

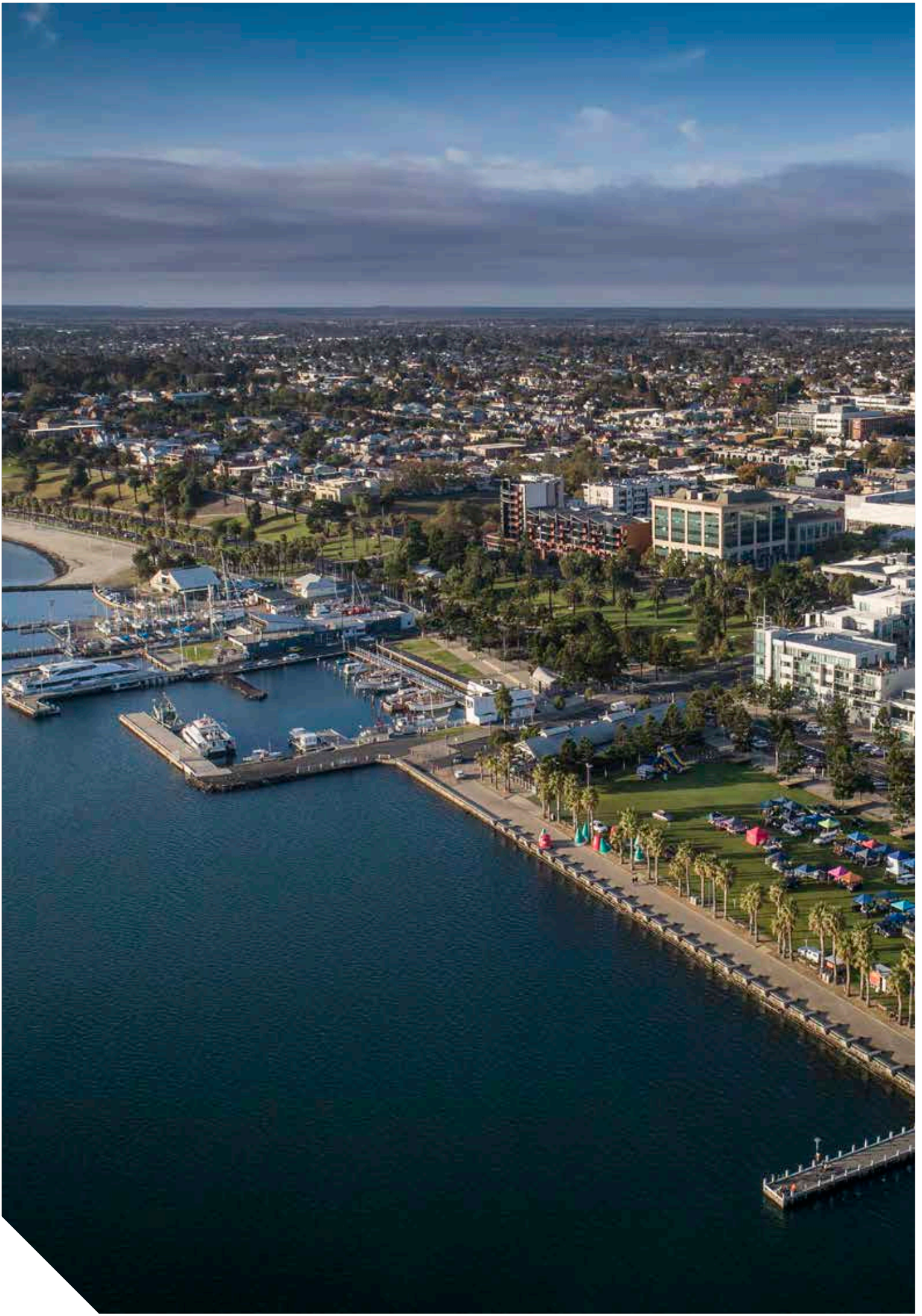
THE CITY OF  
GREATER GEELONG

# RETAIL STRATEGY

—  
2016–36

ADOPTED NOVEMBER 2018





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# ACKNOWLEDGEMENTS

The Greater Geelong municipality is located on the traditional lands of the Wadawurrung people. The land was created by the great ancestor spirit, Bunjil, the wedge tailed eagle. Wadawurrung territory extends from the Great Dividing Range in the north, to the coast around Port Phillip and Western Port Bays. The City acknowledges the Wadawurrung people as the Traditional Owners of this land who to this day practice their culture and uphold the dignity of their ancestors.

The final version of the Retail Strategy is a collaboration between the City of Greater Geelong and SGS Economics and Planning. It is based on work undertaken by SGS Economics and Planning, with input from the City of Greater Geelong.

# EXECUTIVE SUMMARY

The retail sector in Greater Geelong will need to grow to meet future demand for retail services by 2036. Support to grow the retail sector within planned and existing retail centres will continue.

This report provides a technical analysis of Greater Geelong's retail network, proposing changes to the Greater Geelong Planning Scheme to accommodate the findings.

Greater Geelong has a well-established hierarchy of supermarket-based retail centres to support the community's daily needs.

Demand for additional floor space in these centres will increase over the next 20 years. To meet this need, it is better to expand existing centres than deliver new ones, as it helps achieve urban consolidation and reduce travel times for those visiting and working at them.

Demand for new retail centres is strongest in locations experiencing population growth, including:

- Armstrong Creek
- Drysdale/Clifton Springs
- Ocean Grove
- Fyansford and
- Lara.

However, with plans already in place in these areas of high population growth, no new centres are required.

There is demand for additional restricted retail services in Greater Geelong. Restricted retailing in Greater Geelong should continue to be directed to identified restricted retail centres and existing commercial-zoned land, as there is sufficient space to accommodate this.

New department stores and discount department stores, such as Myers, Big W and Target, will continue to be supported in Central Geelong and in sub-regional centres throughout the municipality.

# SUMMARY OF KEY FINDINGS

The following is a summary of the key findings and recommendations of the retail strategy.

## STRATEGIC FINDINGS

The location of retail centres, particularly supermarket based centres, provide convenient access for residents. Most centres can be reached in less than a 20 minute drive from home.

Greater Geelong has a large amount of commercial 2 zoned land. Particularly on the Bellarine Peninsula where previous planning strategies have recommended re-zoning land to enable the establishment of restricted retailing and service related businesses. There will continue to be demand for more restricted retail floor space across Greater Geelong.

The strategy continues to support a hierarchy of retail centres across Greater Geelong, which reflect shopping behaviour and reduced travel times for residents.

Central Geelong continues to sit at the top of the retail hierarchy. Local place making initiatives and strategies continue to prioritise Central Geelong as the city's premier cultural, social and shopping precinct.

Geelong is experiencing increasing levels of population growth. Population growth will drive demand for expanded, and in some instances new retail centres within both existing and growing suburbs.

Planning policy will direct retail development to existing centres within the retail hierarchy in preference to establishing new ones. This will support our established centres, and support other outcomes such as higher density housing development around retail centres.

Retailing that encourages people to spend time at a location or have an experience (slow or cultural retailing) should be the basis for a new approach to developing and enhancing retail centres across Greater Geelong.

There are retail uses located in industrial areas which have few synergies to industrial activity. These uses should be encouraged to locate within existing retail centres.

## STATUTORY RECOMMENDATIONS

The following changes will be made to the Greater Geelong Planning Scheme:

- a new policy context, including objectives to deliver convenient access to services, improved competition, walkability, continued support for existing centres and better urban design outcomes
- an updated retail hierarchy which reflects the role and function of centres across the retail network
- an updated local policy which requires economic impact assessments to be undertaken for new development which challenge the retail hierarchy
- use of floor space caps applied as part of a schedule to the Commercial 1 Zone, to ensure that the timing and size of development will not impact on the retail hierarchy or other nearby centres.

# INTRODUCTION

The City of Greater Geelong is located in south-western Victoria, about 75 kilometres south-west of the Melbourne CBD (see Figure 1).



The retail trade is one of Greater Geelong's largest employment sectors, employing 10,836 people, or 10.5 per cent of people in 2016.<sup>1</sup>



**10,836**  
**PEOPLE**

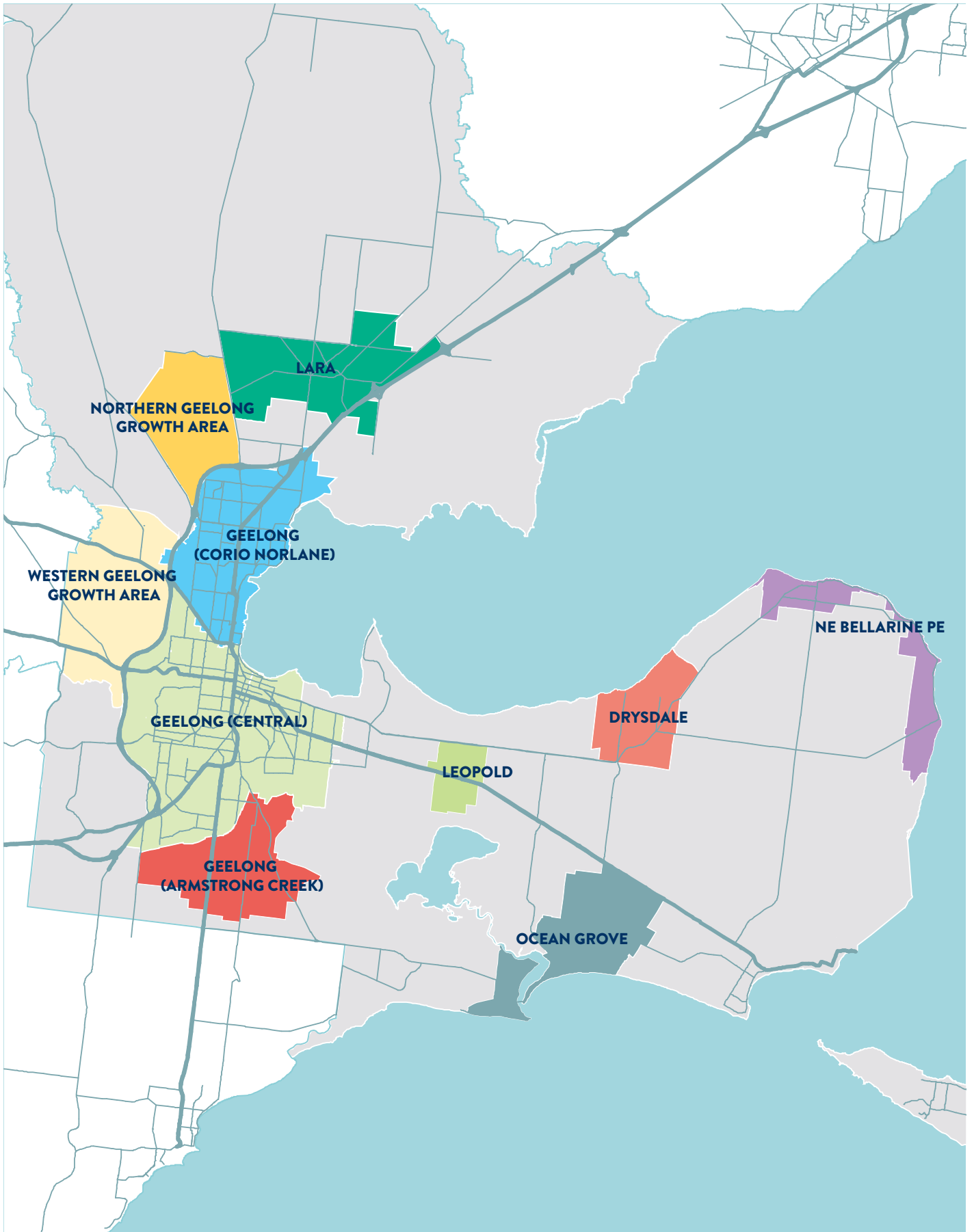
Our existing retail centres have many uses, including:













- retail
- commercial
- accommodation
- community
- cultural
- education
- social
- entertainment
- leisure and
- civic services.

Continued support for our existing and planned centres is important to develop healthy, well-connected neighbourhoods that contribute to the vibrancy and attractiveness of the suburbs.

<sup>1</sup>.id community (2017) City of Greater Geelong Estimated Resident Population. <https://profile.id.com.au/geelong/population-estimate> (accessed on 12 June 2018).

**FIGURE 1: STUDY AREAS AND SUB-CATCHMENT MAP**



- |  |   |
|--|---|
|  Geelong (Central)         |  Leopold         |
|  Geelong (Corio Norlane)   |  Drysdale        |
|  Geelong (Armstrong Creek) |  Ocean Grove     |
|  NGGA                      |  NE Bellarine PE |
|  WGGA                      |  Remainder       |
|  Lara                      |  Major Roads     |





## WHY UNDERTAKE THIS REVIEW

Residents need access to essential retail services, particularly at a neighbourhood level and within a 20-minute drive of their homes. Our last retail strategy was prepared in 2006 and the region has undergone a number of changes, which this strategy must reflect.

The intent of undertaking the Retail Strategy is to understand the likely future retail demand within the City of Greater Geelong and ensure that the local planning framework supports the provision of additional retail floor space to respond to the predicted demand in a way that implements relevant State and Local planning policies, including in relation to activity centres

## CHANGES IN OUR RETAIL SECTOR

Since 2006, a number of retail centres have been built and expanded to meet population growth in existing and new suburbs. Additionally, a number of new retail centres within new suburbs have been planned.

## HOW THIS STRATEGY WAS DEVELOPED

We engaged SGS Economics and Planning to undertake a technical analysis of Greater Geelong's retail network, in the context of:

- recent retailing trends
- land use
- population growth and
- planning policy.

SGS Economics and Planning consulted with major retailers, developers, centre managers and trader groups to gain an understanding of the current retail situation in Greater Geelong.

Their recommendations about future retailing needs across Greater Geelong will guide the development of the retailing sector through to 2036.

<sup>1</sup> .id community (2017) City of Greater Geelong Estimated Resident Population. <https://profile.id.com.au/geelong/population-estimate> (accessed on 12 June 2018).

<sup>2</sup> Australian Bureau of Statistics compiled by .id Forecast prepared for the City of Greater Geelong.

<sup>3</sup> SGS Economics and Planning 2018 – Forecast using 2.0% annual average population change (excluding Surf Coast Shire and Borough Queenscliff).

# A GROWING GREATER GEELONG

## POPULATION GROWTH

Greater Geelong will continue to grow over the next 20 years. Much of this growth will be associated with new housing development in Armstrong Creek, the Northern and Western Geelong Growth Areas and, to a less extent, Lara, Leopold, Ocean Grove and Drysdale. This can be seen in Figure 2 and Table 1 below. Table 1 shows that Greater Geelong is forecast to grow by 114,370 people between 2016 and 2036<sup>4</sup>.

**TABLE 1 – POPULATION PROJECTIONS CITY OF GREATER GEELONG SUB-REGIONS, 2016-36**

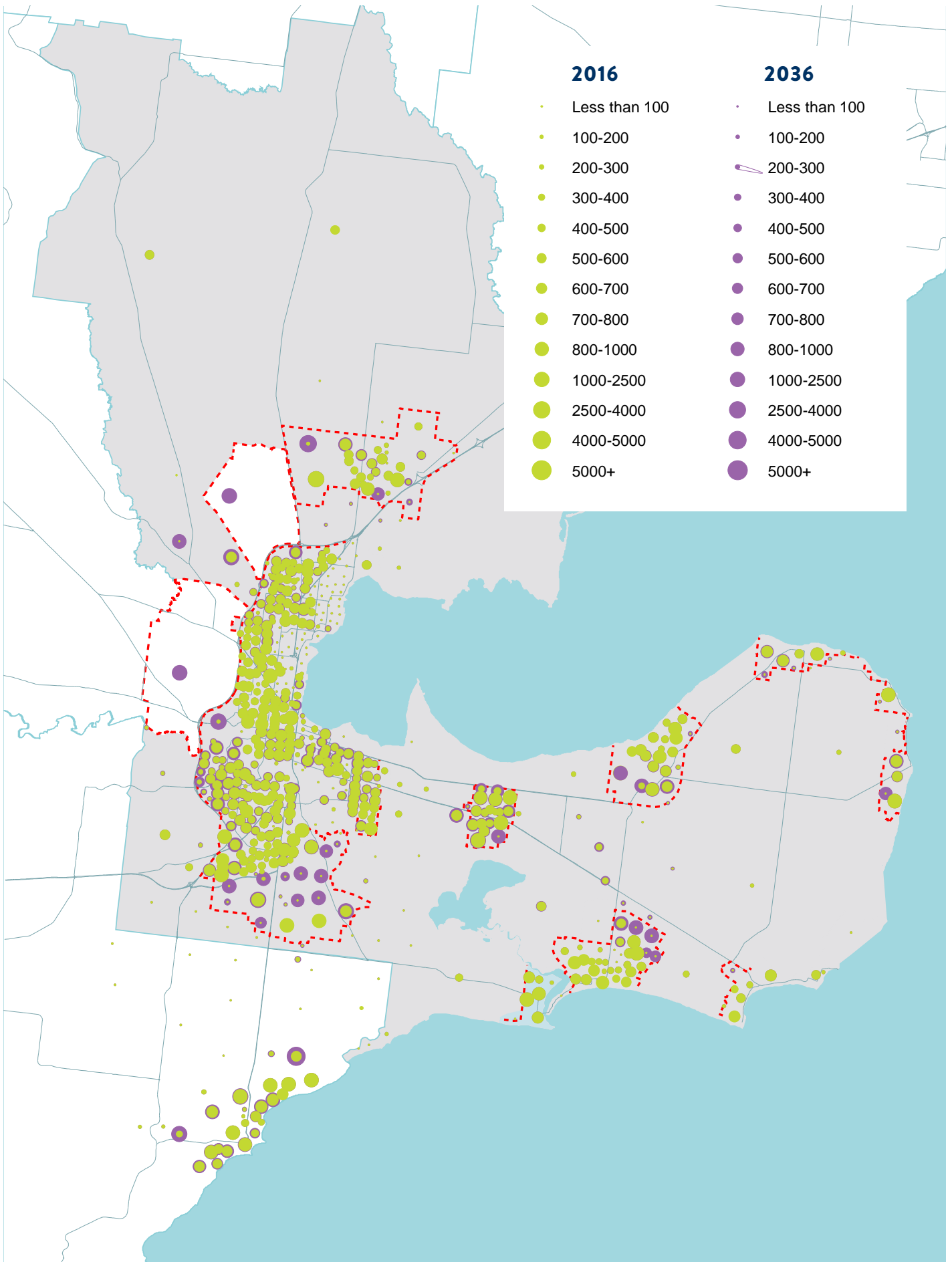
SUB-REGIONS	2016	2021	2026	2031	2036	CHANGE	% OF CHANGE	GROWTH RATE
Lara	15,326	16,931	18,539	20,338	22,242	6,916	6%	1.9%
Northern Geelong GA	1,097	1,095	1,104	3,376	14,112	13,015	11%	13.6%
Geelong (Corio Norlane)	40,641	41,794	42,975	44,205	45,471	4,830	4%	0.6%
Western Geelong GA	342	398	446	3,036	14,108	13,766	12%	20.4%
Geelong (Central)	111,857	117,374	121,940	126,415	131,315	19,458	17%	0.8%
Geelong (Armstrong Creek)	6,476	14,176	23,120	32,117	36,672	30,196	26%	9.1%
Leopold	12,119	13,712	15,331	16,914	18,673	6,554	6%	2.2%
Drysdale	12,668	14,394	16,188	18,136	20,097	7,430	6%	2.3%
Ocean Grove	18,402	19,636	20,823	22,255	24,051	5,648	5%	1.3%
NE Bellarine Pe	7,189	7,958	8,725	9,496	10,281	3,092	3%	1.8%
Remainder	11,013	11,285	11,782	12,620	14,477	3,465	3%	1.4%
<b>Greater Geelong</b>	<b>237,129</b>	<b>258,753</b>	<b>280,975</b>	<b>308,909</b>	<b>351,499</b>	<b>114,370</b>	<b>100%</b>	<b>2.0%</b>

AAGR = Average Annual Growth Rate  
Source: SGS Economics and Planning

<sup>4</sup>.id community (2017) City of Greater Geelong Estimated Resident Population. <https://profile.id.com.au/geelong/population-estimate> (accessed on June 2018) and SGS Economics and Planning 2018 – Forecast using 2.0% annual average population change (excluding Surf Coast Shire and Borough Queenscliff)

<sup>5</sup> SGS Economics and Planning, Population Forecast 2.0% Growth Rate

**FIGURE 2: POPULATION GROWTH AND LOCATIONS – SGS ECONOMICS AND PLANNING**

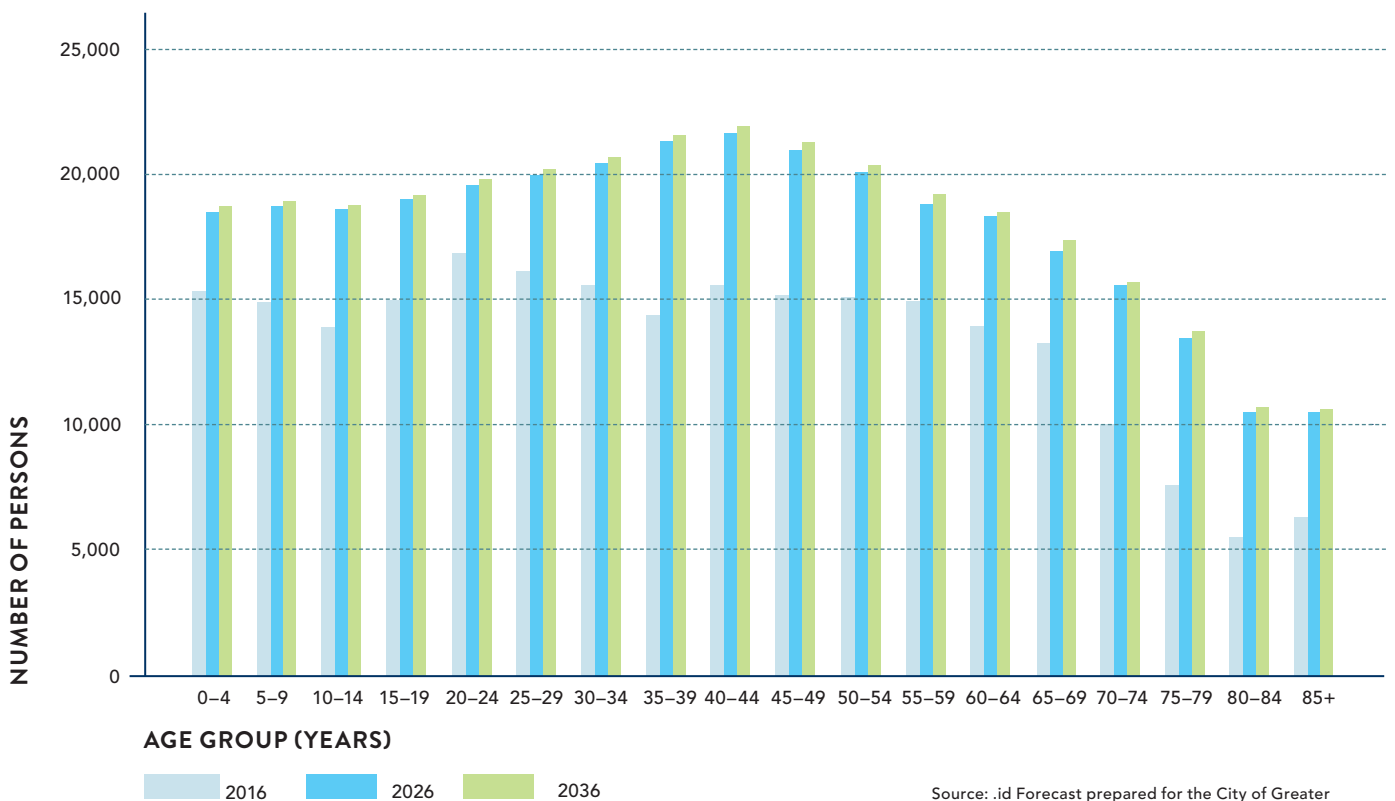


NOTE: Substantial population growth in the Northern and Western Geelong Growth Areas is expected to continue post 2036.

