



ESSENTIAL ECONOMICS

Northern Geelong Growth Area

Activity Centre Assessment

Prepared for

Lovely Banks Development Group

by

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Authorship

Report stage	Author	Date	Review	Date
Draft report	Julie Lim Sean Stephens	7 December 2016	John Henshall	7 December 2016
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Every effort has been made to ensure the accuracy of the material and the integrity of the analysis presented in this report. However, Essential Economics Pty Ltd accepts no liability for any actions taken on the basis of report contents.

Contact details

For further details please contact Essential Economics Pty Ltd at one of our offices:

96 Pelham Street
Carlton
Victoria 3053
Australia
PH +61 3 9347 5255
FAX +61 3 9347 5355

Level 26 / 44 Market Street
Sydney
New South Wales 2000
Australia
PH +61 2 9089 8654

EMAIL mail@essentialeconomics.com

WEB www.essentialeconomics.com

ABN 92 079 850 427

Our Reference: 16151

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INTRODUCTION

Background

Lovely Banks Development Group has commissioned Essential Economics to assess the future activity centre planning requirements of the Northern Geelong Growth Area (NGGA) within the City of Greater Geelong. This forms part of the Northern and Western Geelong Growth Areas Project initiated by the City of Greater Geelong.

At present, detailed urban planning for the NGGA is still to be undertaken. Therefore, the analysis in this report is considered preliminary in nature and will help guide more detailed future land use planning.

As input to this activity centre assessment, our firm prepared a separate “Urban Form and Development Capacity” paper which identifies, on a preliminary basis, the key influences on future urban development in the NGGA.

Objectives

The objectives of this assessment are to prepare an activity centre planning framework for the NGGA which includes:

- Identifying options for a hierarchy of activity centres
- Determining the catchments served by the proposed centres and how these relate to other centres outside the NGGA
- Identifying the potential land use mix in the proposed activity centre framework
- Generally meeting the requirements of the NWGGA scope of works document prepared by Council.

1 URBAN FORM AND DEVELOPMENT CAPACITY

This Chapter presents a summary of the first phase of works for this project, an 'Urban Form and Development Capacity' paper. For more detailed commentary and analysis refer to that document.

1.1 Growth Area Location and Description

The Northern Geelong Growth Area (NGGA) is located between the northern extent of the Geelong urban area in Corio, and the Lara West growth area. Previous studies have identified the NGGA as being highly suited to future urban development.

Comprising approximately 2,127 hectares of land, the NGGA primarily consists of low rolling hills, as shown in Figure 1.1. The predominant existing land use in the NGGA is farming and rural living.

To the south-east of the NGGA is the Geelong Ring Road Employment Precinct (GREP) which has been zoned for heavy industrial uses. The types of activities in the GREP are expected to include manufacturing, storage, goods distribution, and heavier industry applications including port-related uses.

In the south are the well-established Geelong suburbs of Norlane and Corio.

Figure 1.1 Subject Site View



Source: Google Maps

1.2 Influences of Future Urban Form

The influences on future urban development in the NGGA include the following:

- **Road Network:** The preliminary road network has been prepared by GTA Consultants, and reflects an extension of the existing surrounding road networks into the NGGA. A 'grid' pattern for roads is used, including a main north-south major internal road link.
- **Sewer and Gas Pipeline Influences:** The South West gas pipeline easement is 20-metres wide and runs from the north-eastern edge of the NGGA to the south-west edge. Future urban development will also be influenced by the gas pipeline measurement length which extends from the pipeline easement and has an influence on allowable land uses, including activity centres. The exact influence this will have on urban development remains uncertain and subject to ongoing discussion between relevant stakeholders.
- **Buffers to adjacent land uses:** The Lara Energetic Materials Manufacturing Plant (LEMMP) has a 1km industry buffer which applies to land in the north-west of the NGGA. It is assumed the land within the LEMMP buffer is not developable for residential or intensive urban uses.

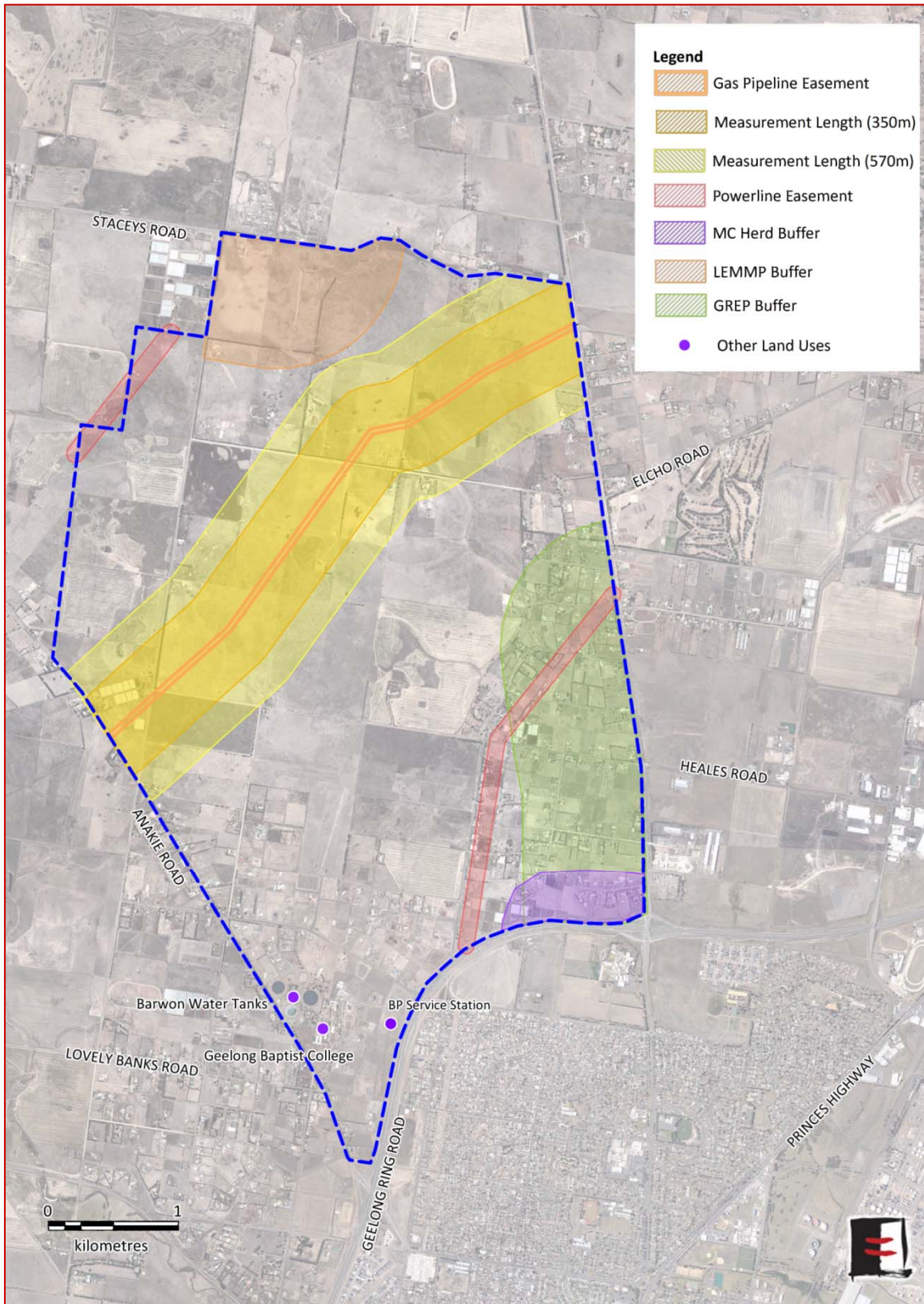
A 1km buffer for the Geelong Ring Road Employment Precinct (GREP) applies to land in the south-east of the NGGA and protects the major industrial operations of this strategic employment precinct. In particular, the GREP buffer applies to Rural Living zoned land west of Bacchus Marsh Road.

The MC Herd 500m industry buffer protects the key employment land from any further encroachment by residential or intensive urban land uses, and includes land on the far south-eastern edge of the NGGA.

- **Existing Land Uses:** The Barwon Water Tanks along Anakie Road, Geelong Baptist College on Anakie Road, and BP Service Station along Geelong Ring Road are existing land uses in the NGGA that will influence future urban form.
- **Heritage:** A home of state architectural significance is located at 605 Bacchus Marsh Road, and the regionally significant Barwon Water Lovely Banks Basin located at 600 Anakie Road is a registered heritage site within the NGGA.
- **Rural Residential Areas:** Rural residential areas are located in the south and south-east of the NGGA. Initial guidance from Council indicates that where rural residential areas are located outside buffers, they may be able to support additional residential densities.

These influences on the future nature of urban development in the NGGA are shown in Map 1.1.

Map 1.1 NGGA Urban Land Use Influences



Source: Essential Economics

1.3 Population Capacity Analysis

Preliminary dwelling and population projections for the NGGA have been calculated using geographic 'cells' that represent smaller sub-regions for use in future analysis. These cells have been defined on the basis of sensible geographic and planning divisions within the growth area.

With consideration of the land use constraints identified previously, the **gross** developable area in the NGGA is approximately 1,535 hectares.

Subsequently, the gross dwelling densities and average household size provided in the NGGA context report (CoGG, 2016) have been applied as follows:

- Farming Zone and Urban Growth Zone land at 15.4 dwellings per hectare (standard density)
- Rural Living Zone land at 6.4 dwellings per hectare (low density)
- Rural Living Zone areas within industry and employment buffers (low density - no change).

