WESTERN GEELONG GROWTH AREA

RETAIL AND ACTIVITY CENTRE TECHNICAL REPORT

JUNE 2017

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1. INTRODUCTION

1.1. BACKGROUND

Urban Enterprise was engaged on behalf on a land owner consortium to provide an assessment of the future activity centre needs for the Western Geelong Growth Area (**WGGA**). The assessment will be a key input into the first phase of the growth area planning framework and includes:

- An assessment of the distribution, form and size of retail centres required to service the needs of future communities;
- The catchment served by each centre and how this integrates with the catchment of existing centres, minimising the impact on existing centres; and
- The level of service anticipated at each centre indicated by retail and non-retail floorspace and the presence and size of key activities (e.g. supermarkets).

The assessment has been guided by a number of assumptions which are outlined in the Western Geelong Growth Area Context Report and Scope of Works prepared by the City of Greater Geelong (referred to in this report as the **Context Report**). Further assumptions and scenarios have been included based on updated information on potential developable areas through on-going technical work undertaken by the landowner consortium.

1.2. REPORT PURPOSE

The project has been completed over three Stages as shown below. This Stage 3 Report (Network Planning) follows on from the previous Stage 2 Report (November 2016), and provides further detail on the role, location, catchment, and land use mix for the WGGA activity centre network.

1.3. DEFINITIONS

The following terms and abbreviations are used throughout the report.

Abbreviation	Term	Detail / definition
DDS	Discount Department Store	A large retail store that offers a wide range of products at lower prices than many other retailers in the same category. E.g. Kmart, Big W, Target.
LAC	Local Activity Centre	A small collection of shops usually serving the day-to-day needs of the immediate residential catchment. May include small supermarkets or large general stores.
NAC	Neighbourhood Activity Centre	Planning term used to describe an activity centre serving a local catchment, typically comprising up to 10,000sqm of commercial floorspace, 7,000sqm of which is retail, including one full-line supermarket.
SRC	Sub-regional Centre	Planning term used to describe a large activity centre serving a sub-regional catchment, typically comprising two discount department stores, 2 supermarkets, specialty stores and a bulky goods precinct with a combined retail floorspace of approximately 55,000sqm.
WGGA	Western Geelong Growth Area	Identified future growth area for Greater Geelong located west of the Geelong Ring Road (the subject of this report).
NGGA	Northern Geelong Growth Area	Identified future growth area for Greater Geelong located to 2km north of the WGGA.

2. CONTEXT

2.1. INTRODUCTION

This section provides an overview of the growth area location and access, the urban growth context of Geelong and the existing and proposed hierarchy of Activity Centres in Geelong and surrounds.

2.2. GROWTH AREA LOCATION AND ACCESS

The WGGA covers an area of approximately 3,240ha of land to the immediate west of urban Geelong, between 5km and 10km west and north-west of the Geelong CBD.

The WGGA is bounded by the Geelong-Ballarat Railway line to the north, the Geelong Ring Road to the east, the Barwon River to the south, and the City of Greater Geelong western boundary to the west as shown in Figure 1.

The WGGA is currently accessible from the arterial and local road network through seven entrance points:

- Ballan Road to the north;
- Midland Highway eastern entrance;
- Midland Highway western entrance.
- Hamilton Highway eastern entrance;
- Hamilton Highway western entrance;
- Merrawarp Road, to the south; and
- Fyansford-Gheringhap Road to the west;

The location and geography of the WGGA is relatively self-contained with mostly impermeable boundaries to the north, east and south created by the rail line, Geelong Ring Road and Barwon River separating the WGGA from the established areas of Geelong.

To the north of the WGGA is the Lovely Banks rural living precinct with the Northern Geelong Growth Area (NGGA) located further to the north (approximately 2km from the WGGA).

FIGURE 1 WESTERN GEELONG GROWTH AREA BOUNDARIES

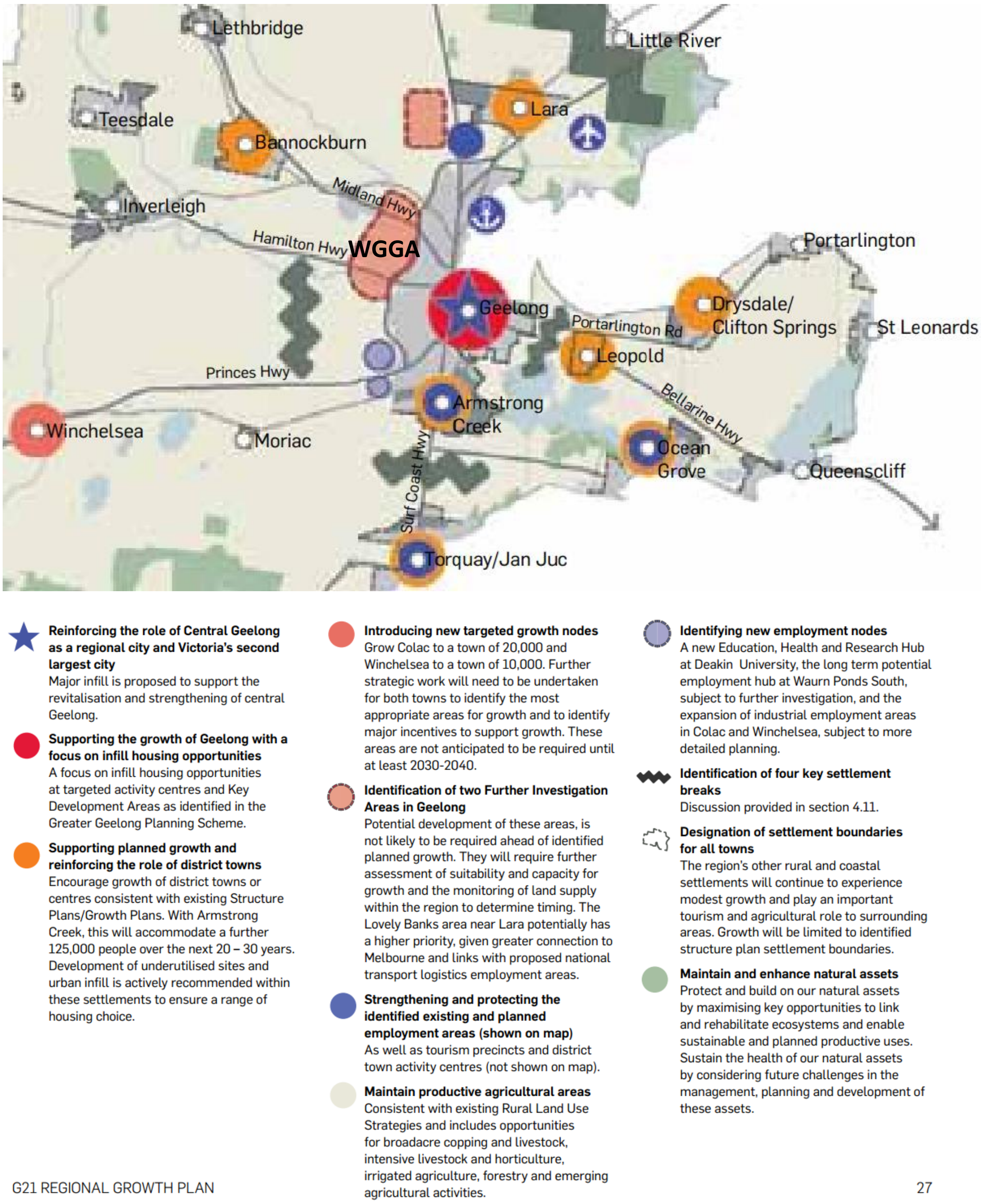
Source: Northern and Western Geelong Growth Areas Context Report, City of Greater Geelong April 2016.

2.3. URBAN GROWTH CONTEXT

The G21 Regional Growth Plan (G21 Region, 2013) sets out a plan to manage growth across the Geelong Region. In respect of urban Geelong, the plan identifies two urban growth areas: Armstrong Creek Urban Growth Area and Lara West Growth Area. The G21 Regional Growth Plan identifies two "Further Investigation Areas" for urban growth in Geelong, including the WGGA and the NGGA.

The Growth Plan also identified Bannockburn as a location for "significant growth" (p.24). The direction for Bannockburn is: "supporting planned growth and reinforcing the role of district towns". Infill growth areas are identified at Central Geelong, Corio, Fyansford, Waurn Ponds and Newtown. The Settlement and Growth Directions Plan is shown in Figure 2.

FIGURE 2 G21 GROWTH PLAN, GEELONG CONTEXT PLAN



Source: G21 Regional Growth Plan, cropped and annotated by Urban Enterprise, 2017.

2.4. DEVELOPMENT CONTEXT

The WGGA has a gross land area of approximately 3,240ha. Not all of this land will be developable for urban purposes. Two scenarios of developable area have been estimated as follows:

- Scenario 1: The City of Greater Geelong included an estimate of 1,793 hectares of developable area in the Context report;
- Scenario 2: further technical report undertaken on behalf of the landowner consortium has been made available to Urban Enterprise since the Context Report was completed. This work has shown that the developable area is likely to be higher than the Context Report, indicatively 1,908 hectares. The potential dwelling and population yield under this scenario has been calculated by Urban Enterprise using the same assumptions as the Context Report - calculations are detailed in Appendix A. **It should be noted that the Scenario 2 developable area is preliminary and subject to change upon finalisation of the NWGGA phase 1 technical reports. Updated developable area mapping will be determined prior to the framework planning exercise commencing.**

These two scenarios have been carried forward for analysis – a summary of the developable areas and estimated yields is shown in Table 1.

TABLE 1 DEVELOPABLE AREA AND YIELD SCENARIOS

	Scenario 1: Context Report	Scenario 2: Updated
WGGA Study Area	3,240ha	3,240ha
Developable Area	1,793ha	1,908ha
Estimated Dwelling Yield	22,000	22,917
Population (ave. household size 2.8 persons)	61,600	64,171

Source: Scenario 1: City of Greater Geelong, Context Report, Scenario 2: Urban Enterprise, 2017. Note: the higher range of the context report (population 61,600) has been adopted as further technical work has indicated that the developable area is larger than what was considered in the Context Report. Note: There are minor variations in the population yield for Scenario 2 cited in this report. This is due to the methodology used to calculate population at the small area.

The calculation of likely yield was based on estimates of average residential densities (including areas proposed for standard and low density residential use) and includes a generic allowance for developable land that will be required for non-residential uses, such as activity centres, schools and open space.

Specific exclusions from the developable area include:

- Alcoa easement;
- Quarry pit and surrounds;
- Moorabool and Barwon River corridors;
- Land in the Township Zone at Batesford;
- Land currently in an industrial zone; and
- Existing schools and active open space reserves, and land owned by a private school and proposed for future active open space.

INDICATIVE ROAD NETWORK AND DEVELOPMENT CELLS

Two road network options have been provided to Urban Enterprise by Golder Associates on behalf of the landowner consortium based on up-to-date technical work. The road network options are understood to be preliminary and subject to further technical report.

Both options include the following:

- Retention of the Midland Highway and Hamilton Highway as access points to the Geelong Ring Road and major east-west roads through the WGGA;

- Geelong-Ballan Road providing the major north-south collector road in the northern section of the WGGA, with a potential future connection to the Northern Geelong Growth Area; and
- Potential partial closure of Fyansford-Gheringhap Road near the junction with the Hamilton Highway.

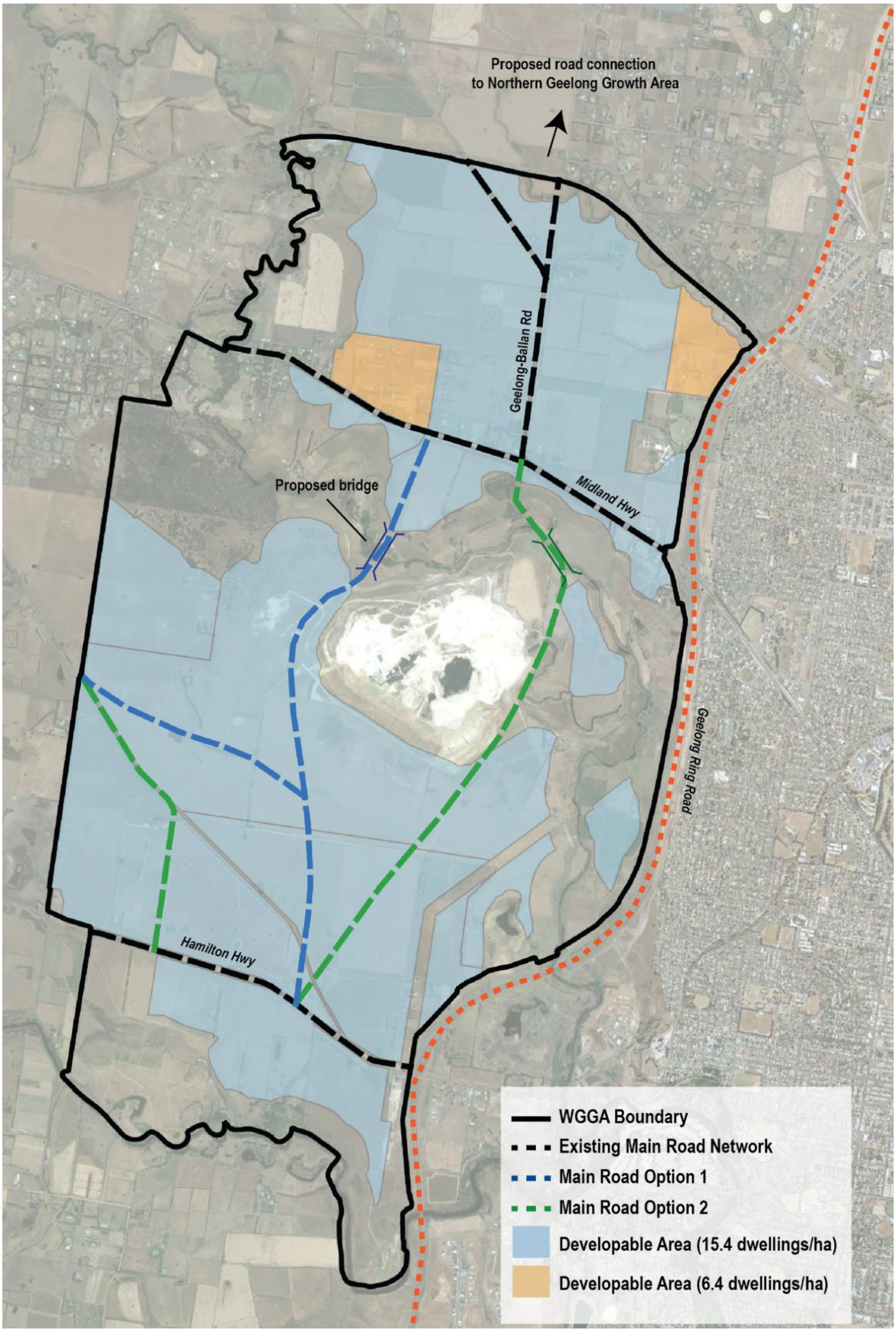
The major difference between the two options is the alignment of the major road network in the central precinct of the growth area, and location of the major north-south road connecting Hamilton Highway and the Midland Highway.

- **Option 1:** Proposes a new north-south road, connecting the Midland to the Hamilton Highway, generally bisecting the growth area, passing to the west of the quarry pit and requiring a major bridge crossing of the Moorabool River near the Midland Highway (the position of the bridge is yet to be confirmed). This will connect with another major road in the middle of the central precinct which curves to the west and connects to Fyansford-Gheringhap Road, near the western border of the WGGA.
- **Option 2:** Proposes a new north-south road, connecting the Midland to the Hamilton Highway, passing to the east of the quarry pit and connecting to the existing Geelong-Ballan Road. Another new major road will connect Hamilton Highway and Fyansford-Gheringhap Road.

The road options are shown in Figure 3, along with the location of the developable area. Figure 4 shows the indicative population yield within each of the major sections of the WGGA. The northern section (north of Moorabool River) has a projected population yield of approximately 22,000, and the central and southern sections have a combined projected population yield of approximately 42,000.

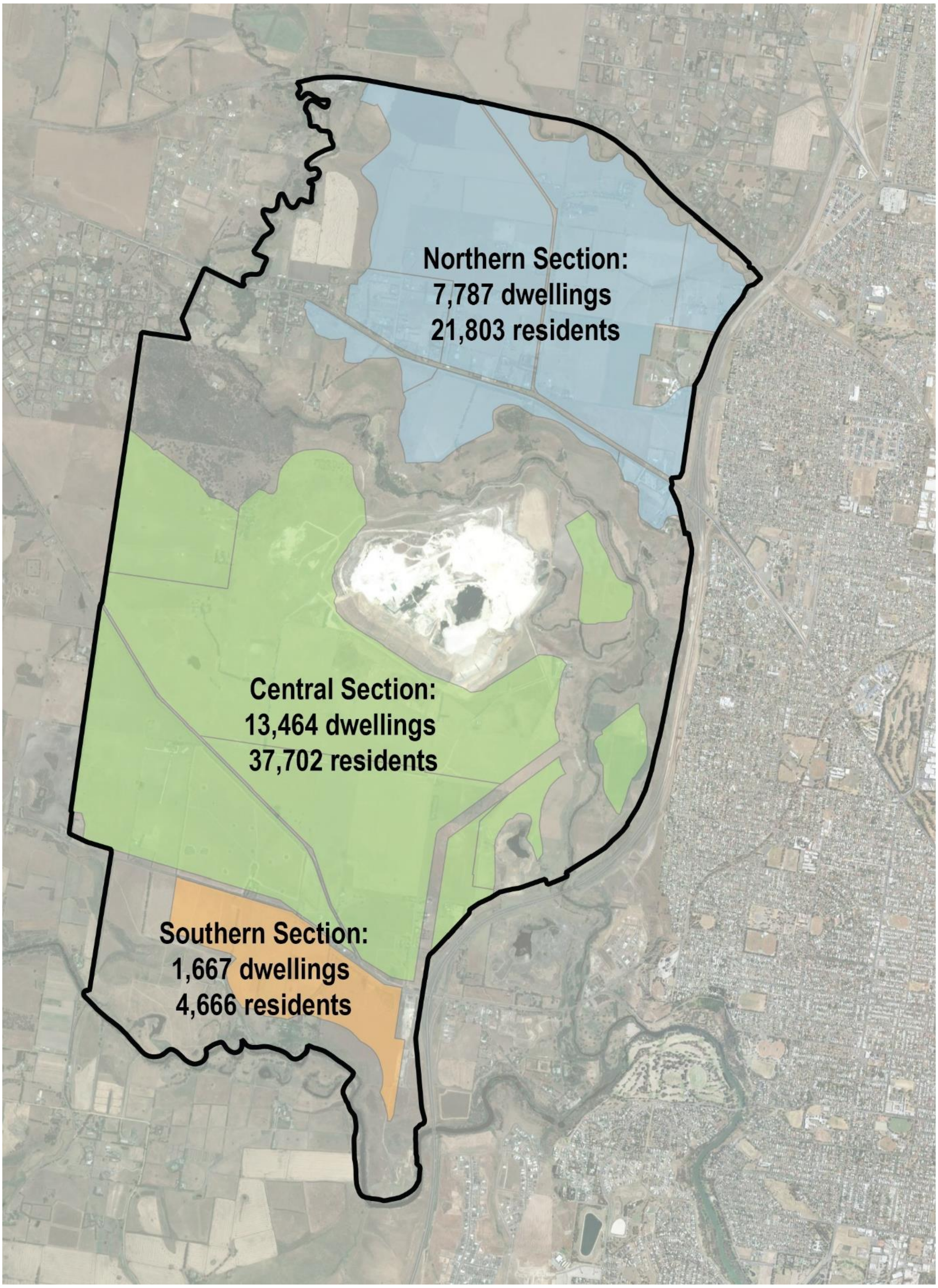
The population yield, road network and implications for activity centre planning are discussed further in the following sections.