## AGE STRUCTURE

Growth is forecast to occur across all age structures. In 2016, the dominant age structure for persons in Greater Geelong was 20 to 24 years, accounting for 6.7 per cent of total persons<sup>5</sup>. Between 2016 and 2036, the majority of growth will occur in the 35-39 age cohort. The age structure can be seen in Figure 3

**FIGURE 3: FORECAST AGE STRUCTURE – 5 YEAR AGE GROUP**

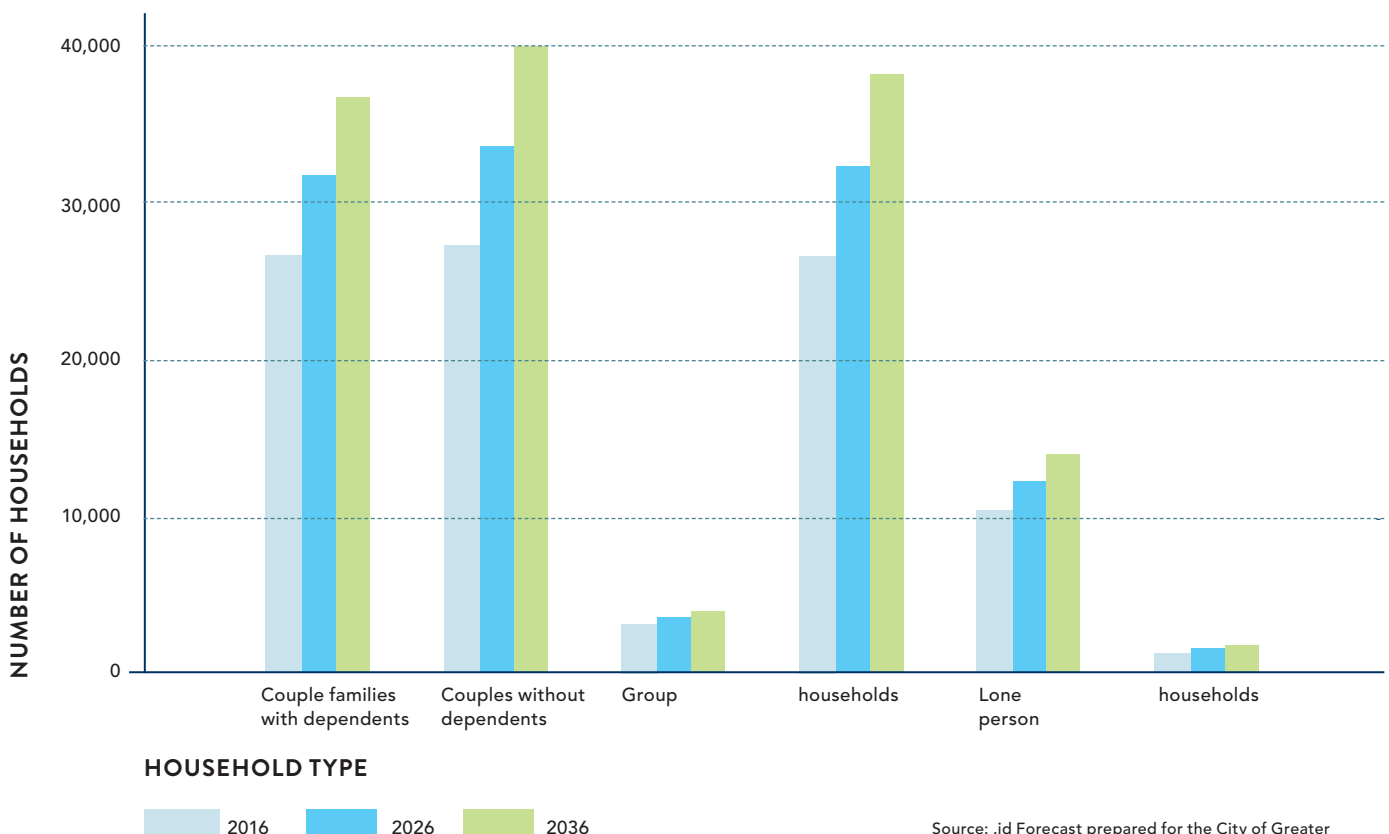


## HOUSEHOLD TYPES

In 2016, the dominant household type in Greater Geelong was couples without dependents, which accounted for 28.4 per cent of all households. By 2036, the most noticeable change to household types will be an increase in the number of lone person households 28.3% and couples without dependents 29.6% of households (see Figure 4)<sup>6</sup>.

The growth in the number of lone person households and couples without dependents over the next 20 years is expected to increase the demand for smaller dwelling sizes close to existing services. Currently 66.1% of dwellings within Greater Geelong are classified as separate houses, 22.9% are medium density and 10.1% are high density<sup>7</sup>.

**FIGURE 4: FORECAST HOUSEHOLD TYPE**



<sup>5</sup> .id community (2017) City of Greater Geelong Population Forecast (<https://forecast.id.com.au/geelong/population-age-structure>) (accessed on June 2018)

<sup>6</sup> <https://forecast.id.com.au/geelong/household-types> (accessed July 2018)

<sup>7</sup> Australian Bureau of Statistics, Census of Population and Housing 2016. Compiled and presented by .id forecast (accessed July 2018)

## RETAILING TRENDS

The retail industry is one of the most important economic sectors in regional Victoria given its contribution to employment, income and the provision of goods and services across diverse spatial geographies. Acting as a primary shaper of local economies, the retail sector also impacts land use, form and function. However, due to both consumer preferences and technology/innovation, physical retail centres have and will continue to see significant disruption. Centres will need to focus on providing more services and higher quality, unique experiences to be successful in the future. With this rapidly evolving context in mind the following presents four forms of retailing which overlap with traditional formats such as Supermarkets, Department Stores and Speciality.

### FAST RETAIL

#### Key features:

- capitalises on efficiency, time savings and cost savings
- is a high-turnover model
- relies on large population catchments to capitalise on technological innovations, such as automated checkouts.
- recent growth in retail activities across Greater Geelong has predominantly been in this domain.

Examples include:

- supermarkets and bottleshops.

Things to consider:

- while fast retail proposals will highlight positive local employment benefits, most jobs associated with this form of retailing are low income and/or casual
- employment opportunities are further impacted by new technologies, such as electronic check-out machines

- fast retail stores are often stocked with the inexpensive goods available in the global market, driving a preference for imported products over locally-produced or manufactured products. This further erodes the market share of local manufacturers and primary producers
- ownership structures are also typically highly detached from the local community

### SLOW RETAIL

#### Key features:

- engages consumers at a more comfortable pace
- typically owner-operated shops, with individuality and personality
- particularly well suited to smaller, rural townships
- the retailer must build relationships and generate repeat sales with local customers, given the limited population catchment available to support trade
- quality of customer interaction, store design and finding a 'niche' in the market are key competitive advantages.

#### Examples include:

- local cafes and delis.

#### Things to consider:

- typically owned and operated by local residents
- more likely to hire skilled, full-time employees on more reasonable wages
- more likely to stock locally-produced goods
- justify their higher price points, by providing customer solutions and service.

## CULTURAL RETAIL

### Key features:

- positions the arts as the centrepiece of a unique offer
- cultural facilities usually the major anchor of a commercial district/precinct
- any combination of museums, galleries, studios, arts retailers, offices and dwellings can typically be found within a mixed-use precinct
- can attract visitors, but ideally concentrated in areas where sufficient critical mass and exposure can be achieved – for example, Central Geelong
- requires strong collaboration between local government, the local arts community and retailers, due to the inherent link between private shops and public space
- cultural retail is an important aspect of tourism development.

### Examples include:

- surf shops in coastal towns
- arts and crafts stalls in cultural precincts.

### Things to consider:

- cultural retailers tend to differentiate their products and services, which is essential for attracting tourism and contributing to the overall 'Geelong' brand
- they often generate positive amenities in vibrant and attractive public spaces. This helps attract businesses engaged in higher-order professional services – an industry sector likely to be important to the economic future of Geelong. This is starting to become evident in the Geelong Cultural Precinct which includes the library, Johnston Park, Performing Arts Centre, Work Cover and NDIA offices.

## RESTRICTED, LARGE FORMAT RETAILING OR WHOLESALE SHOPPING

### Key features:

- a well-established element in retailing
- has limited synergies with centre-based shopping
- can reasonably be managed independently, with due regard to variables such as car access, availability of large footprint sites and highway exposure
- 'bulky retailing' often involves smaller goods, such as tableware, linen and other small furnishings
- can often be encouraged to co-locate with activity centres as larger-format specialty stores, perhaps on the edge of centres.

### Examples include:

- restricted retail centres and hardware
- furniture and white good stores.

## ONLINE RETAILING

Since 2006, online retailing has increased significantly. Once considered a direct competition to store-based retail, maintaining a physical and online presence is now regarded as the best way to maximise potential revenue sources. Online retailing trends and how they have been factored in Geelong Retail Strategy is discussed in Appendix 1.

## RECOMMENDED RETAIL TYPES FOR GREATER GEELONG

Slow and cultural retail have the greatest potential to progress retail in Geelong's largest centres, and should be the basis for new approaches to developing activity centres. Typically, they have the strongest links to the local economy, supporting further output growth and improving local employment outcomes.



# EXISTING PLANNING POLICY

**A primary focus of this strategy is to guide decision making about planning permit applications and requests to zone land for retail purposes.**

The current planning policies and factors that have shaped the recommendations include:

## STATE PLANNING POLICY FRAMEWORK

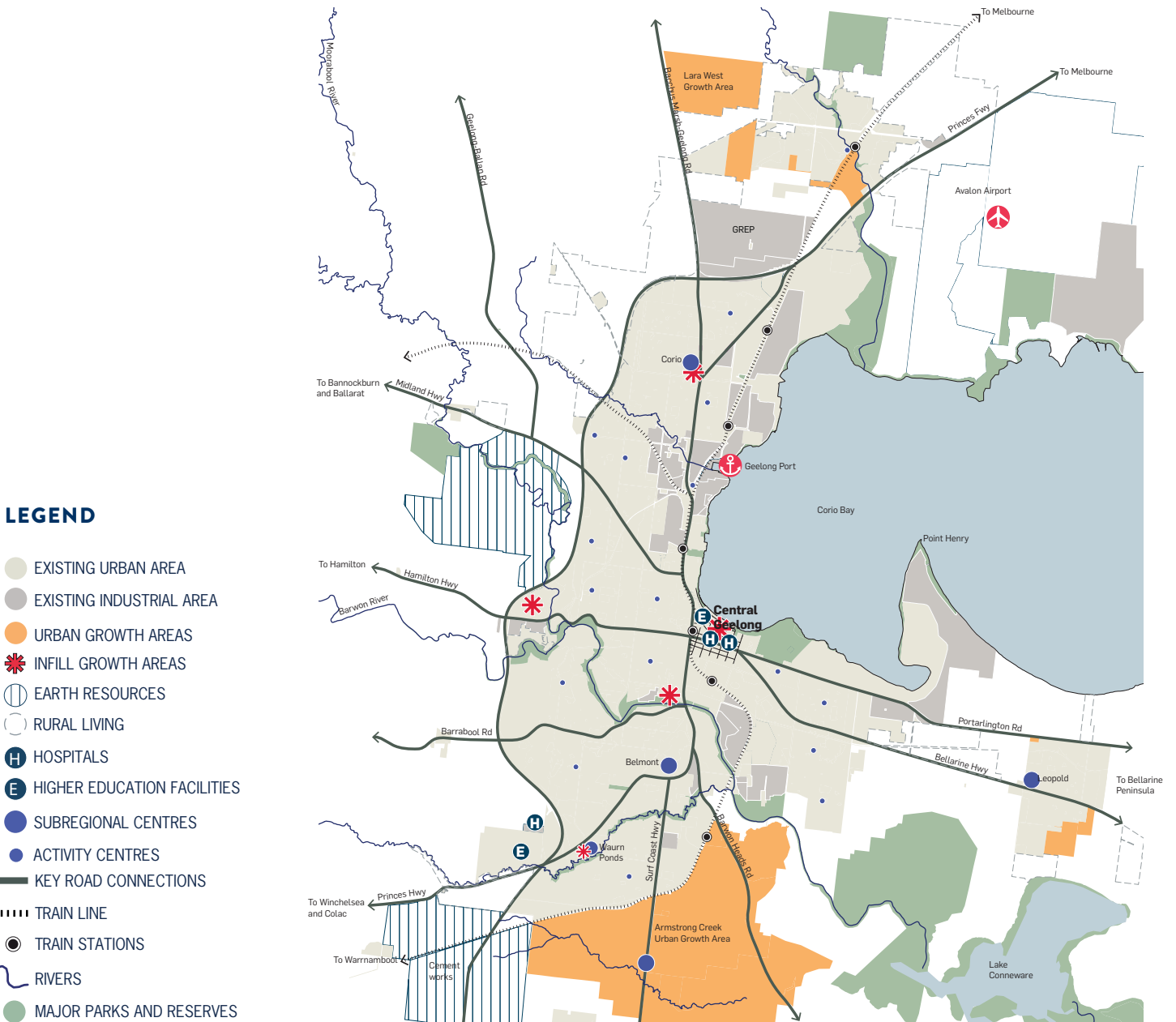
- sets the overall planning framework policy direction for the state
- encourages concentrating major retail, residential, commercial and cultural developments into activity centres
- supports the role of Geelong as both 'the regional city' and Victoria's second city
- supports development of district towns within their established boundaries, such as, Drysdale/Clifton Springs, Lara, Leopold, and Ocean Grove, by improving and expanding existing infrastructure, and developing new infrastructure.
- prioritises directing growth towards key road and rail networks
- supports growth in areas north and west of Geelong.

## G21 REGIONAL GROWTH PLAN (2013)

- covers the City of Greater Geelong and surrounding municipalities
- identifies the retail sector as one of the key drivers of economic growth in Geelong over the last 10 years
- cites a need to review the City of Greater Geelong Retail Strategy 2006 as a strategic planning priority
- suggests infrastructure and services within the overall G21 region should be optimised and consolidated, particularly if near central retail and transport nodes
- figure 5 shows the G21 regional growth context plan.



**FIGURE 5: G21 REGIONAL GROWTH CONTEXT PLAN**



**LEGEND**

- EXISTING URBAN AREA
- EXISTING INDUSTRIAL AREA
- URBAN GROWTH AREAS
- INFILL GROWTH AREAS
- EARTH RESOURCES
- RURAL LIVING
- HOSPITALS
- HIGHER EDUCATION FACILITIES
- SUBREGIONAL CENTRES
- ACTIVITY CENTRES
- KEY ROAD CONNECTIONS
- TRAIN LINE
- TRAIN STATIONS
- RIVERS
- MAJOR PARKS AND RESERVES

## LOCAL PLANNING POLICY FRAMEWORK

- works with zones and overlays to guide development that is responsive to local conditions and opportunities
- highlights a need for a mix of retail, office, cafes, entertainment, housing, education and community facilities in activity centres
- provides a retail centre hierarchy for Greater Geelong, establishing the role of each centre by size and function
- the hierarchy supports the role of Central Geelong as the focus for retail activity in the region
- there is increased development pressure from certain retail types for sites located away from activity centres, including restricted retail and developments needing large sites and/or significant car parking.

## CURRENT RETAIL ASSESSMENT

- currently all major retail developments and out-of-centre developments are to provide a net community benefit to be approved
- applications for new centres must prove the need, according to the retail hierarchy, and establish that it will not negatively impact on the hierarchy.
- assessment criteria for retail planning applications, planning scheme amendments and floor space restrictions have been established.

## SPECIFIC LOCAL POLICIES

There are several features in the policy framework that are specific to particular centres, townships and growth areas, as summarised below:

### Central Geelong

- has been the subject of a number of strategic planning initiatives and public realm improvements in recent years, as part of the revitalisation of the Central Geelong
- changes to the urban environment have been complemented by a comprehensive calendar of events and a range of place-making initiatives that are monitored and reviewed regularly
- central Geelong is to be the focus for investment, retail, education, culture, leisure, commerce, services and higher-density residential living.

### Centre Management Issues

Council in 2001, using its powers under section 86 of the Local Government Act 1989, established a special committee – The Central Geelong Marketing Committee. A special committee is any committee to which the Council delegates a duty, function or power. In this instance the committee is the peak body representing the traders and property owners in central Geelong. The committee is responsible for managing and delivering events and promoting Central Geelong as the City's premier retail and cultural hub. This committee is funded by a special rates scheme under section 163 the Local Government Act 1989, whereby all landowners within central Geelong contribute funds to support the operations of the committee.

We are committed to continuing to actively promote Central Geelong through this mechanism.

Under the Local Government Act 1989 there is an ability for Council to create similar special committee's to promote other activity centres. This would need to be considered on a case by case basis given the resources required to manage such committees.

### **Armstrong Creek Growth Area**

- identified in the Local Policy Planning Framework as the primary growth area for the G21 Region (as shown in Figure 6)
- the framework identifies a need to establish a network of mixed-use activity centres to provide for the needs of the incoming community
- planning for this growth area is well progressed, including an understanding of future retail demand.

### **Townships**

- structure plans have been prepared for all townships within the City of Greater Geelong including Lara, Leopold, Drysdale/Clifton Springs, Ocean Grove, Portarlington, Indented Head and St Leonards
- each structure plan considers the future retail needs of the respective township and identifies if additional retail floor space is needed, where it's needed and when
- Leopold has been identified as the preferred location for a sub-regional centre to service the Bellarine Peninsula.

### **Housing Diversity Strategy 2007**

- identifies our preferred locations for increasing housing densities
- higher-density housing is particularly being encouraged around retail centres
- by increasing residential densities around retail centres, it should strengthen the role and number of services provided.

### **Northern and Western Geelong Growth Areas**

The land within the Northern Growth Area (16,000 dwellings) and the Western Growth Area (18,000 dwellings) has the combined capacity to accommodate 110,000 residents. The project is the largest urban growth project in regional Victoria, comprising 5,367 hectares.

A portion of the Northern Growth Area was rezoned by the Minister for Planning in 2014, to Urban Growth Zone. A framework plan for both the Northern and Western Geelong Growth Areas was adopted by Council on 26 March, 2019. Precinct Structure Plans must be completed before development can begin in these areas.

The planning for both the Northern and Western Geelong Growth Areas should encourage a mix of housing types and densities, including a number of retail and employment centres.

## GREATER GEELONG: CLEVER AND CREATIVE FUTURE

This work represents the voices of more than 16,000 members of the Geelong community.

Greater Geelong: A Clever and Creative Future is a 30-year vision that guides all levels of government, community organisations, businesses and anyone wanting to make a genuine contribution to the Geelong city-region.

The community's vision is:

**“By 2047, Greater Geelong will be internationally recognised as a clever and creative city- region that is forward looking, enterprising and adaptive, and cares for its people and environment.”**

At the heart of the 30-year vision are nine community aspirations. The aspiration most relevant to the Retail Strategy are:

**“A prosperous economy that supports jobs and education opportunities,”** and

**“Sustainable development that supports population growth and protects the natural environment”**

The community values we seek to support include:

- business diversity, education and employment opportunities
- people who are willing to create new business opportunities
- sustainable development that responds to climate change
- design that makes best use of technology for better and more sustainable living
- development that enhances the identity of diverse neighbourhoods
- design excellence and innovation in new buildings and public spaces
- creating high amenity neighbourhoods that are well connected and sustainable.

# RETAIL HIERARCHY

**This strategy continues to support a hierarchy of retail centres. The hierarchy defines the roles of centres in the retail network across Greater Geelong.**

The location of centres in the retail hierarchy is illustrated in Figure 6.

Table 2 describes the different levels in the hierarchy, their principal role and function.

