifically stated in the Report) unsupported by specific and reliable data and information and must not be relied on.

To the maximum extent permitted by law, Urbis (its officers, employees and agents) expressly disclaim all liability and responsibility, whether direct or indirect, to any person (including the Instructing Party) in respect of any loss suffered or incurred as a result of the COVID-19 Outbreak materially impacting the Report Content, but only to the extent that such impact is not reflected in the data and information used to support the Report Content.

This report is dated **May 2026** 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 Ltd's (Urbis) opinion in this report. Urbis prepared this report on the instructions, and for the benefit only, of **City of Melville** (Instructing Party) for the purpose of an **Land Economics Assessment** (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.

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