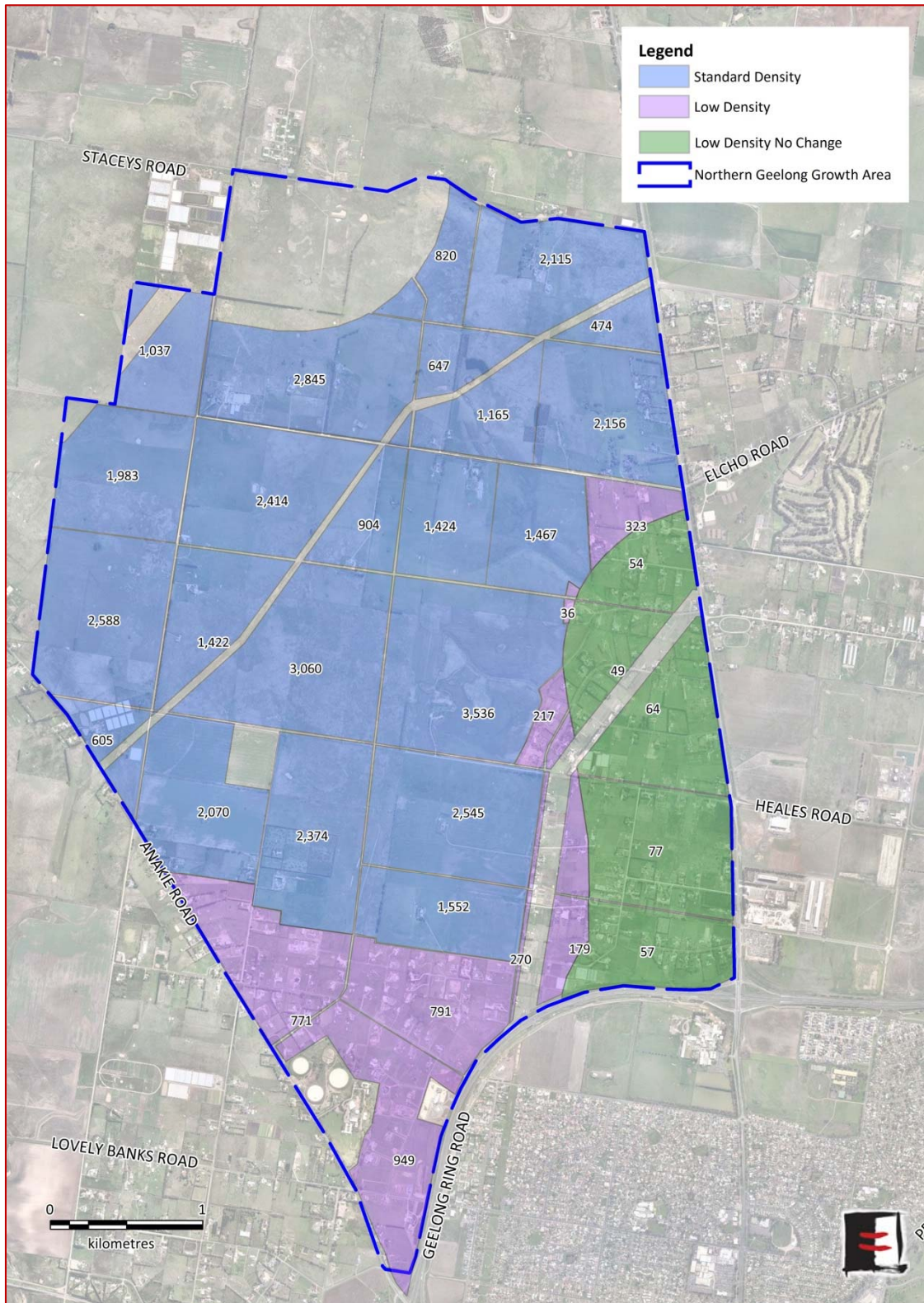
A total development capacity of **15,370 dwellings** is identified with these preliminary assumptions. Using the anticipated average household size of 2.8 (CoGG, 2016), a total population of **43,040 persons** is forecast at development capacity.

To reflect land devoted to schools, activity centres and parks, a **net** developable figure has been derived based on 70% of land devoted to residential use. According to these assumptions, the average residential lot size in the standard density residential areas of the NGGA will be approximately 450m². This is consistent with current industry expectations.

The preliminary forecast of 15,370 dwellings for the NGGA is highly achievable and at the lower end of the 16,000 to 18,000 dwellings identified by Council in earlier scoping work.

The preliminary forecast distribution of dwellings and persons in the NGGA is shown in Map 1.2.

Map 1.2 NGGA Preliminary Population Distribution (43,040 persons)



Source: Essential Economics; CoGG

1.4 Potential Higher Density Development Scenarios

The preliminary urban capacity estimate for the NGGA of 15,370 lots is based on what are considered to be highly achievable assumptions of lot density and developable area.

In reality, subject to detailed urban planning, potential may exist for a higher density dwelling outcome and a higher population in the NGGA. Although it is also possible that a lower dwelling density than that identified in the adopted scenario may be achieved, this is not considered likely.

On this basis, alternative scenarios have been developed based on the achievement of additional dwellings within the NGGA. These scenarios assume that the employment and industry buffers will not be available for residential development, although this may change in the future subject to possible long-term achievable development outcomes [**Note: any changes to buffers are not advocated or endorsed, and are subject to long-term policy decisions which are impossible to predict at this time.**]

According to the scenario analysis (see Table 1.1), an increase in dwelling density could mean an increase in total lot production to 20,450 lots, or approximately +5,100 additional dwellings. This is based on 20 dwellings per gross developable area in the growth areas, and 11 dwellings per hectare in the Low Density residential area.

The scenario analysis highlights the need for planning flexibility to be applied for community infrastructure, including activity centres, subject to detailed urban development patterns being determined by the subsequent growth area planning process.

Table 1.1 Residential Density Scenarios for NGGA

Precinct	Dwelling Density Scenarios					Higher Density Scenario ¹
	Adopted Scenario	Dwellings per hectare				
Standard Density	15.4	16	17	18	19	20
Low Density	6.4	7	8	9	10	11
Number of Dwellings						
Standard Density	14,000	14,540	15,450	16,360	17,270	18,180
Low Density	1,260	1,380	1,580	1,770	1,970	2,170
Low Density No Change	106	106	106	106	106	106
Total Dwellings	15,370	16,030	17,140	18,240	19,350	20,450
Total Population	43,040	44,880	47,980	51,070	54,170	57,270

Source: Essential Economics

1. Higher density scenarios for illustrative purposes only and are subject to detailed urban planning for the NGGA

2 POPULATION AND RETAIL SPENDING

This Chapter provides an assessment of population and retail spending forecasts for the NGGA.

2.1 Regional Population Drivers Relevant to NGGA

Urban development in the NGGA will be influenced by development outcomes within the City of Wyndham and the Lara West growth area. The close connection between the NGGA and dwelling demand in the western parts of Melbourne and Lara is reflected in aspects such as:

- Distance to the Melbourne CBD (55km) is comparable to urban growth areas identified for Cranbourne East and Clyde in the south-east growth corridor of Melbourne
- Residents of the NGGA can easily utilise the Regional Rail Link for commuter rail services to Melbourne, noting that travel times from Lara to the Melbourne CBD are in the order of 55 minutes, just 12 minutes longer than for residents living in Wyndham Vale
- The 55-minute rail commute time of Lara to the Melbourne CBD is less than that for residents of Pakenham, and similar to that of residents in Sunbury and Cranbourne
- A high share of Wyndham residents work in the nationally significant industrial areas of western Melbourne located at Laverton, Altona and Brooklyn, which are also highly accessible from the NGGA via the Western Freeway
- Residents of Lara and the northern suburbs of Greater Geelong are approximately twice more likely to work in metropolitan Melbourne than residents in the central and southern parts of the municipality.

Development of the NGGA can generate ‘induced demand’ for residential development in Greater Geelong associated with capturing market share away from residential estates in Wyndham and Melton.

On this basis, the NGGA is expected to generate a higher share of population growth from Metropolitan Melbourne, particularly as the Werribee and Wyndham Vale region reaches population capacity.

2.2 Historical Population Trends

Historical population trends for the City of Greater Geelong and the City of Wyndham, as shown in Table 2.1, have been prepared based available data from the ABS Estimated Resident Population Series and Victoria in Future (2016).

City of Greater Geelong

Over the period since 2001, the average annual population growth rate in Lara has consistently exceeded the City of Greater Geelong, driven in part by the relatively high accessibility to metropolitan Melbourne.

Since 2006, some population growth has occurred in the established suburbs of Bell Park and Corio associated with infill residential development.

Greater Geelong continues to experience increasing rates of population growth, with an average increase of 1.6% per annum between 2011 and 2016, relative to 1.0% per annum between 2001 and 2006.

City of Wyndham

The City of Wyndham continues experience very high rates of population growth, with an additional 10,650 residents per annum between 2011 and 2016.

In the western part of Wyndham, the Werribee-Wyndham Vale region located 25km north-east of the NGGA is also experiencing accelerating population growth rates which reflect the strong demand for housing in growth areas located west of the Melbourne CBD.

Table 2.1 Historical Population Trends, 2001 to 2016

	2001	2006	2011	2016
Population (No.)				
City of Greater Geelong	191,140	201,100	215,480	232,920
- Lara	13,080	14,680	15,860	17,880
- Bell Park-Corio	40,020	39,520	40,960	41,910
City of Wyndham	87,040	115,310	166,840	220,100
- Werribee-Wyndham Vale	34,420	40,340	48,520	58,020
Average Annual Growth (%)				
City of Greater Geelong		+1.0%	+1.4%	+1.6%
- Lara		+2.3%	+1.6%	+2.4%
- Bell Park-Corio		-0.3%	+0.7%	+0.5%
City of Wyndham		+5.8%	+7.7%	+5.7%
- Werribee-Wyndham Vale		+3.2%	+3.8%	+3.6%
Average Annual Growth (No.)				
City of Greater Geelong		+1,990	+2,880	+3,490
- Lara		+320	+240	+400
- Bell Park-Corio		-100	+290	+190
City of Wyndham		+5,650	+10,310	+10,650
- Werribee-Wyndham Vale		+1,180	+1,640	+1,900

Source: ABS Estimated Resident Population Series, Essential Economics

2.3 Retail Spending Analysis

Estimates of per capita retail spending by the City of Greater Geelong, the City of Wyndham, and Lara West have been prepared with reference to the MarketInfo retail spending model.