## IMPORTANCE OF A RETAIL HIERARCHY

The centre hierarchy typically reflects the following shopping behaviours:

- more frequent, short distance and low spend visits are made to a local or neighbourhood centre
- occasional high spend visits to sub-regional centres, offering higher order goods and services.

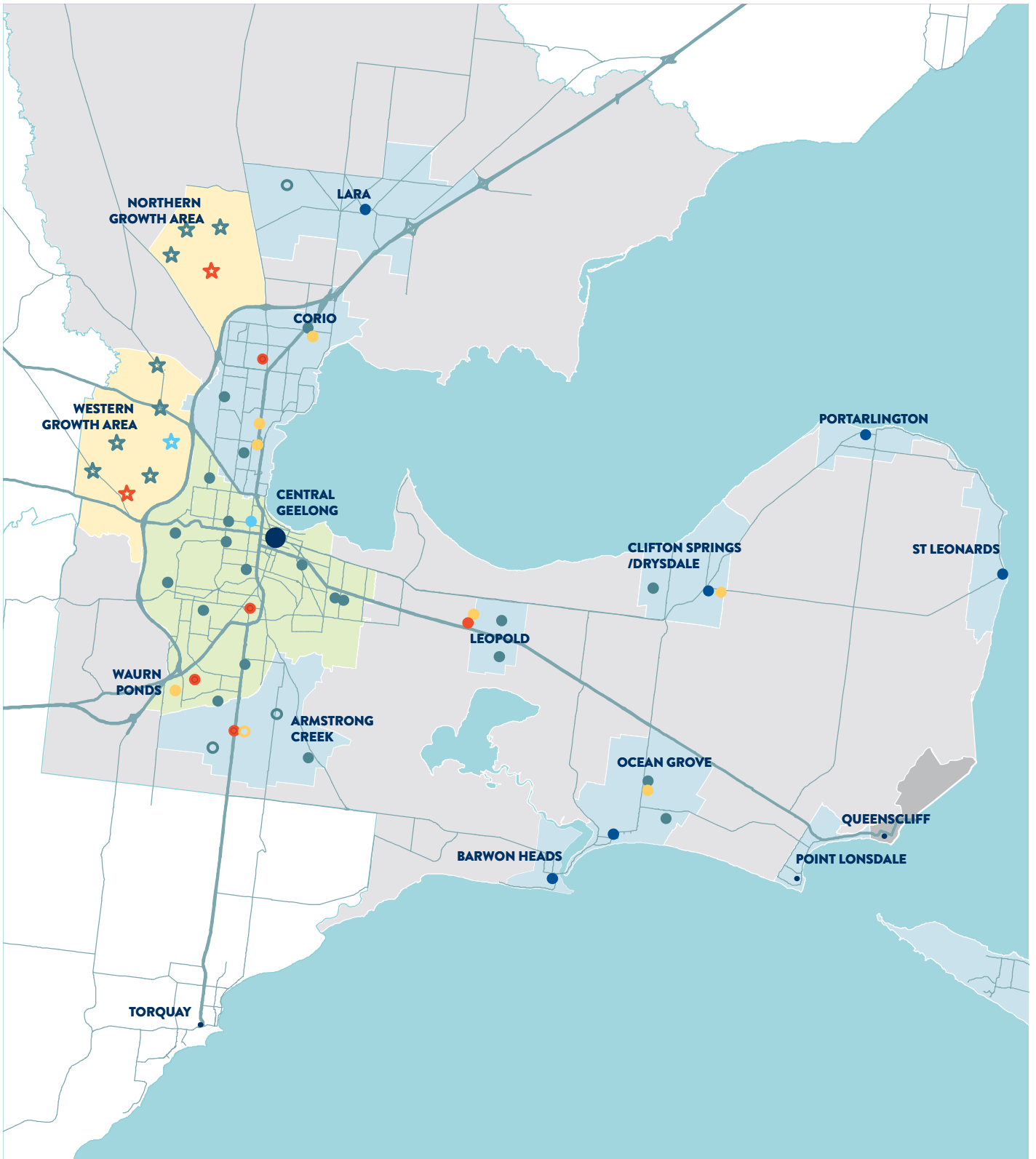
If shopping opportunities are spatially arranged in this way, the cost of travel to consumers and the environment will be minimised.

There is often a strong link between centre policy and urban consolidation. Vibrant nodes of commercial, retail, entertainment, health and civic services provide a centre around which housing density can increase, helping to support the retail network.

A review of each retail centre has been undertaken. Each centre has been assessed against the hierarchy definitions in Table 2, current planning policy direction, forecast floor space projections and in some instances identifies further strategic work that could be done to support the growth of centres. The retail centre review can be found in Appendix 2.

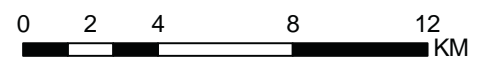


**FIGURE 6: LOCATION OF RETAIL CENTRE**



**HEIRACHY OF RETAIL CENTRE**

- Restricted Retail      ● Sub-Regional      ★ Indicative Neighbourhood      ● Future Restricted Retail
- Neighbourhood      ● Town Centre      ★ Indicative Sub-Regional      ● Future Neighbourhood
- Regional      ● Specialised      ★ Indicative Specialised



There are also a number of local centres throughout Greater Geelong.

**TABLE 2: RETAIL HIERARCHY – ROLE AND FUNCTION OF CENTRES**

CENTRE TYPE	ROLE/FUNCTION	NO. OF CENTRES (CURRENT/FUTURE)	INDICATIVE RETAIL FLOOR SPACE RANGE	CENTRE
Regional	<p>A major retail centre that serves a wide catchment and is anchored by one or more department stores, discount department stores, supermarkets, mini major or speciality stores.</p> <p>Often associated with restricted retail adjacent to, or near the core, retail centre. Provides a full range of retail needs. Is more successful when associated with entertainment and leisure activities, such as cinemas and restaurants, or niche retail precincts.</p>	1	More than 100,000 square metres	Central Geelong
Sub-regional	<p>A major retail centre serving a wide catchment, although it is smaller than a regional centre. Is anchored by one or more discount department stores, supermarkets, mini major and speciality stores. Because of their smaller size, they have fewer higher-order activities, including full-line department stores, and the range of specialty shopping is less extensive.</p>	4/5	15,000 to 60,000 square metres	Belmont, Waurm Ponds, Corio, Leopold, Armstrong Creek
Specialised	<p>Traditional major centres that have grown from strip shopping centres. They are typically located along main arterial routes and/or public transport nodes.</p> <p>Tend to capture niche trade from wider catchments and play an important community role, as the focus for retail, civic and community uses.</p>	1	15,000 to 60,000 square metres	Pakington Street (Geelong West)
Town centre	<p>Major community shopping locations. Provide weekly grocery shopping for the local township, in combination with specialty store shopping that also services visitors.</p>	6	2,000 to 20,000 square metres	Ocean Grove, Drysdale, Lara, Barwon Heads, Portarlington, St Leonards

CENTRE TYPE	ROLE/FUNCTION	NO. OF CENTRES (CURRENT/FUTURE)	INDICATIVE RETAIL FLOOR SPACE RANGE	CENTRE
Neighbourhood	A retail centre that serves a neighbourhood catchment and is anchored by one or more supermarkets, plus speciality stores.	21/24	2,000 to 15,000 square metres	Shannon Avenue (Geelong West), Separation Street, Pakington Street (Newtown), Highton, Newcomb Central, Geelong East, Bellarine Village, Bell Post Shopping Centre, Barrabool Hills Shopping Centre, Shannon Ave (Newtown), Ocean Grove (Marketplace), Vines Road, Fyansford, Grovedale Central, Dorothy Street, Ash Road, Rosewall, Jetty Road, Warralily, Lara West, Armstrong Creek West, Horseshoe Bend North East, Kingston Downs, Surf Coast Highway
Local	Small groups of shops, serving a limited catchment and typically providing for the daily convenience needs of residents in the surrounding area.	69/75	Up to 5,000 square metres	Dispersed throughout Greater Geelong
Restricted retail*	A collection of restricted retail stores, generally comprising furniture, white goods, electrical, floor and window coverings, lighting, hardware and related retail operations can be adjacent to core retail centres, or in stand-alone precincts.	7/8	50,000+	Drysdale, Geelong Gateway, Waurin Ponds, Melbourne Road (Norlane), Melbourne Road (North Geelong), Sinclair Street, Leopold Central, Armstrong Creek

Excludes Northern and Western Growth Areas.

\*The City of Greater Geelong is also home to a number of dispersed 'restricted retail areas' opportunistically distributed throughout industrial and similar areas, with no linkages or synergies with established centres.

## INDICATIVE RETAIL CENTRES IN THE NORTHERN AND WESTERN GEELONG GROWTH AREAS

The Northern and Western Geelong Growth Areas will require a number of retail centres to ensure future communities have access to retail services within a reasonable and walkable distance from home. Like Armstrong Creek, it is intended that the Northern and Western Growth Areas will contain diverse localised and sustainable neighbourhoods that prioritise self-sufficiency whilst maximising connections to the broader Geelong community and economy.

Work undertaken to date on the Northern and Western Geelong Growth Areas project includes assessment of the retail needs of these future communities. The project has considered the ultimate population of each growth area and proposes that additional retail centres are required: four in the north and six in the west.

In determining the location and provision of centres within the growth areas, the City has considered how the proposed retail network will interact with the existing and future network.

The timing and scale of new retail centres, particularly sub-regional centres, will proceed in a planned way that assesses the retail impact of the proposed centre and will allow any potentially affected existing centre time to adjust to new circumstances. This could involve amongst other things, reviewing their retail offer, investing in online sales or renewal of infrastructure.

Each growth area will be planned sequentially via multiple Precinct Structure Plans (PSPs). The PSPs will consider the timing, location and scale of the proposed retail centres, particularly the sub regional centres, and any potential impacts on the existing centre network and will apply floor space caps.

Overall, these processes will provide the City with the opportunity to assess the economic impacts of a new retail centre on the network at the time the development of each centre is proposed.

## DEFINITION OF A RETAIL CENTRE

Greater Geelong has a number of retail centres, but not all of these centres will form part of the identified retail hierarchy. A retail centre is;

*Any place where retail transactions take place for household goods and services, and where one or more of the following conditions apply:*

*The retail activity is lawful under all relevant statutes, including the Planning and Environment Act 1987.*

*The location accommodates at least one shop, and the total floor space of the shop(s) exceeds 500 square metres (this is a nominal limit to signify a significant concentration of shops or sales activity).*

*The boundary of all retail centres identified in Figure 6 of this Strategy is as delineated in Appendix 2. The boundary of all other retail centres will be determined by those contiguous land parcels which may lawfully be used for the purpose of a 'shop' without the need for a planning scheme amendment.*

'Out-of-centre retailing' is defined as proposals which are not consistent with the planned hierarchy of retail centres and which are not permissible 'as of right'.

Based on the above definition, planning policy will primarily direct retail development to existing centres identified in the retail hierarchy in Table 2.

# A GRAVITY MODEL FOR GREATER GEELONG

The SGS Economics and Planning gravity model has been used to estimate the future retail needs of Greater Geelong by 2036. The gravity model simulates the flow of shoppers to different activity centres, taking into account the ease of access, size and attractiveness (or offer) of the various centres. The model takes a whole-of-network approach and uses calculations to model human behaviour. The retail gravity model theory, assumptions and approach are further discussed further in Appendix 1.

A number of key inputs must be considered to make these calculations, including:

- population growth (refer to section on 'Growing Geelong')
- Retail trends by commodity and location, including adjustments for resident, student, worker and tourism
- a centre floor space audit and typical retail centre turnover estimates

- travel times between expenditure origins (i.e. houses, business, tertiary institutions) and centres.

Based on these inputs the gravity model simulates the system under a base case, or business as usual, scenario to determine how centres perform today and in the future given known existing and planned floorspace.

## FLOOR SPACE AUDIT

Table 3 shows the results of the March 2018 floorspace audit used to determine the current retail floor space provided in each centre across Greater Geelong (see Table 3). The audit reviewed all retail land uses across industrial, commercial and mixed-use zoned land within Greater Geelong. Non-retail uses were also recorded.

The audit assessed:

- the gross floor space for each lot
- the predominant floor space type (including 6 retail categories and 7 non-retail categories)
- the amount of vacant land or vacant units in each precinct
- future centres (currently with no floor space) and allowing for early retail development in the Northern and Western Geelong Growth Areas.

Local retailers and centre managers were also consulted, to develop an in-depth local understanding of the supply of retail floor space across the municipality. The audit approach is further discussed in Appendix 1.

According to the audit, Greater Geelong has approximately 903,812 square metres of retail floor space spread across 121 retail centres. Of the total retail floor space, Central Geelong makes up approximately 21 per cent, the four existing Sub-regional centres represent 15 per cent and restricted retail centres make up 15 per cent.



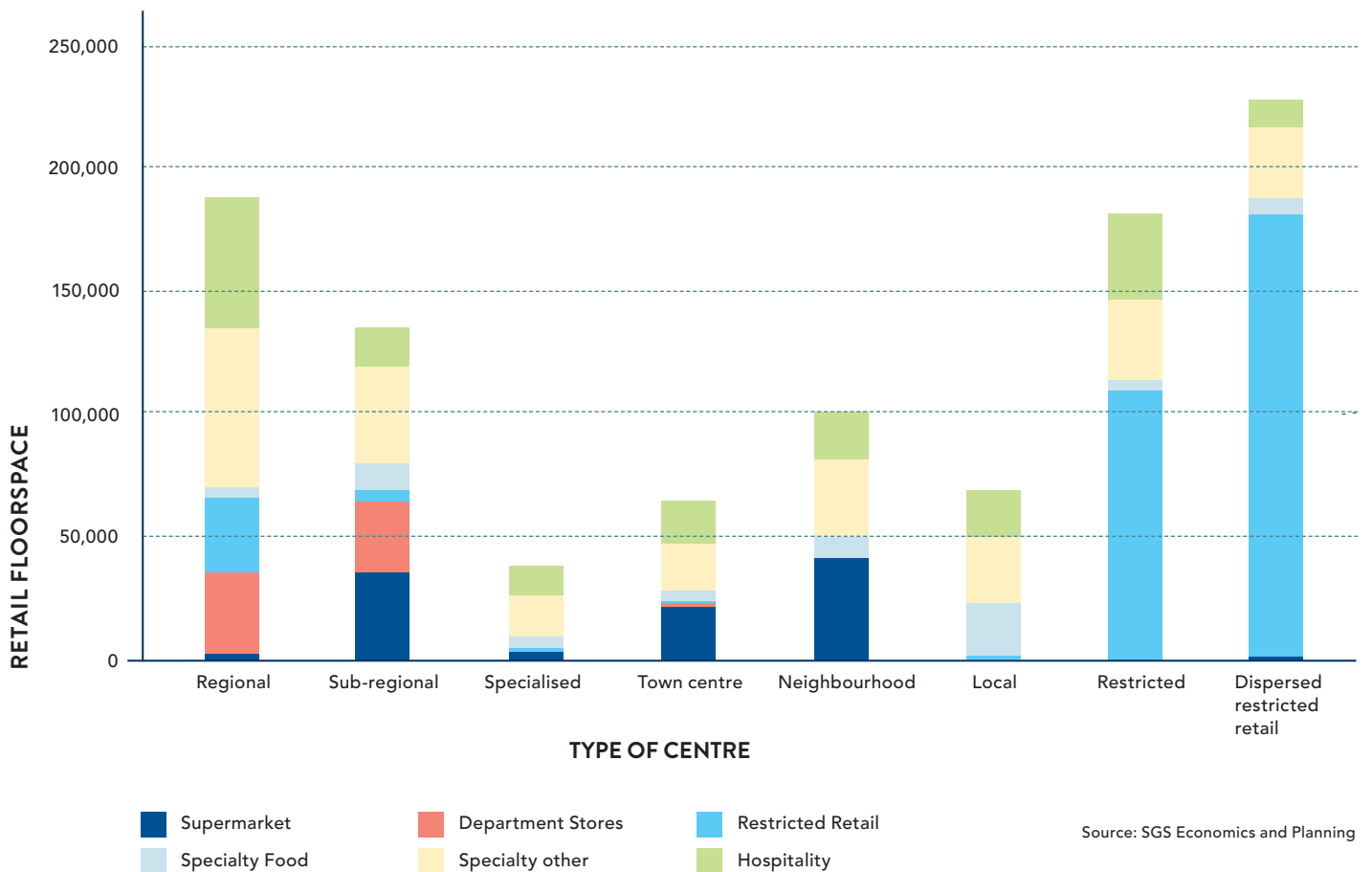
**TABLE 3: RETAIL FLOOR SPACE AUDIT 2018**

CENTRE NAME	SUPERMARKET	DEPARTMENT STORES	RESTRICTED RETAIL	SPECIALTY FOOD	SPECIALTY OTHER	HOSPITALITY	TOTAL RETAIL
<b>Regional</b>	3,242	32,959	29,133	4,670	64,536	52,764	187,304
Central Geelong	3,242	32,959	29,133	4,670	64,536	52,764	187,304
<b>Subregional</b>	36,138	28,823	4,882	9,906	38,905	13,762	132,417
Belmont	9,597	6,108	4,244	5,267	10,098	7,275	42,590
Leopold Gateway Plaza	4,959	5,293	638	957	6,805	1,952	20,604
Corio SC	8,695	5,772	0	1,245	10,708	1,043	27,463
Waurm Ponds	12,887	11,650	0	2,437	11,294	3,492	41,760
<b>Specialised</b>	3,692	0	1,916	4,431	16,099	12,007	38,145
Pakington Street (Geelong West)	3,692	0	1,916	4,431	16,099	12,007	38,145
<b>Town Centre</b>	21,904	1,842	701	4,219	18,536	17,259	64,459
Barwon Heads	430	0	0	273	3,045	4,988	8,735
Drysdale	8,013	0	0	675	3,293	2,905	14,886
Lara	8,323	0	0	1,215	3,569	1,845	14,952
Ocean Grove	2,713	1,842	701	1,013	6,445	3,579	16,293
Portarlington	1,425	0	0	1,043	1,145	2,796	6,408
St Leonards (Murradoc Road)	1,000	0	0	0	1,039	1,146	3,185
<b>Neighbourhood</b>	41,414	0	286	10,954	28,894	19,956	101,504
Ash Road	0	0	0	376	715	488	1,578
Barrabool Hills Neighbourhood Shopping Centre	3,318	0	0	111	543	255	4,227
Bell Post SC	3,352	0	0	675	1,169	366	5,562
Bellarine Village	3,868	0	0	1,438	827	796	6,929
Dorothy Street	636	0	0	0	860	306	1,803
Grovedale Central	866	0	0	382	1,055	176	2,479
Highton	2,150	0	0	1,717	2,139	966	6,972
Fyansford	0	0	286	0	0	2,060	2,346
Jetty Road	3,264	0	0	202	581	100	4,147
Kingston Downs	0	0	0	0	0	0	0

CENTRE NAME	SUPERMARKET	DEPARTMENT STORES	RESTRICTED RETAIL	SPECIALTY FOOD	SPECIALTY OTHER	HOSPITALITY	TOTAL RETAIL
Lara West NAC	0	0	0	0	0	0	0
Newcomb Central	5,251	0	0	630	1,194	315	7,390
Ocean Grove (Marketplace)	3,566	0	0	287	910	985	5,748
East Geelong	627	0	0	516	4,256	519	5,917
Pakington Street (Newtown)	0	0	0	446	4,759	3,946	9,151
Rosewall	1,740	0	0	0	0	0	1,740
Separation St	0	0	0	908	1,898	2,766	5,572
Shannon Avenue (Geelong West)	4,340	0	0	1,727	4,903	1,978	12,948
Shannon Avenue (Newtown)	1,967	0	0	151	740	1,637	4,495
Surf Coast Highway NAC	1,781			648	204	757	3,390
The Village Warralily	3,826	0	0	341	773	1,060	6,000
Vines Road	862	0	0	399	1,368	480	3,110
<b>Local (68)</b>	<b>0</b>	<b>0</b>	<b>1,852</b>	<b>21,571</b>	<b>28,185</b>	<b>17,850</b>	<b>69,459</b>
<b>Restricted Retail</b>	<b>2,156</b>	<b>0</b>	<b>107,109</b>	<b>4,456</b>	<b>31,833</b>	<b>35,994</b>	<b>136,021</b>
Drysdale Homemaker	0	0	1,655	328	755	436	3,174
Geelong Gateway	0	0	26,022	1,540	2,775	1,125	31,463
Leopold Homemaker		0	12,343	0	0	0	12,343
Melbourne Road (Norlane)	0	0	18,968	1,400	2,286	998	23,652
Melbourne Road (North Geelong)	0	0	9,084	0	4,802	436	14,322
Sinclair Street	0	0	724	0	2,836	535	4,095
Waurm Ponds	0	0	31,398	473	14,821	280	46,972
<b>Dispersed Restricted Retail</b>	<b>3,775</b>	<b>0</b>	<b>174,501</b>	<b>7,425</b>	<b>31,106</b>	<b>12,886</b>	<b>229,693</b>
<b>Dispersed Retail</b>	<b>5,400</b>	<b>0</b>	<b>84,500</b>	<b>4,200</b>	<b>10,600</b>	<b>10,700</b>	<b>115,300</b>
<b>Total Audit Floorspace</b>	<b>115,565</b>	<b>63,624</b>	<b>353,676</b>	<b>71,117</b>	<b>265,136</b>	<b>160,994</b>	<b>1,030,013</b>

Figure 7 shows the breakdown of uses across all centre types. The graphs shows that there is a high level of hospitality within Central Geelong and generally across all centre types. There is also a large amount of floor space across Greater Geelong occupied by restricted retail, the majority within restricted retail centres.