FIGURE 3 WGGA DEVELOPABLE AREA AND ROAD NETWORK OPTIONS



Source: Urban Enterprise, 2017.

FIGURE 4 WGGA DEVELOPMENT YIELD BY SECTION



Source: Urban Enterprise, 2017.

3. RETAIL FLOORSPACE DEMAND

3.1. INTRODUCTION

This section assesses the scale of retail and non-retail floorspace that will be required within activity centres in the WGGA to meet demand generated by future residents under each developable area scenario.

3.2. RETAIL FLOORSPACE DEMAND

Retail demand is primarily driven by local residents of a growth area. Activity centres in urban growth areas typically provide local and neighbourhood level retail services, with larger growth areas also providing higher order sub-regional and regional facilities. The scale of retail expenditure of WGGA residents has been estimated having regard to the likely expenditure profile of future residents and the ultimate population yield in each area of the WGGA. Naturally, some of this expenditure will take place at retail centres outside the WGGA.

3.2.1. RETAIL EXPENDITURE

Estimates of likely per capita retail spending by future WGGA residents have been prepared with reference to the MarketInfo retail spending model prepared by Market Data Systems.[1]

Retail expenditure data was analysed for current residents in western Geelong suburbs that are expected to have comparable characteristics to the WGGA at full development. Residents in comparable areas of western and southern Geelong have an average annual retail expenditure of $12,851 (MarketInfo, 2014), slightly higher than the Greater Geelong average ($12,527), as shown in Table 2.

TABLE 2 AVERAGE ANNUAL RETAIL EXPENDITURE PER PERSON 2014, WESTERN & SOUTHERN GEELONG

SA2	FLG	Food Catering	AHL	Bulky Goods	Retail Services	Total
Belmont	$6,158	$1,607	$3,383	$1,283	$465	$12,896
Geelong West - Hamlyn Heights	$6,177	$1,660	$3,466	$1,333	$463	$13,100
Grovedale	$6,015	$1,519	$3,245	$1,346	$431	$12,556
Average of Above	**$6,117**	**$1,595**	**$3,365**	**$1,321**	**$453**	**$12,851**
Greater Geelong LGA	$6,068	$1,521	$3,213	$1,295	$429	$12,527

Source: MarketInfo 2014.

Over the past 20 years, the average amount spent per person by Australian residents on retail goods and services has increased at a higher rate than inflation (known as real per capita retail expenditure growth). Real per capita expenditure growth has increased at an average rate of 2.25% per annum since 1984 (ABS Retail Trade, analysed by Urban Enterprise). The rate of growth is slowing, however, likely reflecting the increasing influence of online retailers among other macro-economic factors. For the purposes of this report, real per capita expenditure is projected to increase at a rate of 1.0% per annum until 2026, with no real growth thereafter as specified in the project brief.

The result of this projected growth is that WGGA residents will spend an estimated $14,480 per capita per annum on retail goods and services (in 2016 dollars), as shown in Table 3.

[1] MarketInfo is a micro-simulation model which uses data from the ABS Household Expenditure Survey, the ABS Census of Population and Housing, ABS Australian National Accounts, and other relevant sources.

TABLE 3 RETAIL EXPENDITURE PER PERSON 2014 AND 2026

Retail Category	2014	2026
Food, Liquor, Groceries	$6,117	$6,892
Apparel Homewares, Leisure	$3,365	$3,791
Food Catering	$1,595	$1,798
Retail Services	$453	$510
Bulky Goods	$1,321	$1,489
Expenditure Per Person	**$12,851**	**$14,480**

Source: MarketInfo 2014, compiled by Urban Enterprise 2017

The 2026 per capita expenditure has been adopted for this study ($14,480 per person, 2016 values). If real per capita growth continues over the long term, actual expenditure could exceed this amount, however to ensure that supportable retail floorspace is not overestimated, the 2026 value has been adopted.

3.2.2. TOTAL RETAIL EXPENDITURE

Based on the expected population at full development and the projected average retail expenditure per person, WGGA residents will generate an estimated $892m - $929m of retail expenditure in 2016 dollars (at full development) as shown in Table 4.

Not all of this expenditure will take place in the WGGA. The following sections provide a review of factors which guide the distribution of floorspace to existing and new activity centres.

TABLE 4 TOTAL SUPPORTABLE RETAIL FLOORSPACE BY WGGA RESIDENTS AT FULL DEVELOPMENT

	Scenario 1: Context Report	Scenario 2: Updated
Yield Assumptions		
Developable Area	1,793ha	1,935ha
Indicative Population	**61,600**	**64,171**
Expenditure Per Person	$14,480	$14,480
Retail Expenditure by Category		
Food, Liquor, Groceries	$424,566,895	$442,287,049
Apparel, Homewares, Leisure	$233,547,014	$243,294,569
Food Catering	$110,740,427	$115,362,402
Retail Services	$31,440,121	$32,752,338
Bulky Goods	$91,696,545	$95,523,685
Total Expenditure at full development	**$891,991,003**	**$929,220,043**

Source: Urban Enterprise 2017, MarketInfo 2014. Note: figures are rounded and therefore may not always add up to totals.

3.3. RETAIL AND ACTIVITY CENTRE CONTEXT

The distribution of expenditure from WGGA residents will be influenced by the location of retail offer of centres in the existing network, both within Geelong and urban Melbourne.

Urban Geelong currently has one 'regional' retail centre (the Geelong CBD) and 3 sub-regional centres (Corio, Belmont and Waurn Ponds). These centres are supported by a network of neighbourhood centres, local centres and bulky goods / homemaker centres.

The Draft Geelong Retail Strategy (SGS, July 2016) found that although the CBD is the largest retail centre in the region, it is currently performing poorly, and therefore policy support to strengthen the role and offering of the CBD was recommended.

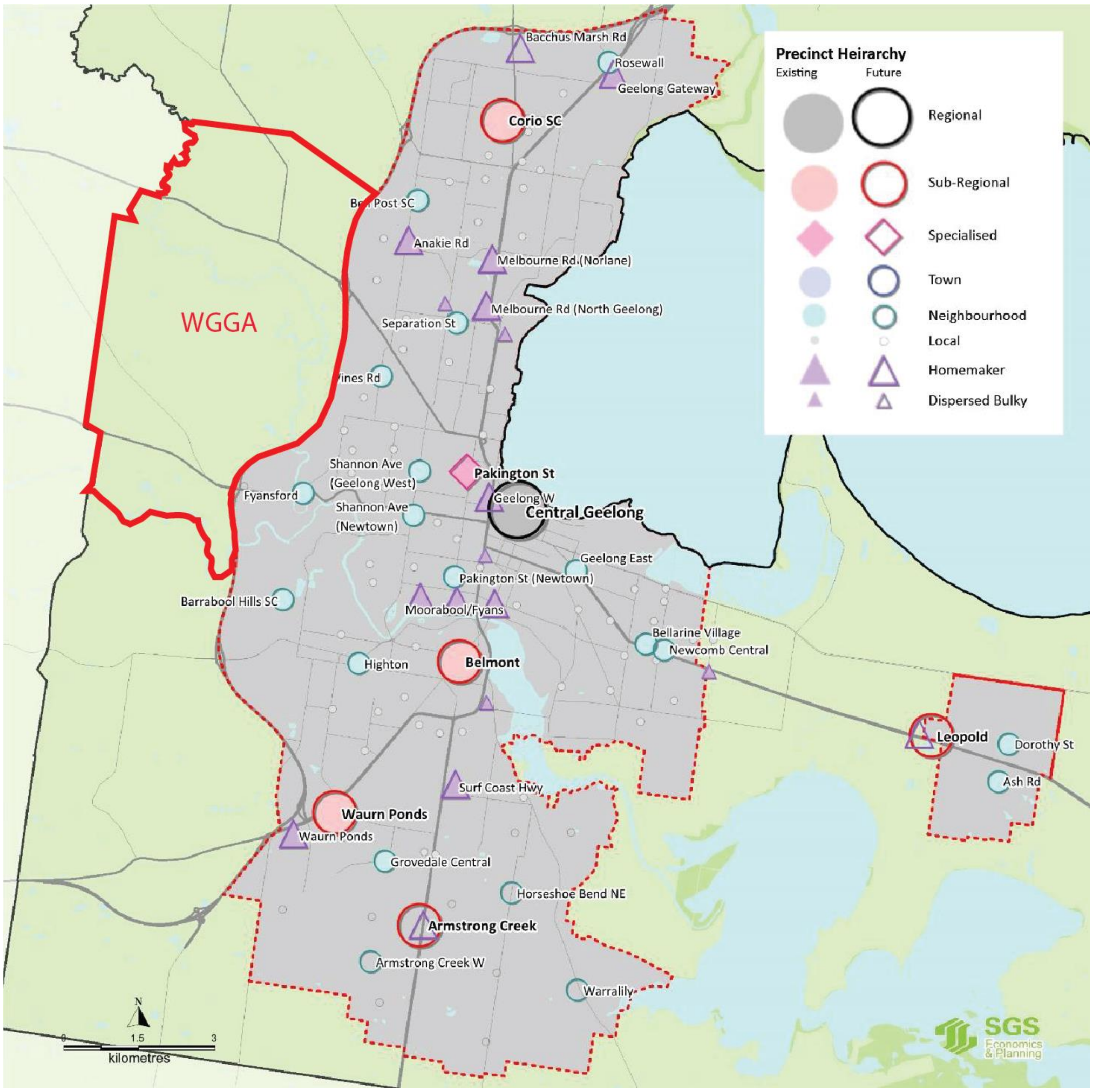
Outside Greater Geelong, the main retail centre which will influence planning for the WGGA is Bannockburn, which acts as a neighbourhood centre for the township and surrounding rural areas.

Proposed future activity centres that will influence planning for activity centres in the WGGA include:

- A future sub-regional centre within the Armstrong Creek Growth Area, which is proposed to accommodate two Discount Department Stores, a bulky goods centre, 2 supermarkets and other non-retail and residential uses;
- A large neighbourhood centre in the Lara West Growth Area; and
- A neighbourhood centre in Fyansford.

In addition, activity centre network planning is underway for the NGGA. The existing and future retail hierarchy is summarised in Table 5, with the location of each centre shown in Figure 5.

FIGURE 5 GEELONG RETAIL PRECINCT HIERARCHY MAP



Source: Draft Greater Geelong Retail Strategy 2016.

TABLE 5 WGGA RETAIL CENTRE HIERARCHY

Centre Name	Centre Type	Retail Floorspace	Role	Anchors	Distance to WGGA
Geelong CBD	Regional	226,900sqm	Large retail and commercial precinct with two shopping centres (Westfield Geelong and Market Square Geelong).	1 DS (Myer), 3 DDS (Big W, Dimmeys, Harris Scarf, Target), 1 supermarket (2,542sqm Coles)	5.9km to Hamilton Highway east entrance 6.9km to central point
Corio Shopping Centre	Sub-Regional	29,940sqm	Major, double storey shopping centre with over 95 stores and services, 2 supermarkets and a Geelong Council customer service centre.	1 DDS (6156sqm Kmart), 2 supermarkets (3634sqm Coles, 3655sqm Woolworths)	4.6km to Midland Hwy east entrance 6.5km to central point
Belmont	Sub-Regional	42,580sqm	Major shopping strip located in close proximity to Central Geelong and well-connected to bus services. Contains Belmont Shopping Village (anchored by Coles) to the north and finer grain built form to the south, and includes a municipal library.	1 DDS (6,108sqm Kmart), 3 supermarkets (6,027sqm Coles, 1,927sqm Coles, 1,643sqm Aldi)	5.4km to Hamilton Highway east entrance 8.0km to central point
Waurn Ponds	Sub-Regional	42,760sqm	Major shopping centre in the south west of urban Geelong with over 115 stores, along with an Aldi supermarket adjacent. In close proximity to Deakin University's Waurn Ponds campus and a municipal library.	2 DDS (6,155sqm Kmart, 5,488sqm Target), 3 supermarkets (6,800sqm Coles, 3,712sqm Woolworths, 1,563sqm Aldi)	6.7km to Hamilton Highway east entrance 9.9km to central point
Bell Post SC	Neighbourhood	5,810sqm	Mid-sized shopping centre (anchored by Woolworths) along Anakie Road.	1 supermarket (3,403sqm Woolworths)	2.2km to Midland Hwy east entrance 4.3km to central point
Fyansford	Local (future Neighbourhood centre)	2,300sqm (ultimate 11,800 sqm)	Small shopping strip along the Hamilton Highway. Contains a mix of uses, including hospitality, specialty shops, restricted retail and residential. Future Town Centre Precinct proposed, including supermarket and specialties.	Current: none Future: 1 full-line supermarket	1.3km to Hamilton Hwy east entrance 3.5km to central point
Shannon Ave (Geelong West)	Neighbourhood	12,950sqm	A mid-sized, medium-density retail strip containing various specialty shops, hospitality and services.	2 supermarkets (2,543sqm Coles, 1,797sqm Aldi)	3.7km to Hamilton Hwy east entrance 4.5km to central point
Shannon Ave (Newtown)	Neighbourhood	4,500sqm	A small retail strip anchored by Woolworths. It has strong representation from the medical industry.	1 supermarket (1,967sqm Woolworths)	3.5km to Hamilton Hwy east entrance 5.4km to central point
Vines Road, Hamlyn Heights	Local Centre	3,110sqm	Local retail strip adjacent to a municipal library. Contains a mix of speciality shops and IGA supermarket.	1 supermarket (862sqm IGA)	1.4km to Hamilton Hwy east entrance 3.0km to central point
Barrabool Hills SC, Highton	Small Neighbourhood	3,780sqm	Recently constructed neighbourhood centre, anchored by full-line Woolworths supermarket.	1 supermarket (3,200sqm Woolworths)	2.4km to Hamilton Hwy east entrance 5.5km to central point
Bannockburn	Township / Neighbourhood	7,000sqm (approx.)	Bannockburn is approximately 13km west from the centre of the WGGA. It is a small town of approximately 3,512 residents[2], located along the Midland Highway. The Bannockburn UDF 2011 projects the town to grow to 10,474 residents by 2023. The town core includes a mixture of retail and commercial uses such as specialty retailers, food retail, offices and service retail shops.	1 small supermarket (approx. 1,500sqm Woolworths)	12km to Midland Highway west entrance 13km to central point

[2] ABS Census 2011, Bannockburn Urban Centre Locality

Anakie Rd	Homemaker	6,000sqm (approx.)	Largely serves the surrounding community with hardware needs.	Mitre 10	1.5km to Midland Hwy east entrance 3.5km to central point
Waurn Ponds	Homemaker	31,880sqm	Mid-sized homemaker precinct on Prince Highway, close to Waurn Ponds Shopping Centre and Deakin University Waurn Ponds campus. Includes the Geelong Homemaker Centre.	Bunnings, Harvey Norman	6.9km to Hamilton Hwy east entrance 10.2km to central point
Bacchus Marsh Rd	Homeaker (planned)	-	A planned Homemaker precinct. Original proposal for a Masters and associated restricted retail.	Vacant	6 km to Midland Hwy east entrance 8km to central point

Source: Greater Geelong Retail Strategy 2016 (Draft), Urban Enterprise 2017.