The total retail spending in both the City of Greater Geelong and Wyndham are estimated at \$13,030 per resident, while spending by residents of Lara are slightly higher at \$13,730 per resident. These figures are as shown in Table 2.3.

Table 2.2 Per Capita Retail Spending 2016, (\$2016)

	Greater Geelong	City of Wyndham	Lara
Food Liquor Groceries	\$5,730	\$5,390	\$5,950
Food Catering	\$970	\$1,600	\$1,080
Apparel	\$1,430	\$1,310	\$1,450
Homewares	\$1,080	\$960	\$1,270
Bulky Merchandise	\$1,410	\$1,400	\$1,520
Leisure/General	\$1,990	\$1,920	\$2,050
Services	<u>\$420</u>	<u>\$460</u>	<u>\$400</u>
Total Retail	\$13,030	\$13,030	\$13,730

Source: Marketinfo, Essential Economics

Due to the proximity and similar housing demand characteristics (see Section 2.1), per capita retail spending in the NGGA is expected to have characteristics similar to residents of Wyndham and Lara.

As a result, the per capita retail spending by residents NGGA is forecast to be approximately \$13,390, as shown in Table 2.4. This figure is expressed in 2016 dollars and at current per capita spending levels. The long-term nature of development of the NGGA means that forecasts of retail spending taking into account inflation and real spending growth are not useful for analysis.

Allowing for the forecast population of 43,040 persons within the NGGA, total retail spending of \$576 million per annum would be generated by residents (in 2016 dollars).

Table 2.2 Forecast Retail Spending at Population Capacity (\$2016)

	Per Capita Spending	Total Spending
Food Liquor Groceries	\$5,670	\$244m
Food Catering	\$1,340	\$58m
Apparel	\$1,380	\$59m
Homewares	\$1,120	\$48m
Bulky Merchandise	\$1,460	\$63m
Leisure/General	\$1,990	\$85m
Services	<u>\$430</u>	<u>\$19m</u>
Total Retail	\$13,390	\$576m

Source: Marketinfo

Subject to detailed urban planning in the NGGA, a forecast population capacity higher or lower than 43,040 persons would have a proportional effect on total retail spending.

For example, the population capacity of 57,270 persons in the higher density scenario identified in Table 1.1 would generate total retail spending of \$767 million (expressed in 2016 dollars).

3 ACTIVITY CENTRE ASSESSMENT

This Chapter identifies the appropriate locations for activity centres in the NGGA, including testing of alternative location scenarios.

3.1 Existing and Proposed Activity Centres

Activity centres in the NGGA will be operating in conjunction with a range of existing and proposed activity centres across the wider region. It is important that the location, role and function of these centres is clearly understood in order to ensure that the activity centre hierarchy within the NGGA operates in a complementary manner. The location and indicative catchment of relevant centres is shown in Map 3.1.

Existing Centres

Corio Central Shopping Centre

Corio Central Shopping Centre is the sub-regional centre serving residents of northern Geelong, including Lara. The centre incorporates approximately 27,000m² of retail floorspace, including major tenants Kmart, Coles, Woolworths, and Best & Less. Corio Central Shopping Centre trades successfully, generating annual sales of approximately \$160 million.

The centre operates in a well-established urban environment, with limited physical capacity for site expansion. A relatively aged centre, the design and layout reflects the original development of the centre in 1973.

Catchment: Includes established areas in the north of urban Geelong, as well as Lara, the Lara West growth area and the NGGA. Corio Central Shopping Centre is currently the only sub-regional centre serving urban Geelong north of Central Geelong activities district.

Lara Town Centre

The Lara Town Centre is located 5.5km to the east of the NGGA, and is the primary service centre for the Lara Township. Recent investment in the centre includes a new Coles supermarket and an expansion to the existing Woolworths. Total retail floorspace is estimated at approximately 12,000m².

Catchment: Includes the existing Lara urban area, and will also serve a town centre role for the Lara West growth area in a complementary manner to the future Lara West neighbourhood centre. Note that the Lara town centre has an emphasis on meeting day-to-day needs and is not a true sub-regional centre in terms of the scale and diversity of retail and other uses. For this reason, the Lara town centre is not expected to directly serve residents of the NGGA.

Bell Post SC

Bell Post Shopping Centre is a neighbourhood activity centre located 3km from the southern edge of the NGGA, and is anchored by a Woolworths supermarket. The centre contains approximately 5,500m² of retail floorspace and is of only limited competitive relevance to activity centres in the NGGA.

Catchment: Serves a neighbourhood centre role to the surrounding areas of northern Geelong and is not of direct relevance to the NGGA.

Homemaker

Various locations for homemaker retailing are in northern Geelong, including:

- The Geelong Gate Homemaker Centre which is located on the Princes Highway at Corio
- Bunnings Norlane and associated retailers fronting the Princes Highway
- Land in the Commercial 2 Zone opposite the Herds site on Bacchus Marsh Road.
- Individual traders located in the light industrial areas of Norlane

Catchment: The Geelong Gateway Homemaker Centre and Norlane Homemaker precinct serve both the northern parts of urban Geelong, as well as Lara, Lara West and the NGGA.

Central Geelong

Central Geelong is the regional centre serving the City of Greater Geelong and surrounding rural and regional areas. The centre contains approximately 115,000m² of retail floorspace, including the Westfield Bay City shopping centre. Central Geelong also includes an extensive street-based retail precinct. Major retail tenants in Central Geelong include Myer, Target, Big W, Coles and Harris Scarfe. Central Geelong is also the administrative and commercial centre serving the region and contains a wide range of commercial and community facilities and services.

Catchment: Is the higher-order centre serving the entire Greater Geelong region, including all of the NGGA.

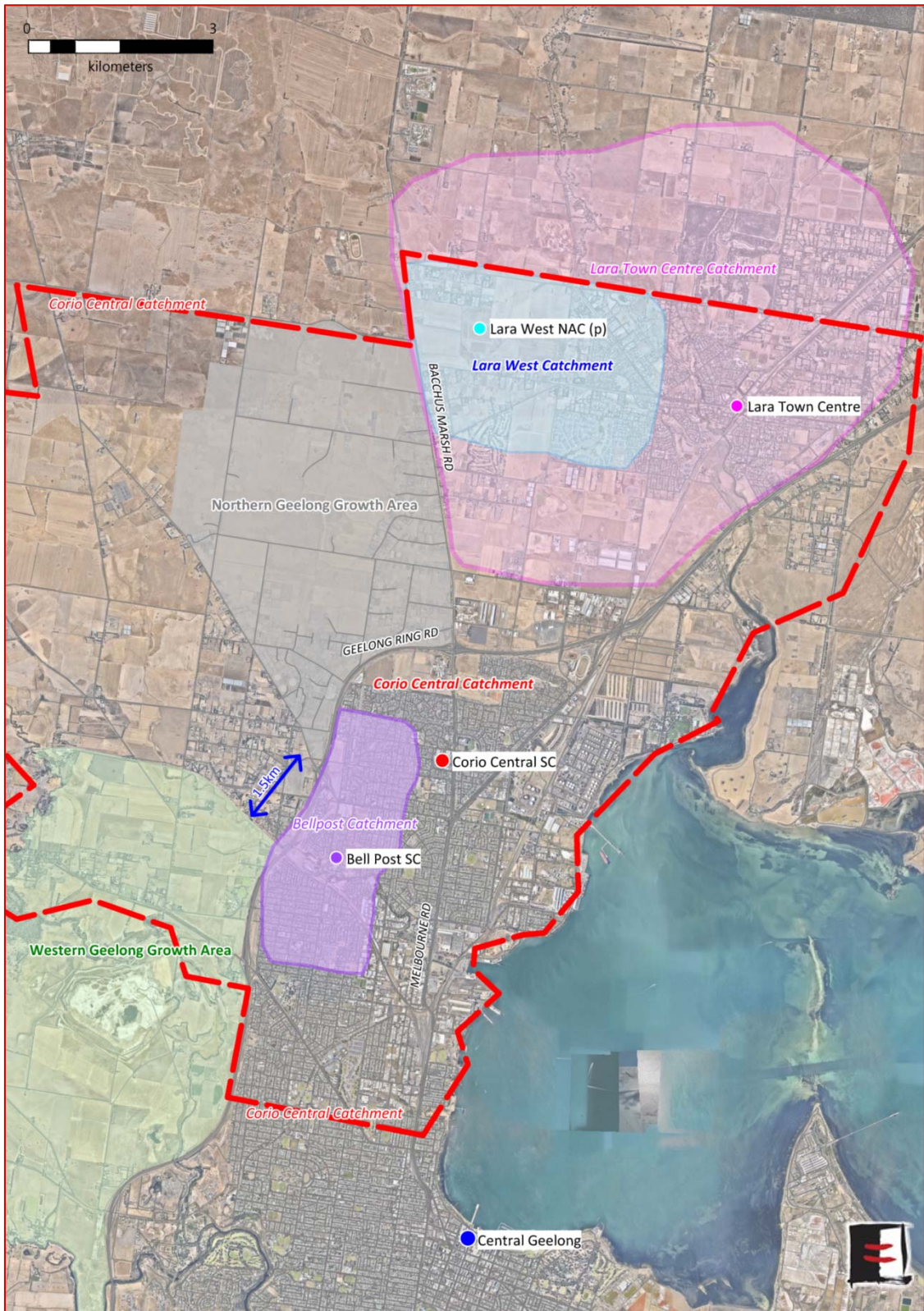
Proposed Centres

Lara West

The Lara West urban growth area adjoins the north-east edge of the NGGA and includes the proposed Lara West neighbourhood activity centre. This centre is proposed for a location central to the Lara West growth area, and is proposed to include total floorspace of approximately 4,700m² (additional subject to permit).