**FIGURE 7: RETAIL FLOOR SPACE SUPPLY, BY CENTRE AND STORE TYPE, 2014**





## RETAIL CENTRE TURNOVER

For a strategic level study such as this, exact turnovers are not actually required. This is because the modelling is not trying to predict an individual centres performance in a particular year, rather the modelling is trying to understand the general alignment, or misalignment, of the quantum and location of retail floorspace supply and demand now and in the future. For this purpose, turnovers can largely reflect the typical performance of a centre.

Typical centre performance is determined using a measure called 'retail turnover density'. Calculated as follows:

**Retail turnover density = total shop turnover (\$) divided by shop floor space area**

Retail turnover densities are varied by store type, commodity, centre role and aligned to actual turnover for the few centres where information is available. Overall turnover is also aligned to the total amount of floorspace and the total expenditure pool across the entire Greater Geelong retail system. This is further discussed in Appendix 1.

**FIGURE 8: RETAIL TURNOVER DENSITY FOR SELECTION OF CENTRES**

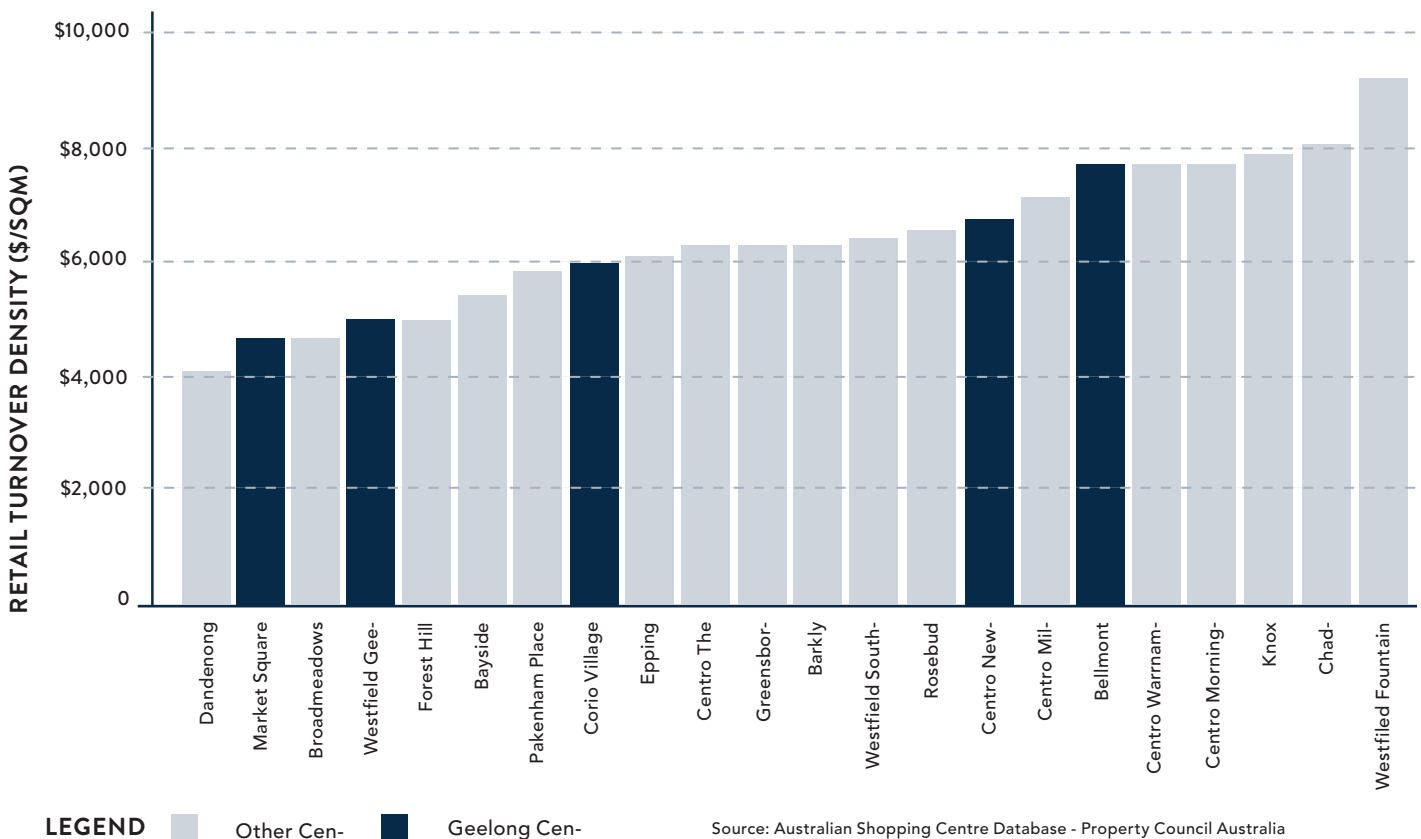


Figure 8 shows retail turnover density for a selection of centres across Victoria, including Geelong.

**TABLE 4: CURRENT AND TARGET RETAIL DENSITY ESTIMATES**

RTD COMPARISON	SUPERMARKET AND GROCERY STORES	DEPARTMENT STORES	BULKY GOODS	SPECIALTY – FOOD AND DRINK	SPECIALTY – NON FOOD	HOSPITALITY	TOTAL RETAIL	SHOP RETAIL ONLY
Geelong Current (2016)	\$7,700	\$3,500	\$2,500	\$7,800	\$4,300	\$4,200	\$4,000	\$5,400
Victoria Benchmark	\$10,800	\$4,500	\$2,900	\$7,200	\$6,600	\$5,800		
Geelong target for determining supportable floorspace demand	\$10,000	\$3,500	\$3,000	\$9,000	\$4,000	\$4,000	\$4,800	\$6,000

## EXPENDITURE IN GREATER GEELONG

Expenditure by commodity type has been forecast for the gravity model. Expenditure forecasts have considered local retail expenditure trends, resident population forecasts and the impact of spending decisions linked to place of work, study (for tertiary students in particular) and tourism. The role of online retailing has been factored into the expenditure modelling. This is discussed in detail in Appendix 1.

The following commodity types have been modelled:

- fresh food and groceries
- pharmaceutical, toiletry and cosmetics
- tobacco and bottleshop spending
- restaurants, cafes and take-away spending

- clothing and shoes
- newsagent and lotto
- personal items and services
- furniture, whitegoods, manchester and home decoration
- electronic home entertainment
- hardware and gardening.

The analysis identified a total retail expenditure pool of \$3,648 million across Geelong in 2016. This will increase to \$6,465 million by 2036, representing growth of 2.9% per annum (in real terms) over the next 20 years based on population and expenditure growth.

# FUTURE RETAIL DEMAND

## A BASE-CASE SCENARIO

In planning for retail centres across Greater Geelong over the next 20 years, it is important to understand the 'business-as-usual' or base-case scenario. In this theoretical scenario, it is assumed that existing and planned retailers will absorb increasing levels of demand in the current/committed floor space and store mix, with no extra floor space above that which is planned. Using the retail gravity model the growing population and expenditure across the region would be allocated to larger, more 'attractive' (or higher-order) centres which are also close to growth. Unchanged, these centres would experience ever-increasing retail turnover density for all store types. By comparing this predicted performance back to target retail turnover densities an understanding of the level of supportable floorspace and potential provision gaps can be determined.

This base case supportable floorspace demand by centre is the basis of floorspace guidelines and caps (for selected centres) as further detailed in the remainder of this Retail Strategy and local policy.

## SUPPORTABLE RETAIL FLOORSPACE DEMAND AND SUBREGIONAL ALIGNMENT

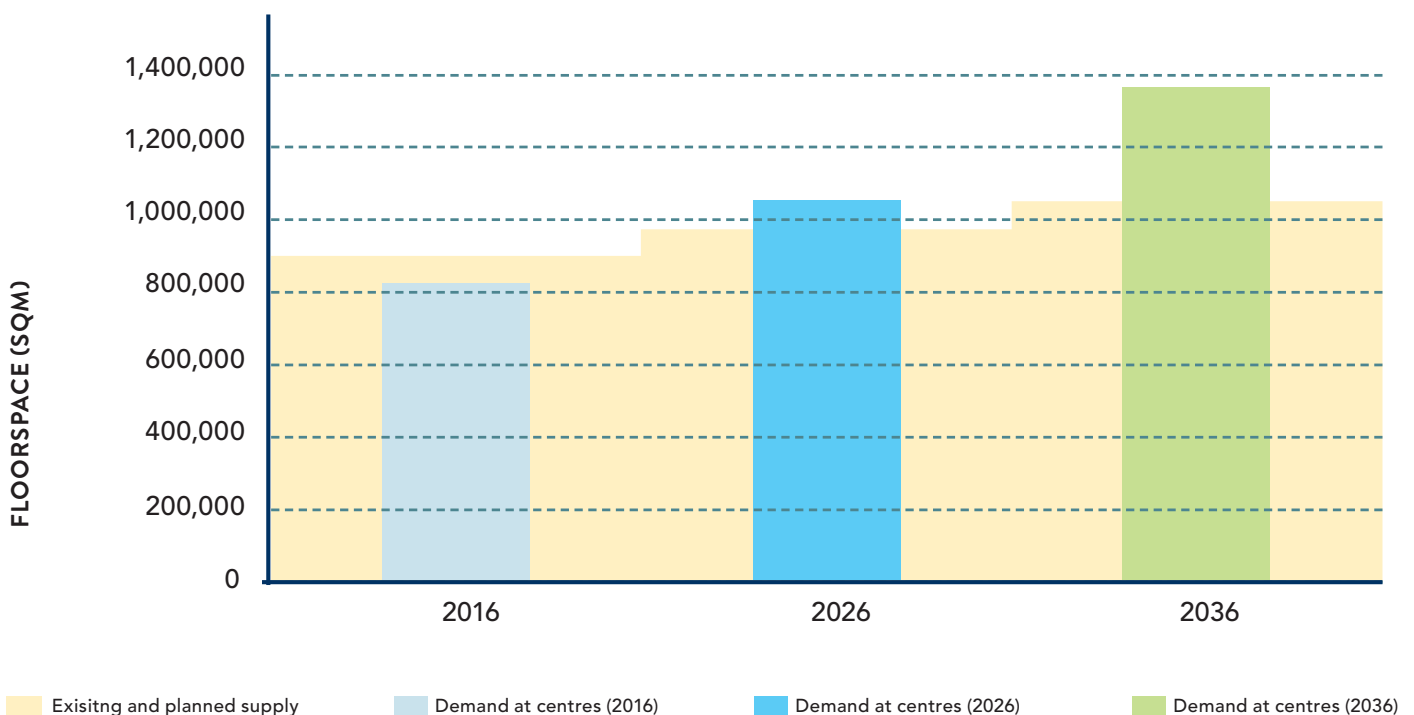
Figure 12 presents the current and prospective supply-demand balance under the base case scenario for retail floor space across all commodity/store types in Greater Geelong based. This has been derived from the population and expenditure forecasts, target retail turnover densities and gravity modelling (further discussed in Appendix 1).

Once accounting for existing and currently planned floorspace, due to the significant population growth projected for the municipality, the following undersupply of retail floor space is predicted:

- 2016 (current) – 106,000 square metre oversupply
- 2026 – 89,900 square metre undersupply
- 2036 – 418,200 square metre undersupply.

Using the gravity model, this can be further disaggregated to better understand the location of undersupply across Greater Geelong. The following provided a summary of the demand-supply alignment by sub-regions (Figure 1).

**FIGURE 12: OVERALL SUPPLY DEMAND FLOORSPACE ALIGNMENT**



Source: SGS Economics and Planning

The subregional alignment below compares existing and planned floorspace supply to supportable floorspace demand at centres within each subregion based on the base case gravity modelling. This analysis highlights several opportunities and challenges across the network:

- **Geelong – Central Subregion** Includes 47 per cent of Greater Geelong’s population, 17 per cent of projected population growth and a larger share of employment and services for the broader region. From a supply perspective, it includes 68 per cent of total retail floorspace across Greater Geelong, including Central Geelong Regional Centre, two Sub regional centres and the only Specialised centre.

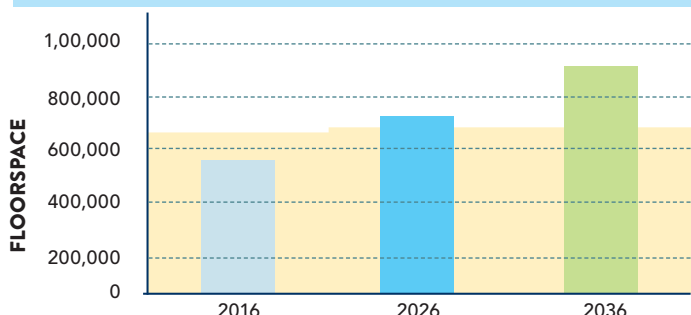
It is estimated to see significant growth in retail demand partly due to the significant existing and future population of the sub-region itself and partly due to its established higher order role in the broader Greater Geelong hierarchy.

Over the next 20 years the base case scenario suggests there could be demand for a further 338,200 sqm metres of retail floorspace across the 66 centres, once accounting for existing and planned supply this creates a potential undersupply of 256,600 square metres by 2036.

- **Geelong – Corio Norlane Subregion** which includes 17 per cent of Greater Geelong’s population and existing 26 centres, including one Sub-regional centre (Corio) is also estimated to see strong growth in supportable floorspace demand at centres within the subregion under the base case scenario. This would result in an undersupply of 86,200 square metres by 2036.

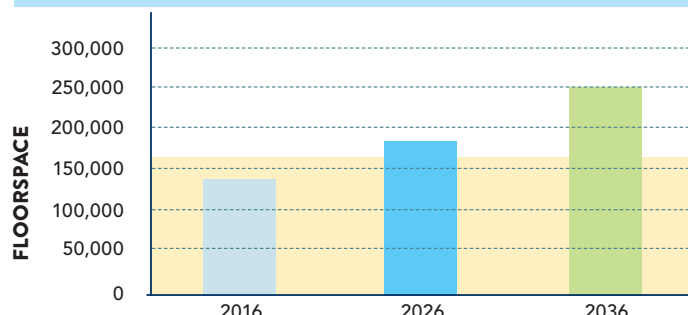
- The growth area subregions around Geelong (including **Geelong (Armstrong Creek), Northern Geelong Growth Area and Western Geelong Growth Area**) are all anticipated to see strong growth in supportable floorspace demand at centres due to demand from growing local populations. The current planned floorspace and network of centres aligns with supportable floorspace demand forecasts, with a potential gap in Armstrong Creek appearing in 2036.
- Other major settlements (including **Lara, Leopold, Drysdale and Ocean Grove**) represent 25 per cent of current population and are anticipated to see a similar level of population growth in the future. The base case scenario suggests these subregions will see supportable floorspace demand growth that is largely consistent with their current share of floorspace. This will provide for growth in their existing centres along with the establishment of a few planned centres to support expanded urban footprints. This growth is largely already planned for within Ocean Grove. There are potential gaps in Drysdale and Leopold by 2036 (largely within the Restricted Retail sector) which could be provided for within the existing and planned network of centres.

**FIGURE 14: SUPPLY DEMAND FLOOR SPACE ALIGNMENT – GEELONG - CENTRAL**



Note Geelong (Central) includes Geelong, Geelong West, South Geelong, East Geelong, Hamlyn Heights, Herne Hill, Manifold Heights, Newtown, Highton, Wandana Heights, Grovedale, Belmont, Waurin Ponds, Breakwater, St Albans Park, Whittington, Newcomb and Thomson.  
Source: SGS Economics & Planning.

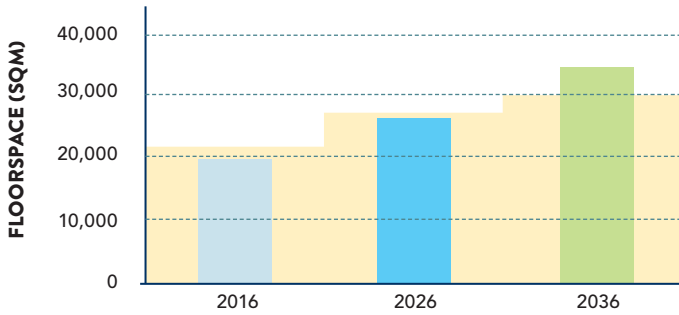
**FIGURE 15: SUPPLY DEMAND FLOOR SPACE ALIGNMENT – GEELONG - CORIO NORLANE**



Note Geelong (Corio Norlane) includes the suburbs of Corio, Norlane, Bell park, Bell Post Hill (part), North Geelong, North Shore, Rippleside and Drumcondra.  
Source: SGS Economics & Planning.

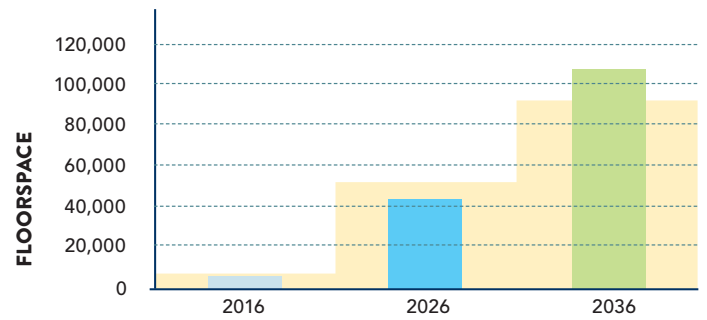
Existing and planned supply      Demand at centres (2016)      Demand at centres (2026)      Demand at centres (2036)

**FIGURE 16: SUPPLY DEMAND FLOOR SPACE ALIGNMENT – GEELONG - LARA**



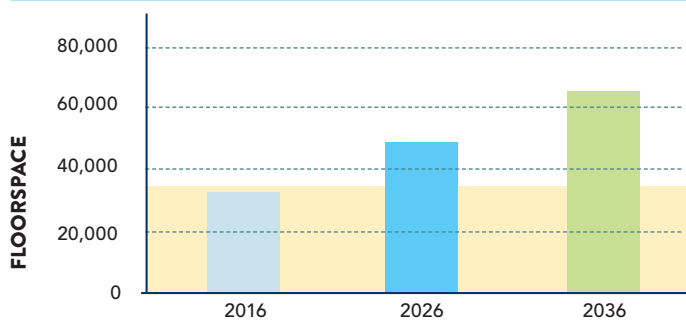
Source: SGS Economics & Planning

**FIGURE 17: SUPPLY DEMAND FLOOR SPACE ALIGNMENT – GEELONG - ARMSTRONG CREEK**



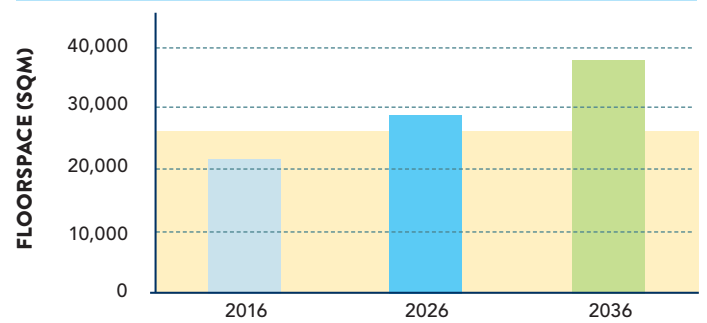
Source: SGS Economics & Planning

**FIGURE 18: SUPPLY DEMAND FLOOR SPACE ALIGNMENT – GEELONG - LEOPOLD**



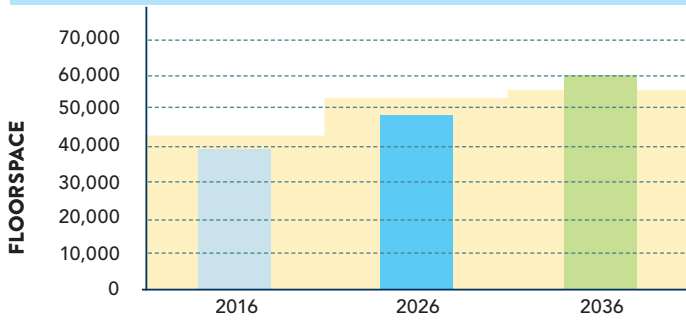
Source: SGS Economics & Planning

**FIGURE 19: SUPPLY DEMAND FLOOR SPACE ALIGNMENT – GEELONG - DRYSDALE**



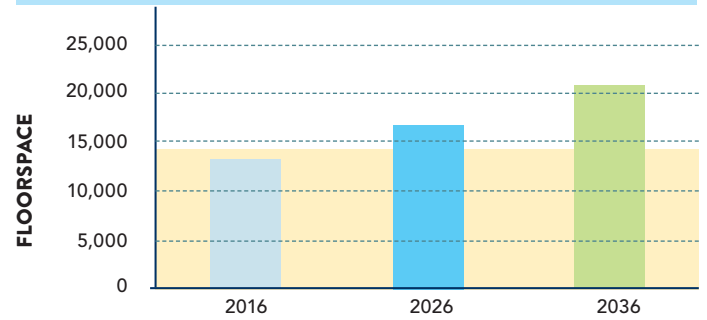
Source: SGS Economics & Planning

**FIGURE 20: SUPPLY DEMAND FLOOR SPACE ALIGNMENT – GEELONG - OCEAN GROVE**



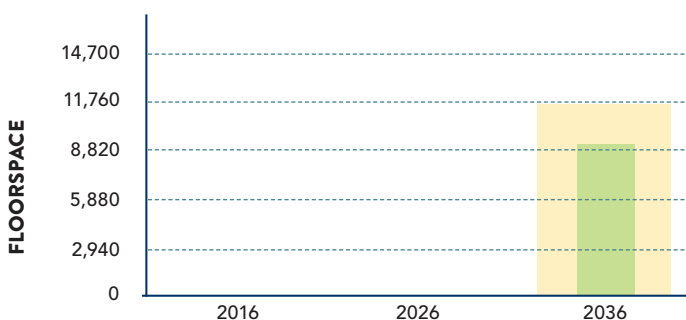
Note Ocean Grove includes Ocean Grove and Barwon Heads  
Source: SGS Economics & Planning

**FIGURE 21: SUPPLY DEMAND FLOOR SPACE ALIGNMENT – GEELONG - NORTH EAST BELLARINE PENINSULA**



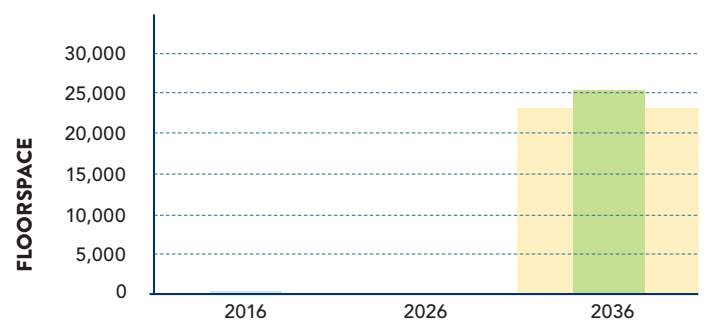
Source: SGS Economics & Planning

**FIGURE 22: SUPPLY DEMAND FLOOR SPACE ALIGNMENT – GEELONG - NORTHERN GEELONG GROWTH AREA**



Source: SGS Economics & Planning

**FIGURE 23: SUPPLY DEMAND FLOOR SPACE ALIGNMENT – GEELONG - WESTERN GEELONG GROWTH AREA**



Source: SGS Economics & Planning

Existing and planned supply      Demand at centres (2016)      Demand at centres (2026)      Demand at centres (2036)



## CENTRE CATCHMENTS

### DEFINITION OF PRIMARY CATCHMENTS

The retail gravity model simulates the retail economy across 606 zones and 151 centres creating synthetic and graduated market catchments for each centre. From this a primary catchment can be defined to gain a simplified understand of the all zones which contribute at least 50% of their expenditure to the respective centre.