3.3.1. EXISTING CENTRE CATCHMENTS

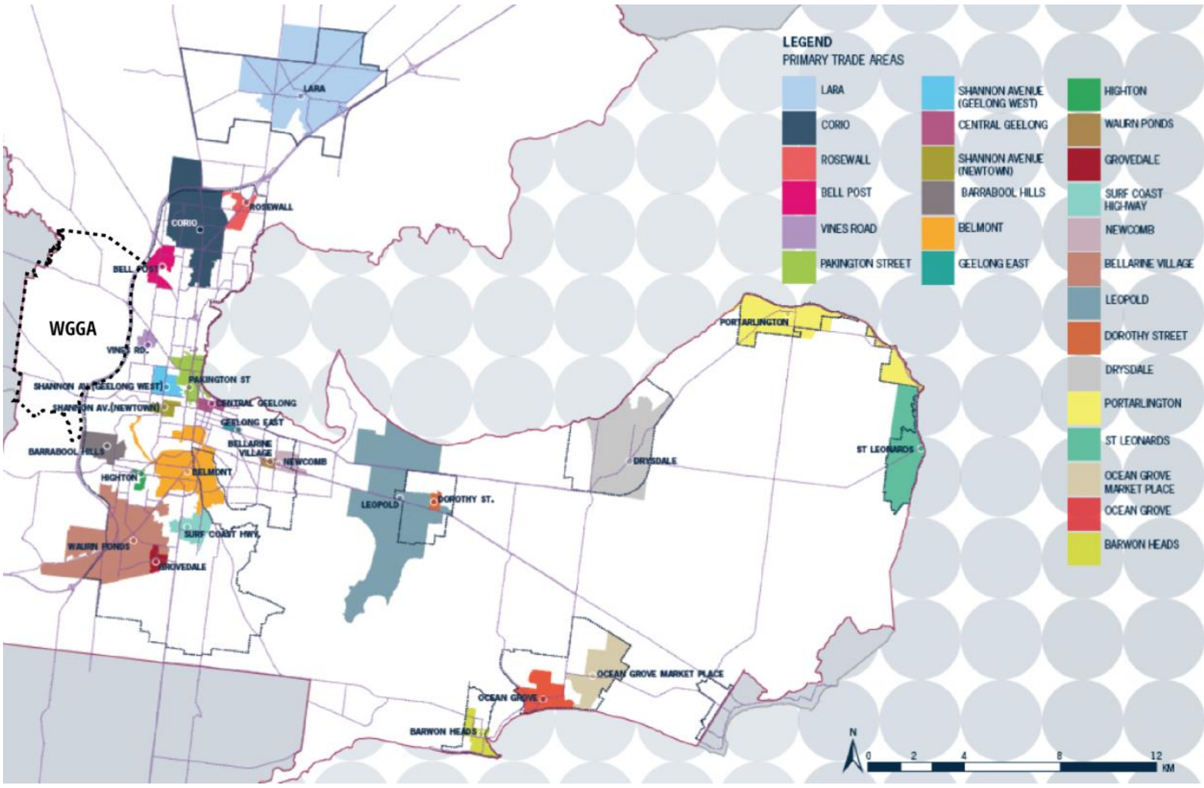
This section provides analysis of existing centre catchments and implications for the location of new centres.

SUPERMARKET CATCHMENTS

Figure 6 shows the primary catchments of existing supermarkets in Geelong. The WGGA is not part of the primary catchment of any existing supermarkets, and there is currently a gap in the provision of modern supermarkets in the established western Geelong area. Figure 7 shows that by 2031, parts of western Geelong, particularly along the Midland Highway, are expected to be undersupplied by supermarket floorspace.

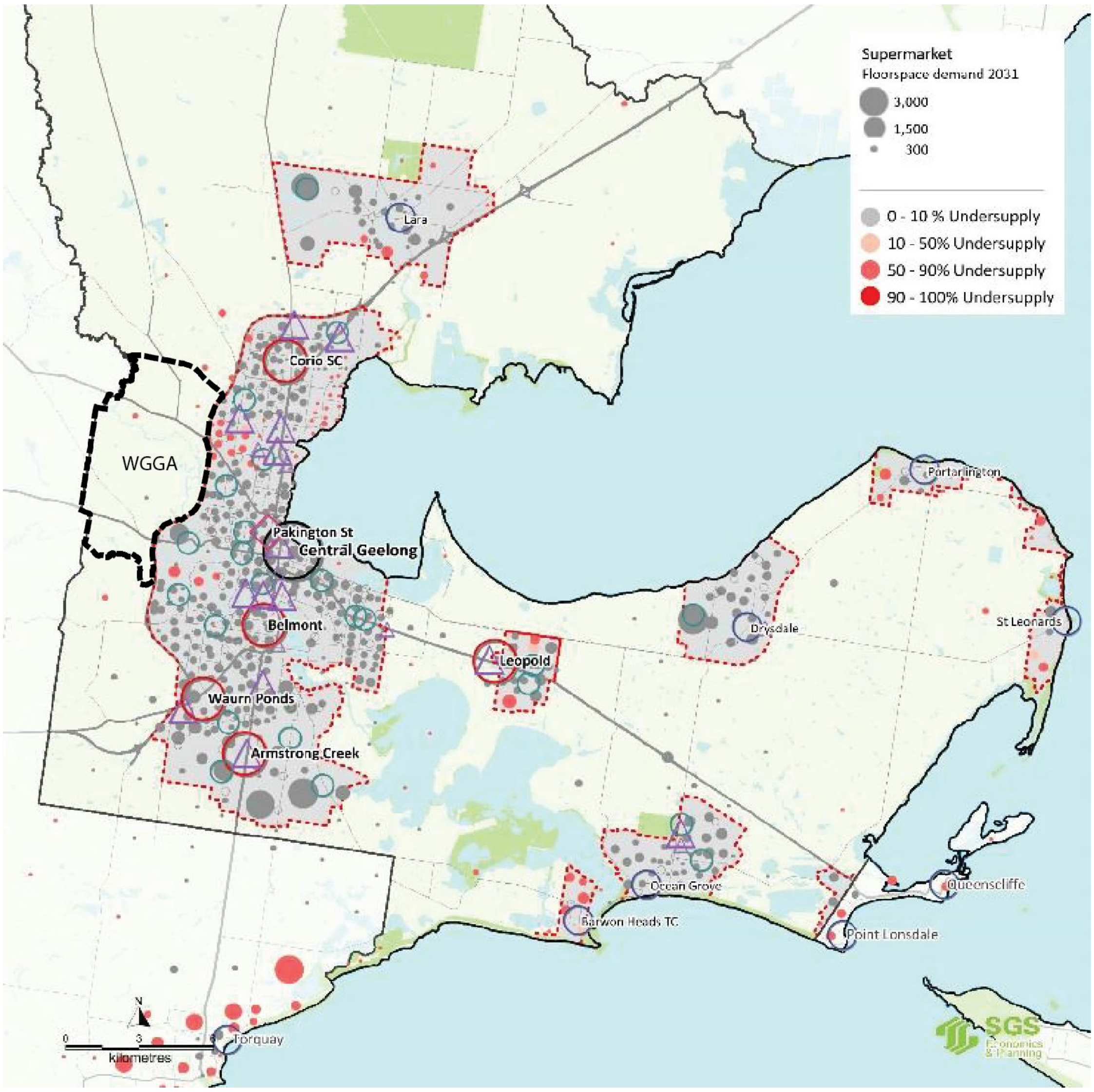
Given that the suburbs of Bell Post Hill, Bell Park and Hamlyn Heights are currently poorly serviced by full-line supermarkets and modern retail facilities, it is considered that a new retail centre in a Midland Highway location would result in an improvement in service to these residents, in addition to other planned supermarket expansions in the area.

FIGURE 6 EXISTING SUPERMARKET PRIMARY CATCHMENTS



Source: Draft Greater Geelong Retail Strategy, 2017.

FIGURE 7 SUPERMARKET SUPPLY AND DEMAND BALANCE 2031

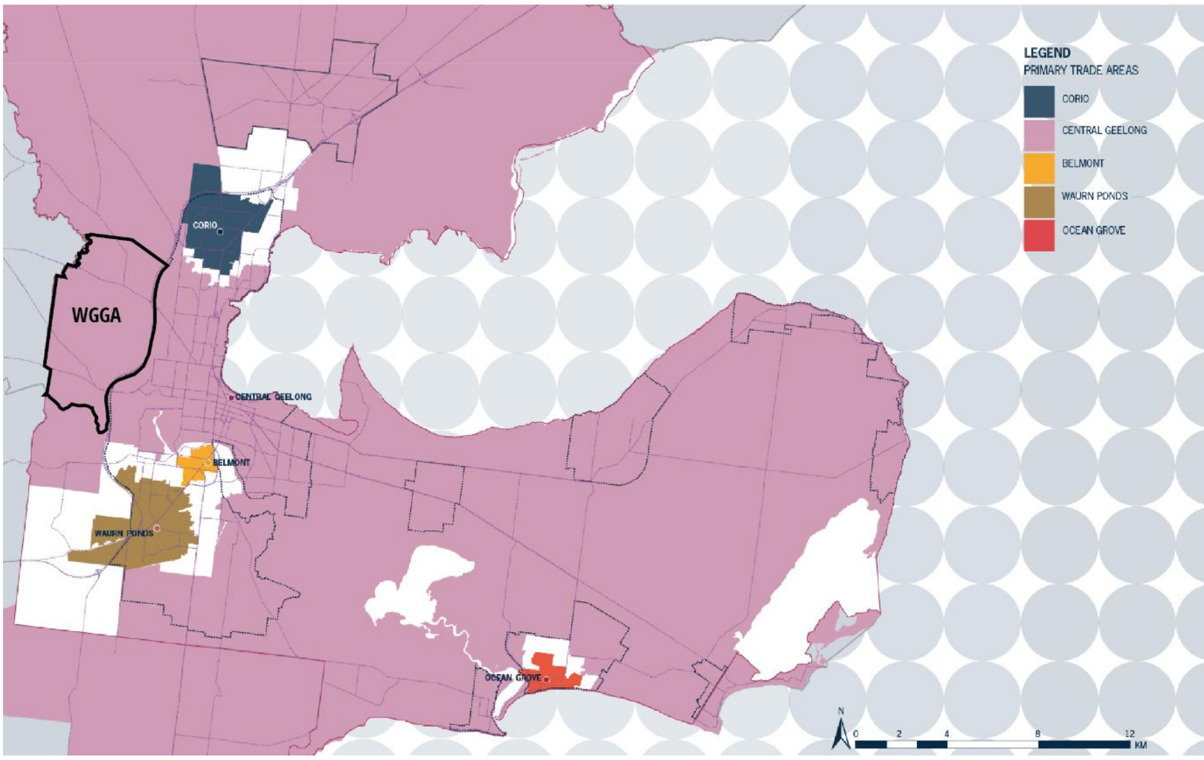


Source: Draft Greater Geelong Retail Strategy, July 2016.

3.3.2. SUB-REGIONAL CATCHMENTS

Figure 8 shows the primary catchments for existing discount department stores. The WGGA is not part of any existing primary catchments for discount department stores outside of the CBD.

FIGURE 8 PRIMARY CATCHMENT OF EXISTING DISCOUNT DEPARTMENT STORES



Source: Draft Greater Geelong Retail Strategy, 2017.

3.3.1. HIERARCHY IMPLICATIONS FOR WGGA

There is a relatively uneven distribution of subregional centres across urban Geelong. The retail hierarchy shows that the western part of urban Geelong – and the future WGGA - is relatively poorly serviced by the current sub-regional activity centre network. There are no sub-regional centres located between the WGGA and the CBD, with only neighbourhood centres serving the suburbs of Manifold Heights, Herne Hill, Newtown, Bell Park, Bell Post Hill and Norlane. Many of these neighbourhood centres do not have full-line supermarkets – the only full-line supermarkets serving the urban areas to the immediate east of the WGGA are located at Bell Post Shopping Centre and Barrabool Hills Shopping Centre, neither of which will be conveniently accessible to WGGA residents.

Corio is the only sub-regional centre located to the north of the CBD. The potential location of any higher order centre within the WGGA and subsequent encroachment on existing centre catchments is discussed in detail in Section 4.

Waurn Ponds is located approximately 7km south of the WGGA. Waurn Ponds Shopping Centre plays a broader regional retail role due to it's location on the Geelong Ring Road. If a new higher order centre is located in the WGGA, on the Geelong Ring Road, this would potentially compete with Waurn Ponds (and the future Fyansford NAC).

If a new sub-regional centre were to be located in the WGGA, it would also be supported by expenditure from residents in Bannockburn, as well as other smaller towns and rural areas in the eastern part of Golden Plains Shire. The significant population growth projected for Bannockburn will increase demand for both local retail (within Bannockburn) and higher order retail floorspace (in sub-regional centres and the Geelong CBD).

3.4. RETAIL EXPENDITURE DISTRIBUTION

The existing hierarchy of centres will influence the locations to which the WGGA residents' expenditure will be directed. The following considerations guide the likely distribution of expenditure drawing on the analysis of the existing hierarchy and reports which address the typical regional, municipal, and metropolitan distribution of expenditure. This includes:

- The regional role of the Geelong CBD (anchored by department stores, entertainment, hospitality and employment cluster not available elsewhere in Greater Geelong) will result in a proportion of the WGGA residents' expenditure being directed to the CBD. The Greater Geelong Retail Strategy (draft) estimates that the Geelong CBD attracts between 10-20% of Greater Geelong resident expenditure from outside its immediate catchment.[3]
- Expenditure will also be drawn to higher order centres outside the municipality that accommodate retailers and concentrations of other uses that will not be available within the City of Greater Geelong, such as international fashion retailers (eg. Zara, H&M at Highpoint), major employment and entertainment nodes and the Melbourne CBD.
- Online spending is estimated to account for 6.8% of total retail spending nationally.[4] This share is likely to continue to increase in the future; and
- Some expenditure of residents is likely to be made at or near the place of employment. In 2011, 25% of City of Greater Geelong residents were employed in metropolitan Melbourne (Profile ID).

To account for these factors, an allowance for 30% of all WGGA resident expenditure to 'escape' to other higher order centres has been made.

The balance of expenditure from WGGA residents (70%) would be directed to neighbourhood, sub-regional and bulky goods centres. In order to provide a suitable level of service to future WGGA residents in reasonable proximity to their place of residence, it is expected that most of this expenditure should be captured within the WGGA.

The way in which this expenditure will be met in the WGGA is guided by the current benchmarks for activity centre catchments including Neighbourhood, Sub-regional and Bulky Goods Centres.

NEIGHBOURHOOD CENTRES

An average population catchment of 10,000 residents supports a Neighbourhood Centre anchored by a full-line supermarket. This is derived from benchmarks for growth area planning (Activity Centre and Employment Planning Report, Essential Economics 2011). In some cases, catchments may vary within the range of 8,000 to 12,000 residents due to variations in development layouts and road networks. This ensures that each Neighbourhood Centre is anchored by a full-line supermarket (a supermarket typically services a catchment of 8,000 – 10,000 residents). The presence of a supermarket allows for a viable convenience retail centre which acts as a focal point for other non-retail uses, including local employment and community facilities.

Applying the benchmark of one neighbourhood centre per 10,000 population, at least 6 Neighbourhood Centres would be required. If each of these centres were to be a Neighbourhood Centre only, Neighbourhood Centres would accommodate approximately 42,000sqm of retail floorspace and attract approximately $265 million of WGGA expenditure.[5] This accounts for approximately 30% of WGGA resident expenditure.

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[3] City of Greater Geelong Retail Strategy 2016 (draft), SGS Economics and Planning , July 2016

[4] NAB Online Retail Sales Index, June 2016

[5] Based on an average turnover density of $7,000/sqm, and 90% supported by WGGA residents

BULKY GOODS

WGGA residents are expected to generate $91-95m in expenditure on bulky goods items (refer to Section 3.2.2). This accounts for approximately 10% of WGGA resident expenditure.

SUB-REGIONAL CENTRE

The following provides an assessment of the factors to be considered when planning for a sub-regional centre within the WGGA.

The Draft Retail Strategy notes that a sub-regional centre is a major retail centre that serves a wide catchment (but smaller than a regional centre) and is anchored by one or more discount department stores, supermarket(s), mini major(s) and speciality stores. The retail demand assessment undertaken in this report shows that a sub-regional centre can be supported within the WGGA based on the following:

- Sub-regional centres typically service a catchment of at least 50,000 residents. The expected population of the WGGA is between 61,600 and 64,171 residents (i.e. 1.2 1.3 times a typical catchment);
- Retail demand modelling shows that, once allowance for neighbourhood centres has been made, there is sufficient remaining expenditure that would generate demand for a Sub-Regional Centre.
- The WGGA is relatively poorly serviced by the existing sub-regional network, with no sub-regional centres located between the WGGA and central Geelong. Existing centres in this area are generally smaller neighbourhood centres;
- The large geographic area of the WGGA and positioning (separated from urban Geelong by Geelong Ring Road), mean that the higher order retail, employment, and services which are typically within in a sub-regional centre should be located locally.

Research prepared by Essential Economics to inform the Precinct Structure Planning Guidelines notes that sub-regional centres can vary in size, however centres generally average approximately 35,000sqm of shop floorspace, based on the typical retail elements that characterise higher order centres.[6] This will generally include:

- Two discount department stores (total 15,000sqm);
- Two supermarkets (total 7,000sqm); and
- A range of specialty stores (total 13,000sqm).

Table 6 shows a summary of existing sub-regional centres in Greater Geelong - each centre is anchored by multiple supermarkets and at least one DDS. Centres range from 30,000sqm (Corio) to 43,000sqm (Belmont and Waurn Ponds). The proposed Armstrong Creek sub-regional centre includes a shop floorspace cap of 48,000sqm with opportunity for further restricted retail.

TABLE 6 GREATER GEELONG SUB-REGIONAL CENTRES

Centre Name	Shop Retail Floorspace	Anchors
Corio Shopping Centre	29,940sqm	1 DDS (6,156sqm Kmart), 2 supermarkets (3634sqm Coles, 3655sqm Woolworths)
Belmont	42,580sqm	1 DDS (6,108sqm Kmart), 3 supermarkets (6,027sqm Coles, 1,927sqm Coles, 1,643sqm Aldi)
Waurn Ponds*	42,760sqm	2 DDS (6,155sqm Kmart, 5,488sqm Target), 3 supermarkets (6,800sqm Coles, 3,712sqm Woolworths, 1,563sqm Aldi)
Armstrong Creek (future)	48,000sqm	DDS, Supermarkets, and Bulky Goods

*Not including the Waurn Ponds Homemaker Centre. Source: Greater Geelong Retail Strategy 2016 (Draft)

[6] Activity Centre and Employment Planning, Growth Corridor Plans, Essential Economics 2011

Based on the size of the WGGA catchment (64,171 residents), and other demand drivers (discussed below), there would be sufficient demand to support a sub-regional centre that would be larger than the typical growth area benchmark of 35,000sqm retail floorspace. A centre of between 40,000 – 50,000sqm of retail floorspace may be supported at full development.