Catchment: Is located centrally to the Lara West growth area, and is expected to primarily serve residents of that growth area. The proposed centre location provides only limited scope to serve residents of the NGGA.

Map 3.1 Centre Catchment Comparison (Indicative Catchment Areas)



Source: Essential Economics with MapInfo

Note: Prepared with reference to draft Geelong Retail Strategy 2016 and published sources

Western Geelong Growth Area

The Western Geelong Growth Area (WGGA) is also subject to a detailed urban planning program, including an activity centre hierarchy. It is not anticipated that activity centres in the WGGA will have an influence on centre planning within the NGGA given:

- The physical separation of at least 1.5km between the northern and southern growth area boundaries
- A low-level of direct and convenient transport connections between each growth area
- The general bias in the orientation and connectivity of each growth area to established urban areas of Geelong rather than each other.

Catchment: The catchments served by centres in the WGGA are not expected to include land within the NGGA.

3.2 NGAA Centre Location Analysis

In identifying potential locations for activity centres in the NGGA, the following considerations have been made:

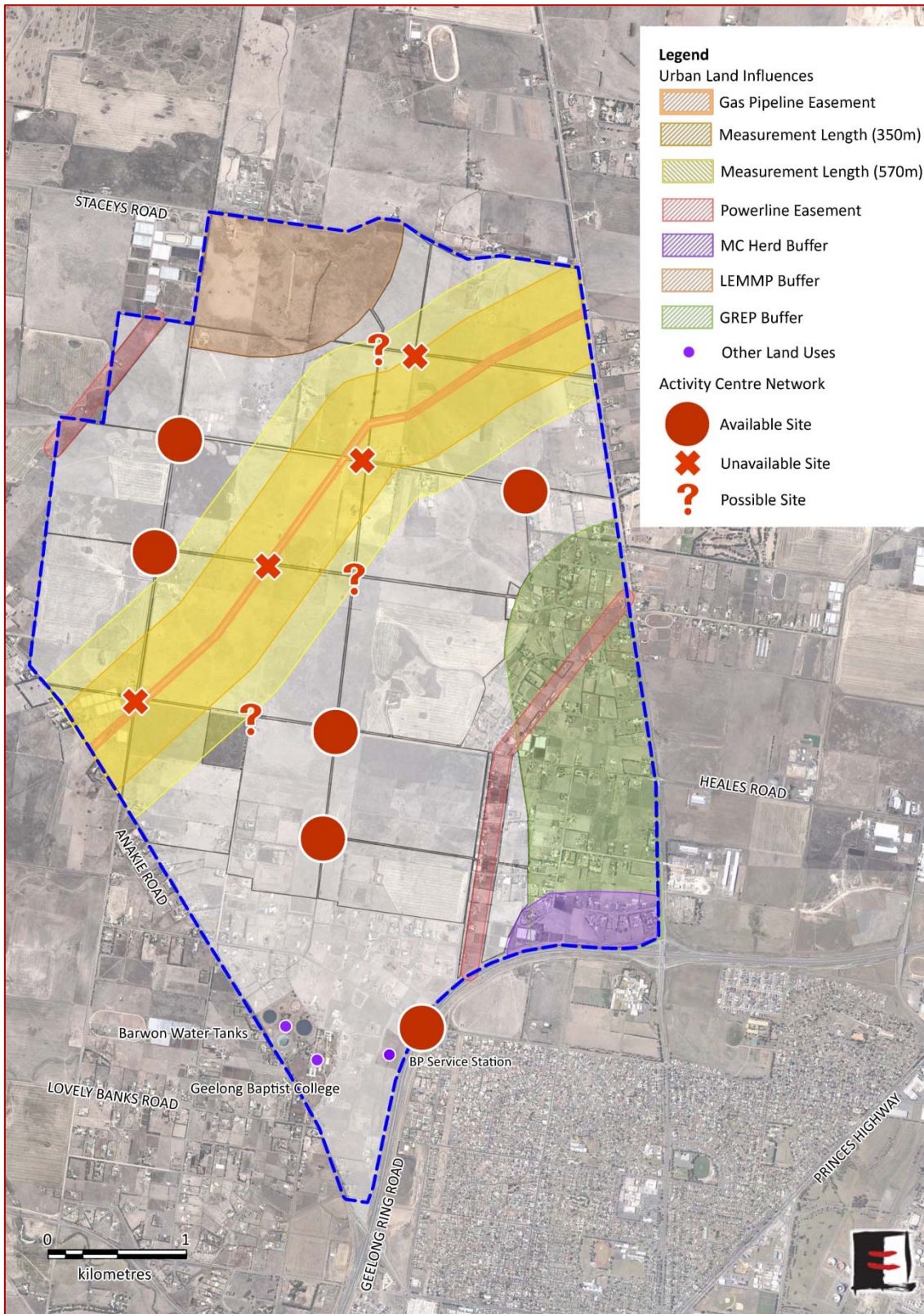
- **Road Network:** a preference has been made for prominent corner locations on the major road network within the NGGA. These locations allow for sufficient exposure and accessibility to potential customers and visitors to an activity centre, and help drive vibrancy and customer activity.

Prominent corner locations are generally preferred by all major supermarket chains within urban growth areas (where reasonable). These locations are also generally identified for activity centres in PSPs undertaken on behalf of the Victorian Planning Authority (VPA). It is anticipated detailed local site planning will determine the exact location and layout of centres at, or near, major intersections.

- **Easements and Planning Buffers:** the presence of numerous easements and planning buffers (see Chapter 1) which apply to the NGGA will have a strong influence on possible activity centre locations. For the purposes of the assessment, it has been assumed that an activity centre may be possible within the area within the 570 metre and 350 metres measurement length – subject to future confirmation of the exact controls to apply. No activity centre is to be developed within the other buffer areas.
- **Urban Accessibility:** the potential activity centre locations will need to be accessible to a surrounding resident population, thus locations on the edge of the NGGA are not considered, unless also accessible to an urban population outside the growth area. Similarly, the presence of lower-density residential areas in the NGGA also influence potential activity centre locations. Activity centres are preferred in locations where standard residential density is to be achieved, and where they are most accessible to people living in standard density residential areas.

A summary of available, possible and unavailable sites is shown in Map 3.2.

Map 3.2 Centre Location Analysis



Source: Essential Economics

3.3 Activity Centre Demand Drivers

In understanding the potential demand for retail and other uses in activity centres within the NGGA, the following aspects are relevant.

Long-Term Development Outlook

The NGGA represents a long-term urban development opportunity for Greater Geelong, with a likely development phase of approximately 25 to 30 years. For this reason, the activity centres in the NGGA will need to evolve over time to reflect growing and changing demand considerations.

Most importantly, activity centre locations should have consideration for meeting the needs of residents in the early stages of urban development in the NGGA, through to the latter stages of development, and ultimately at full development of the growth area.

Population Capacity

The population capacity of the NGGA has been estimated at approximately 43,040 persons, based on the likely urban form and the application of urban density assumptions applied by Council (see Chapter 2). The adopted population scenario is broadly reflective of current industry benchmarks and is a realistically achievable outcome based on the expected future urban form in the NGGA.

In reality, detailed urban planning for the NGGA may result in actual development outcomes with a population higher (or less likely, lower) than forecast. For this reason, consideration needs to be made for sufficient flexibility for activity centres in the NGGA to respond to levels of demand higher or lower than indicated by the current preliminary population scenario.

Retail Spending

Based on current estimates of likely retail spending of \$13,390 per capita (2016 dollars and spending levels), total retail spending by NGGA residents of approximately \$576 million per annum is forecast at development capacity (see Section 2.4).

The significant growth in retail spending from residents of the NGGA will support a wider range of new retail facilities including supermarkets, specialty shops, bulky goods retailer etc. As much as practicable, this spending should be retained within the NGGA in order to maximise available local facilities, liveability and employment.

Supportable Retail Floorspace

In general terms, a total of approximately 2.2m² of retail floorspace per capita is provided in Australia. As such, a population of 43,040 persons will generate demand able to support 94,600m² of total retail floorspace.

However, in reality, some retail demand will leak to other centres outside the NGGA, including Central Geelong, Corio Central etc. Likewise, centres in the NGGA will 'capture' some spending from other areas, including from Lara and Lara West.

The supportable retail floorspace within the NGGA will be determined by the activity centre hierarchy that is adopted, including consideration of the appropriate provision of:

- Higher-order retailing consistent with a sub-regional function including discount department stores, mini major etc, and
- Homemaker or bulky goods retailing.

These aspects are considered in the balance of this report.

Considering Balance of the Activity Centre Hierarchy

The development of the activity centre hierarchy in the NGGA must also take into account the balance of the hierarchy in Geelong. This is to ensure that the network of activity centres applying to the NGGA is an organic extension of the current activity centre hierarchy for the wider region, and that impacts on the existing centre network are within reasonable bounds.

However, it is important to recognise that trading impacts' on other centres are not, in isolation, a valid planning consideration for activity centres. It is the implication of any trading impacts for the delivery of an activity centres hierarchy that serves the net community benefit which is of relevance to planning policy. Competition and trading impacts are a fundamentally important part of a market economy and the creation of a robust, innovative and responsive retail sector.

Industry Change and Innovation

Demand for a range of land uses located in activity centres will be subject to the effects of changing industry trends, consumer tastes, technology and innovation. For this reason, it is important that activity centre planning is not overly subject to controls reflecting current industry practice, but rather can respond to the evolving demands of business and consumers over time.

Supermarkets

No other retail format is visited more often by a higher share of the population than supermarkets. For growth area planning, supermarkets are the most important retail 'anchor' tenant to consider in terms of meeting the day-to-day needs of NGGA residents and identifying appropriate activity centre locations.

One major supermarket is typically provided per 10,000 residents in growth areas of Australia. This suggests that with 43,040 residents at capacity, the NGGA would be able to support a total of **four full-line supermarkets**, with the potential for a smaller limited range supermarket such as ALDI.