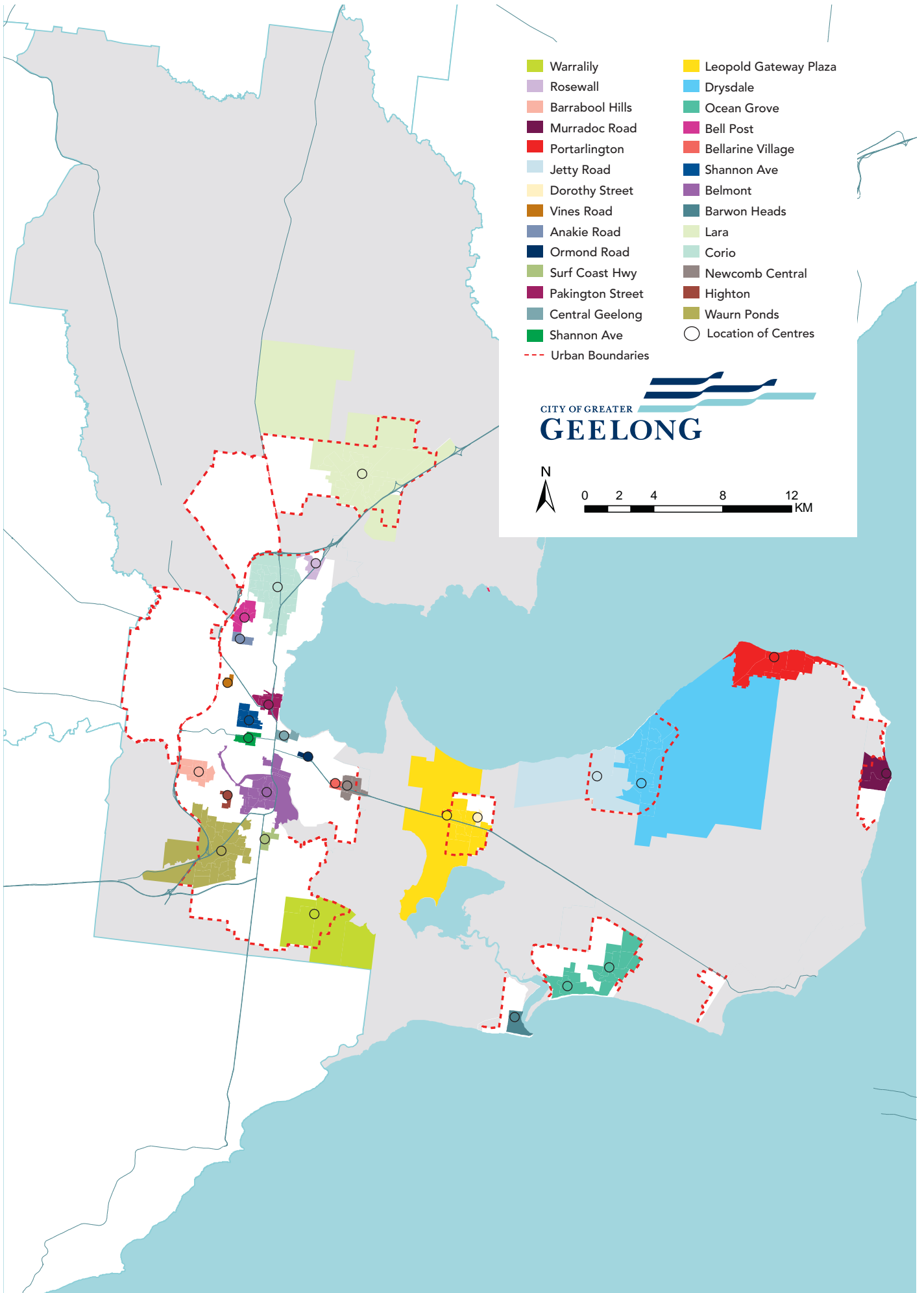
Figures 24 to 26 map trade areas for all significant centres across Greater Geelong. The map shows the primary trade area for each centre. Areas that do not fall under any centre's primary catchment trade area are 'contested', which means expenditure is fairly evenly distributed among multiple centres. It does not necessarily mean there is an undersupply of retail floor space in that area – indeed in some cases, it is due to significant competition between multiple nearby centres.

Due to the car-oriented nature of shopping trips in Greater Geelong, catchment areas are defined with the use of road-based travel time calculations, along with the relative attractiveness of each centre from the gravity model. (See Appendix 1 for further information on how the gravity model determines centre catchments)

The maps indicate that the most dominant centres across the retail network are Belmont, Waurin Ponds, Leopold and Corio. These centres each contain discount department stores, multiple supermarkets and a large number of specialty shops.

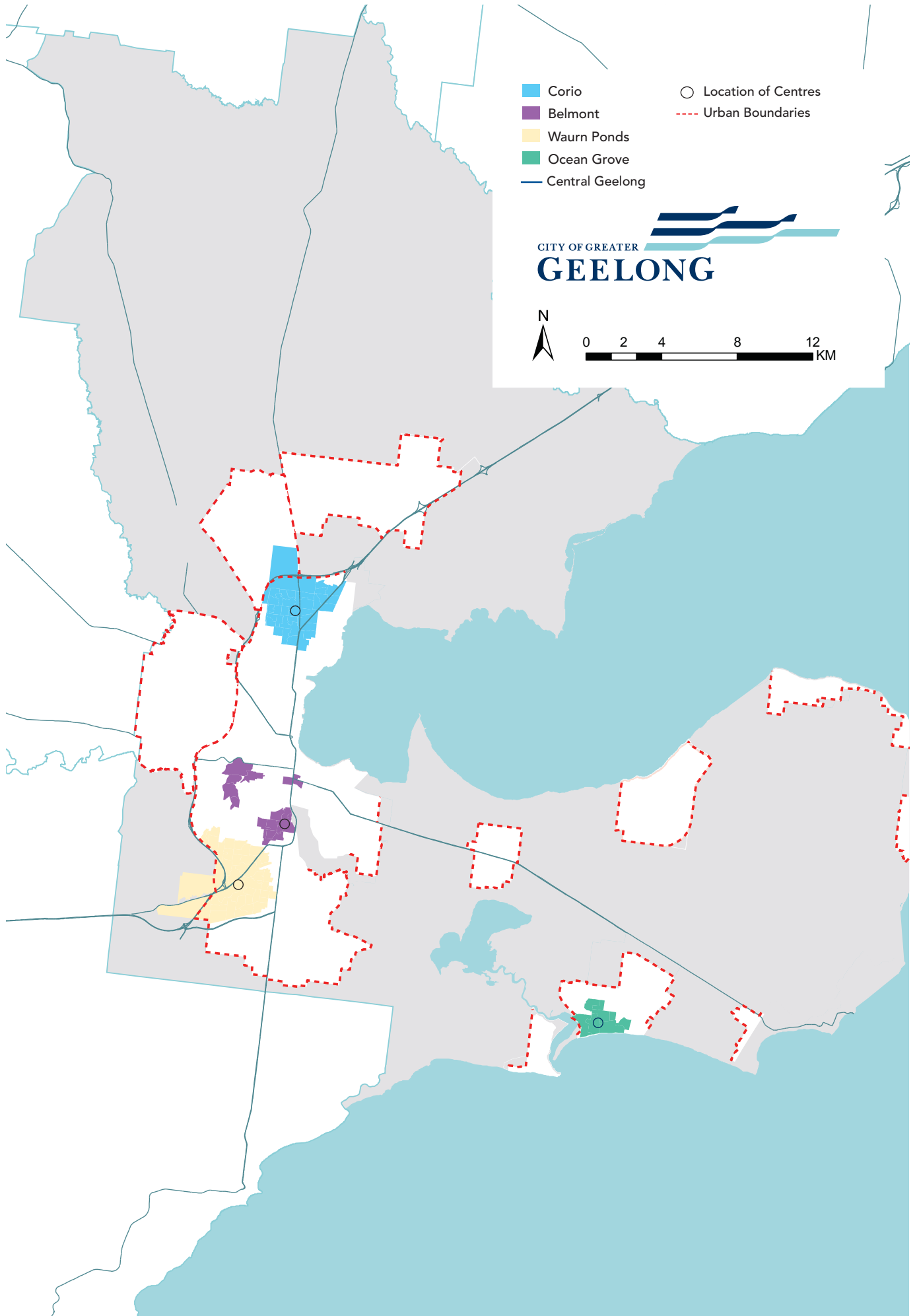
The catchment areas of neighbourhood centres are more localised. Central Geelong typically captures no more than 10–20 per cent of people residing in the catchment of another centre, which could be improved if the retail offer was stronger. Competition from other centres also plays a role in this.

**FIGURE 24: SUPERMARKET CENTRE PRIMARY CATCHMENT**



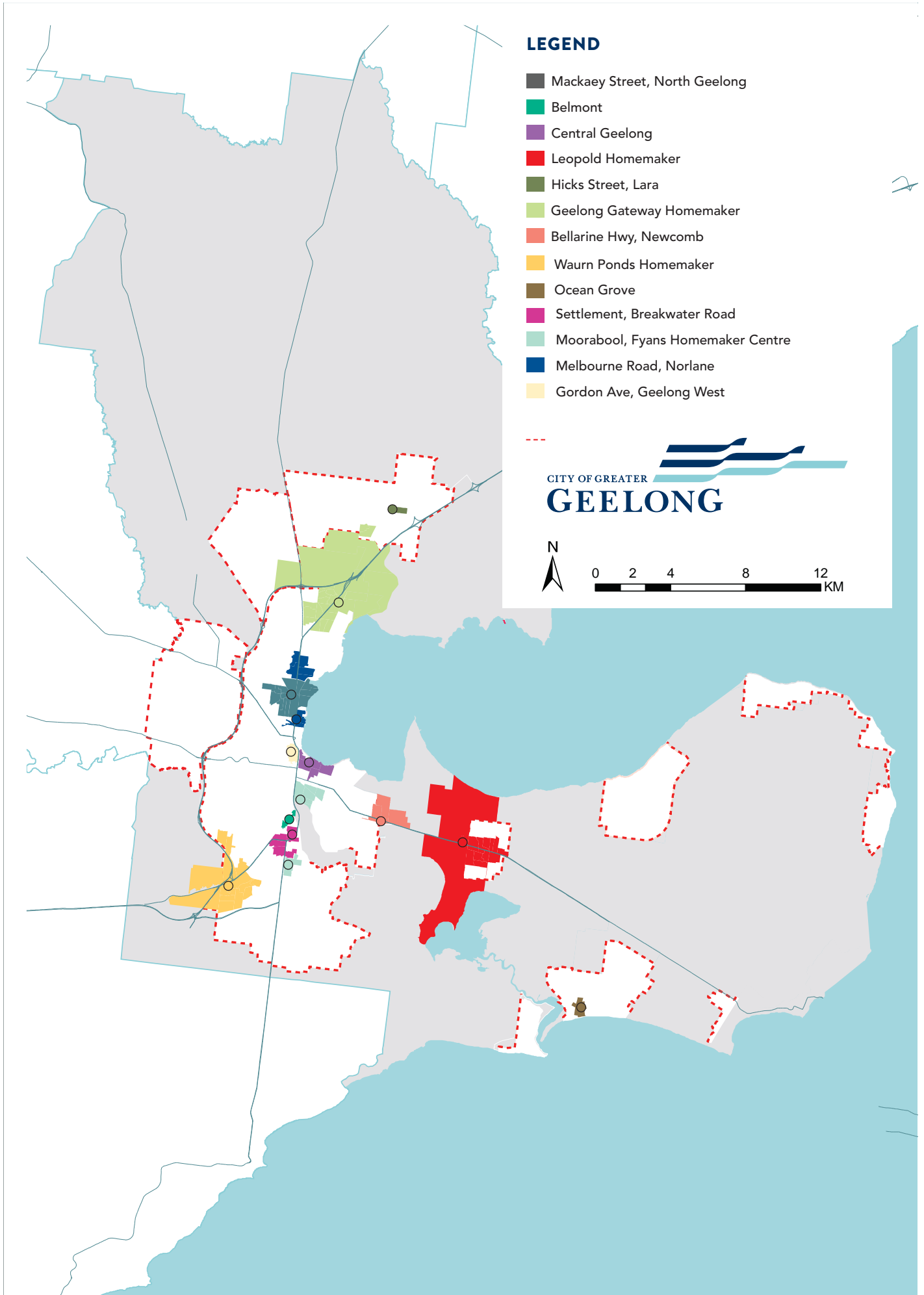
Not all centres have a trade area, as a result of expenditure being evenly distributed among multiple centres, due to competition.

**FIGURE 25: DISCOUNT DEPARTMENT STORE PRIMARY CATCHMENT**



Not all centres have a trade area, as a result of expenditure being evenly distributed among multiple centres, due to competition.

**FIGURE 26: RESTRICTED RETAIL CENTRE PRIMARY CATCHMENT**



Not all centres have a trade area, as a result of expenditure being evenly distributed among multiple centres, due to competition.

# OPPORTUNITIES AND CHALLENGES

## WHOLE OF NETWORK OPPORTUNITIES AND CHALLENGES

Greater Geelong faces both challenges and opportunities to improve the retail economy:

1. Population growth is being directed to both greenfield and infill locations, which creates demand for new retail centres and may provide the population base needed to increase support of existing centres.
2. Supermarket and bottleshops dominate retail sales across Geelong and do little to support other stores within a centre. Planning policy should encourage new supermarket-based developments to feature a diversity of businesses, creating opportunities for local, independent enterprises.
3. Successful shopping centre networks strongly represent the four approaches to retail (see page 7), however this is not currently happening, particularly in Central Geelong, where sub-regional centres may be considered to have a similar retail offer.
4. Townships on the Bellarine struggle to create a year-round retail market, relying heavily on the summer tourism period. Improvements in the hospitality and cultural tourism offer will be important for these locations.
5. Restricted retail is generally oversupplied across the municipality, except on the Bellarine. Here residents need to travel significant distances to reach the nearest restricted retail centre.
6. Most existing centres are forecast to support additional floor space by 2036. Managing how and where this growth occurs will require robust planning policy combined with further strategic work to guide future development.
7. Whilst online retailing was initially seen as direct competition to traditional retail stores, many retail stores have adapted by providing both an online and store experience.

## OPPORTUNITIES FOR MAJOR RETAIL INVESTMENT

The demand and supply data from the gravity modelling has been further examined to determine the areas that may be undersupplied for major store types in the future. Whether such floor space can actually locate in these areas depends on many factors, such as site availability options, market appetite and alternative centre expansions.

For the maps on the following pages:

- grey circles indicate floor space demand that is met by supply (up to a 20-minute drive for Supermarkets and 30-minutes for Department Stores and Restricted Retail)
- maroon circles indicate unmet demand based on travel time or supply availability compared to demand
- the size of the circles represent the quantum of floor space demand.

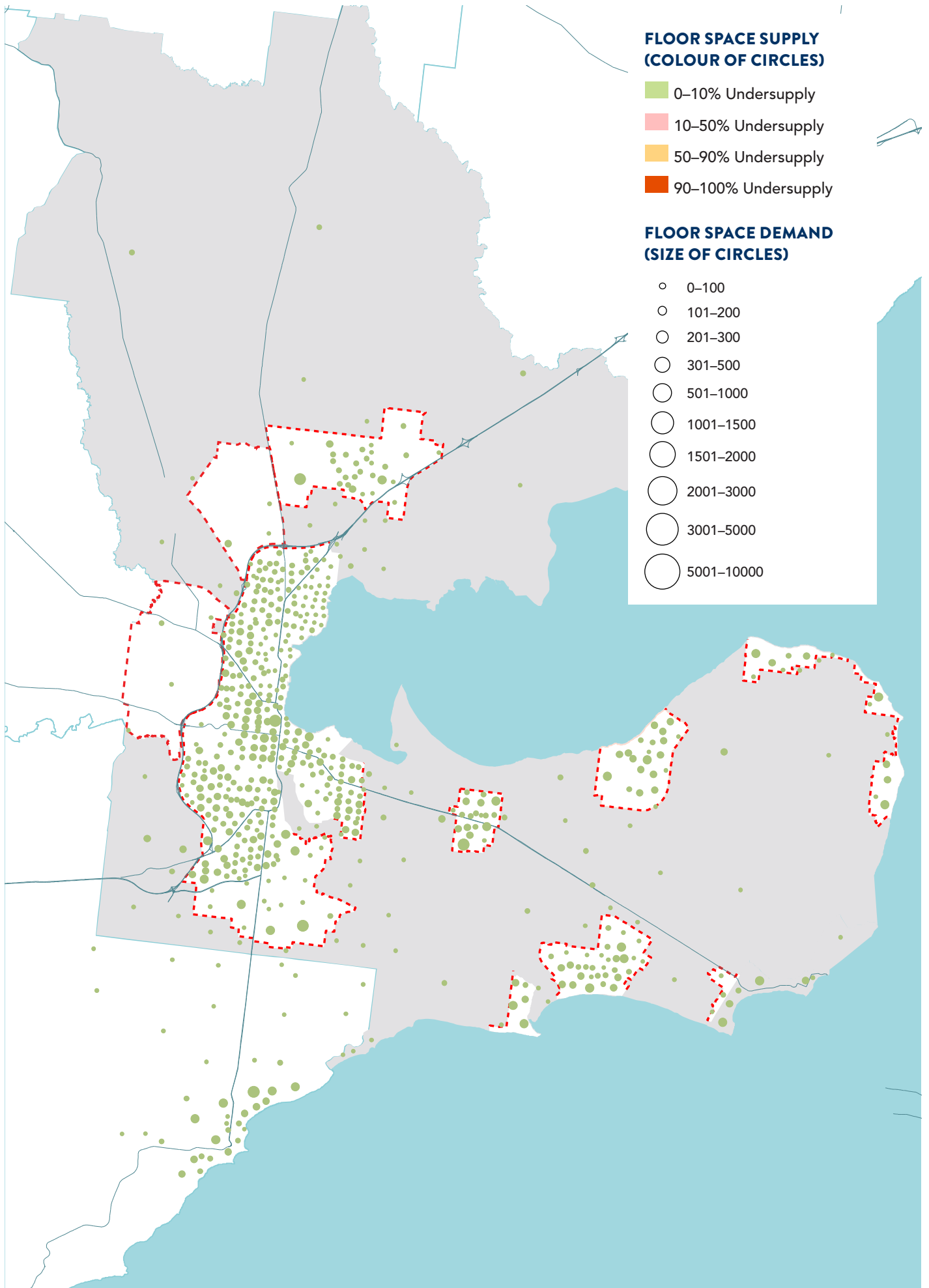
This analysis assumes no increase in floor space supply over and above that which is planned for across the network. Demand is based on adjusted expenditure demand (i.e. resident demand with adjustments for online, workers, student and tourism) and target retail turnover density to determine floorspace needs. These concepts are further discussed in Appendix 1.