OTHER DEMAND DRIVERS FOR RETAIL FLOORSPACE IN THE WGGA

In addition to demand driven by WGGA residents, retail floorspace in the WGGA will also be likely to attract further trade from other areas, including:

- Bannockburn / Golden Plains Shire – Bannockburn is located 15-20 minutes drive to the west of the WGGA. 44% of residents in the Bannockburn area work in the City of Greater Geelong (2011,Profile ID) and the nearest higher order retail centres are the Corio Sub-regional centre and the Geelong CBD. Therefore, Bannockburn residents are likely to add to convenience pool (small) and sub-regional pool (significant) if new centre is readily accessible from main transport routes. The population of the Bannockburn area is projected to double over the next 20 years, from 4,957 in 2016 to 9,911 in 2036 (Forecast ID), increasing the demand for local retail floorspace in Bannockburn and sub-regional floorspace in western Geelong;
- Inner western Geelong – this area has a low provision of supermarkets (particularly full-line supermarkets) as identified in the Draft Retail Strategy, and is not within the primary of secondary catchment of any of the suburban sub-regional centres. The extent to which new activity centres (particularly a new sub-regional centre) in the WGGA could draw trade from residents in this area will depend on the location of the centre, relative proximity and travel time to existing centres, and the competing offer at established centres;
- Employees and visitors – retail floorspace in the WGGA would also be supported by expenditure from local employees and visitors to facilities established in the growth area, such as community centres, tertiary education institutions and health centres. The scale of this employment and visitation is difficult to estimate until further detailed planning is completed, however the demand is likely to present an ancillary addition to resident driven demand for retail floorspace; and
- Tourism and passing trade – the location of the WGGA adjacent to the Geelong Ring Road is likely to draw a proportion of trade from passing traffic, particularly traffic travelling between Melbourne and the Surf Coast / Great Ocean Road. The attractiveness of the WGGA activity centres to passing trade will depend primarily on the location of the centres relative to the Ring Road access points and the visibility of the centres from the Ring Road.

HIERARCHY DISTRIBUTION

Based on the typical growth area planning benchmarks and factors discussed above, the indicative distribution of retail expenditure across the retail hierarchy is shown in Table 7.

TABLE 7 % OF WGGA RESIDENT RETAIL EXPENDITURE ACROSS THE RETAIL HIERARCHY

Retail Hierarchy	Estimated % of WGGA Expenditure
Escape Expenditure	
Geelong CBD	15%
Other escape (Melbourne, online)	15%
Expenditure retained in the WGGA	
Neighbourhood Centres	30-35%
Sub-regional Centre	25-30%
Bulky Goods Centres	10%
Total	100%

Source: Urban Enterprise 2017.

3.5. IMPLICATIONS FOR WGGA

Based on the likely distribution of expenditure, the considerations for WGGA retail planning include:

- There is demand to support between 6-7 Activity Centres in the WGGA. The size and composition of neighbourhood centres will likely vary based on the layout of developable areas and the need for accessibility to supermarkets;
- There is demand to support a new sub-regional centre in the WGGA of a similar size to existing sub-regional centres in Geelong (40,000 – 50,000sqm). The scale of the centre will need to be responsive to its catchment, and consider the existing sub-regional network. Further analysis of sub-regional centre options is provided in Section 4; and
- WGGA residents will generate demand for approximately 25,000 – 30,000 sqm in bulky goods retail. A portion of this may be co-located in the WGGA with a sub-regional centre, and the remaining demand would be supported by existing centres (e.g. CBD, Waurn Ponds).

Based on the distribution of WGGA expenditure, the indicative distribution supportable floorspace is shown in Table 8, under the higher yield ('Updated') scenario.

TABLE 8 WGGA SUPPORTABLE FLOORSPACE BY CENTRE TYPE

	Updated Scenario
Population	64,171
WGGA Expenditure Breakdown	
Total WGGA Resident Retail Expenditure	$929m
Escape Expenditure (30%)	$279m
Expenditure directed to centres likely to be provided in the WGGA (70%)	$650m
WGGA Floorspace Hierarchy	
No. Neighbourhood Centres to meet benchmark (1 per 10,000 residents)	6-7
Neighbourhood Centre Floorspace (average 7,000sqm)	42,000 - 49,000sqm
Bulky Goods Floorspace	25,000 - 30,000 sqm
Sub-regional Centre Floorspace	40,000 – 50,000sqm
Total Retail Floorspace in WGGA	**107,000 – 129,000sqm**

Source: Urban Enterprise 2017.

4. NETWORK PLANNING

4.1. INTRODUCTION

This section builds on the demand assessment and includes analysis of:

- The location options for neighbourhood centres based on agreed principles and consideration of accessibility targets and commercial attractiveness; and
- The location options for a sub-regional centre;
- Options for the centre network and hierarchy.

The proposed activity centre locations identified in this report are indicative and subject to more detailed planning at the PSP stage.

4.2. NETWORK PLANNING PRINCIPLES

The following planning principles for the WGGA activity centre network have been developed based on a review of existing strategy and policy including the Draft Retail Strategy (SGS, July 2016) and Precinct Structure Planning Guidelines (Victorian Planning Authority 2009), as well as the Context Report. The review is detailed in Appendix B.

POLICY ALIGNMENT

1. Ensure consistency with the goals, strategies and retail centre hierarchy outlined in the Greater Geelong Retail Strategy (draft) and Greater Geelong Planning Scheme.
2. The size, form and catchment of new centres is consistent with industry benchmarks for growth area planning (PSP Guidelines) and the Greater Geelong Retail Strategy (draft). This includes an indicative average size of 7,000sqm of retail floorspace, and 3,000sqm of non-retail commercial floorspace for Neighbourhood Activity Centres servicing a catchment of 10,000 residents.

FORM AND LOCATION OF ACTIVITY CENTRES

3. Additional centres should be fully integrated with and form an organic extension of the existing activity centre network and hierarchy.
4. Ensure that the location and size of new centres does not encroach significantly on the catchment of existing centres to the extent that their role and viability is threatened.
5. Ensure that any new sub-regional centre (if required), forms part of the existing sub-regional centre network and considers the primacy of Geelong CBD as the flagship centre in the region. Locate new sub-regional centres on the arterial road network and any proposed public transport route.
6. Locate neighbourhood activity centres to maximise accessibility for new growth area residents, encourage active transport, and reduce car trips. 80-90% of households should be within 1km of an activity centre of sufficient size to allow for provision of a supermarket.
7. All new neighbourhood centres should be located proximate to the proposed collector road system, any proposed public transport route and pedestrian network.
8. Locate new centres where they may contribute to improving the existing centre network, and service existing residential areas which are poorly serviced / undersupplied.

9. Large format retail uses are located along major transport routes (arterial roads), with high visibility, easy access, and have regard to the existing bulky goods centres and demand and supply context. Where possible, co-locate large format retail uses either within, or in close proximity to, an activity centre, particularly a sub-regional centre (if required).

10. The proposed role and land allowance for activity centres encourages a diverse mix of uses including retail, commercial, entertainment, and recreation.

CO-LOCATION OF USES

11. Broader strategic planning should aim to:

    - Encourage community facilities (e.g. schools, community centres, active open space) to co-locate with each other, and in close proximity to an activity centre;
    - Encourage high-medium density residential uses surrounding activity centres;
    - Encourage opportunities for co-location of diverse employment uses and business types; and
    - Where possible, ensure the delivery of activity centres and community facilities are staged within the early development of the growth area to ensure that new residents have adequate access to services and facilities.

A key limitation to network planning at this stage is the uncertainty regarding the final road network and public transport network. Urban Enterprise has been provided a preliminary road network that is understood to be subject to Council approval and further refinement. The public transport network is unknown. Due to these limitations, the activity centre network proposed should be revised once further details are known regarding the road and public transport network.

4.3. CENTRE LAYOUT OPTIONS

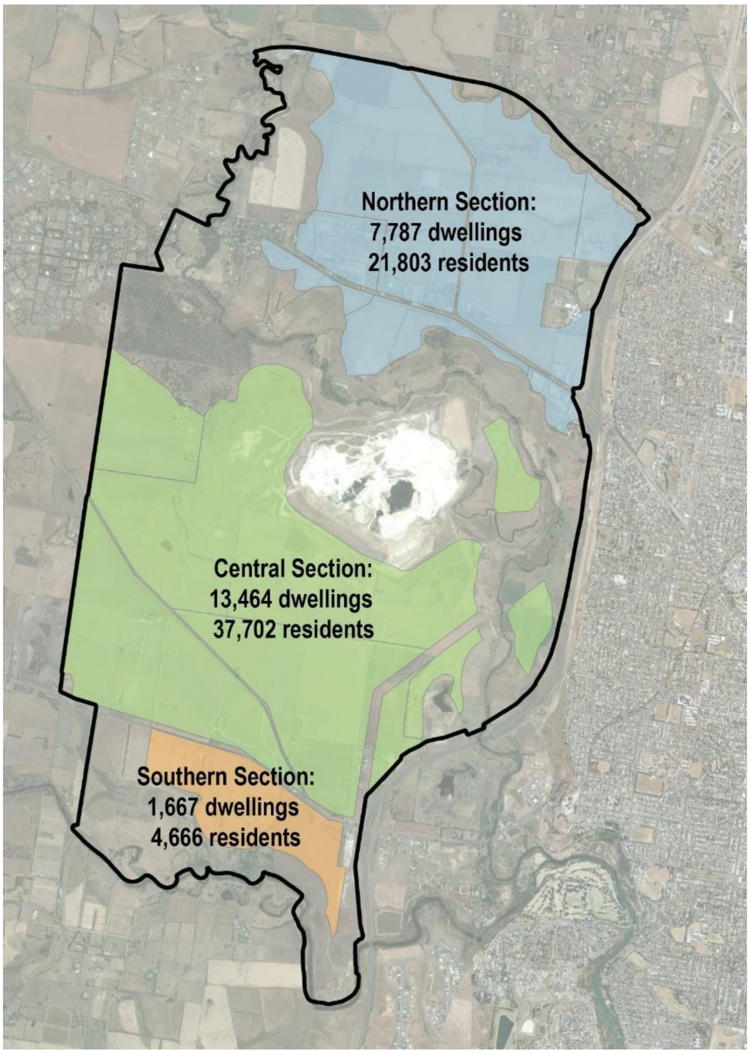
WGGA PRECINCTS AND CENTRES

As identified in Section 3, the WGGA will generate demand for a minimum of six centres, in order to meet the benchmark of 10,000 residents for each neighbourhood centre catchment, with one of these centres to ultimately become a sub-regional centre.

The WGGA is split by topography into two distinct precincts which create well defined 'super' catchments. This includes:

- Northern Section: 21,803 residents generating demand for at least **two** neighbourhood centres; and
- Central and Southern Section: 42,368 residents generating demand for at least **four** neighbourhood centres.

FIGURE 9 WGGA DEVELOPMENT YIELD BY SECTION



Source: Urban Enterprise, 2017.

PRINCIPLES GUIDING OPTIMAL LOCATION FOR NEIGHBOURHOOD CENTRES

Neighbourhood centres have been distributed across the WGGA based on the agreed network planning principles (as discussed in Section 4.3), and considers the following criteria:

- Minimising the impact on existing centres;

- Proximity to a main road;
- Maximising accessibility for residents to convenience retail (supermarkets);
- Consideration of commercial attractiveness and centre viability - service a primary catchment of at least 10,000 residents; and
- Contribute to improving the existing centre network, and service existing residential areas which are poorly serviced / undersupplied.

An indicative centre layout is shown for each road option in Figures 10 and 11. This network has been developed to strike a balance between the optimum commercial location of centres having regard to the preliminary road network, the optimum number of centres to ensure sufficient catchment size, and maximum accessibility to residents. Three options for higher order centres are highlighted, located on the main north-south road. Further discussion and analysis of potential sub-region centre locations is provided in Section 4.3.

The indicative layout of centres for the two road options is fundamentally the same with three options for a potential higher order centre located on the major north-south arterial The only difference between the two road options is the location of centres relative to the main north-south road.

This layout allows for approximately 76% of residents to be located within 1km of a neighbourhood centre (under the 80% target set out in the agreed principles). Some adjustments to the centre locations may be made to meet the 80% target, however this would require shifting centres away from the main road network, or additional smaller centres to service isolated areas of the growth area. An important consideration for this study is the balance between accessibility and viability and a fundamental principle for the network is the development of strong and viable Neighbourhood Centres which can provide a better focal point for community and employment opportunities.

NORTHERN SECTION LAYOUT

The estimated population yield in the northern section of approximately 22,000 residents will generate demand for two Neighbourhood Centres. A centre on or near the Midland Highway would have significant commercial exposure to passing traffic. The Midland Highway carries high traffic volumes and has excellent access to the Ring Road. The future duplication of the Midland Highway would further increase its commercial attractiveness. The Midland Highway would also provide accessibility to residents in western Geelong which are currently poorly serviced by modern supermarket facilities. The centre may be positioned at the intersection of Geelong-Ballan Road, or on the north-south arterial road (dependent on the final arterial road network alignment).

A second centre would be positioned internally, away from the main road network, in order to maximise accessibility for surrounding residents. The location of the centre (east or west of Geelong-Ballan Rd) would be relative to the location of the Midland Highway centre to ensure that the centre can be supported by a viable catchment and warrant a full-line supermarket (i.e. limit overlap with the primary catchment of NAC1). The location of the two centres in the northern section will need to be reviewed once the alignment of the arterial road network is finalised.

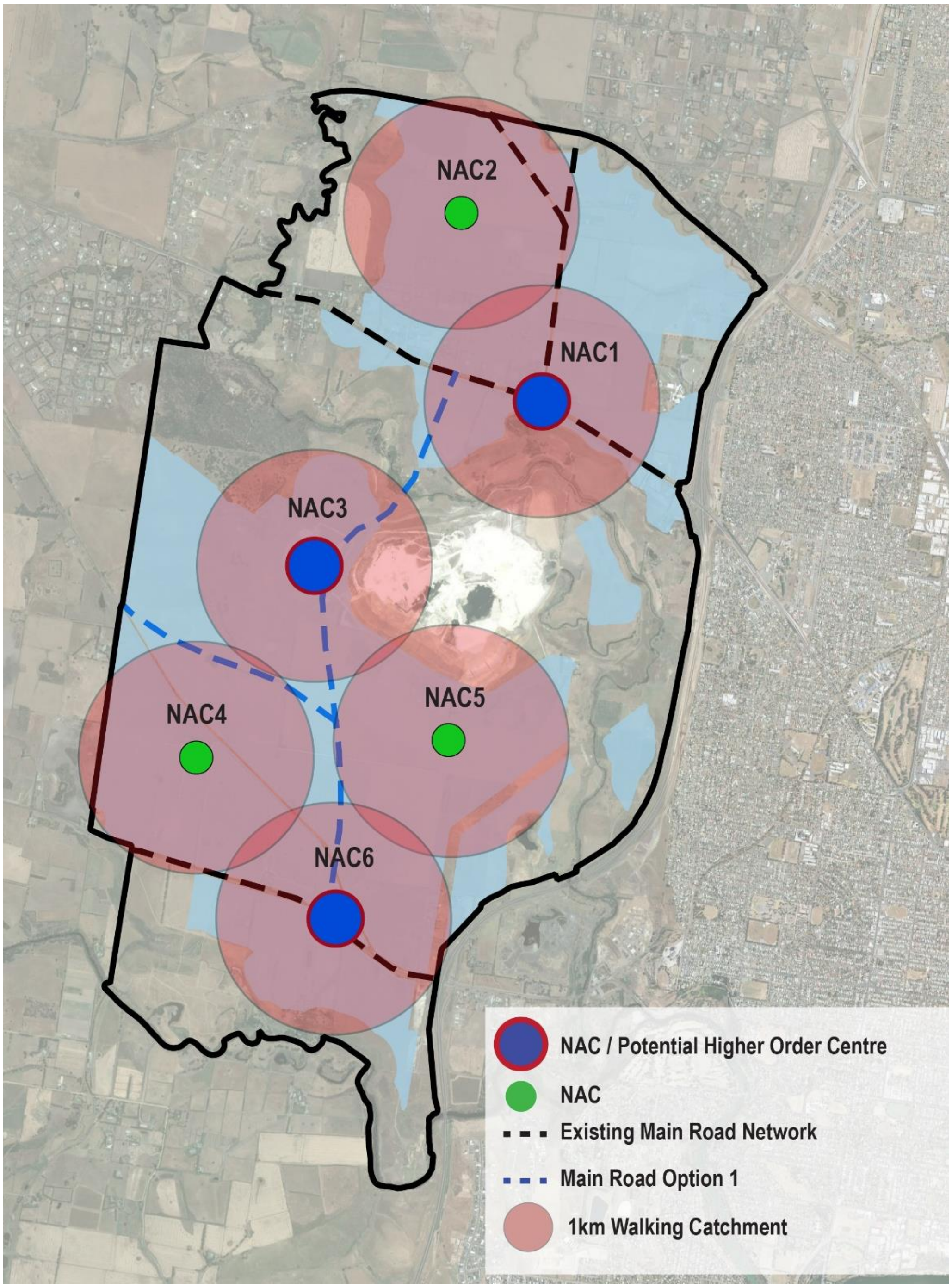
SOUTHERN SECTION LAYOUT

The estimated population yield in the northern section of approximately 42,000 residents will generate demand for four Neighbourhood Centres. A centre at or near the intersection of the Hamilton Highway and main north-south road would have exposure to passing traffic, as well as servicing the catchment to the south and north of Hamilton Highway, without encroaching on the future Fyansford Neighbourhood Centre development.

A centre located centrally to the WGGA, on the proposed future lake, would provide for a high amenity location with potential for specialised uses (tourism and employment) and would be located on the main north-south road allowing for accessibility from the north and south sections of the WGGA.

Two additional centres would be positioned internally, away from the main road, to maximise coverage and accessibility for residents.