In determining preferred locations for activity centres in the NGGA, an outcome is being sought which ensures the viability of four major supermarkets. This potentially includes four separate sites, or alternatively consideration of three sites with one activity centre supported as a location for two major supermarkets. These two scenarios are considered in the following Section 3.4.

3.4 Site Comparison and Catchment Testing

This section of the report provides an assessment of alternative activity centre locations within the NGGA. The analysis includes consideration of two specific activity centre scenarios:

- **Four Centre Scenario:** Assumes four centres are developed in the NGGA, each anchored by a single major supermarket.
- **Three Centre Scenario:** Assumes three centres are developed in the NGGA, with one centre containing two major supermarkets and the other two centres with a single major supermarket each

Each scenario is based on a population of 43,040 persons at full development in the NGGA.

Four Centre Scenario

Centre Locations

Preferred activity centre locations have been chosen with consideration of the urban form and capacity influences (see Chapter 1) and the locational considerations in Section 3.2.

The adopted four centre scenario was developed based on testing of various four-centre location options to determine the preferred framework.

An overview of the four centres and the exclusive catchment area within the NGGA that they serve is shown in Map 3.3, and described below.

Catchment Descriptions

The characteristics of the exclusive catchment served by each centre are as follows:

- **Area 1:** The catchment served by the centre in Area 1 will include approximately 11,640 persons at full development. This includes 3,095 people or 26% of the population in Low Density No Change and Low Density areas.
- **Area 2:** The catchment served by the centre in Area 2 will include approximately 9,290 persons at full development. This includes 365 people or 4% of the population in Low Density No Change and Low Density areas.
- **Area 3:** The catchment served by the centre in Area 3 will include approximately 9,220 persons at full development. This includes 375 people or 5% of the population in Low Density No Change and Low Density areas.
- **Area 4:** The catchment served by the centre in Area 4 will include approximately 12,890 persons at full development.

Accessibility

The four centre scenario allows for some overlap of centres within a 1km radius of each other, particularly in Area 2. This implies a high degree of direct competition between centres which

may undermine vibrancy and the ability to deliver some non-retail centre components which rely on exposure to high levels of centre visitation.

A total of 65% of the population in the NGGA will be living within 1km of a centre location, with this higher at 67% for people living in the proposed standard density residential areas.

Overview

Overall, the four centre scenario allows for a catchment size of between 9,220 and 12,890 persons per centre.

The location for a centre serving Area 2 needs to address the presence of the 570 metre gas pipeline measurement length. An indicative location of this centre away from the major road intersection is shown in Map 3.3 in order to remain outside the 570 metre measurement length. Such a location away from a prominent location may reduce accessibility and visitation levels (although this is dependent upon the final road network configuration).

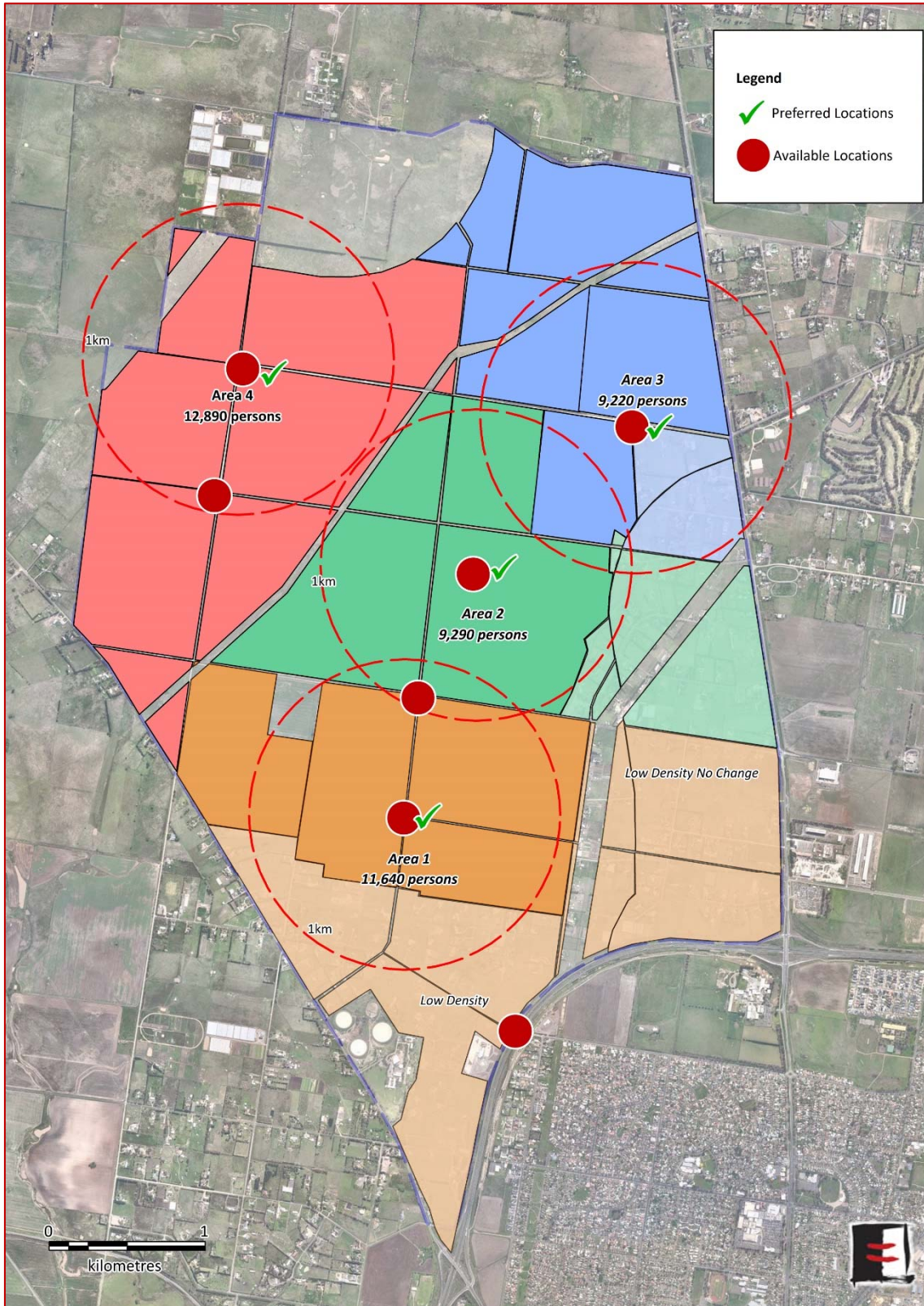
The centres at Area 2 (9,290 persons) and Area 3 (9,220 persons) are below the indicative threshold of 10,000 persons for a major supermarket. As a result, stores at these locations may trade only moderately, with modest overall levels of visitation and vibrancy.

From a risk management perspective, planning for neighbourhood centres at Area 2 and Area 3 should reflect the very real potential for the viability of these centres to be undermined by:

- Lower than anticipated population density in the exclusive catchments for each centre as a result of constraints possibly identified in subsequent detailed urban planning
- Lower interest from major supermarket operators in view of:
 - The influence of the gas pipeline easement and measurement length on the trading performance of the Area 3 centre arising from their influence on accessibility and exposure to residents of the exclusive catchment (particularly from the north)
 - The need for a location adjacent to low density residential development in order to avoid the gas pipeline measurement length (see also Map 3.2)
 - The possible 'leakage' of some spending to the Lara West neighbourhood centre from residential areas north of the pipeline.

However, the performance of the centres at Area 2 and Area 3 may also be positively influenced by higher than expected levels of housing and population density in the NGGA.

Map 3.3 NGGA - Four Centre Scenario



Source: Essential Economics

Three Centre Scenario

Centre Locations

Preferred activity centre locations have been chosen with consideration of the urban form and capacity influences (see Chapter 1) and the locational considerations in Section 3.2. An overview of the three centres and the exclusive catchments they serve within the NGGA is shown in Map 3.4, and described below.

Catchment Descriptions

The characteristics of the catchment served by each centre are as follows:

- **Area 1:** The catchment served by the centre in Area 1 will include approximately 18,595 persons at full development. This includes 3,460 people or 18% of the population in Low Density No Change and Low Density areas.
- **Area 2:** The catchment served by the centre in Area 2 will include approximately 10,645 persons at full development. This includes 380 people or 4% of the population in Low Density No Change and Low Density areas.
- **Area 3:** The catchment served by the centre in Area 3 will include approximately 13,800 persons at full development.

Accessibility

The three centre scenario allows for no overlap of centres within a 1km radius of each other. A total of 51% of the population in the NGGA will be living within 1km of a centre location, with this higher at 55% for people living in the proposed standard density residential areas.