Whether a circle is grey or red is driven by travel times and the underlying supply and demand equation, based on trade area catchments. When maroon circles appear within a 20/30-minute drive of a centre, it suggests that these centres are potentially overtrading, and there is a case for supplying new floor space either:

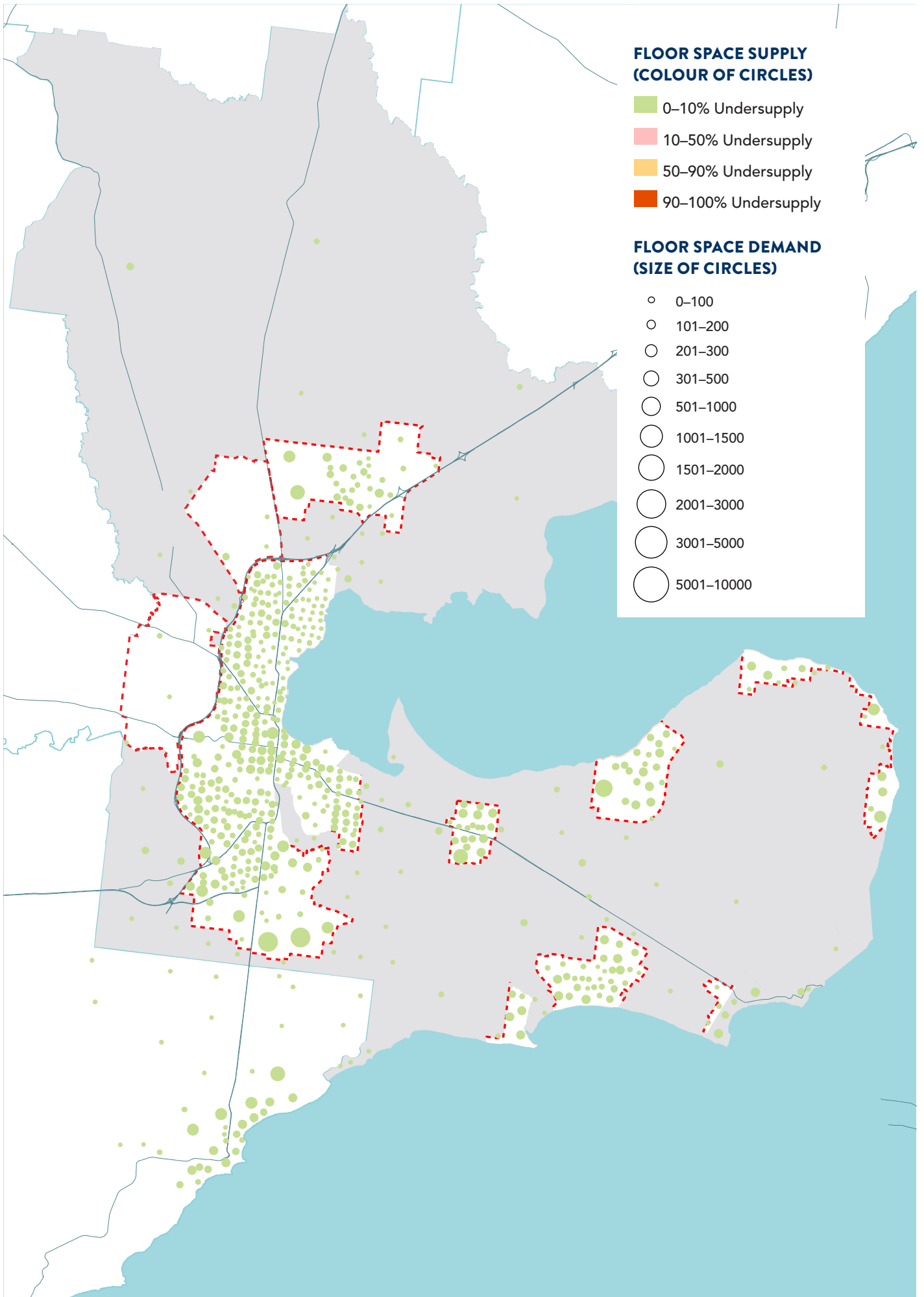
- at the nearby centre(s) or
- in a new centre if:
  - a. the nearest centre is relatively distant and
  - b. there is sufficient demand to justify a new centre