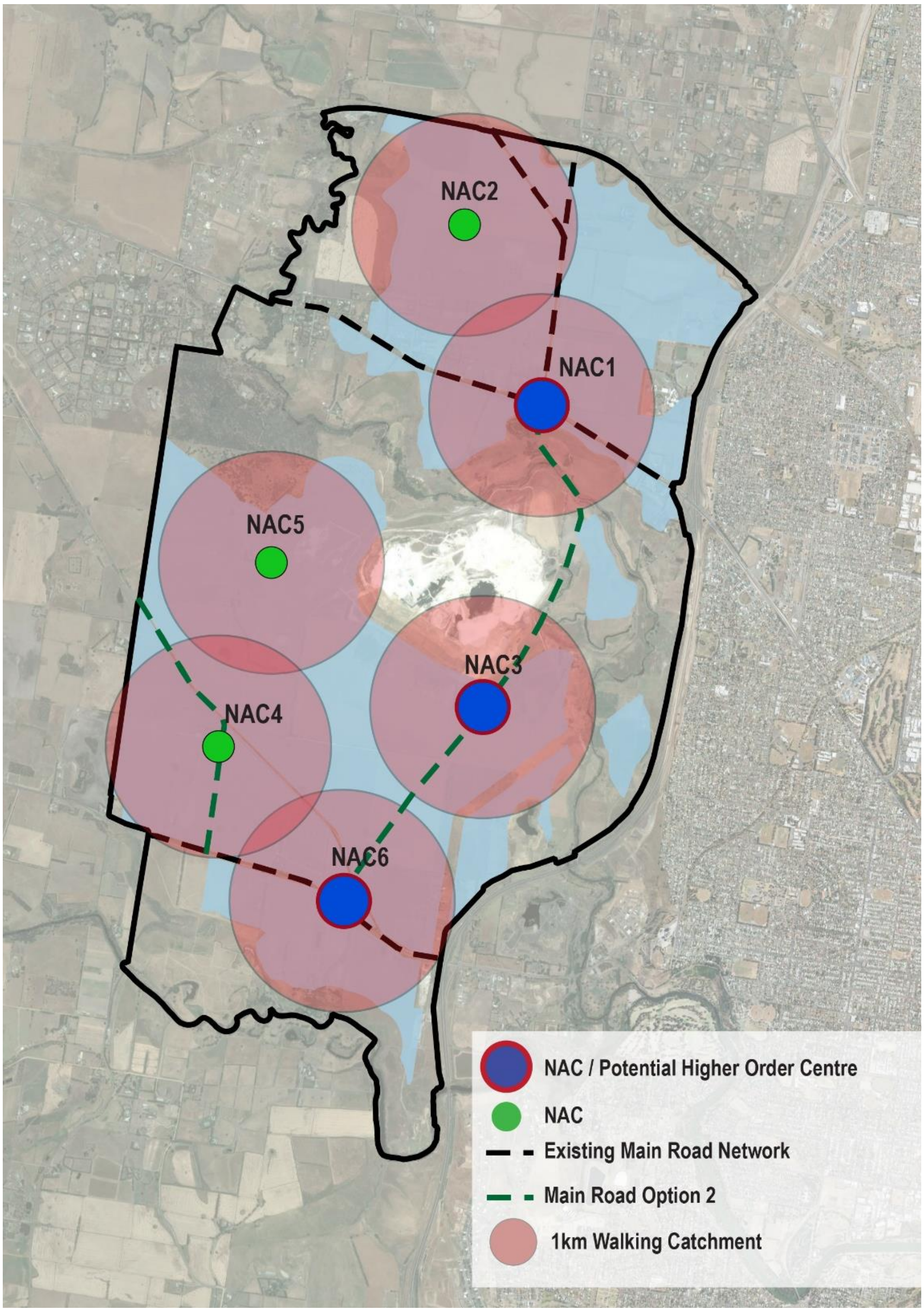
FIGURE 10 WGGA INDICATIVE CENTRE LAYOUT – ROAD OPTION 1



Note: the location of NAC1 and NAC2 may need to be reviewed once the arterial road alignment is finalised.

Source: Urban Enterprise, 2017.

FIGURE 11 WGGA INDICATIVE CENTRE LAYOUT – ROAD OPTION 2



Source: Urban Enterprise, 2017

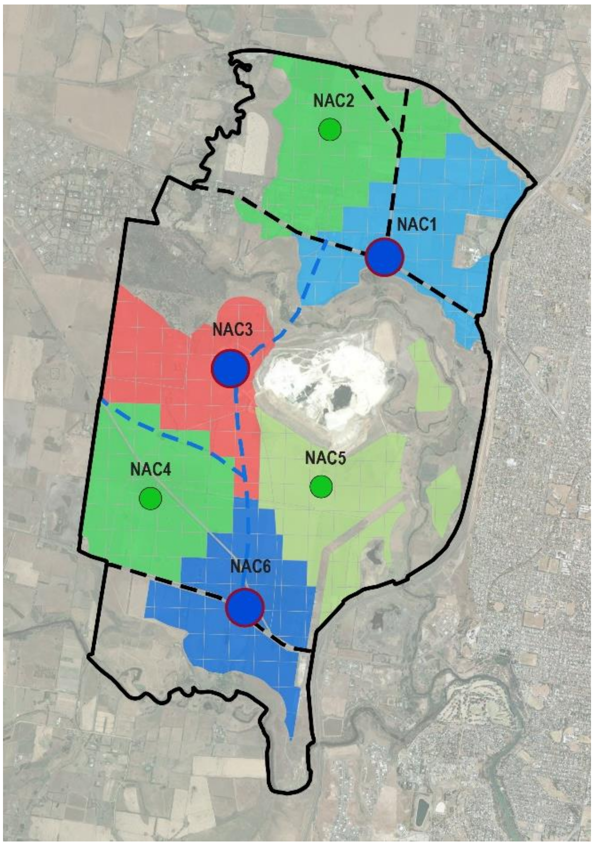
NEIGHBOURHOOD RETAIL CATCHMENTS AND FLOORSPACE

Based on the indicative layout of centres, an analysis of retail catchments was undertaken to ensure that each centre services a viable catchment (at least 10,000 residents) and is appropriately sized.

The developable area has been divided into a 10ha grid which was then used to create catchments (Figure 12 and 13). These were developed having regard to the relative distance to other neighbourhood centres and accessibility on the main road network. These catchments are indicative only and subject to further detailed analysis once the arterial and collector road system has been finalised.

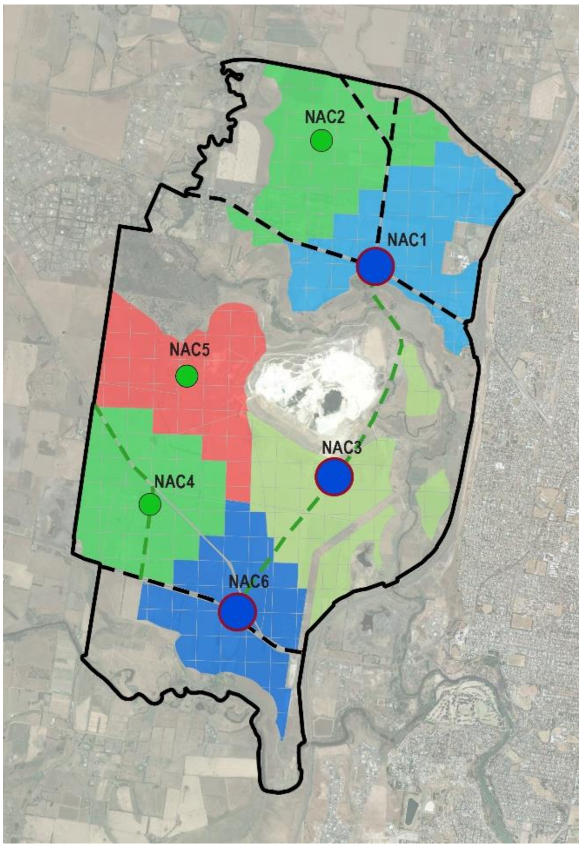
The indicative neighbourhood centre catchment size and supportable retail floorspace (based on the benchmark of a NAC of 7,000sqm of retail floorspace for every 10,000 residents) is shown in Table 9. If the benchmark ratio is maintained for each catchment, approximately 45,000sqm of retail floorspace would be required in neighbourhood centres in the WGGA.

FIGURE 12 CENTRE CATCHMENTS – ROAD OPTION 1



Source: Urban Enterprise 2017

FIGURE 13 CENTRE CATCHMENTS – ROAD OPTION 2



Source: Urban Enterprise 2017

TABLE 9 INDICATIVE RETAIL CATCHMENT POPULATIONS (ROAD OPTION 1)

Centre	Population	NAC Retail Flooorspace (sqm)
NAC1	11,105	7,774
NAC2	10,700	7,490
NAC3*	10,621	7,435
NAC4	10,641	7,449
NAC5*	10,836	7,585
NAC6	10,270	7,189
Total NAC	64,173	44,921

Source: Urban Enterprise 2017

*Note: NAC3 and NAC5 are inversed for Road Option 2

4.4. SUB-REGIONAL CENTRE LOCATION OPTIONS

The optimal location of the sub-regional centre should be based on the agreed network planning principles (as discussed in Section 4.2), and consider the following:

- Located on a main road (preferably an arterial road), and proposed public transport routes;
- A relatively central location to the growth area to maximise accessibility to residents (preferably on or next to the main north-south connector road);
- Minimise the impact on existing centres, with consideration of existing sub-regional network and catchments;
- Commercially viable location for higher order retailing; and
- Can accommodate large format retail uses, and provide appropriate commercial exposure.

At the detailed planning stage, the optimal location should also consider the ability of the precinct to accommodate higher density residential uses within proximity to the sub-regional centre.

Based on a review of the preliminary road network options, three main areas, incorporating five potential locations (based on the road network options), have been identified for a new sub-regional centre in the WGGA, as shown in Figure 14. They include:

1. Midland Highway Location:

- **1A:** Near the intersection of the Midland Highway and proposed north-south main road (Road Option 1).
- **1B:** Near the intersection of Midland Highway and Geelong Ballan Road (Road Option 2).

The Midland Highway carries high traffic volumes and has excellent access to the Ring Road. This location would be an attractive commercial prospect, particularly for bulky goods retail. If positioned close to the north-south road, it would be relatively accessible from the southern section of the WGGA.

2. Central Location (on proposed lake)

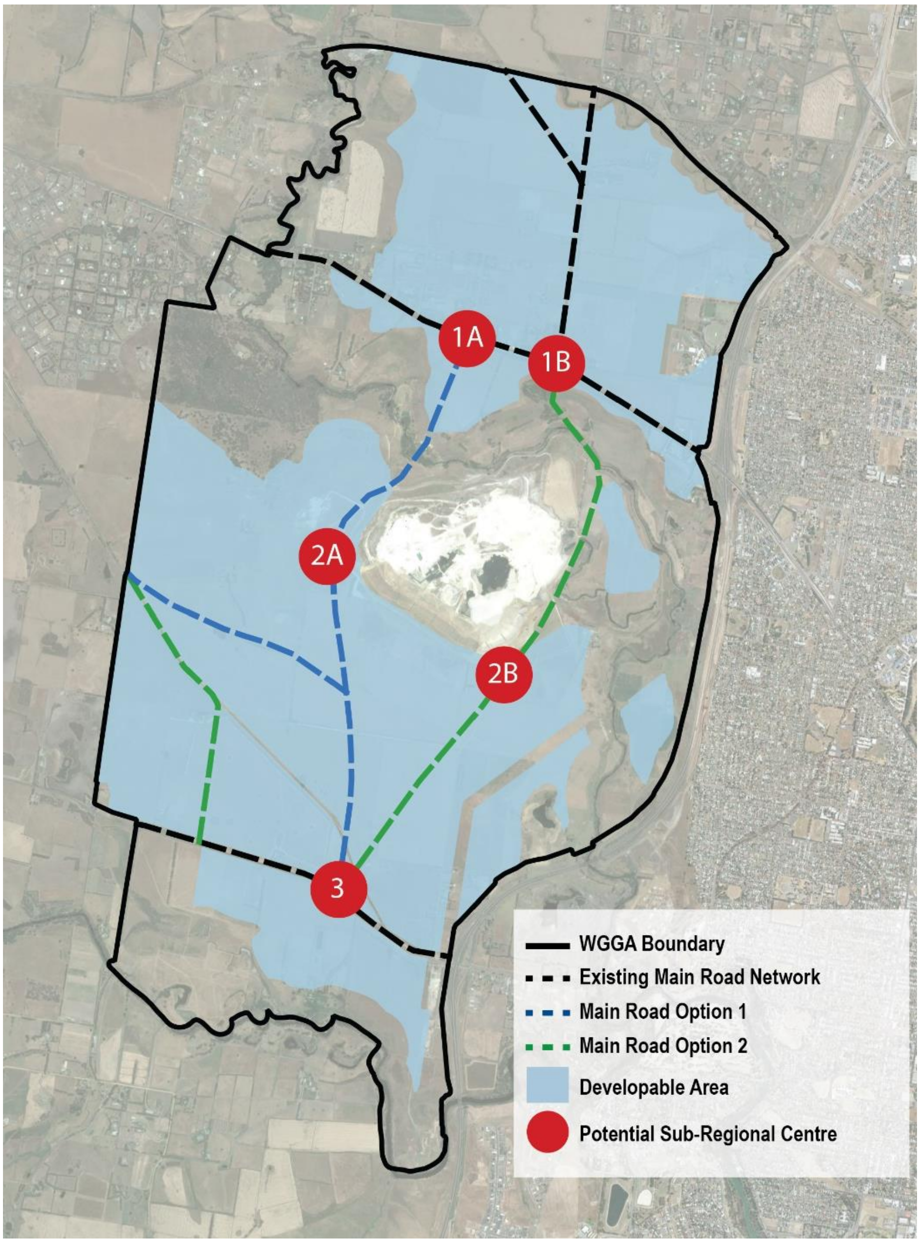
- **2A:** A location central to the growth area with access from the new primary north-south road and in close proximity to the quarry pit / future lake (based on Road Option 1).
- **2B:** As above, but based on Road Option 2.

Located on the main north-south road, this option would be centrally located to all WGGA residents. It is potentially a high amenity location considering the opportunity for a lake setting which would be attractive for employment and lifestyle uses.

3. Hamilton Highway Location

Near the intersection of the Hamilton Highway and Fyansford-Gheringhap Road / new north- south road. This location would have exposure to passing traffic and be attractive for bulky goods retailing.

FIGURE 14 SUB-REGIONAL CENTRE LOCATION OPTIONS



Source: Urban Enterprise 2017

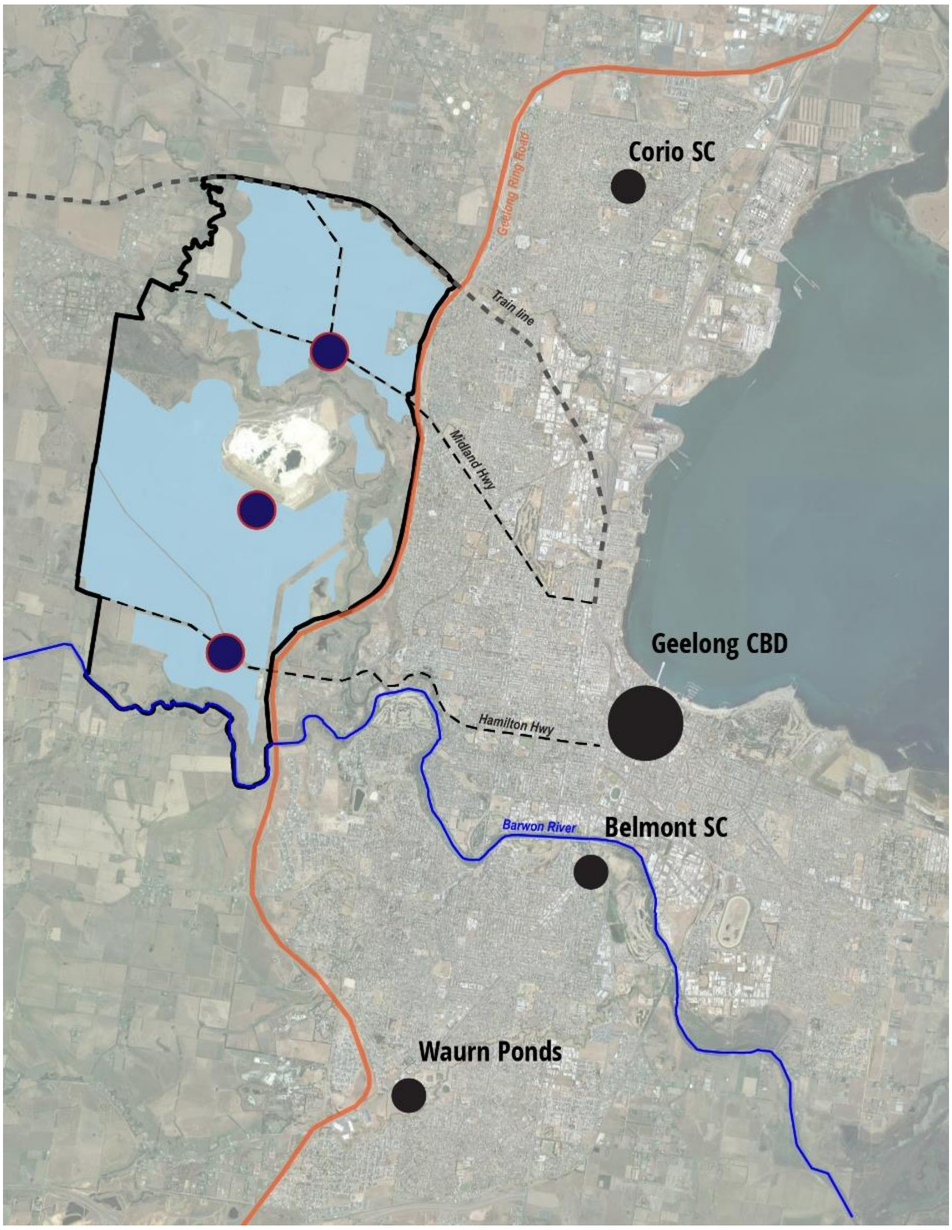
4.4.1. SUB-REGIONAL CENTRE CATCHMENTS

This section analyses the indicative catchment of a new WGGA sub-regional centre for the three general location options, and reviews the extent to which these catchments could encroach on existing sub-regional catchments.

Analysis of WGGA sub-regional catchments shows that there are a number of movement barriers within urban Geelong which limit the size of the WGGA catchment and impact on existing centres (Figure 15). The key barriers include:

- The Geelong Ring Road which runs along the eastern border of the WGGA.
- The Geelong-Ballarat Train Line which defines the northern border of the WGGA and continues to the CBD. There are only three entrance points to the WGGA from urban Geelong – Creamery Road, Midland Highway, and Hamilton Highway.
- The Barwon River which defines the southern border of the WGGA. For residents located south of Barwon River, there are a limited number of river crossings meaning that Waurn Ponds is relatively more accessible.