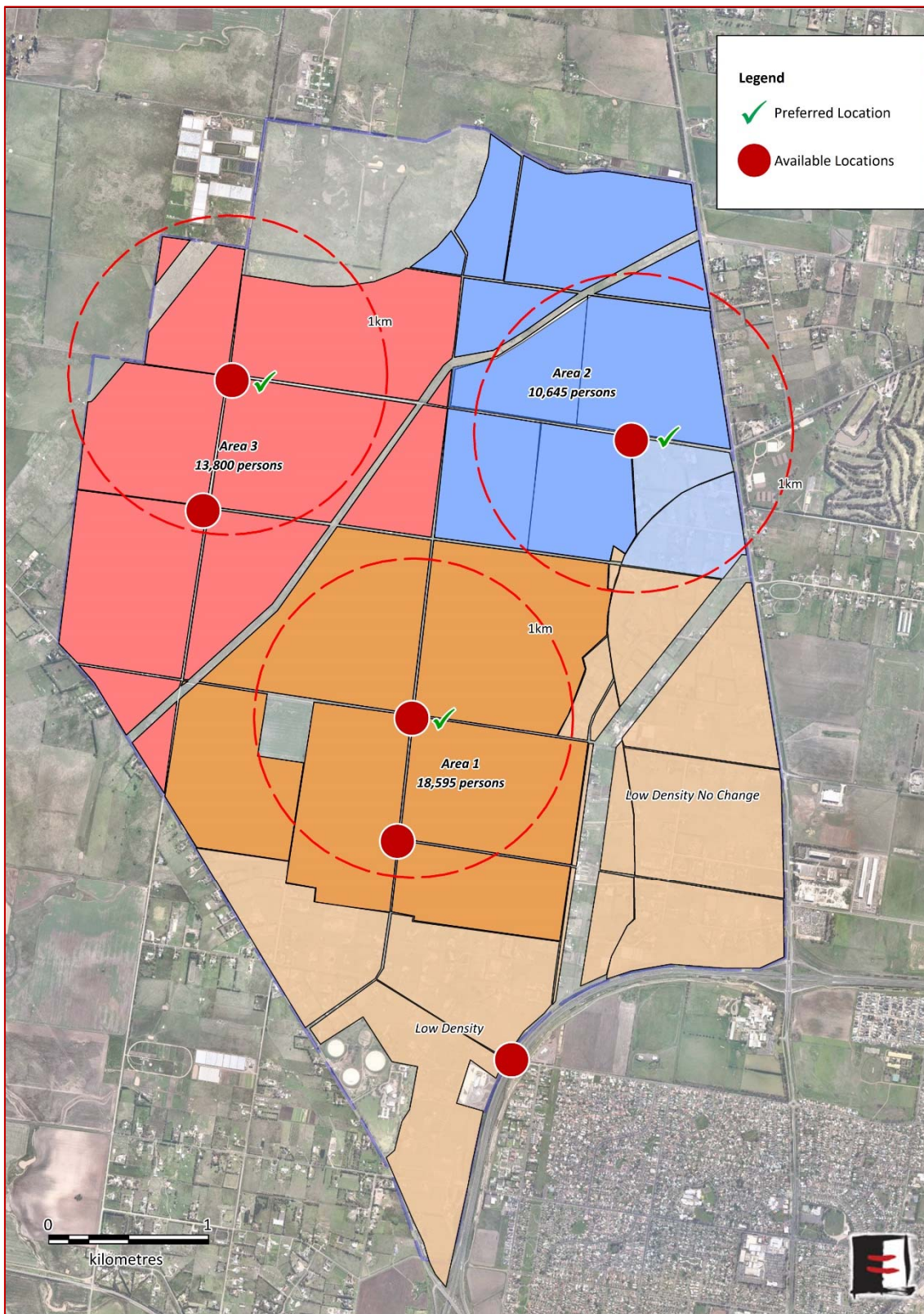
A total of 89% of the population in standard density urban areas would live within 1.5km (three minute drive) of a centre. Note this is higher than the 88% of people in standard density urban areas living within 1.5km of a centre under the four centre scenario, and reflects the complex settlement patterns in the NGGA as described in Chapter 1.

The three centre model allows for an even distribution of centres which are not as heavily impacted by the buffers, pipeline measurement lengths and other constraints associated with urban form of the NGGA which are present in the four centre scenario.

That is, from a risk management perspective, the deliverability of the three centre scenario potentially more achievable in comparison to the four centre scenario. The three centre scenario is less vulnerable to changes in expected dwelling and population density which may arise from detailed urban planning, and provides locations with a high degree of support expected from major supermarket operators.

Allowance has been made in the three centre scenario for a possible additional supermarket-based centre, probably located centrally to the NGGA. This is subject to urban planning identifying higher than expected residential densities sufficient to support a fifth major supermarket in the NGGA.

Map 3.3 NGGA - Three Centre Scenario



Source: Essential Economics

Overview

The three centre scenario allows for a catchment size of between 10,645 and 18,595 persons per centre. This is sufficient to ensure strong trading levels, as well as high amounts of customer visitation and vibrancy. No centre is at risk of being un-viable subject to detailed urban planning outcomes which may reduce the size of individual catchments.

For this reason, the three centre scenario is considered highly achievable and able to accommodate a wide range of possible development outcomes within the NGGA that may be identified in the detailed urban planning phase.

Flexibility exists for an additional neighbourhood centre, if detailed urban planning subsequently identifies a sufficiently high population capacity in the NGGA (say 50,000-plus persons).

3.5 Potential Locational Framework

A comparative analysis of the three and four centre scenarios suggests that:

- **Accessibility:** both scenarios allow for a spread of centres that is accessible to all residents of the NGGA notwithstanding the impact of buffers, gas pipeline measurement lengths, low density residential areas etc. All centres can locate at prominent locations on the local transport network. Where gaps in local service delivery are identified during the detailed urban design phase, these can be resolved through the delivery of local convenience retail nodes and centres.
- **Viable:** the three centre scenario allows for strong and viable activity centres which are less vulnerable to changes in achievable population capacity which may arise during the urban planning phase for the NGGA. The four-centre scenario is achievable with the adopted population scenario, although may be vulnerable to change subject to the detailed urban planning for the NGGA.
- **Reflects Urban Structure:** the scenarios provide for the creation of exclusive catchments which are a natural 'fit' within the unique constraints and urban development patterns of the NGGA
- **Flexibility:** the three centre scenario does not preclude the development of a fourth centre if justified by achievable dwelling densities identified during detailed urban planning and design for the NGGA.
- **Sense of Hierarchy:** the three centre scenario allows for a large neighbourhood centre (Area 1) which provides a sense of hierarchy to residents of the NGGA, rather than four similarly sized centres serving a common role and function. Both the three and four centre scenarios have scope to allow for a higher-order sub-regional centre in the NGGA (see Chapter 4).

4 CENTRE FLOORSPACE ASSESSMENT

This Chapter of the report provides an assessment of the potential retail floorspace development in the NGGA which will need to be accommodated by the activity centre hierarchy. Consideration of non-retail floorspace is also provided.

4.1 Neighbourhood-Level Retailing

Four Centre Scenario

Neighbourhood-level retail facilities will generally be developed according to the requirements of major supermarket traders, and with reference to the demand for supporting speciality shops and other retail and non-retail components.

It is impossible to accurately predict the scale and nature of retailing for each centre in the current early phases of planning for development of the NGGA. However, each neighbourhood centre can be expected to include at full development:

- A major supermarket operator (3,000m² to 4,000m²)
- Retail speciality shops (1,500m² to 2,500m²)
- Other retail including larger mini major type tenancies such as discount variety and pharmacy, as well as convenience and other retail associated with service stations, restaurants bar bistro etc. (500m² to 2,000m²)
- Non-retail uses potentially including healthcare, gyms, office and consulting suites, service industry (e.g motor vehicle repairs), child care, Government services (library, Council service centre) etc. (1,500m² to 4,000m²).

In general terms, planning for a typical neighbourhood centre with a single major supermarket will allow for approximately **7,000m² of retail floorspace** and **3,000m² of non-retail uses**. Overall, this requires a total site area of approximately 3 hectares allowing for car parking, service and delivery areas, landscaping etc.

As detailed planning for the NGGA proceeds it will be necessary to review the appropriate floorspace and site area allocation for each centre. Subject to expected dwelling yields, urban development patterns and transport networks, some individual centres may require a larger or smaller footprint.

Three Centre Scenario

According to the three centre locational framework for the NGGA, neighbourhood-level retail facilities may be distributed on the following basis.

Area 1

Anchored by two major supermarkets, and potentially including a smaller limited range supermarket serving the entire NGGA.

This centre is located centrally to wider NGGA and can deliver a genuine ‘large neighbourhood’ centre role and function which includes some uses not viable at the two other smaller centres.

On an indicative basis, Table 4.1 shows that the centre would comprise of approximately **15,000m²** of retail floorspace.

An indicative allowance for 5,000m² of non-retail floorspace is also provided. This would likely include office space, showrooms, medical and other non-retail commercial uses.

Table 4.1 Area 1 Large Neighbourhood Centre, Indicative Floorspace

Tenants	Floorspace
Major Supermarket	3,500m ²
Major Supermarket	3,500m ²
Limited Range Supermarket	1,500m ²
Specialty Shops	4,000m ²
Other Retail	<u>2,500m²</u>
Total Retail	15,000m²
Non Retail	5,000m ²

Area 2 and Area 3

The single-supermarket based centres at Area 2 and Area 3 would have a role and function typical of similar centres in growth areas of metropolitan Melbourne and Geelong.

As per the four-centre scenario, this would include a major supermarket operator supported by a range of specialty shops providing convenience-oriented retail. Some scope may also exist for standalone food retailers and retail located on pad sites. Total retail floorspace is approximately **7,000m²**.

A summary of the possible tenancy and floorspace mix is shown in Table 4.2.

Table 4.2 Area 2 and 3 Neighbourhood Centres, Indicative Floorspace

Tenants	Floorspace
Major Supermarket	3,500m ²
Specialty Shops	2,000m ²
Other Retail	<u>1,500m²</u>
Total Retail	7,000m²
Non Retail	3,000m ²

Source: Essential Economics

4.2 Sub-Regional Assessment

Market Demand for a Sub-Regional Centre

With an expected population in the NGGA of 43,000 persons at full development, it is appropriate to consider the opportunity for a sub-regional centre to operate in the activity centre hierarchy.

A sub-regional centre provides a wider and higher-order range of retail and other facilities relative to a neighbourhood-level centre. Typically, this includes the provision of a discount department store, also often referred to as a 'DDS' (most often Target, Kmart or Big W).

In urban growth areas of Australia, a discount department store is generally viable when the population threshold of 35,000-plus persons is achieved. At present, operators are typically seeking markets slightly larger than this at 40,000 to 50,000 persons.

In considering the opportunity for a sub-regional centre in the NGGA we have identified the following key factors:

- **Population Threshold:** The forecast population capacity in the NGGA of 43,040 persons is generally consistent with the expectation for a new DDS and sub-regional centre.
- **Potential Location:** A location for a sub-regional centre in the north-east of the NGGA would need to address the gas easement and gas pipeline measurement length. Any available location for a sub-regional centre in the north-east of the NGGA would be located in proximity to low density residential areas, and with potentially sub-optimal access arrangements.