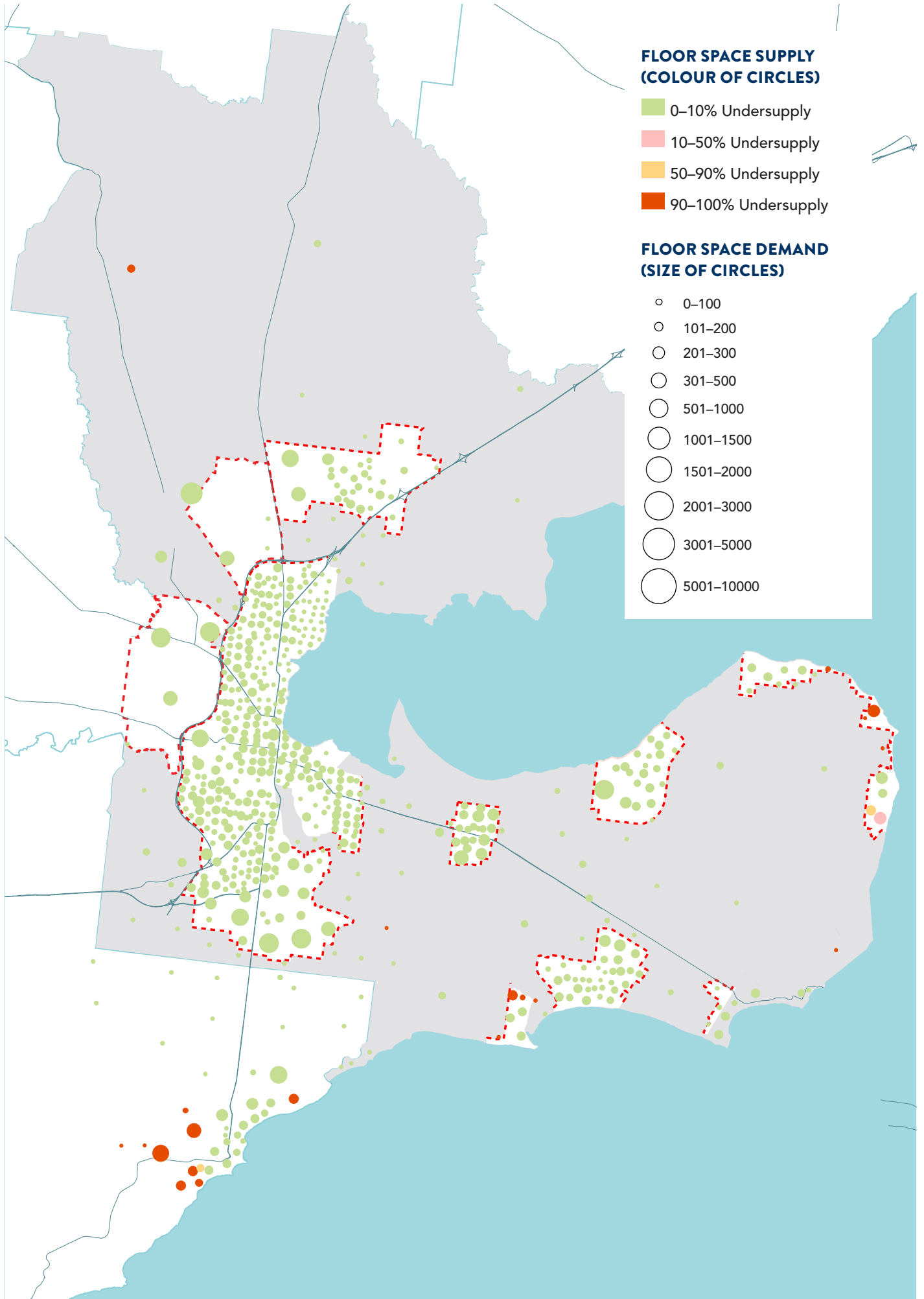
**FIGURE 27A: SUPERMARKET SUPPLY-AND-DEMAND EQUATION 2016**



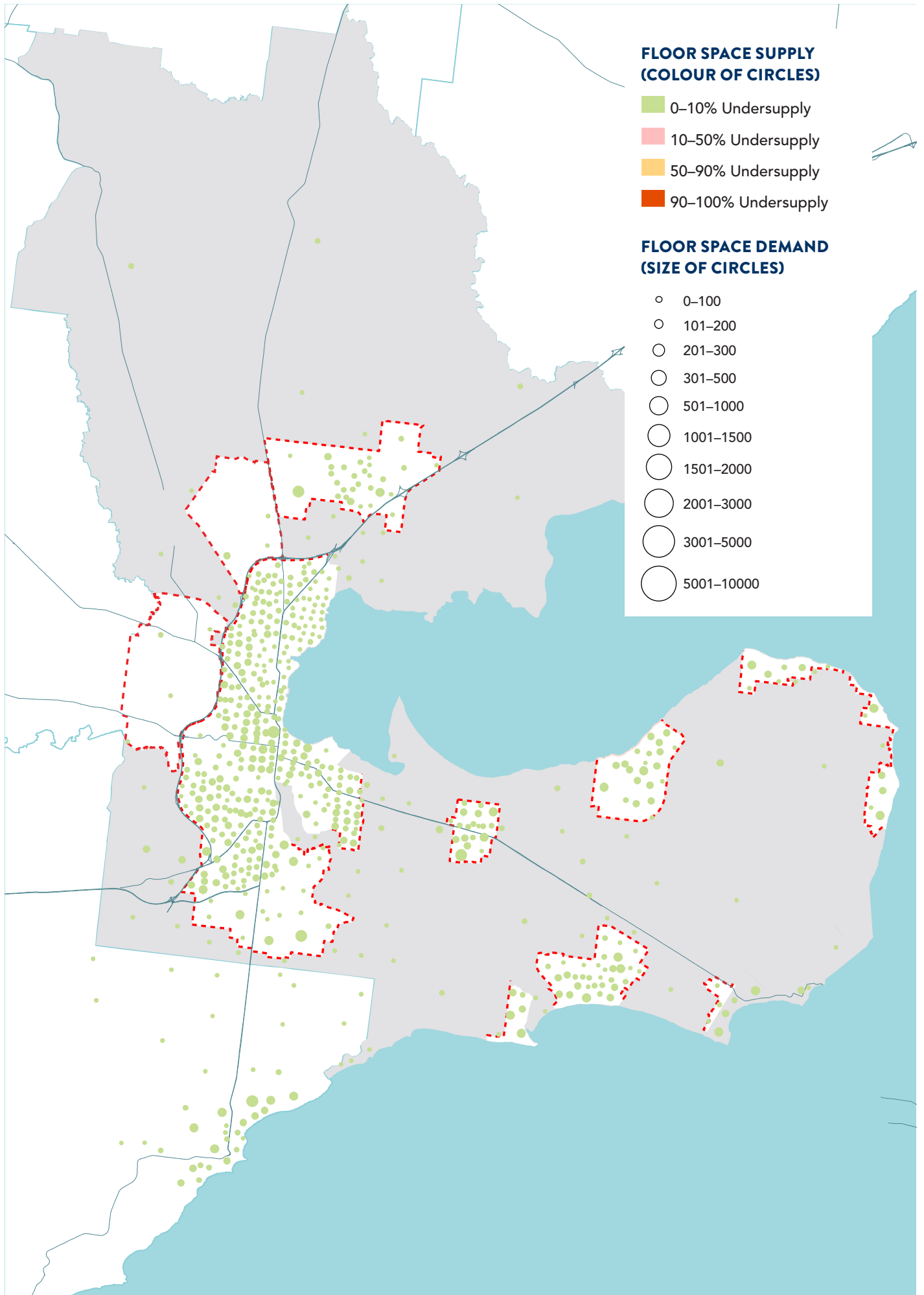
**FIGURE 27B: SUPERMARKET SUPPLY-AND-DEMAND EQUATION 2026**



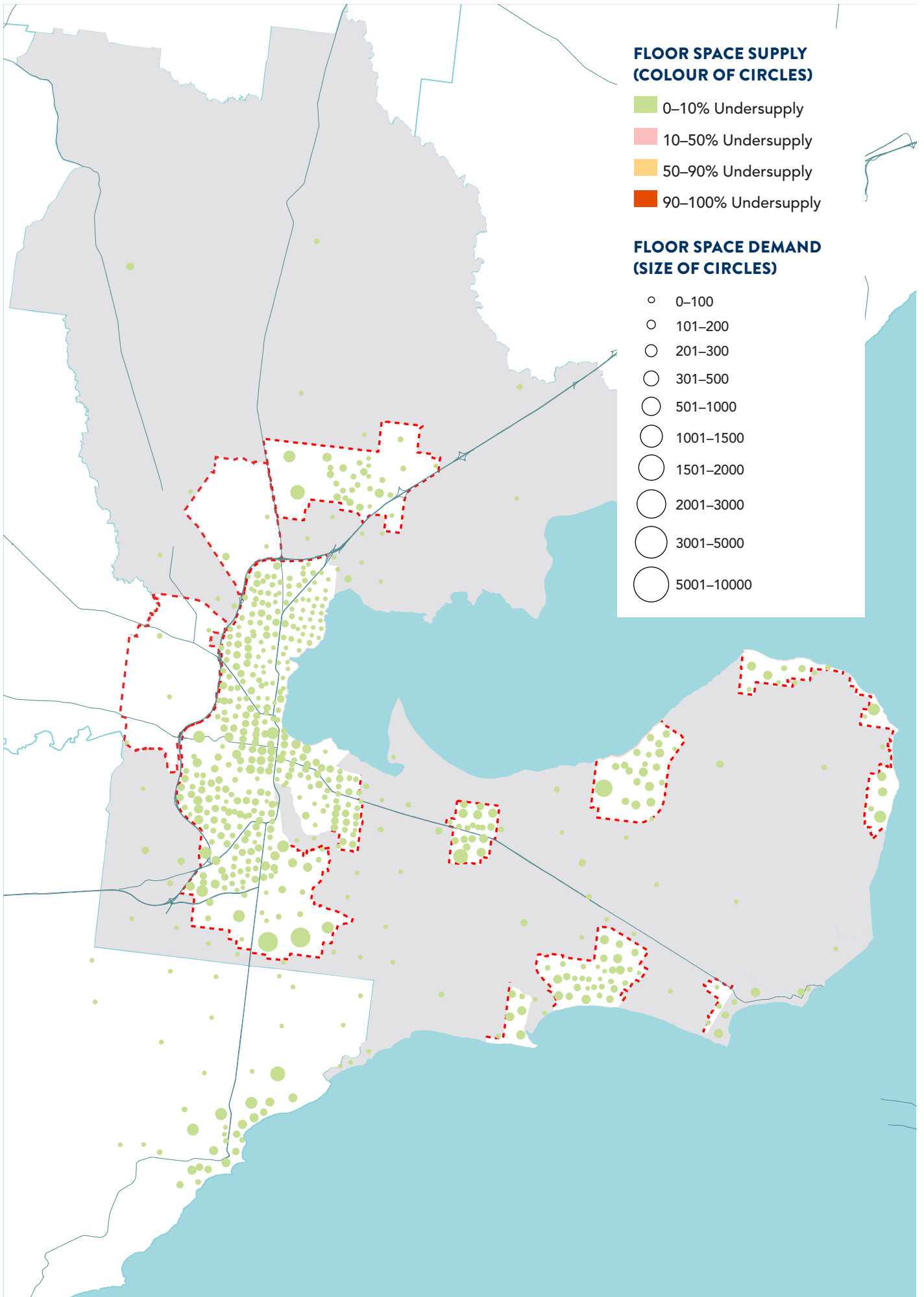
**FIGURE 27C: SUPERMARKET SUPPLY-AND-DEMAND EQUATION 2036**



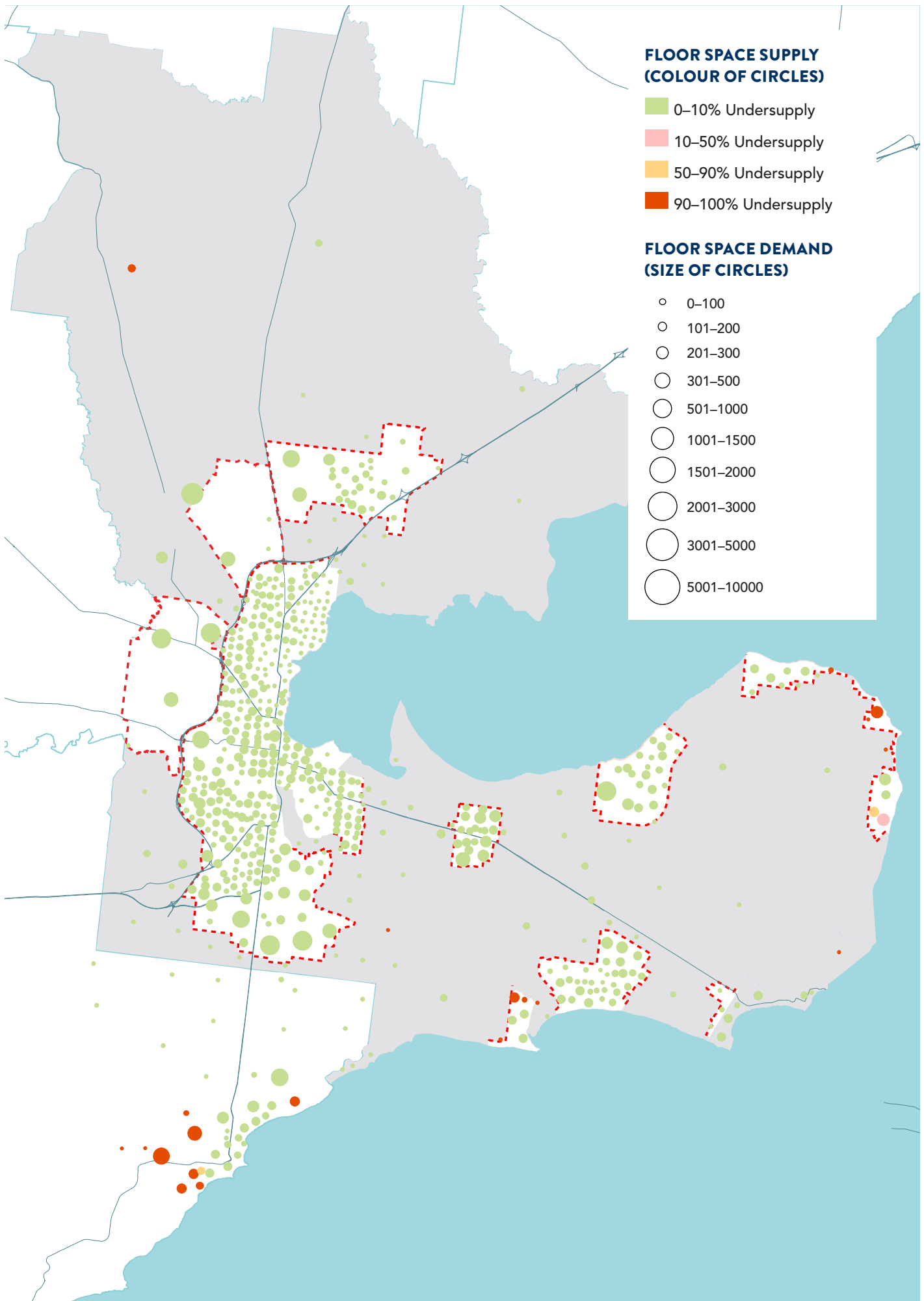
**FIGURE 28A: DISCOUNT DEPARTMENT STORE SUPPLY-AND-DEMAND EQUATION 2016**



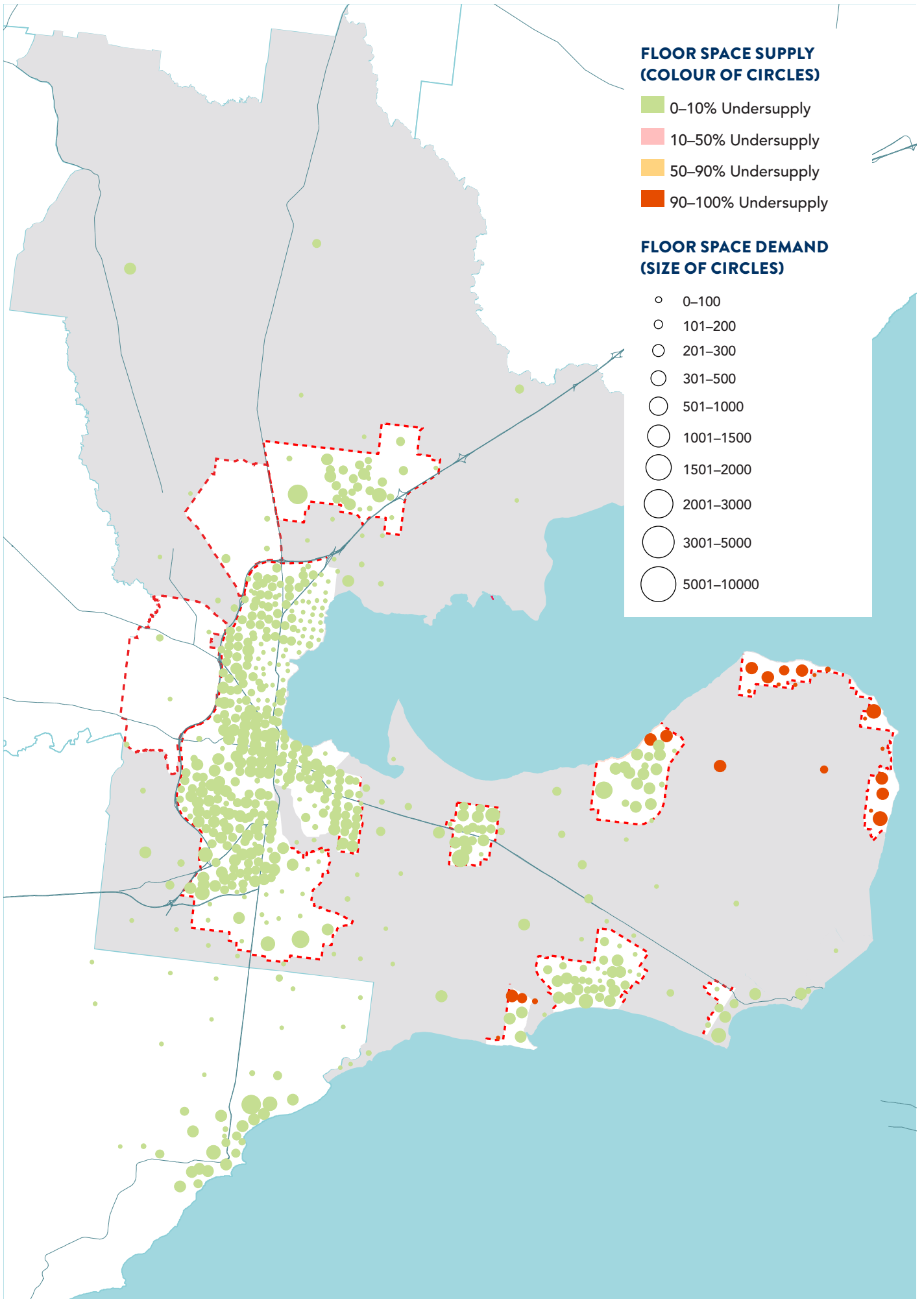
**FIGURE 28B: DISCOUNT DEPARTMENT STORE SUPPLY-AND-DEMAND EQUATION 2026**



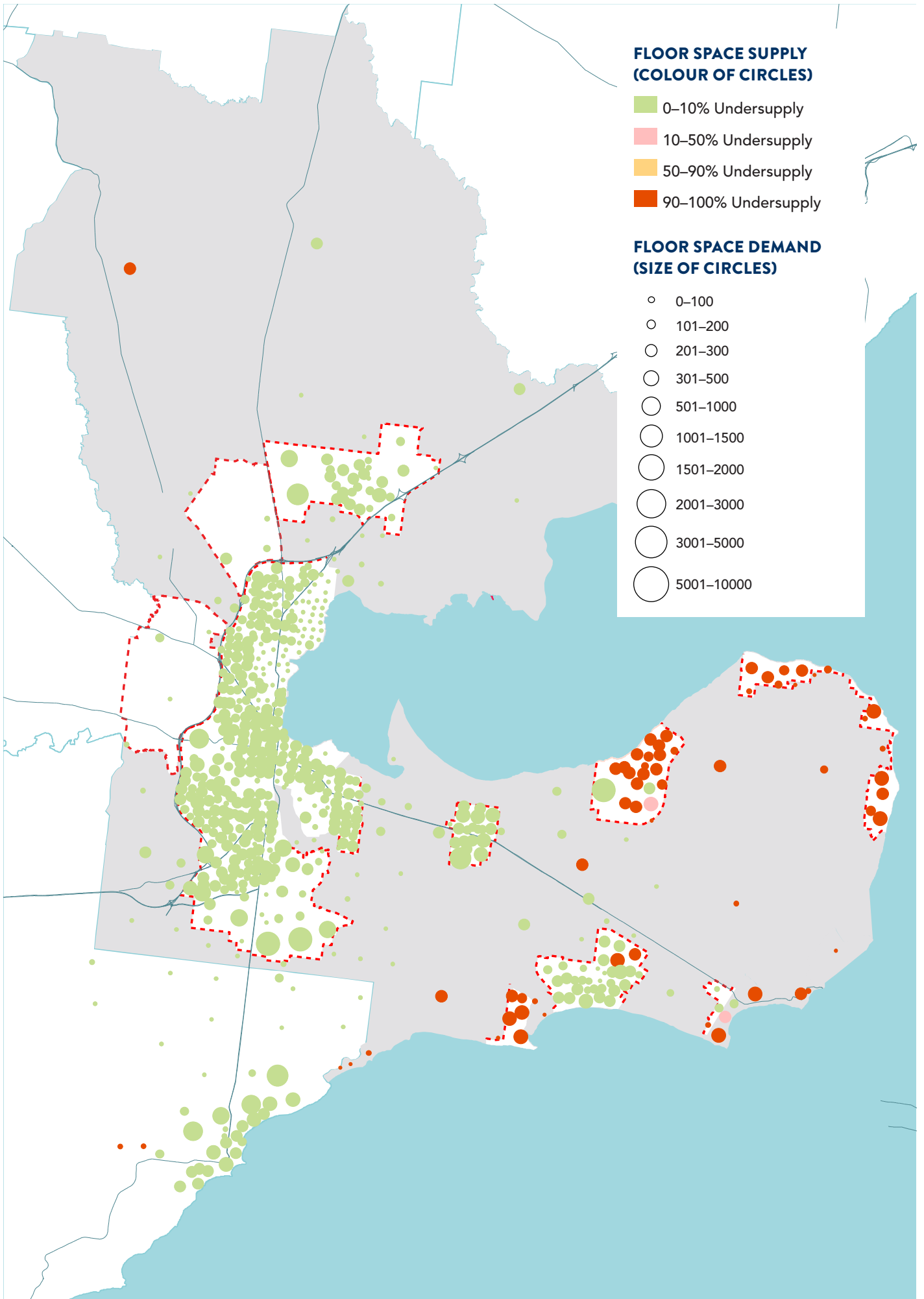
**FIGURE 28C: DISCOUNT DEPARTMENT STORE SUPPLY-AND-DEMAND EQUATION 2036**



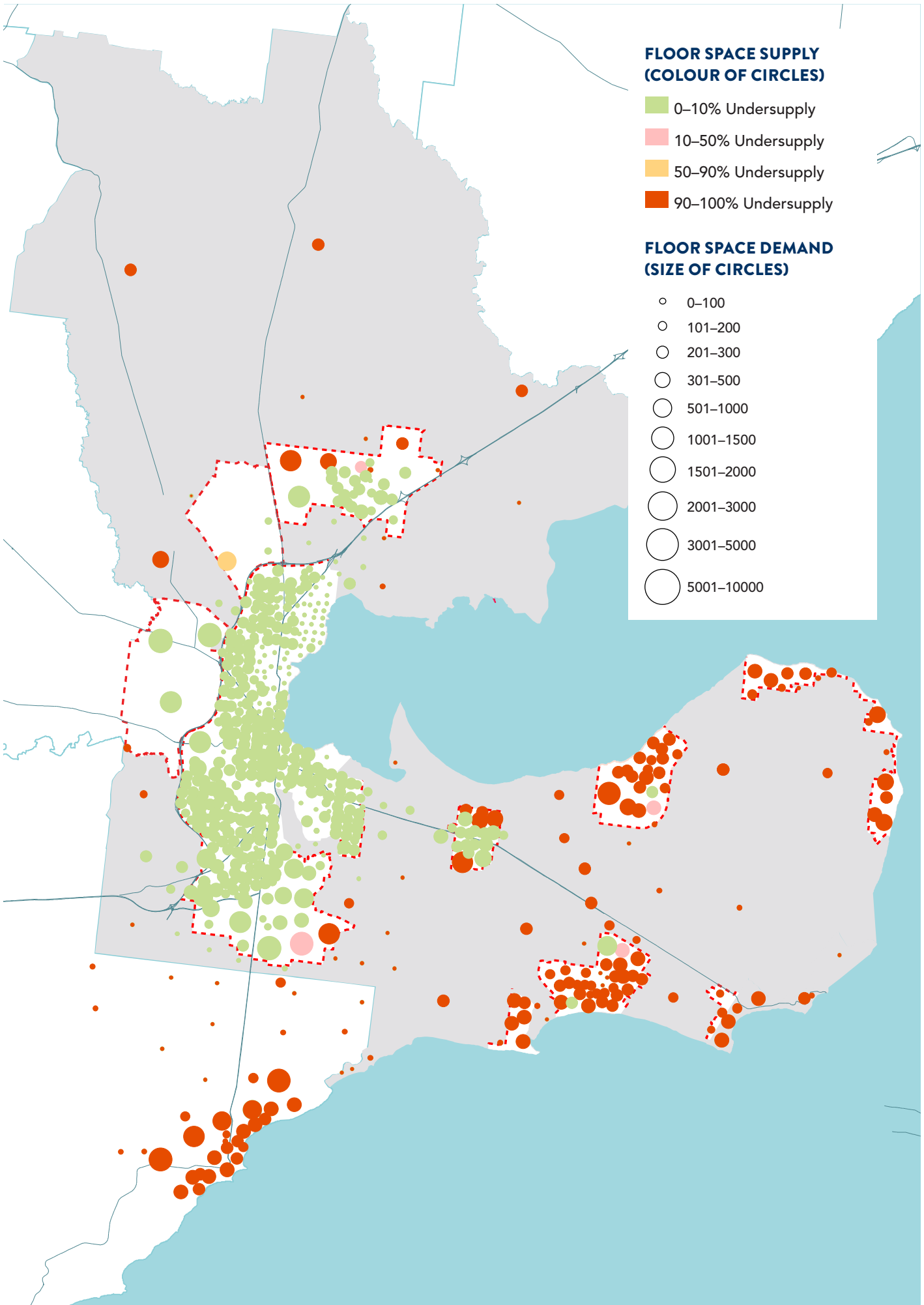
**FIGURE 29A: RESTRICTED RETAIL SUPPLY-AND-DEMAND EQUATION 2016**



**FIGURE 29B: RESTRICTED RETAIL SUPPLY-AND-DEMAND EQUATION 2026**



**FIGURE 29C: RESTRICTED RETAIL SUPPLY-AND-DEMAND EQUATION 2036**



## SUPPORTABLE RETAIL FLOOR SPACE BY CENTRE

Table 5 further distills this analysis by focusing on the supportable retail floor space demand at each centre out to 2036 and compares this to existing and planned floorspace supply. Population growth plus trends in retail expenditure, workers, students, tourist increases the demand for additional retail floor space across the hierarchy. By 2036 most centres in Greater Geelong will have the potential to expand from a supportable demand perspective. While this opportunity exists, actual outcomes will need to be considered alongside centre performance, supply availability options, market appetite and alternative centre uses. It is also worth noting in some centres, existing and approved floor space is already in excess of what is expected to be supportable in 2036.

The calculations provided here are not intended to limit the growth of a centre beyond what has been indicated in this table. Indeed, some centres may never achieve the supportable floor space identified for a range of reasons, such as land constraints. This demand may then be taken up by a nearby centre or new centre. Planning policy contained in the Greater Geelong Planning Scheme should be used to determine whether growth of a centre should occur.

The time scale provided in the table is not intended to prevent centres expanding earlier than identified. If population growth rates were to increase above the projected 2% average annual growth rate, then it is likely that planning policy would support more retail floor space sooner.

**TABLE 5 – SUPPORTABLE FLOOR SPACE 2016–2036**

PRECINCT	Existing and planned to 2036 (as of March 2018) total retail floorspace supply				Base case scenario total retail floorspace demand projections				Total supply less demand		
	A) EXISTING FLOORSPACE	B) VACANT FLOORSPACE	C) PLANNED NEW/ ADD	D = A+B+C) TOTAL	E) 2016	F) 2026	G) 2036	H = G - E) 2016-36	I = E - D) 2016	J = F - D) 2026	K = G - D) 2036
GREATER GEELONG	903,812	55,967	149,786	1,109,564	853,599	1,120,759	1,527,750	674,151	255,965	-11,194	-418,186
Regional	187,304	25,985	0	213,289	189,091	253,737	345,803	156,712	24,198	-40,448	-132,514
Central Geelong	187,304	25,985	0	213,289	189,091	253,737	345,803	156,712	24,198	-40,448	-132,514
Sub-Regional	132,416	1,370	61,924	195,710	125,759	180,747	281,484	155,725	69,951	14,963	-85,774
Belmont	42,590	1,370	0	43,960	40,209	51,635	64,809	24,600	3,751	-7,675	-20,849
Wairn Ponds	41,760	0	0	41,760	39,556	51,541	64,455	24,899	2,204	-9,781	-22,695
Corio SC	27,463	0	0	27,463	26,136	33,002	44,081	17,945	1,327	-5,539	-16,618
Leopold Gateway Plaza	20,604	0	0	20,604	19,858	26,930	36,376	16,518	746	-6,326	-15,772
Armstrong Creek Town Centre	0	0	40,000	40,000	0	17,640	49,574	49,574	40,000	22,360	-9,574
Sub-regional Centre - WGGA	0	0	16,552	16,552	0	0	17,569	17,569	16,552	16,552	-1,017
Sub-regional Centre - NGGA	0	0	5,372	5,372	0	0	4,619	4,619	5,372	5,372	753
Specialised	38,145	5,015	0	43,160	38,243	47,306	61,124	22,882	4,917	-4,146	-17,964
Pakington Street (Geelong West)	38,145	5,015	0	43,160	38,243	47,306	61,124	22,882	4,917	-4,146	-17,964
Specialised Centre - WGGA	0	0	0	0	0	0	0	0	0	0	0
Town	64,460	2,653	522	67,634	61,128	74,744	91,271	30,143	6,506	-7,109	-23,637
Ocean Grove	16,293	408	0	16,701	16,095	17,807	20,231	4,136	606	-1,106	-3,530
Drysdale	14,886	187	0	15,073	13,372	18,035	23,193	9,821	1,701	-2,963	-8,120
Lara	14,952	98	0	15,050	13,249	16,392	20,847	7,597	1,800	-1,343	-5,797
Barwon Heads	8,735	1,066	522	10,323	9,115	10,389	11,853	2,738	1,208	-66	-1,530
Portarlington	6,408	774	0	7,182	6,200	7,797	9,708	3,508	983	-615	-2,526
St Leonards (Murradoc Road)	3,185	120	0	3,306	3,098	4,323	5,440	2,343	208	-1,017	-2,135
Neighbourhood	101,504	2,953	50,540	154,997	93,767	134,283	188,299	94,532	61,230	20,714	-33,303
Shannon Avenue (Geelong West)	12,948	0	0	12,948	12,184	14,571	18,109	5,925	763	-1,623	-5,162
Separation St	5,572	409	0	5,981	5,754	7,124	9,545	3,791	228	-1,143	-3,563
Pakington Street (Newtown)	9,151	301	0	9,452	9,655	12,045	14,848	5,193	-204	-2,593	-5,396
Highton	6,972	77	0	7,049	6,463	7,973	9,852	3,388	586	-924	-2,803

PRECINCT	Existing and planned to 2036 (as of March 2018) total retail floorspace supply				Base case scenario total retail floorspace demand projections				Total supply less demand		
	A) EXISTING FLOORSPACE	B) VACANT FLOORSPACE	C) PLANNED NEW/ ADD	D = A+B+C) TOTAL	E) 2016	F) 2026	G) 2036	H = G - E) 2016-36	I = E - D) 2016	J = F - D) 2026	K = G - D) 2036
Newcomb Central	7,390	0	0	7,390	6,210	7,741	9,900	3,690	1,180	-352	-2,510
Ormond Road	5,917	165	0	6,083	6,023	7,606	9,624	3,601	60	-1,524	-3,541
Bellarine Village	6,929	0	0	6,929	5,967	7,443	9,495	3,528	962	-514	-2,566
Bell Post SC	5,562	0	0	5,562	4,811	5,845	8,270	3,459	751	-283	-2,708
Barrabool Hills	4,227	0	0	4,227	3,508	4,511	5,646	2,138	719	-284	-1,419
Shannon Avenue (Newtown)	4,495	363	0	4,858	4,178	5,089	6,307	2,129	680	-231	-1,449
Ocean Grove (Marketplace)	5,748	72	0	5,820	5,020	5,754	6,862	1,842	800	66	-1,042
Vines Road	3,110	136	0	3,245	2,983	3,597	4,885	1,902	263	-352	-1,640
Hyland Street	2,346	0	9,500	11,846	2,429	7,877	11,327	8,898	9,417	3,969	520
Grovedale Central	2,479	248	0	2,726	2,313	2,812	3,400	1,087	413	-86	-674
Dorothy Street	1,803	0	0	1,803	1,734	2,211	2,851	1,118	69	-409	-1,049
Ash Road	1,578	191	0	1,769	1,608	2,372	3,220	1,612	161	-603	-1,451
Rosewall	1,740	0	0	1,740	1,344	1,658	2,193	849	397	82	-452
Jetty Road	4,147	95	0	4,242	3,422	4,127	5,559	2,137	820	115	-1,317
The Village Warralily	6,000	897	1,863	8,760	5,201	11,059	16,600	11,399	3,559	-2,299	-7,840
Surf Coast Highway NAC	3,390	0	0	3,390	2,961	3,905	4,812	1,850	429	-515	-1,422
Kingston Downs	0	0	11,177	11,177	0	4,385	6,257	6,257	11,177	6,792	4,920
Lara West NAC	0	0	4,700	4,700	0	565	829	829	4,700	4,135	3,871
Armstrong Creek West NAC	0	0	3,000	3,000	0	1,146	1,572	1,572	3,000	1,854	1,428
Armstrong Creek Horseshoe Bend Precinct North East NAC	0	0	7,000	7,000	0	2,864	4,424	4,424	7,000	4,136	2,576
Elcho Rd East-NGGA	0	0	6,650	6,650	0	0	4,683	4,683	6,650	6,650	1,967
Elcho Rd West -NGGA	0	0	0	0	0	0	0	0	0	0	0
Heales Rd West -NGGA	0	0	0	0	0	0	0	0	0	0	0
Northern Centre -WGGA	0	0	6,650	6,650	0	0	7,231	7,231	6,650	6,650	-581
Midland Hwy -WGGA	0	0	0	0	0	0	0	0	0	0	0
Lakeside West -WGGA	0	0	0	0	0	0	0	0	0	0	0
Lakeside South -WGGA	0	0	0	0	0	0	0	0	0	0	0
Western Centre -WGGA	0	0	0	0	0	0	0	0	0	0	0
Local (82 centres)	69,459	5,863	11,800	87,122	69,371	85,603	114,764	45,392	17,751	1,519	-27,642
Homemaker	136,021	2,904	25,000	163,925	121,584	189,682	290,349	168,765	42,340	-25,758	-126,425
Geelong Gateway Homemaker precinct	31,463	2,121	0	33,584	27,346	39,950	59,746	32,400	6,238	-6,367	-26,162
Waurm Ponds Homemaker Retail	46,972	333	0	47,305	42,876	64,564	90,913	48,037	4,428	-17,259	-43,608
Melbourne Road (Norlane)	23,652	92	0	23,744	20,644	29,802	43,474	22,830	3,101	-6,058	-19,729

Source: SGS Economics and Planning

\*Future floor space growth of dispersed centres has been restricted. Growth will be directed to centre's identified in the retail hierarchy at Table 2

PRECINCT	Existing and planned to 2036 (as of March 2018) total retail floorspace supply				Base case scenario total retail floorspace demand projections				Total supply less demand		
	A) EXISTING FLOORSPACE	B) VACANT FLOORSPACE	C) PLANNED NEW/ ADD	D = A+B+C) TOTAL	E) 2016	F) 2026	G) 2036	H = G - E) 2016-36	I = E - D) 2016	J = F - D) 2026	K = G - D) 2036
Melbourne Road (North Geelong)	14,322	0	0	14,322	13,211	18,411	26,131	12,920	1,111	-4,089	-11,809
Sinclair Street	4,095	0	0	4,095	4,200	6,146	8,851	4,650	-105	-2,051	-4,756
Drysdale Homemaker	3,174	358	0	3,532	2,944	4,252	5,586	2,643	588	-720	-2,055
Leopold Homemaker	12,343	0	0	12,343	10,363	16,428	24,480	14,117	1,980	-4,085	-12,137
Armstrong Creek	0	0	25,000	25,000	0	10,129	31,168	31,168	25,000	14,871	-6,168
Central Restricted Retail Centre - WGGA	0	0	0	0	0	0	0	0	0	0	0
Dispersed Bulky Goods	174,502	9,226	0	183,728	154,655	154,655	154,655	0	29,072	29,072	29,072
Bellarine Highway (Newcomb)	19,234	1,332	0	20,566	17,661	17,661	17,661	0	2,905	2,905	2,905
Settlement and Breakwater Road Belmont - Spotlight centre	32,959	210	0	33,169	28,179	28,179	28,179	0	4,989	4,989	4,989
Smithton Grove	4,277	0	0	4,277	3,988	3,988	3,988	0	289	289	289
North Geelong - Mackey Street	11,199	0	0	11,199	9,403	9,403	9,403	0	1,796	1,796	1,796
Sharon Court	10,519	0	0	10,519	8,832	8,832	8,832	0	1,687	1,687	1,687
Princess Hwy Auto Centre	290	0	0	290	243	243	243	0	47	47	47
Gordon Avenue Precinct (Geelong West)	20,302	1,825	0	22,127	17,850	17,850	17,850	0	4,277	4,277	4,277
Moorabool-Fyans Dispersed	42,460	3,121	0	45,582	38,084	38,084	38,084	0	7,498	7,498	7,498
Anakie Road	3,909	339	0	4,248	3,658	3,658	3,658	0	590	590	590
Gregory Avenue	2,509	0	0	2,509	2,284	2,284	2,284	0	225	225	225
West Fyans Street	13,316	384	0	13,700	12,389	12,389	12,389	0	1,310	1,310	1,310
Surf Coast Highway	13,528	2,015	0	15,543	12,083	12,083	12,083	0	3,460	3,460	3,460
Bacchus Marsh Road (Corio)	0	0	0	0	0	0	0	0	0	0	0

Source: SGS Economics and Planning

■ Planned or indicative centre ■ Total

# RETAIL OBJECTIVES AND STRATEGIES

## RETAIL DEVELOPMENT OBJECTIVES

Retail land use and development in the City of Greater Geelong is expected to:

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

## RETAIL DEVELOPMENT STRATEGIES TO SUPPORT OBJECTIVES

A revised Local Planning Policy Framework should reflect these objectives, in the following ways:

### Convenient access

- 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 and quality road access for private vehicles.

### Competitive supply of goods and services

- provide an appropriate forward land supply for retail and activity centre development to meet current and anticipated needs of communities and stimulate competition
- where demand is expected to exceed supply, encourage new stores to establish in existing retail centres, in conformity with the agreed retail hierarchy
- allow the development of new retail centres only where all of the following can be demonstrated:
  - a. supply in the existing network of centres is constrained
  - b. they are justified by demand growth and
  - c. where they generate a net community benefit.

- where possible, provide retail-zoned land in multiple land ownerships, to avoid monopoly conditions in catchments. Monopoly holdings can encourage restrictive lease practices and anti-competitive land withholding behaviour, leading to undersupply of retail floor space within the network
- require advocates for new supermarket-based centres to encourage a diversity of businesses in their proposals, creating opportunities for local, independent enterprises.

#### **Walkable access to day-to-day essentials**

- reduce travel distances for –day-to-day needs by encouraging development of a dense network of convenience-based local and neighbourhood centres within walking distance for all residential areas of Greater Geelong (approximately 800 metres).