FIGURE 15 MOVEMENT BARRIERS IMPACTING WGGA SUB-REGIONAL CATCHMENT



Source: Urban Enterprise 2017

Indicative primary catchments have been developed based on the network distance to existing sub-regional centres using SA1 geographies (measured from the SA1 centrepoint).

It is important to note that for residents in urban Geelong, the Geelong Ring Road acts as a major barrier to movement to the WGGA thus limiting the potential size of a WGGA sub-regional catchment.

Table 10 shows the network distance (driving distance) from the WGGA sub-regional centre options to existing sub-regional centres.

TABLE 10 WGGA SUB-REGIONAL CENTRE OPTIONS VS EXISTING CENTRES DISTANCE MATRIX

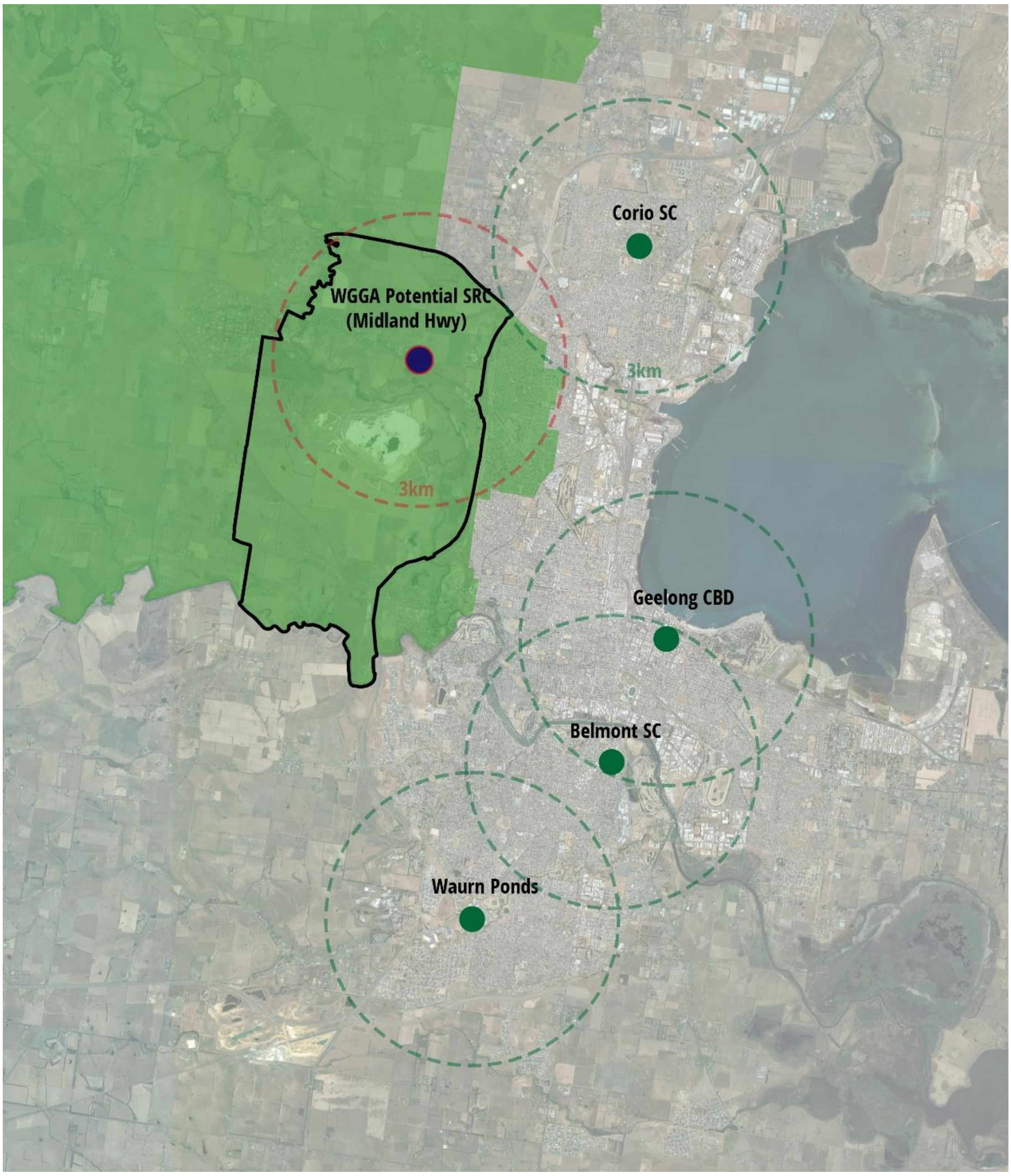
WGGA Sub-regional Centre Option	Corio SC	Geelong CBD	Belmont SC	Waurn Ponds
1. Midland Highway	7.9km	7.7km	15km	14.8km
2. Central Location	9.9km	9.3km	17km	12.3km
3. Hamilton Highway	11.9km	6.8km	9km	9.8km

Source: Urban Enterprise 2017 Google Maps

The sub regional catchments for the three locations are discussed below. For each option, sub-regional catchment extends to the west to include Bannockburn and the eastern rural Golden Plains Shire.

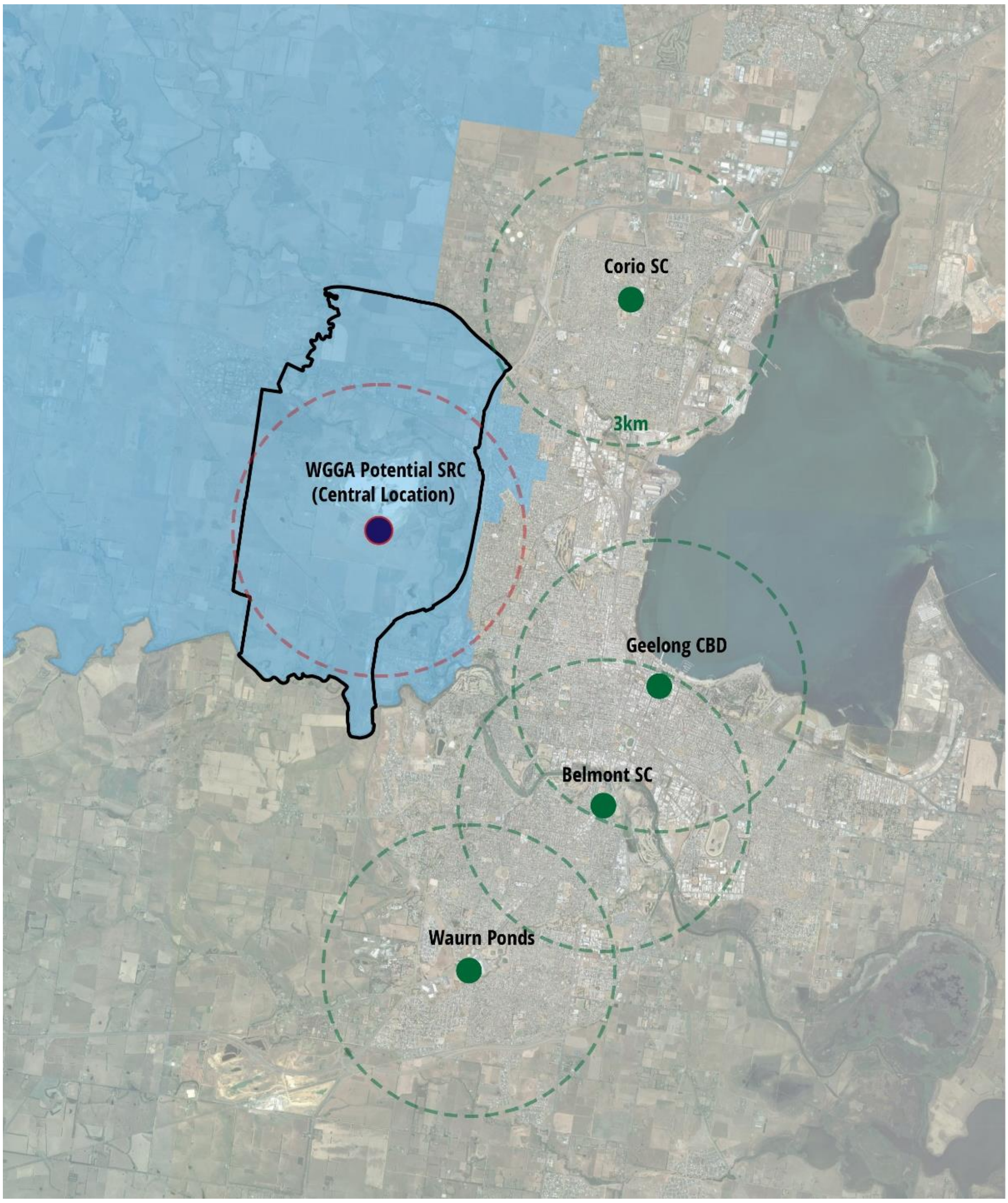
- The indicative catchment for a sub-regional centre located on the Midland Highway is shown in Figure 16. The catchment extends beyond western Geelong into Golden Plains Shire, incorporating Bannockburn. The indicative catchment extends shortly into urban Geelong, to areas surrounding the Midland Highway. The extent of the catchment is limited by proximity to Corio SC and Geelong CBD. The railway line acts as movement barrier which limits the size of the catchment in a northerly direction. The existing population within this catchment is estimated at approximately 15,000 residents, with an indicative future population of 78,000 residents (including future WGGA residents at full development).
- The indicative catchment for a sub-regional centre which is in a central location is shown in Figure 17. As the central option is located away from the two major highways and entrances to the WGGA, this location would be less accessible to urban Geelong, decreasing accessibility from urban Geelong, limiting the size of its potential catchment. The existing population within this catchment is estimated at approximately 9,000 residents, with an indicative future population of 73,000 residents (including future WGGA residents at full development).
- The indicative catchment for a sub-regional centre located on the Hamilton Highway is shown in Figure 18, extending to the south and along the Hamilton Highway into urban Geelong. The Barwon River acts as a major travel barrier which limits the size of the catchment in a southerly direction. The existing population within this catchment is estimated at approximately 8,000 residents, with an indicative future population of 72,000 residents (including future WGGA residents at full development).

FIGURE 16 INDICATIVE WGGA SUBREGIONAL CATCHMENT – MIDLAND HIGHWAY LOCATION



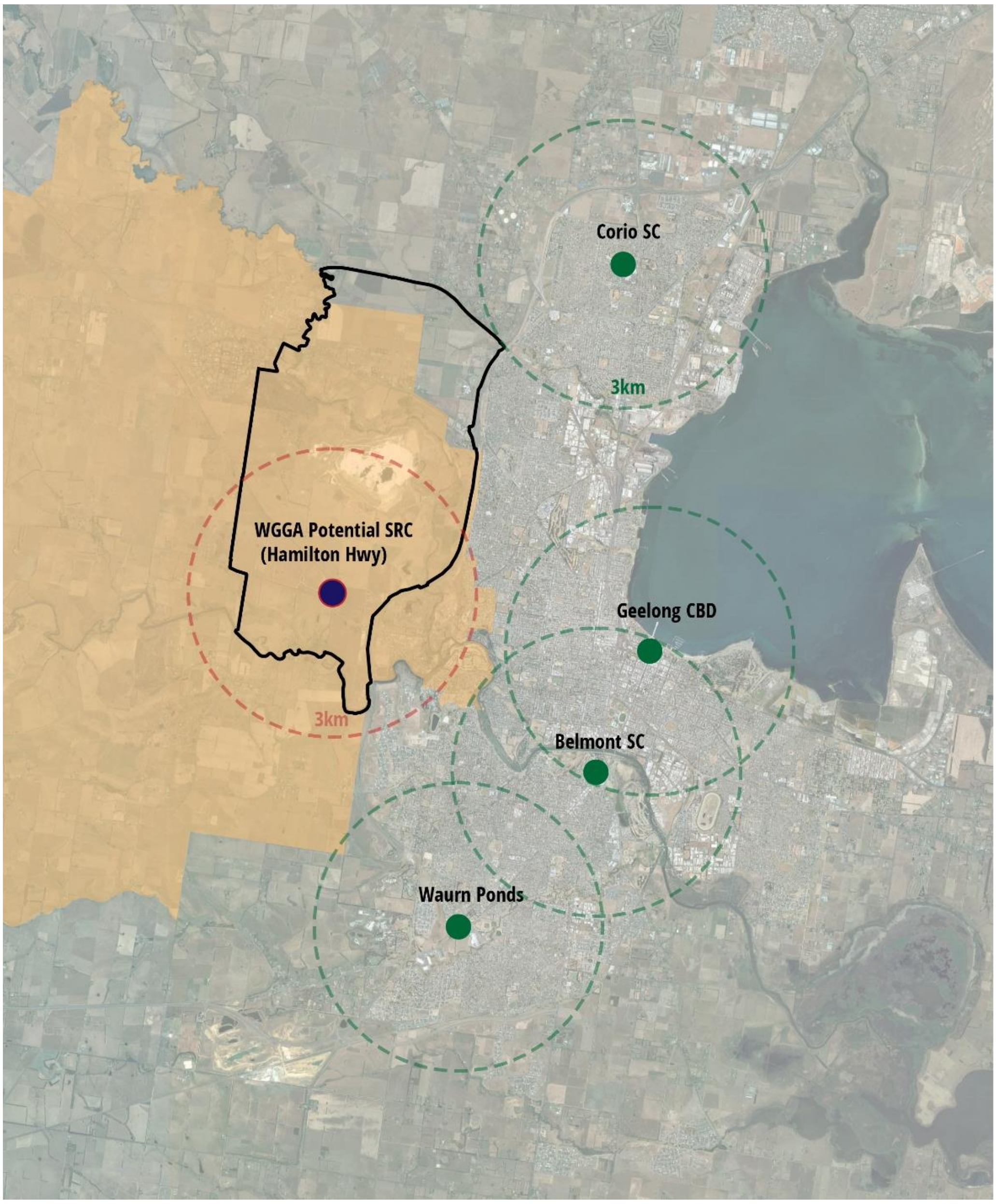
Source: Urban Enterprise, 2017.

FIGURE 17 INDICATIVE WGGA SUBREGIONAL CATCHMENT – CENTRAL LOCATION



Source: Urban Enterprise, 2017.

FIGURE 18 INDICATIVE WGGA SUBREGIONAL CATCHMENT – HAMILTON HIGHWAY LOCATION

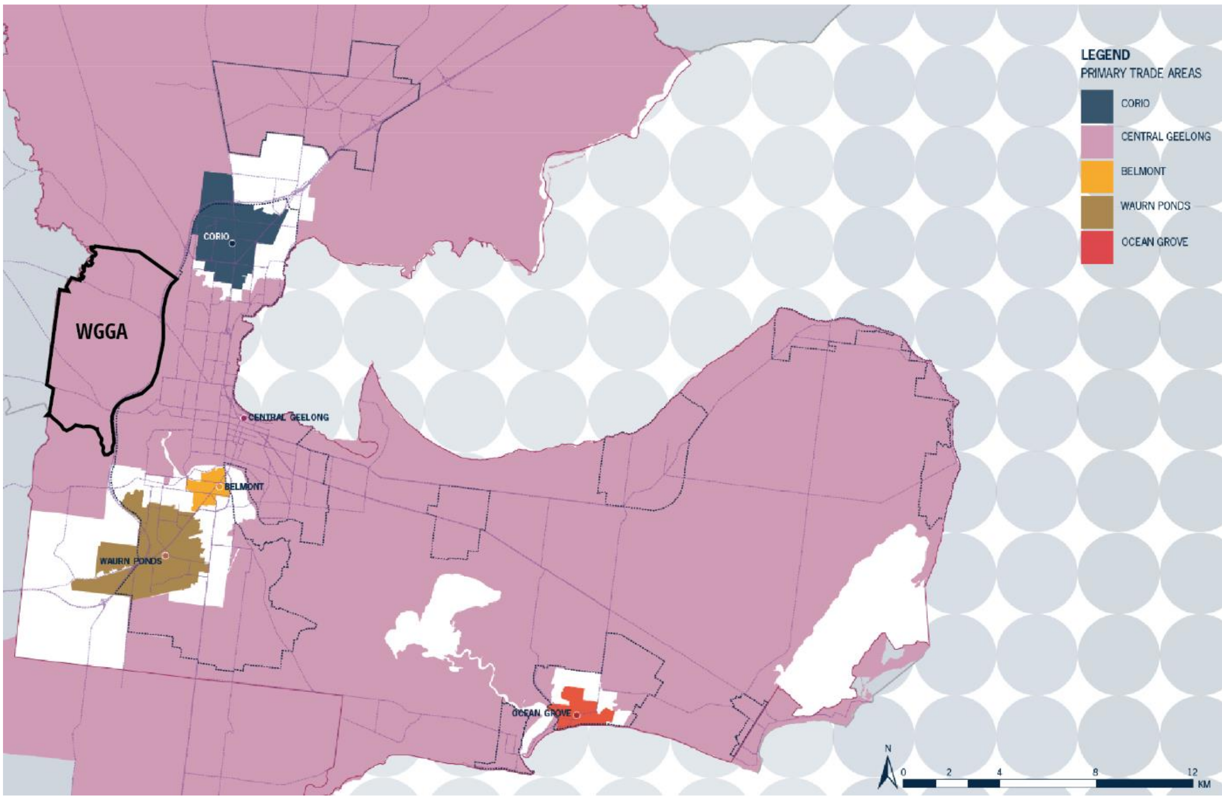


Source: Urban Enterprise, 2017.

4.4.2. POTENTIAL ENCROACHMENT ON EXISTING CATCHMENTS

19 shows the primary catchment of existing sub-regional centres based on the DDS catchment. The WGGA indicative sub-regional catchments was compared with the catchments of existing centres to assess potential impact as discussed below.