For this reason, a preferred location for a potential sub-regional centre is central to the NGGA, unencumbered by buffers, easements or the gas pipeline measurement length. An upgrade of the role and function of this centre to 'sub-regional' status is easily achievable at either:

- **Four Centre Scenario:** Area 2 centre
- **Three Centre Scenario:** Area 1 centre.
- **Lara:** At present, the population of Lara uses the Corio Central Shopping Centre as its primary sub-regional shopping facility. This is reflected in the Corio Central catchment identified in Map 3.1.

A new purpose-built sub-regional shopping facility at the NGGA would provide additional choice for current and future residents of Lara and the Lara West growth area who are likely to utilise both centres, as suits their own requirements and preferences.

Note that the Corio Central Shopping Centre has particular attributes that support its ongoing role in providing sub-regional services and facilities to residents of Lara and Lara West, namely:

- The Lara Town Centre is approximately 7.4km north-east (direct distance) of Corio Central Shopping Centre, and this is effectively the same as the distance between the Area 1 Centre and Lara Town Centre (7.2km direct distance) in the three centre NGGA scenario
 - The transport networks in Lara offer excellent access to Corio Central Shopping Centre via Bacchus Marsh Road, Forest Road South and Princes Highway/Freeway
 - Journey-to-work patterns for many Lara residents involve passing in proximity to Corio Central Shopping Centre in order to access employment opportunities in urban Geelong
 - The degree of integration between the urban areas of Lara and the NGGA is reduced by the presence of planning buffers and low density residential areas (see Chapter 1). This reduces the extent to which residents of Lara might otherwise use a sub-regional centre in the NGGA.
- **Corio Central:** Corio Central will compete to some degree with a sub-regional centre in the NGGA.
 - **Infill Residential:** The catchment served by Corio Central in the established suburbs to the south is experiencing its own population growth associated with various infill development opportunities (see also Table 2.1).

As shown in Table 4.3, forecast population in the wider region means that the overall provision of sub-regional shopping facilities in northern Geelong would be relatively unchanged with the development of a sub-regional centre in the NGGA.

Table 4.3 Current and Future Population Per Sub-Regional Centre (No. Persons)

	Current	Long-Term Forecast
Population		
NGGA	900	43,040 ¹
Lara (incl Lara West)	17,880	32,000 ²
Bell Park-Corio (excluding NGGA)	<u>37,700</u>	<u>41,500³</u>
Total Population	56,480	116,540
Sub-Regional Centres	1	2
Average Population Per Sub-Regional Centre	56,480	58,270

1. As per preliminary population projection

2. Allows for development of Lara West Growth Area (11,000 residents as per PSP) and 3,000 residents in balance of Lara (no allowance for the potential future rezonings identified in G21 lot supply analysis)

3. Nominal increase to 2036 based on id consulting forecasts prepared for Council.

For Corio Central Shopping Centre, long-term viability is not undermined by a sub-regional centre in the NGGA. At present, Corio Central serves an exclusive catchment of approximately 56,480 persons, as shown in Table 4.3.

It is also important to recognise the significant potential benefits to residents of the NGGA and Lara associated with the provision of a new sub-regional centre in the NGGA which generates consumer choice and supports economic well-being and sustainability.

Any proposed sub-regional centre in the NGGA would be subject to detailed future assessment as more detailed planning for the growth area proceeds. However, at this time a high-level catchment analysis indicates that development of a sub-regional centre in the NGGA could proceed without excessive trading impacts that might otherwise undermine the role and function of the Corio Central Shopping Centre.

Potential Development Mix

A sub-regional role in the NGGA activity centres hierarchy would result in a significant increase in floorspace for the relevant centre location, relative to neighbourhood centre status.

In overall terms, retail floorspace would increase to between **25,000m²** and **30,000m²**.

A 30,000m² centre is most likely under the 3-centre scenario.

The additional floorspace potentially includes a DDS (7,000m²), additional specialty shops and additional other retail such as mini majors, family restaurants and fast food outlets etc. This is summarised in Table 4.4.

Additional non-retail floorspace would also be associated with a sub-regional centre. Including higher-order office, commercial and administrative functions typically attracted to sub-regional centre locations.

Note that a larger retail component for a sub-regional centre is often associated with the stronger provision of these complementary non-retail uses. This is because these non-retail functions seek locations adjacent to the high-levels of visitation generated by a major retail centre.

Table 4.4 Sub-Regional Centre, Indicative Maximum Floorspace

Tenants	Sub-Regional Centre	
	Four Centre Scenario	Three Centre Scenario
Discount Department Store	7,000m ²	7,000m ²
Major Supermarket	3,500m ²	3,500m ²
Major Supermarket – 3 centre option only	-	3,500m ²
Limited Range Supermarket	1,500m ²	1,500m ²
Specialty Shops	6,000m ²	7,000m ²
Other Retail	7,000m ²	7,500m ²
Total Retail	25,000m²	30,000m²
Non Retail	10,000m ²	15,000m ²

Source: Essential Economics

With a maximum floorspace of approximately 45,000m², including retail and non-retail components, an allowance for up to 14 hectares of land for the sub-regional centre is required.

4.3 Homemaker Retailing

In Australia, the total provision of large-format homemaker (bulky goods) retailing is in the order of 0.7m² per capita.

On that basis, the total provision of homemaker retail floorspace supported by the population of the NGGA is approximately **30,000m²** (or 0.7m²* 43,040 persons).

Some spending on homemaker retail will be directed to businesses in urban Geelong, including at the Gateway Homemaker Centre. However, future urban development at Lara and Lara West in the future means that it is also reasonable to allow for at least some spending from these areas to be directed to a future homemaker retail precinct within the NGGA.

At present in Australia, major homemaker centres and precincts typically have a minimum 'critical mass' of 20,000m² of floorspace. For the NGGA, a marginally higher allowance for **25,000m²** of retail floorspace is recommended allowing for the potential for some sales and visitation to be drawn from Lara and Lara West.

Typically, a homemaker retail precinct will also include some showroom uses that are non-retail in nature. A nominal allowance of **5,000m²** has been made for non-retail uses co-locating with a homemaker retail precinct in the NGGA – this may be delivered at an edge-of-centre location to the sub-regional centre.

4.4 Mixed Business Area

Subject to detailed urban planning and design, the provision of a 'mixed business area' is advocated for the NGGA which provides an appropriate location for a wide range of service businesses to operate. These would include the full-range of service businesses in an urban area related to motor vehicle sales and repairs, light industry, trade and wholesale business etc.

On an indicative basis, a general business area able to accommodate **25,000m²** of floorspace is proposed. A possible location is in proximity to the sub-regional centre given its higher-order role.

4.5 Total Floorspace Provision

In total, the proposed activity centre hierarchy for the NGGA allows for approximately **74,000m²** to **76,000m²** of retail floorspace, or 1.7m² of retail floorspace per capita. This is shown in Table 4.5.

The allowance includes 5,000m² of retailing at the local centre level of the hierarchy. Note that locations for approximately 5 to 7 local centres in the NGGA can only be determined through a

more detailed urban design process. These centres will increase the accessibility of residents in the NGGA to basic convenience retail and other facilities.

Table 4.5 NGGA Forecast Retail Floorspace and Non-Retail Floorspace (Indicative)

Retail Hierarchy	<u>Four Centre Scenario</u>		<u>Three Centre Scenario</u>	
	Retail	Non-Retail	Retail	Non-Retail
Sub-Regional	25,000m ²	10,000m ²	30,000m ²	15,000m ²
Neighbourhood	21,000m ²	9,000m ²	14,000m ²	6,000m ²
Homemaker	25,000m ²	5,000m ²	25,000m ²	5,000m ²
Local	5,000m ²	2,000m ²	5,000m ²	2,000m ²
Mixed Business Area	n.a.	25,000m ²	n.a.	25,000m ²
Total	76,000m²	51,000m²	74,000m²	53,000m²

Source: Essential Economics

5 ACTIVITY CENTRE FRAMEWORK

This Chapter of the report outlines the overarching activity centre planning framework for the NGGA.

5.1 Key Principles

In delivering the proposed activity centre framework for the NGGA, the goals for retail development in Greater Geelong identified by SGS Economics and Planning in advice to Council in March 2016 have been considered. These are as follows:

- ***To provide convenient access to goods and services, minimising the need for, and length of, car trips***

The proposed hierarchy responds to the unique urban form and capacity challenges of the NGGA to provide a network of centres that are convenient and accessible to the future population. A total of at least 84% of the NGGA population will be living within 1.5km of a centre. The potential new sub-regional centre will also generate significant travel time benefits for local residents seeking higher-order employment and other needs.

- ***To encourage a competitive supply of goods and services, keeping prices down***

A hierarchy is proposed for the NGGA which allows for competition between retailers and provides a relatively high overall provision of local goods and services.

- ***To encourage walkable access to suppliers of day to day essentials***

The proposed centres serve exclusive catchments highly accessible to surrounding residents and will be complemented during the detail urban design phase by a network of appropriately located local activity centres.

- ***To create vibrant and exciting town and neighbourhood centres***

The proposed centre hierarchy has been developed on the basis that each centre is able to serve a sufficient catchment which ensures appropriate levels of trading and centre visitation.

- ***To maintain an appropriate mix of sub-regional centres that offer a wide range of retail goods and services***

A sub-regional centre in the NGGA would ensure that residents of northern Geelong have appropriate access to higher-order facilities, without undermining the existing Corio Central sub-regional centre and the regional function of Central Geelong.

- ***To improve a strong Central Geelong, acting as a flagship for the commercial and cultural life of the City***

The provision of retail and other services in the NGGA is at a level which retains the role of Central Geelong as the highest-order retail, commercial and administrative centre serving future residents of the growth area.

- ***To distribute bulky goods activity within a hierarchy, with retailers located in centres and in a number of specialised regional bulky goods nodes.***

An allowance has been made for bulky goods retailing to be developed in accordance with normal retail planning considerations. In particular, potential exists for an edge-of-centre location adjacent to the proposed sub-regional centre.

5.2 Net Community Benefit

In terms of achieving a net community benefit, both activity centre hierarchy options deliver the following general outcomes:

- **Employment:** The retail floorspace identified in the proposed hierarchy options will generate a total of approximately **2,500 jobs**. The potential for non-retail employment is based on a mix of uses varying from small offices through to large showrooms and general business areas. Total non-retail employment in indicative terms would be in the order of **1,150 jobs**. Thus, overall long-term employment is estimated at **3,650 jobs** according to the three and four centre activity centre hierarchy options identified for the NGGA.
- **Retained Spending:** The proposed activity centre hierarchy in the NGGA would retain the equivalent of approximately 75% to 80% of spending by residents (in net terms). This is equivalent to \$425 million to \$450 million of retail spending in 2016 dollars. The balance of spending (\$150 million to \$175 million) would be directed to a range of other existing and proposed activity centres including Corio Central, Central Geelong etc, as well as online-only sales.
- **Balanced Hierarchy:** The provision of sub-regional, neighbourhood, local, homemaker activity centres and a mixed business area in the NGAA will provide residents with a genuine sense of choice and a full-range of local facilities.
- **Certainty:** Given the lack of clarity related to achievable urban development outcomes in the NGGA, the proposed activity centre hierarchy has been developed with care to ensure that all outcomes are achievable and developable. The three centre hierarchy can be delivered with a higher-degree of certainty and lower 'planning risk' than the four-centre option. Although

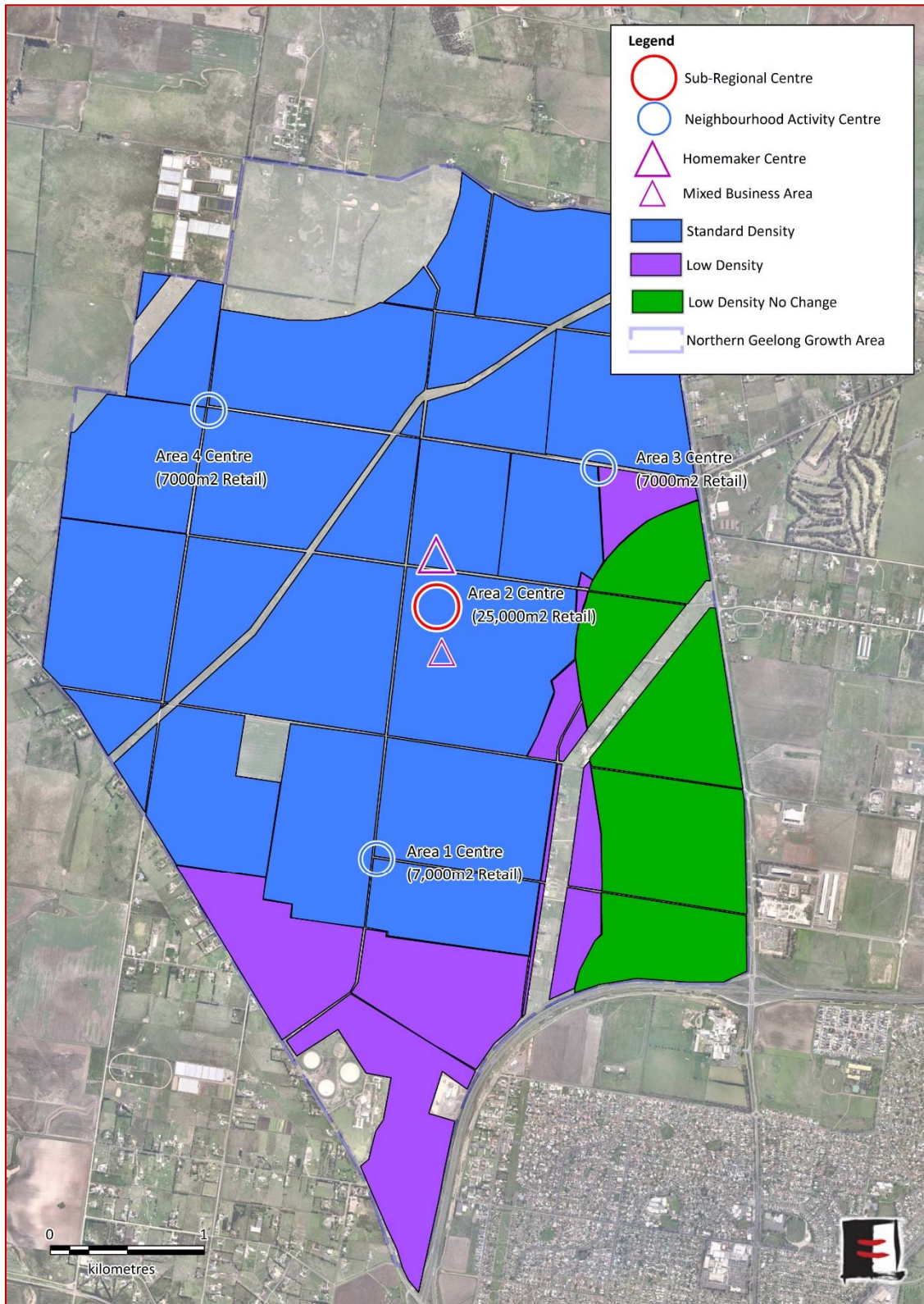
the four centre option is readily achievable if dwelling densities above the adopted scenario (15,370 dwellings) are achieved.

In the three-centre option, the flexibility for a potential additional neighbourhood centre is provided, subject to a higher than expected dwelling density and population capacity in the NGGA being achieved.

5.3 Activity Centre Hierarchy Overview

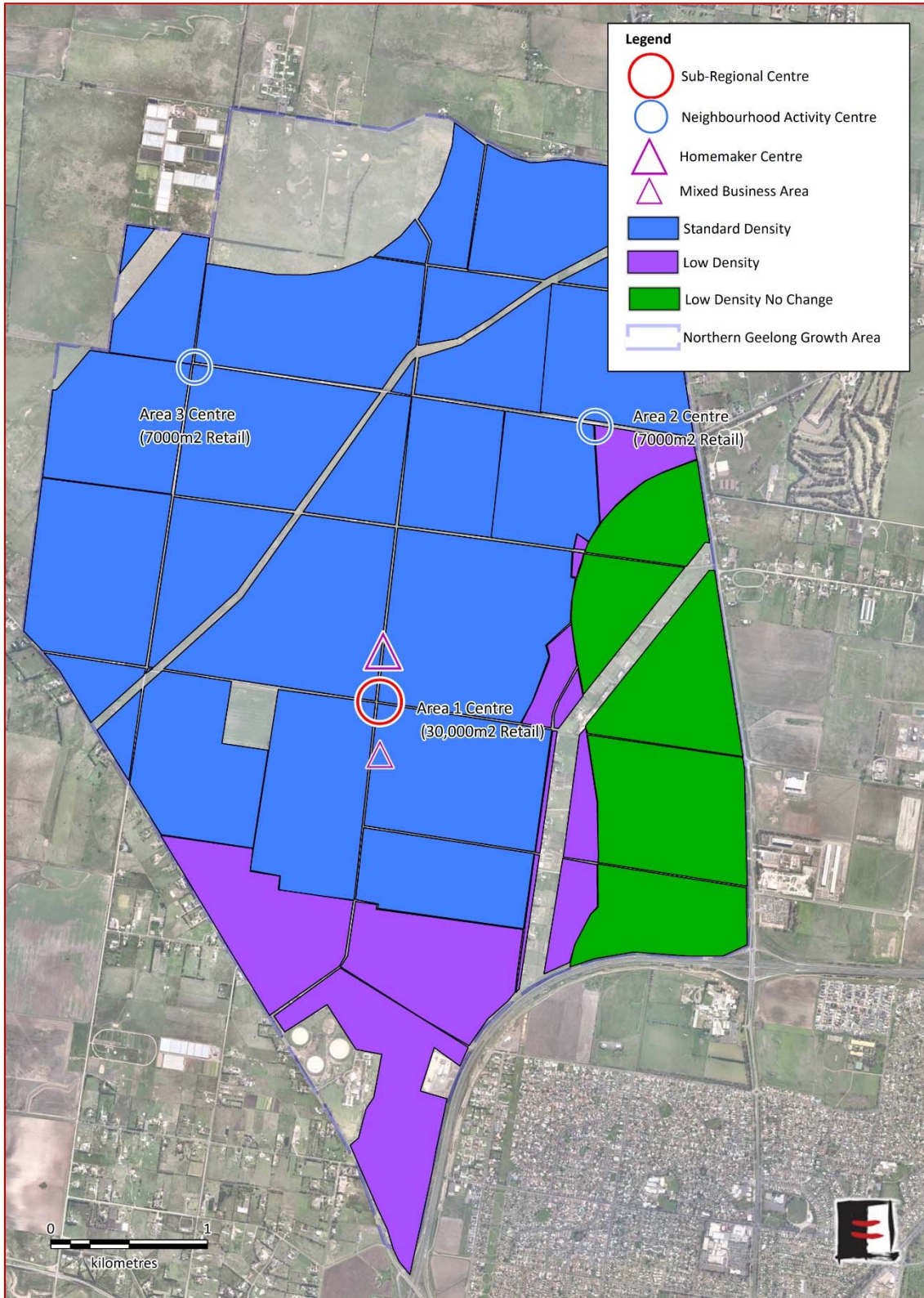
The proposed activity centre hierarchy options for the NGGA are shown in Map 5.1 and Map 5.2.

Map 5.1 NGGA Four Centre Scenario (Indicative Locations and Floorspace)



Source: Essential Economics with MapInfo

Map 5.2 NGGA Three Centre Scenario (Indicative Locations and Floorspace)



Source: Essential Economics with MapInfo