FIGURE 19 EXISTING DDS PRIMARY CATCHMENT



Source: Draft Greater Geelong Retail Strategy, 2017

CORIO SHOPPING CENTRE

Corio's primary catchment extends south to the rail line which is a key movement barrier. Areas further to the south – those immediately east of the WGGA – are included in the broad catchment of the Geelong CBD for the purposes of higher order retail.

As a result, a sub-regional centre in the Midland Highway location would have minimal impact on Corio's primary catchment. The Corio Shopping Centre draws trade from across a catchment of over 55,000 residents (according to the draft Strategy). Over time, the Corio catchment population is expected to grow by approximately 10,000 residents to 2036 (Forecast ID), increasing the catchment to 65,000 residents and offsetting any lost turnover to the WGGA. The Draft Retail Strategy (2017) identifies that by 2031 there will be an undersupply of 8,100sqm of retail floorspace at the Corio centre.

The Draft Retail Strategy (SGS, July 2017) recommends applying a floorspace cap pf 27,400sqm to the centre. This would further support the need for a new sub-regional centre to service the needs of the WGGA and parts of western Geelong.

Due to the movement barriers between Corio's catchment and the WGGA (i.e. Ring Road and rail line), encroachment from a WGGA sub-regional centre into Corio's catchment is considered minimal.

GEELONG CBD

The Geelong CBD primary catchment is represented as covering all areas of Greater Geelong which are outside the primary and secondary catchment of sub-regional centres.

The impact of any sub-regional centre in the WGGA on the CBD will depend on the scale of the proposed centre. The catchment of each SRC location option would slightly encroach on the current CBD catchment, however, the composition of a new centre would be likely to be quite different to the offer of the CBD, and the number of residents impacted would be very low relative to the broad CBD catchment population.

WAURN PONDS

The Waurn Ponds existing DDS catchment is depicted as extending north to Barrabool Road (Draft Retail Strategy, 2017). As the Barwon River acts as movement barrier, it is expected that a WGGA sub-regional centre located on Hamilton Highway would not impact the Waurn Ponds primary catchment.

The Draft Retail Strategy (SGS, July 2017) found that due to growth in Waurn Ponds' catchment there would be sufficient demand to support expansion of the centre to 54,660sqm of retail floorspace by 2031 (an addition of approximately of 11,900sqm). This did not contemplate the potential major demand generated by the WGGA. The Draft Strategy also recommends applying a floorspace cap of 38,100sqm shop retail floorspace to Waurn Ponds in order to protect the regional role of the Geelong CBD.

Due to the movement barriers between Waurn Ponds and the WGGA (i.e. Ring Road and Barwon River), encroachment from a WGGA sub-regional centre into Waurn Ponds' catchment is considered to be very minor.

BELMONT

Belmont Shopping Centre is a well-established strip-based sub-regional centre located close to the Geelong CBD. Its primary catchment covers a small area of established suburbs close to the CBD. The Hamilton Highway WGGA SRC would be the closest option to Belmont and would have negligible impact.

4.4.3. SUB REGIONAL CENTRE LOCATION CONSIDERATIONS

Table 11 provides an assessment of the relative merits of the three potential sub-regional centre location options based on the criteria and analysis of existing catchments.

TABLE 11 SUB-REGIONAL CENTRE LOCATION ASSESSMENT

Location	Relative Advantages	Relative Disadvantages
Midland Highway	• The Midland Highway carries high traffic volumes and has excellent access to the Ring Road and Geelong CBD. This location would be an attractive commercial prospect given high exposure and accessibility, particularly for bulky goods retail; • Future duplication is proposed for the Midland Highway, which would further increase its role and likely traffic volumes in the future; • Location would draw expenditure from Bannockburn and a small part of western Geelong that are currently underserviced by sub-regional retail improving the accessibility and standard of retail service to these areas;	• Location is less accessible to the WGGA developable area's south of the Moorabool River which contain the majority of future population yield; • Accessibility from the south will rely on construction of a major bridge across the Moorabool River, which could delay accessibility to the SRC; • Midland Highway provides easy accessibility to urban Geelong. This location would draw customers and expenditure from residents of existing SRC catchments; • The local role of the SRC would have a mostly one-sided catchment (only limited developable land to the south between Midland Highway and Moorabool River).
Central Location (near quarry / lake)	• Centrally located to all WGGA residents, particularly for the southern precinct which has a greater population catchment; • Potentially a high amenity location considering the opportunity for lake-side setting and/or views. This may attract employment, tourism, and lifestyle uses; • Less accessible to existing residents in western Geelong, which could limit expenditure that be redirected from existing activity centres catchments;	• Located away from the existing major arterial network and less commercially desirable for bulky goods retailers and other retail anchors; • Accessibility from the north would rely on construction of a major bridge across the Moorabool River, which could delay accessibility to the SRC. • Less accessible for Bannockburn residents and western Geelong residents – missed opportunity to improve service to these areas.
Hamilton Highway	• High profile location at the intersection of Hamilton Highway and the major north-south road – likely to be attractive for retail anchors and bulky goods; • Excellent accessibility to the Ring Road and passing traffic; • Would improve the sub-regional retail service provision for Fyansford.	• Not readily accessible for residents of the WGGA northern precinct; • Only a limited local catchment to the south of the Hamilton Highway – could be a more appropriate location for a Neighbourhood Centre or Large Neighbourhood Centre; • Lower traffic volumes than Midland Highway • Could impact on catchment of Geelong CBD for SRC shopping.

Source: Urban Enterprise, 2017.

4.5. NON-RETAIL COMMERCIAL AND EMPLOYMENT USES

In addition to retail, the WGGA could support a range of other uses, including:

- Employment uses which would be located within activity centres (commercial offices, civic uses, entertainment, medical etc);
- Institutional uses which would be located adjacent to activity centres (e.g. education, health); and
- Specialised employment precincts such as industrial and business parks (subject to further analysis).

In order to estimate the amount of floorspace and land that should be dedicated towards non-retail employment uses, broad estimates have been prepared based on three industry benchmarks including:

- Method 1: Non-retail commercial floorspace 30% of total floorspace within Activity Centres (and up to 40% for a sub-regional centre);
- Method 2: A target of providing one job within the WGGA for every household; and
- Method 3: An assumption that 10% of developable land should be set aside for employment uses (as indicated in the Context Report).

The findings of these high-level assessments are provided as follows.

METHOD 1: RETAIL FLOORSPACE RATIO

Across growth areas, the proportion of activity centre floorspace dedicated to non-retail uses usually comprises approximately 30% of total floorspace. For sub-regional centres, a higher proportion is typically dedicated to non-retail uses, reflecting the greater mix and concentration of employment and other land uses. A rate of 40% has been applied to the sub-regional centre (indicatively NAC1 for calculation purposes).

Table 12 shows the application of activity centre floorspace ratios to each proposed centre. This is based on an indicative distribution of centres (further discussion of the hierarchy is provided in the next section).

TABLE 12 NON-RETAIL COMMERCIAL FLOORSPACE REQUIREMENTS

Centre	Retail Floorspace (inc. bulky goods)*	Non-retail commercial floorspace % of total	Non-retail commercial floorspace (sqm)*	Total Floorspace (sqm)*
NAC1 / SRC	75,000	40%	50,000	125,000
NAC2	7,500	30%	3,200	10,700
NAC3	7,400	30%	3,200	10,600
NAC4	7,400	30%	3,200	10,600
NAC5	7,600	30%	3,300	10,900
NAC6	7,200	30%	3,000	10,300
	112,100		65,900	178,000

Source: Urban Enterprise 2017. *Rounded

METHOD 2: EMPLOYEE PER HOUSEHOLD TARGET

To achieve the one employee per household benchmark, the WGGA would need to support 22,000 – 23,000 jobs. A high-level analysis of employment within the activity centres is shown in Table 13. It is estimated that the activity centres would support approximately 6,700 jobs, with the need to provide an additional 15,000-16,000 jobs outside of activity centres. To achieve the one employee per household measure, significant additional employment would need to be provided outside activity centres such as home-based business, schools, major institutions (e.g. hospital, university, aged-care), community facilities which are currently undersupplied the north of Geelong (youth services, libraries, cultural centres etc.), or dedicated employment precincts.

TABLE 13 INDICATIVE ACTIVITY CENTRE EMPLOYMENT

	WGGA Outcome
Total Retail Floorspace (sqm)	112,000sqm
Retail Employment (@25sqm per worker)	4,480
Non-Retail Floorspace (sqm)	65,900
Non-Retail Jobs (@30sqm per worker)	2,196
Total Employment in Activity Centres	6,676

Source: Urban Enterprise 2017.

METHOD 3: PROPORTION OF DEVELOPABLE LAND

The Context Report provides an indicative measure of 10% of developable land being used for employment purposes in the WGGA, which would equate to between 179 and 194ha.

Activity centre land area requirements are estimated at 32.5ha, therefore a significant amount of additional land dedicated to employment uses would be required to meet this benchmark. As discussed earlier, a specialised employment precinct or larger institutional uses (e.g. university, hospital) would need to be located within the WGGA to meet this target.

TABLE 14 NON-RETAIL FLOORSPACE – 10% OF DEVELOPABLE LAND

	Updated Scenario
Developable Area	1,935ha
10% of Developable Area	193.5ha
Indicative Activity Centre Land Requirements*	32.5ha
Additional Employment Land (to achieve the 10% developable area benchmark)	161ha

*Based 2.5ha for Neighbourhood Centres (x5) and 20ha for a sub-regional centre (inc bulky goods)

4.5.1. IMPLICATIONS FOR WGGA

The analysis presented in this section demonstrates that for the WGGA to meet benchmarks and targets for local employment, additional employment land would be required (in addition to activity centres). Providing employment land in growth areas has many benefits, including reducing travel time for local residents, encouraging active transport, limiting congestion in existing employment areas and supporting a diverse mix of economic and social activities within the growth area at all hours of the day.

The WGGA is easily accessible from the freeway network, particularly the eastern section of the growth area near the Geelong Ring Road entrances at the Midland Highway and the Hamilton Highway. The scale and accessibility could attract both retail and employment uses, including potentially institutional campuses. One limitation is the current lack of public transport servicing the area, however it is likely that transport planning will provide for bus routes to any sub-regional activity centre.

The relative proximity to the Geelong CBD could lead to the attraction of some professional, institutional and public land users, especially co-located with a future sub-regional activity centre. The existing local catchment in western Geelong is characterised by higher income earners and professionals, indicating that the future population of the WGGA could include a similar profile, leading to demand for office, education and health floorspace.

Due to the area's natural features and amenity (particularly the potential regeneration of the quarry for a lake which would be a significant natural feature/point of interest), higher order employment uses may be attracted including office, institutional (e.g. university, hospital), and lifestyle/tourism uses (e.g. hospitality, conferencing). Further analysis would be required to establish demand for these uses.

A sub-regional centre would provide an important focal point for employment uses. A sub-regional centre typically accommodates a significant range of non-retail activities including entertainment, commercial office, health facilities, service businesses, and community uses amongst others. The types of non-retail uses and scale of floorspace vary amongst sub-regional centres based on a number of factors, primarily the location and relative proximity to existing government services, health facilities, community services, and business and industrial precincts; and the amenity and attributes of the centre which make it attractive for businesses and commercial development.

The community uses and government services which would be co-located with a sub-regional centre, rather than a NAC, are those which service a sub-regional or regional catchment. Due to the wide geographic area of the WGGA, it is considered important that local and neighbourhood community services are distributed across the growth area rather than concentrated in a single centre to ensure accessibility for residents.

Neighbourhood Centres generally support a small number of ancillary commercial office uses, such as real estate agents, small professional services, banks and post offices.

Pakenham provides a good example of a higher order centre which now has a strong office role which has matured as the growth area has developed, however this role has taken many years to establish. Medium scale office development is considered a longer-term opportunity as part of a staged development of a sub-regional centre, with smaller office uses supportable in the early stages. The attraction of a major office space user, such as a government office, is an important step in attracting other office tenants. However, it should be noted that local policy supports the Geelong CBD as the preferred location for government office uses.

4.6. ACTIVITY CENTRE HIERARCHY OPTIONS SUMMARY

Based on the assessment provided in this section, there are two main options for the activity centre hierarchy as discussed below. The intention of this analysis is not to identify a 'preferred' scenario, but assess the options and relative strengths and weaknesses.

The hierarchy options are the same for both road network options, with the only variation being the positioning of centres in the Central Precinct of the WGGA based on the alternative alignments of the main north-south road.

INDICATIVE HIERARCHY OPTION 1

Option 1 includes five neighbourhood centres, and a Sub-Regional Centre which exceeds the size of the typical growth area SRC due to the significant catchment area population that would be served by the centre. It includes:

- **1 x Sub-Regional Centre (large).** This centre would be the location for major food and non-food retailers (DDS), a bulky goods centre of up to 25,000 sqm, major health and community services and commercial floorspace. This would be the primary location for commercial office floorspace, government agencies, and civic uses in the WGGA. Based on the indicative catchment population, the scale of the centre would be larger than typical growth area provision model, accommodating up to 50,000sqm of core retail floorspace. Based on the development of the growth area, the centre may evolve to accommodate up to three supermarkets.
- **5 x Neighbourhood Centres.** These centres would serve a neighbourhood role, and accommodate a full-line supermarket and speciality shops. The size of the centre would be proportional the benchmark of approximately 7,000sqm of retail floorspace per 10,000 residents in the catchment, with each centre sized between 7,000 and 7,500sqm of retail floorspace.

Table 15 shows the indicative hierarchy and floorspace distribution.

TABLE 15 INDICATIVE WGGA CENTRE HIERARCHY – OPTION 1

	Location Options*	Retail Anchors	Shop Retail Floorspace (sqm)	Restricted Retail Floorspace (sqm)	Non-Retail Floorspace (sqm)	Total Floorspace (sqm)
Sub-Regional Centre (x1)	NAC1, NAC3 or NAC6	3 supermarkets, 2 DDS, mini-majors	50,000	25,000	50,000	125,000
Neighbourhood Centre (x5)	NAC1-NAC6	1 supermarket	7,000 – 7,500 x 5		3,000 – 3,500 x 5	10,000 – 11,000 x5
Total in WGGA Activity Centres			85,000 – 87,500	25,000	65,000 – 68,000	175,000 – 180,000

*Based on Figure 10 and 11
Source: Urban Enterprise 2017.

This network hierarchy would allow for a Sub-Regional Centre which is larger than the typical growth area provision, but would allow for a greater focal point for employment uses. However, the scale of the sub-regional centre would potentially result a larger impact on existing sub-regional centre catchments and performance, and would be more likely to draw expenditure from the existing urban areas of Geelong.

The elongated layout of the WGGA and the significant distances between the northern and southern boundaries would mean that this option may not provide a good balance of centre sizes across the hierarchy – all major non-food retailers would be consolidated in the Sub-Regional Centre. This may result in a high quality service and accessibility in one part of the WGGA for higher order shopping, and lower level service in others.

INDICATIVE HIERARCHY OPTION 2

Option 2 is an alternative to the standard approach whereby a more distributed network of floorspace is provided across the hierarchy. This option would include the following:

- **1 x Sub-Regional Centre.** As in Option 1, the sub-regional centre would be the location for major food and non-food retailers (DDS), a bulky goods hub, major health and community services, and commercial floorspace. The sub-regional centre would be similar in size to existing sub-regional centres (Waurn Ponds and Belmont) of approximately 40,000 - 45,000sqm retail shop floorspace. The Sub-Regional Centre is smaller than Option 1, with the balance of floorspace re-distributed to a larger neighbourhood centre.
- **1 x Large Neighbourhood Centre.** Located on main roads, this centre would initially serve a neighbourhood role, but overtime could develop into a larger Neighbourhood Centre and potentially accommodate two retail food anchors, one or two mini-majors, and a small bulky goods retail component. It would be located in a commercially attractive position such as Hamilton Highway, Midland Highway, or centrally (on the lake), depending on the preferred location for the SRC.
- **4 x Neighbourhood Centres.** These centres would serve a neighbourhood role, and accommodate a full-line supermarket. The size of the centre would be proportional to its catchment of approximately 7,000sqm of retail floorspace per 10,000 residents.

Table 16 shows the indicative hierarchy and floorspace distribution. This approach does not change the neighbourhood centre catchments, but re-distributes higher order floorspace to a larger neighbourhood centre.

TABLE 16 INDICATIVE WGGA CENTRE HIERARCHY – OPTION 2

	Location Options*	Retail Anchors	Shop Retail Floorspace (sqm)	Restricted Retail Floorspace (sqm)	Non-Retail Floorspace (sqm)	Total Floorspace (sqm)
Sub-Regional Centre (x1)	NAC1, NAC3 or NAC6	2 supermarkets, 2 DDS, mini-majors	45,000	20,000	43,000	108,000
Large Neighbourhood Centres (x1)	NAC1, NAC3 or NAC6	2 supermarkets, mini-majors	12,000	5,000 (highway location)	7,000	24,000
Neighbourhood Centre (x4)	NAC1-NAC6	1 supermarkets	7,000 - 7,500 x 4		3,000 – 3,500 x 4	10,000 – 11,000 x 4
Total in WGGA Activity Centres			**85,000 – 87,000**	**25,000**	**62,000 – 64,000**	**172,000 – 176,000**

*Based on Figure 10 and 11
Source: Urban Enterprise 2017.

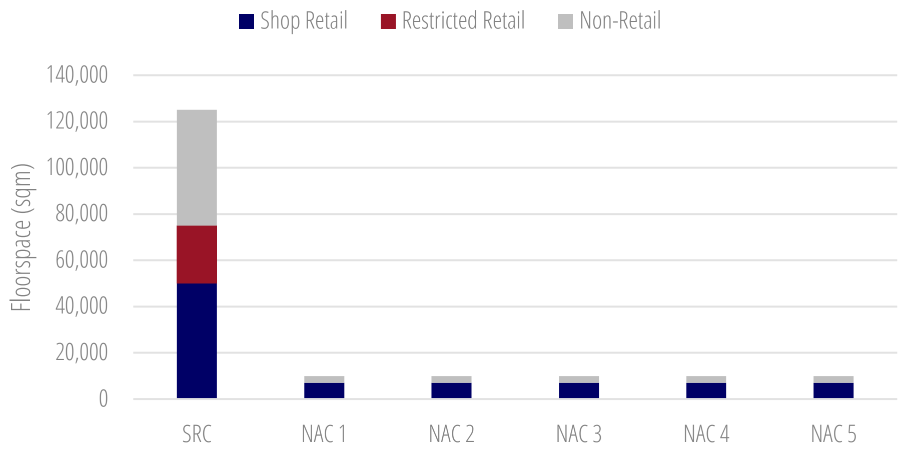
The inclusion of a Large Neighbourhood Centre is intended to leverage the higher profile locations of the WGGA (i.e. highway locations). It could also play a wider employment role and a more diverse retail role (incorporate mini-majors and some bulky goods).

The Large Neighbourhood Centre would assist in servicing the split nature of the WGGA, ensuring that at least one larger centre with dual supermarkets and a range of retail types (including bulky goods and min-majors) is offered in both the north and south sections of the growth area.

This option could also provide greater flexibility in planning for future centres which can respond to the timing, staging, and locations of development.

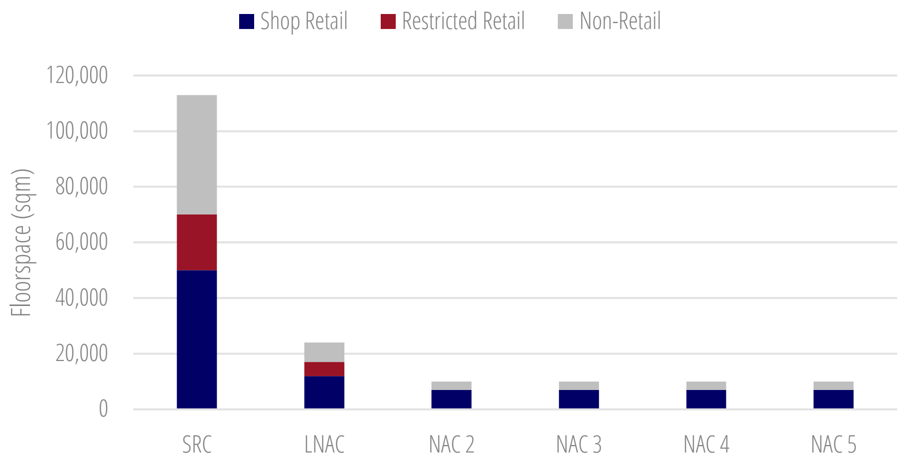
The following figures show the distribution of floorspace across the activity centre hierarchy. This inclusion of a Larger Neighbourhood Centre in Option 2 would provide a more distributed network than Option 1.

FIGURE 20 ACTIVITY CENTRE HIERARCHY FLOORSPACE DISTRIBUTION - OPTION 1



Source: Urban Enterprise 2017

FIGURE 21 ACTIVITY CENTRE HIERARCHY FLOORSPACE DISTRIBUTION - OPTION 2



Source: Urban Enterprise 2017

BATESFORD TOWNSHIP

In addition to the network options discussed, there is also an opportunity for the existing Batesford Township to develop into a small local centre, potentially incorporating some hospitality and tourism uses to take advantage of the local environmental amenity and demand generated by the growth area. This is could be considered as part of future strategic planning and due to its more specialised role, sits outside the centre hierarchy options discussed above.

4.7. CONCLUSION

The substantial population projected for the WGGA will require a range of activity centre types to provide retail and commercial services within reasonable proximity to residents. A sub-regional centre will be required to meet demand. The specific location of the sub-regional centre would be determined at the precinct planning stage and have regard to the finalised road network, precinct boundaries, other uses located in proximity, and land ownership patterns.

The sub-regional centre should be supported by a network of neighbourhood centres which vary in terms of their ancillary roles, including some bulky goods, education, health and employment opportunities.

Higher amenity locations, including the township of Batesford and areas in proximity to the future lake, present opportunities for hospitality and potentially tourism uses, in conjunction with retail and employment uses commensurate with the scale of the surrounding catchments.

Consideration should be given to the range of employment opportunities within the WGGA, having regard to the locational advantages and large surrounding employment catchment. Large scale health, education and government uses should be considered in appropriate locations to service the large catchment of both the WGGA and the western suburbs of Geelong.

APPENDIX A UPDATED DEVELOPABLE AREA INDICATIVE YIELD CALCULATIONS (STAGE 3)

The following assumptions have been made regarding the yield calculations:

- 80% Net Residential Developable Area (NRDA)
- Dwelling density as outlined in the Context Report (dwellings/ha):
  - FZ: 15.4
  - SUZ: 15.4
  - RLZ: 6.4
  - All other zones have not been included in the analysis
- Average household size of 2.8

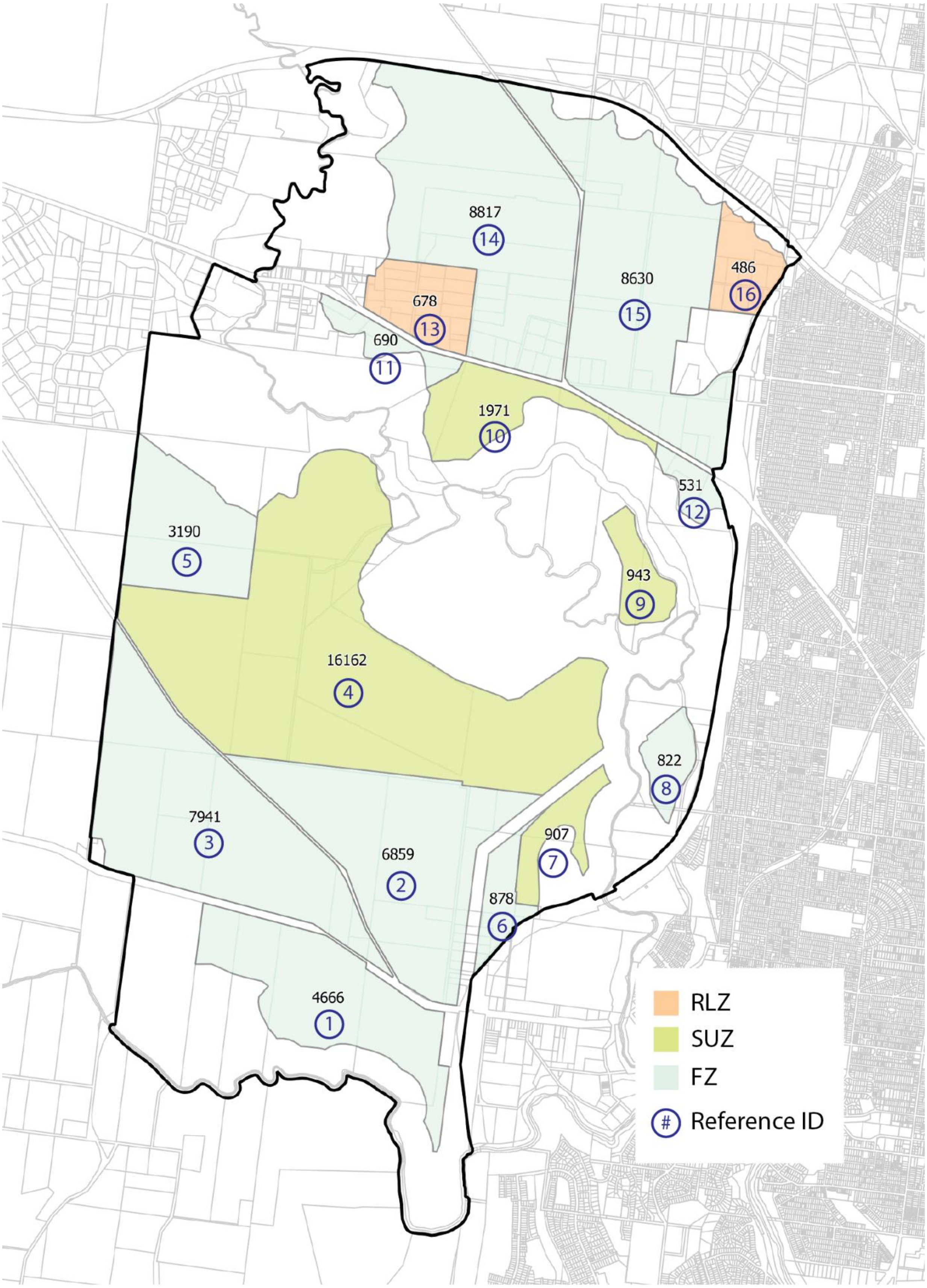
Table 17 corresponds to the areas identified on Figure 9 overleaf, showing the population yield by zone for the updated developable area scenario.

TABLE 17 INDICATIVE POPULATION YIELD CALCULATION TABLE

Map Reference	Zone Code	Dwelling Density	Gross Land Area (ha)	Estimated NRDA	Dwellings	Population
1	FZ	15.4	135.3	108.2	1667	4666
2	FZ	15.4	198.8	159.0	2449	6859
3	FZ	15.4	230.2	184.1	2836	7941
4	SUZ7	15.4	468.5	374.8	5772	16162
5	FZ	15.4	92.5	74.0	1139	3190
6	FZ	15.4	25.5	20.4	314	878
7	SUZ7	15.4	26.3	21.0	324	907
8	FZ	15.4	23.8	19.0	293	822
9	SUZ7	15.4	27.4	21.9	337	943
10	SUZ7	15.4	57.1	45.7	704	1971
11	FZ	15.4	20.0	16.0	246	690
12	FZ	15.4	15.4	12.3	189	531
13	RLZ	6.4	47.4	37.9	243	678
14	FZ	15.4	255.6	204.5	3149	8817
15	FZ	15.4	250.2	200.2	3082	8630
16	RLZ	6.4	33.9	27.1	174	486
Total			**1907.7**	**1526.1**	**22,917**	**64,171**

*All areas outside of the FZ, SUZ, and RLZ have not been included in the analysis to align with the Context Report assumptions.

FIGURE 22 INDICATIVE POPULATION BY ZONE (UPDATED SCENARIO)



APPENDIX B ACTIVITY CENTRE NETWORK PRINCIPLES

This section outlines the relevant principles and standards which inform activity centre planning for the WGGA. The principles have been based on a review of existing strategy and policy including the draft Greater Geelong Retail Strategy 2016 (SGS Economics and Planning, July 2016) and Precinct Structure Planning Guidelines (Victorian Planning Authority 2009), as well as the requirements specified in the Context Report.

4.7.1. GREATER GEELONG RETAIL STRATEGY (DRAFT)

The draft Strategy includes the following goals for retail development in Greater Geelong:

- To provide **convenient access** to goods and services, minimising the need for, and length of, car trips;
- To encourage a **competitive supply of goods and services**, keeping prices down;
- To encourage **walkable access to suppliers of day to day essentials;**
- To create **vibrant and inviting town and neighbourhood centres;**
- To maintain an **appropriate mix of sub-regional centres** that offer a wide range of retail goods and services;
- To improve a **strong Central Geelong**, acting as a flagship for the commercial and cultural life of the City; and
- To **distribute bulky goods activity within a hierarchy**, with retailers located in centres and in a selected number of specialised regional bulky goods nodes.

In addition, a range of polices and strategies are provided:

- Where possible, reduce the need for shoppers to travel long distances from home to access retail services;
- Address service gaps identified in Greater Geelong's retail system, taking into account the effect on existing levels of retail competition and customer choice;
- Locate any new retail centres on sites that have existing or potential future access to public transport services in addition to quality road access for private vehicles. Radial transport and movement networks into centres should be provided wherever possible;
- Encourage development of a dense network of convenience based local centres within walking distance for all residential areas of Greater Geelong (approximately 800m). This network should, where possible, reduce the need for shoppers to travel long distances from home to access day to day needs;
- Supermarket-based Neighbourhood and Town Centres should be distributed across the municipality to perform the role of primary food centres for communities;
- Consolidate the demand base of individual retail centres by integrating housing where possible;
- Where demand exists, facilitate expansion of existing Centres without undermining the structure of the centres hierarchy;
- Ensure that there is a broad mix of activities in higher order Town and Sub-Regional Centres including office and community uses;
- A number of regional-scale specialised bulky goods centres should continue to service regional catchments. These would provide for large-scale and low density bulky goods;
- Smaller-scale and / or higher density bulky goods should be encouraged to locate in designated retail centres in preference to the specialised precincts;
- The general dispersal of bulky goods in other locations should be discouraged unless it can be proven that a net community benefit will be created by proposed development.

4.7.2. PRECINCT STRUCTURE PLAN GUIDELINES

The Precinct Structure Plan Guidelines (Victorian Planning Authority 2009) provide an overview of planning, objectives and key considerations for growth area planning in Metropolitan Melbourne. It is important to note that current planning for WGGA is preliminary and therefore the level of detail which the guidelines seek to produce is above what is required for this report. The guidelines include the following standards for employment and activity centres which provide a guide to the standards and principles to be considered for the WGGA.

EMPLOYMENT AND ACTIVITY CENTRES

Relevant standards

- S1. **Employment uses** that have a high employment density and/or frequent visitors (e.g. offices, retailing, and some community facilities) are **located in town centres**. The more substantial office developments, retailing and community facilities should be located in principal and major town centres.
- S2. Major **employment areas are connected to other employment areas** (including town centres) in the region by arterial roads, public transport and freight networks, as appropriate.
- S3. Land shown as employment in the Growth Corridor Plan is primarily used for commercial and industrial employment uses. However, complimentary residential neighbourhoods may also be included where appropriate.
- S4. The employment area incorporates open space (that links to the open space network) for the benefit of workers, local residents and visitors to the employment area.
- S5. The employment area **incorporates services for the benefit of workers, local residents and visitors** to the employment area within a town centre. Service facilities may include education facilities, medical centres, child care facilities, post offices, banks and retail/ entertainment services.
- S6. Mixed use employment areas that include housing are designed to ensure residents have access to public transport, local community services and open space.

ACTIVITY CENTRE DESIGN

Relevant Standards

- S1 Town centres and land within the walkable catchment of **town centres incorporate mixed use development**.
- S2 Town centres have a **variety of land uses** and a range of business sizes that have main street frontage. This includes a mix of retail, office (including home-office and other administration uses), housing, recreation and entertainment, community services and civic uses.
- S3 **80-90% of households** should be **within 1km of a town centre** of sufficient size to allow for provision of a supermarket.
- S4 Street blocks should be highly permeable and enable people to access goods and services safely.
- S5 Buildings on landmark sites within town centres are multi-storey.
- S6 Buildings within town centres address the street and public spaces and have 'active' ground floor uses.
- S7 Pedestrian movement is prioritised over vehicle movement within town centres, including along the main street.
- S8 All town centres should contain town parks/squares and multi-purpose urban spaces should be provided for meeting places, local markets and community events or other gatherings.
- S9 **Larger format restricted retail stores are located within town centres**, but away from the highest intensity uses.
- S10 Opportunities are provided for small business in and adjacent to town centres, including in conjunction with a dwelling.
- S11 Civic buildings are placed in prominent locations, usually next to town squares.

- S12 Local centres are located on connector streets carrying an existing or proposed public transport route, and include a viable convenience store.

4.7.3. CONTEXT REPORT

The Context Report includes the following direction on employment and retail planning for WGGA which will need to be considered:

- Does the WGGA have the ability to achieve the one job per household benchmark?;
- Consider the importance of existing employment nodes;
- Consider the impact of any new retail provision on the existing retail and centre hierarchy;
- Neighbourhood centre population catchments should be similar in size and should aim to maximise the number of residents who can walk to the centre;
- Locate centres to maximise accessibility to new residents while not encroaching significantly on the catchment of existing centres to the extent that their role and viability is not threatened;
- Identify opportunities to improve the retail network and improve service to existing residents in areas which are undersupplied;
- Centre catchments and floorspace should be consistent with planning for other growth areas in Geelong and Victoria; and
- Consistent with the Geelong Planning Scheme and draft Greater Geelong Retail Strategy.

4.8. PRINCIPLES FOR WGGA ACTIVITY CENTRE PLANNING

The following principles have been adopted for this report based on documents reviewed in this section.

POLICY ALIGNMENT

12. Ensure consistency with the goals, strategies and retail centre hierarchy outlined in the Greater Geelong Retail Strategy (draft) and Greater Geelong Planning Scheme.

13. The size, form and catchment of new centres is consistent with industry benchmarks for growth area planning (PSP Guidelines) and the Greater Geelong Retail Strategy (draft). This includes an indicative average size of 7,000sqm of retail floorspace, and 3,000sqm of non-retail commercial floorspace for Neighbourhood Activity Centres servicing a catchment of 10,000 residents.

FORM AND LOCATION OF ACTIVITY CENTRES

14. Additional centres should be fully integrated with and form an organic extension of the existing activity centre network and hierarchy.

15. Ensure that the location and size of new centres does not encroach significantly on the catchment of existing centres to the extent that their role and viability is threatened.

16. Ensure that any new sub-regional centre (if required), forms part of the existing sub-regional centre network and considers the primacy of Geelong CBD as the flagship centre in the region. Locate new sub-regional centres on the arterial road network and any proposed public transport route.

17. Locate neighbourhood activity centres to maximise accessibility for new growth area residents, encourage active transport, and reduce car trips. 80-90% of households should be within 1km of an activity centre of sufficient size to allow for provision of a supermarket.

18. All new neighbourhood centres should be located proximate to the proposed collector road system, any proposed public transport route and pedestrian network.

19. Locate new centres where they may contribute to improving the existing centre network, and service existing residential areas which are poorly serviced / undersupplied.

20. Large format retail uses are located along major transport routes (arterial roads), with high visibility, easy access, and have regard to the existing bulky goods centres and demand and supply context. Where possible, co-locate large format retail uses either within, or in close proximity to, an activity centre, particularly a sub-regional centre (if required).

21. The proposed role and land allowance for activity centres encourages a diverse mix of uses including retail, commercial, entertainment, and recreation.

CO-LOCATION OF USES

22. Broader strategic planning should aim to:

    a. Encourage community facilities (e.g. schools, community centres, active open space) to co-locate with each other, and in close proximity of an activity centre.

    b. Encourage high-medium density residential uses surrounding activity centres.

    c. Encourage opportunities for co-location of diverse employment uses and business types.

    d. Where possible, ensure the delivery of activity centres and community facilities are staged within the early development of the growth area to ensure that new residents have adequate access to services and facilities.