#### **Vibrant and inviting retail centres**

- distribute supermarket-based neighbourhood and town centres 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, make it easier to expand existing centres, without undermining the structure of the centre’s hierarchy
- encourage a broad mix of activities in higher-order town and sub-regional centres, including office and community uses
- minimise amenity impacts by ensuring the built form of new or expanding centres maintain an appropriate interface with abutting sensitive land uses
- maintain active frontages to abutting streets in new or expanding centres.

#### **Restricted retail**

- a number of regional-scale, specialised, restricted-retail centres should continue to service regional catchments to accommodate large-scale and low-density restricted retail
- encourage smaller-scale and/or higher-density restricted retail to locate in Central Geelong and sub-regional centres, in preference to the specialised restricted retail precincts
- discourage restricted retail in other locations, unless it can be proven that a net community benefit will be created by the proposed development.

#### **Industrial areas**

- support retail uses where they have direct synergies to industrial land use activities
- retail premises should be directed to commercial 1 or 2 zoned land
- retail uses should not detrimentally impact on current and future industrial operations.

## FURTHER WORK FOR INDIVIDUAL CENTRES

To guide Greater Geelong's retail centre growth, future work that could be done to support the retail hierarchy and broader retail strategy objectives include (further discussed in Appendix 2):

- Prepare an urban design framework or structure plan for Belmont sub-regional centre to guide the ongoing development of this centre. The plan should investigate future retail needs and high density housing opportunities.
- Prepare a structure plan for the Waurin Ponds sub-regional centre. The plan should investigate future retail needs and high density housing opportunities. There is also an opportunity to include the surrounding area between Pioneer Road and the ring road as part of this study.
- Prepare an urban design framework or structure plan for Pakington Street (Geelong West). The plan should consider rezoning opportunities within the northern end of Pakington Street and review the role of the Gordon Avenue restricted retail precinct.
- Support the redevelopment of the Bellarine Village and Newcomb Shopping Centres by identifying opportunities to expand the centre which may include land acquisition, redeveloping existing car parking and/or encouraging multi-storey development.
- Prepare an urban design framework or structure plan for the Separation Street neighbourhood centre in Bell Park. The plan should investigate opportunities to develop a supermarket anchor within this centre and consider streetscape upgrades.
- Prepare an urban design framework or structure plan for the Shannon Ave, Geelong West. The plan should investigate opportunities to grow this centre and consider streetscape upgrades.



# RECOMMENDED CHANGES TO POLICY

## SUMMARY OF CHANGES TO THE GREATER GEELONG PLANNING SCHEME

Based on the findings contained in the Retail Strategy it is recommended that the following changes be made to the Greater Geelong Planning Scheme:

- A new policy context, including objectives to deliver convenient access to services, improved competition, walkability, continued support for existing centres and better urban design outcomes.
- an updated retail hierarchy which reflects the role and function of centres across the retail network
- an updated local policy which requires economic impact assessments to be undertaken for new development which challenge the retail hierarchy
- use of floor space caps applied as part of a schedule to the Commercial 1 Zone, to ensure that the timing and size of development will not impact on the retail hierarchy or other nearby centres.

## FLOORSPACE CAPS

### The Victoria Planning Provisions

Floor space caps (or maximum 'leasable floor area' as defined in Clause 73.01) require a planning permit in cases where a development exceeds the cap, even if a planning permit is not otherwise required for use.

In the Greater Geelong Planning Scheme, floor space caps can only be applied to land zoned Commercial 1 Zone in the form of a schedule to the zone. Furthermore, floor space caps can only apply to 'Shop' uses (other than Restricted retail premises).

A 'Shop' is defined at Clause 73.03 of the Greater Geelong Planning Scheme as:

*Land used to sell goods or services, or to hire goods. It includes the selling of bread, pastries, cakes or other products baked on the premises. It does not include*

*food and drink premises, gambling premises, landscape gardening supplies, manufacturing sales, market, motor vehicle, boat, or caravan sales, postal agency, primary produce sales or trade supplies.*

### Benefits of floor space caps

Floorspace caps further sharpen the definition of the City of Greater Geelong's preferred retail hierarchy. The floorspace caps are intended to make clear to development proponents just what the role and function of a given centre is in the hierarchy and the expectations around application assessment and approval. They provide a number of benefits to existing retail centres, potential investors, the community and Council. These benefits all relate to preserving the retail hierarchy and include:

- support co-location of services (non-retail) and/or infrastructure/investment. This is particularly relevant for Town centres in a regional settlement context, where these locations act as a 'heart' for the location community. Supporting a strong vibrant Town centre benefits the community and local council in particular
- promote and optimise accessibility and create more consolidated urban centres. Supporting this ensures efficient use of infrastructure and investment and benefits community, council and existing retail centres/investors
- manage impact on existing centres (i.e. significant overinvestment in new centres can undermine the viability of existing creating high vacancy and other social issues) – this benefits community, council, retail centres and investors
- ensuring that the amount of floorspace within the retail hierarchy is consistent with population growth demands.

In addition the caps provide certainty around investment location/size opportunities to reduce uncertainty risk and speculation – this benefits investors and retail centres in particular.

### How floor space caps will be applied in this Strategy

Floor space caps in the Greater Geelong Planning Scheme will be retained. In the past however, floor space caps have been applied inconsistently across Greater Geelong. This has created confusion over their role and purpose.

Table 7 identifies the recommended floor space caps for sub-regional and growth area locations. These caps are further discussed below for individual centres. These floor space caps relate to shop uses only.

This shows:

- existing floor space caps have been retained for some sub-regional centres and growth-area locations
- in other centres, floor space caps have been informed by the gravity model supportable floorspace demand (2026)
- in some individual cases, discussed below, an alternative floor space cap has been recommended.

Appendix 1, Table 14 shows the shop retail floorspace provision, 2016 to 2036 for centres in the hierarchy.



**TABLE 7: PROPOSED FLOOR SPACE CAPS**

NAME OF CENTRE	SIZE IN SQUARE METRES IN 2016 (SHOP)	OVERALL SQUARE METRES SUPPORTABLE FLOOR SPACE BY 2026 (SHOP)*	OVERALL SQUARE METRES SUPPORTABLE FLOOR SPACE BY 2036 (SHOP)*	EXISTING FLOOR SPACE CAP IN SCHEME 2016	PROPOSED FLOOR SPACE CAP SQUARE METRES (SHOP ONLY)
<b>Sub-regional centres</b>					
Corio	26,400	31,624	42,369	-	32,000
Leopold	18,000	23,338	31,454	30,000	30,000
Waurn Ponds	38,300	46,999	59,224	35,000	47,000
<b>Growth Areas</b>					
Armstrong Creek Town Centre	0	15,353	42,700	40,000	40,000
Fyansford (Hyland Street)	0	3,250	4,759	-	4,800
Horseshoe Bend North East	0	2,344	3,614	7,000	7,000
Jetty Road	4,100	3,994	5,375	6,000	6,000
Warralily	7,700	8,708	12,990	6,000	7,700
Kingston Downs	0	3,729	5,311	-	8,700
Armstrong Creek West	0	1,146	1,572	3,000	3,000
Lara West	0	516	762	-	5,000
Armstrong Creek East Precinct Local Activity Centre <sup>^</sup>	0	N/A	N/A	1,000	1,000
Armstrong Creek West Precinct Whites Road Local Activity Centre <sup>^</sup>	0	N/A	N/A	1,000	1,000
Armstrong Creek West Precinct Boundary Road Local Activity Centre <sup>^</sup>	0	N/A	N/A	1,000	1,000
West Precinct Train Station Local Activity Centre <sup>^</sup>	0	N/A	N/A	1,000	1,000
Armstrong Creek Horseshoe Bend Precinct Southern Local Activity Centre <sup>^</sup>	0	N/A	N/A	1,000	1,000
Armstrong Creek Horseshoe Bend Precinct Western Local Activity Centre <sup>^</sup>	0	N/A	N/A	1,000	1,000

<sup>^</sup> Supportable floor space was not calculated for local centres, however all floor space was included as an input into the SGS gravity model.

Note: In some instances shop floor space already exceeded existing caps. In most instances this occurs in an existing centre where changes of land use occur frequently but the overall floor space of the centre does not e.g. waurn ponds sub-regional centre.

## REGIONAL CENTRES

### Central Geelong

**Existing floor space total: 213,300 square metres**

**Existing shop floor space: 131,400 square metres**

**Current floor space cap: No**

**Recommendation:** Floor space cap not recommended.

Central Geelong sits at the top of our retail hierarchy and will remain the focus of investment, retail, education, culture, leisure, commerce, services and higher-density residential living.

The retail audit has identified that sub-regional centres compete strongly with Central Geelong, as they are conveniently located near residents and have a similar retail offering.

We have a number of strategies in place to strengthen the role of Central Geelong as a regional centre and create a point of difference with other sub-regional centres. A strong focus has been on encouraging arts and culture, hospitality and accommodation.

## SUB-REGIONAL CENTRES

A floor space cap, applied to sub-regional centres, will support the retail hierarchy, by giving us an opportunity to review the size, timing and offering of such centres through the planning permit process.

### Belmont sub-regional centre

**Existing floor space total: 44,000 square metres**

**Existing shop floor space: 32,500 square metres**

**Current floor space cap: No**

**Recommendation:** Floor space cap not recommended.

This centre is primarily a strip shopping centre which is anchored by a Coles and Kmart (discount department stores). The centre has a high proportion of hospitality and speciality shops. Property within the centre is controlled by multiple owners, making it difficult to manage in comparison to a large shopping complex. Paired with constant small changes to the use of land and multiple ownership patterns, make administrating a floor space cap for this centre complex.

Future floor space demand for this centre is estimated to be 20,800 square metres by 2036 (13,600 square metres of this relates to shop uses). While some of this growth may be accommodated within existing zoned land without significantly impacting the retail hierarchy, growth beyond this would likely require land rezoning enabling Council to consider the timing and impact of new development on the retail hierarchy.

### Leopold sub-regional centre

**Existing floor space total: 20,600 square metres**

**Existing shop floor space: 18,000 square metres**

**Current floor space cap: 30,000 square metres**

**Recommendation:** Retain existing floor space cap

Leopold is identified in the retail hierarchy as a sub-regional centre, servicing the Bellarine Peninsula. An Urban Design Framework and existing Development Plan Overlay (DPO30) currently guide the development of the centre. Planning policy has identified land to the north of the existing centre for future expansion. The existing floor space cap is considered sufficient to allow this centre to grow in line with population growth on the Bellarine Peninsula.

## Corio Shopping Centre

**Existing floor space total:** 27,500 square metres

**Existing shop floor space:** 26,400 square metres

**Current floor space cap:** No

**Recommendation:** Introduce a floor space cap of 32,000 square metres

The centre currently has 26,400 square metres of shop floor space. It is proposed to introduce a floor space cap of 32,000 square metres. This is the 2026 supportable shop floor space demand. By setting the cap above the current shop floor space, only proposals to increase the size of the centre above the cap will require a planning permit for use. This will enable Council to consider the timing and impact of new development on the retail hierarchy beyond the 2026 supportable floor space demand.

## Waurin Ponds sub-regional centre

**Existing floor space total:** 41,800 square metres

**Existing shop floor space:** 38,300 square metres

**Current floor space cap:** 35,000

**Recommendation:** 47,000 square metres

This centre has expanded in recent years to the current floor space of 41,800 square metres. The centre currently exceeds or is close to the current maximum floor space cap. It is proposed to increase the floor space cap to 47,000 square metres. Proposals to increase the size of the centre above the cap will require a planning permit enabling Council to consider the timing and impact of new development on the retail hierarchy.

## SPECIALISED CENTRE

### Pakington Street (Geelong West)

**Existing floor space total:** 43,100 square metres

**Existing shop floor space:** 29,200 square metres

**Current floor space cap:** No

**Recommendation:** Floor space cap not recommended

This centre is similar in size and character to Belmont, in that it is primarily a strip-shopping centre. However, it doesn't meet the definition of a sub-regional centre because it does not contain a discount department store.

This centre plays an important role in the Greater Geelong retail hierarchy. It acts as a core retail, commercial and community centre in the municipality, with a broader employment role.

Future floor space demand is forecast to be an additional 18,700 square metres by 2036 (8,400 of this relates to shop uses). Whilst some of this growth may be able to be accommodated within existing commercial zoned land, growth beyond 18,700 would likely require land to be rezoned enabling Council to consider the timing and impact of new development on the retail hierarchy.

## TOWN CENTRES

**Recommendation:** Do not apply floor space caps

Town centres are similar to neighbourhood centres, in that they support the daily retail needs of residents. However, they are often larger, due to the isolated nature of the townships. Additional retail investment should be encouraged in town centres as our analysis indicates that town centres can accommodate additional retail investment, without posing a threat to the hierarchy.

## NEIGHBOURHOOD CENTRES (IN EXISTING URBAN AREAS)

**Recommendation:** Floor space caps not recommended.

As most neighbourhood centres in Greater Geelong are 'land locked', requiring significant redevelopment of existing buildings and car parking areas or rezoning to accommodate additional growth, floor space caps are not recommended. Additionally, if rezoning of nearby land was required, it would enable Council to consider the timing and impact of the development on the retail hierarchy.

## NEIGHBOURHOOD CENTRES (IN AREAS EXPERIENCING GREENFIELD GROWTH)

### General

**Recommendation:** Various floor space caps between 3,000 and 8,700 square metres

There are several locations experiencing growth within Greater Geelong, including Armstrong Creek, Drysdale/Clifton Springs, Fyansford, Ocean Grove and Lara. The development of each area is supported by a precinct structure plan or development plan. The location, size and make up of centres have been agreed on and, in most instances, have also been reviewed by an independent Planning Panel.

All planned centres are located in convenient places for residents, and with their size determined by the estimated surrounding population. In most cases, planned centres have a current floor space cap.

We propose retaining floor space caps where they already exist and applying them where they don't. This will allow each centre to service a particular trade area.

Removing or increasing the floor space caps in these locations may:

- make it difficult for new centres to establish, as those established early are likely to dominate
- make established centres more attractive as an investment for new business and delay other planned centres from establishing
- remove an opportunity to review the impacts of additional retail floor space – both on the established hierarchy and any planned or existing centres
- delay residents in new communities having good access to essential retail services.

## **Kingston Downs Neighbourhood Activity Centre, Grubb Road, Ocean Grove**

**Planned retail floor space total: 11,202 square metres**

**Planned shop floor space: 8,688 square metres**

**Current floor space cap: No**

**Recommendation:** Floor space cap of 8,700 square metres.

The Ocean Grove Structure Plan 2007, and subsequent Amendment C60, rezoned:

- 9.7 hectares of land to Commercial 1 Zone and
- 14.5 hectare to the Commercial 2 Zone.

There is an approved development plan for the Kingston Neighbourhood Activity Centre and Industrial Estate which shows the location of future land uses, road network and other details (see Figure 18). A planning application (PP233/2016) has been approved to develop stage 1 of the Kingston Neighbourhood Centre. Separate permits have been granted for Convenience restaurant and Service station. The Centre due to open by the end of 2019.

The proposed neighbourhood centre will contain:

A total of 11,202 square metres of retail floor space, comprising:

- 8,688 square metres of floor space to the north of Coastal Boulevard (Commercial 1 Zone); and
- 1,969 square metres of floor space to the south (Commercial 2 Zone);
- key centre anchors including Woolworths and Aldi supermarkets, a Dan Murphy's liquor store and McDonalds.

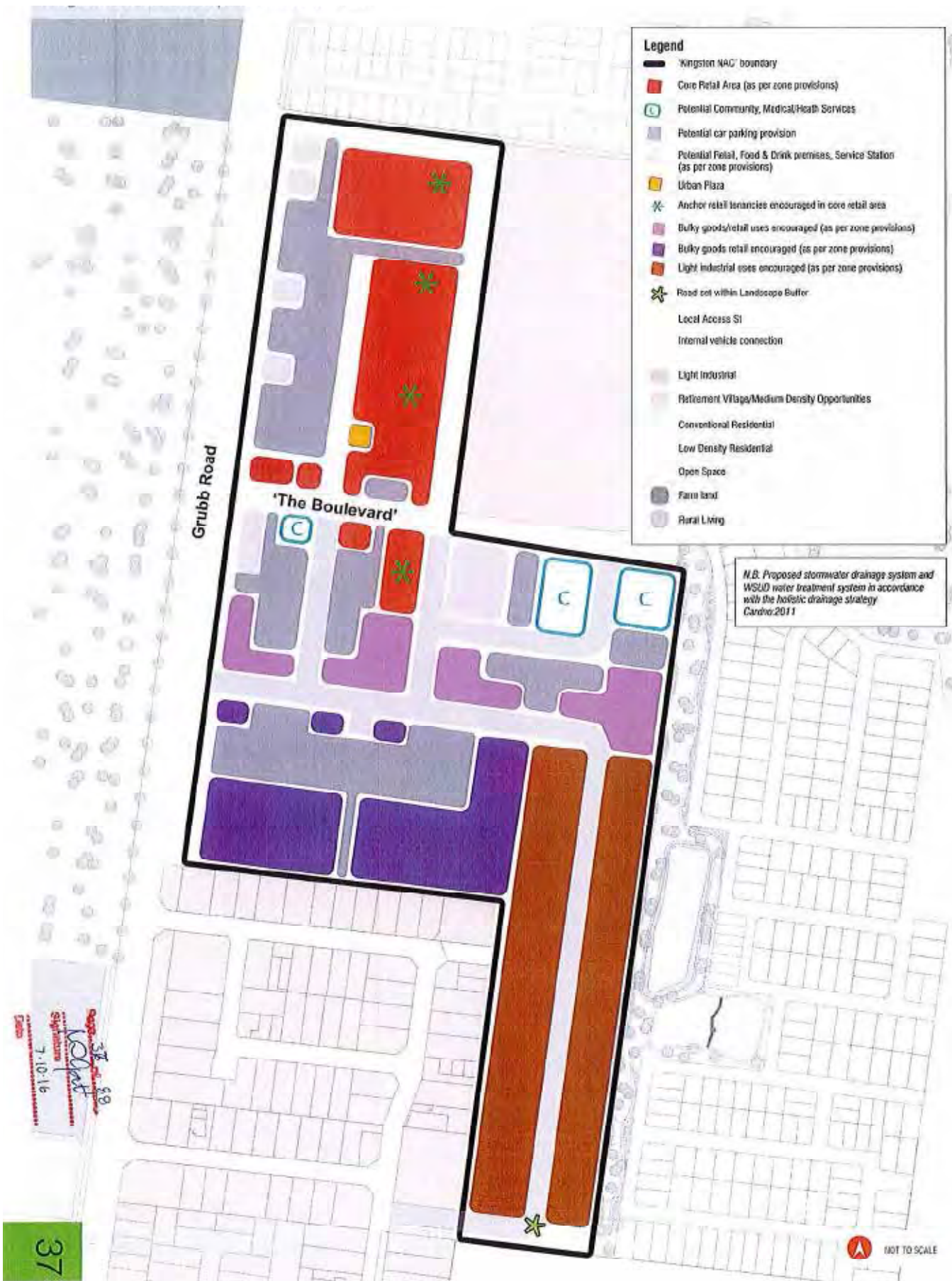
The northern side of the centre (Commercial 1 Zone) will consist of:

- a 3,895 square metre Woolworths;
- a 1,376 square metre Dan Murphy's;
- 3,202 square metres of floor space dedicated to specialty retail tenancies, which will comprise a variety of uses including shops, cafes, takeaway food premises and other retail uses; and
- 714 square metres dedicated to non-retail uses, such as office spaces and gym.

Taking into consideration the existing planning permit and that floor space caps do not apply to Commercial 2 Zone land, a floor space cap of 8,700 square metres should be applied to the Kingston Downs Neighbourhood Centre.

This is consistent with the planning permit on Commercial 1 Zone land. Under this cap, further development will then trigger an economic impact assessment and provide an opportunity to review the impact of further development on the retail hierarchy particularly the Ocean Grove Town Centre and Leopold Sub-regional Centre.

**FIGURE 30: KINGSTON DOWNS – APPROVED DEVELOPMENT PLAN**



## Warralily Neighbourhood Activity Centre – Armstrong Creek East Precinct

Retail floor space total: 9,625 square metres

Existing shop floor space: 7,700 square metres

Current floor space cap: 6,000 square metres

**Recommendation:** Increase floor space cap to 7,700 square metres

Known as The Village Warralily, this centre opened in 2017 and includes:

- a full line 3,800 square metre Woolworths supermarket
- 1,544 square metres of speciality retail
- 2,424 square metres of hospitality and other uses and
- 400 car parking spaces.

A subsequent planning permit (PP722/2016) has been approved to include a 1,600 square metre Aldi supermarket and 257 square metres of speciality retail within this centre. Combined with the existing centre, this means approximately 9,625 square metres will be dedicated to retail uses. This centre currently has a floor space cap of 6,000 square metres.

It is forecast that this centre could support 16,100 square metres of retail floor space (13,000 dedicated to shop uses) by 2036.

The precinct structure plan anticipates there will be a number of non-retail uses within this centre, including office and community uses. Sufficient land has already been identified for this purpose.

Prior to granting additional planning permits for retail development in this centre, we should consider whether there is sufficient land available to deliver a variety of uses within the centre and review the impact on other planned centres within Armstrong Creek.

## Lara West Neighbourhood Centre

Planned Retail floor space total: 5,000

Current Floor space cap: No

**Recommendation:** Introduce a floor space cap of 5,000 square metres

The Lara West growth area is located on the western edge of Lara. A neighbourhood centre has been identified in the approved precinct structure plan (amendment C246) as needed to service future residents. Amendment C246 suggests the size of the centre should be approximately 5,000 square metres and include a full-line supermarket and speciality retail, however no floor space cap was proposed. Forecasting suggests that a centre of this size is appropriate. A planning permit has not been lodged to develop the neighbourhood centre, however subdivision permits to commence development of the land have been lodged. The proposed centre would be delivered between 2020 and 2030.

It is recommended that a 5,000 square metre floor space cap be applied to this centre. Additionally, the Lara West Neighbourhood Centre should be included within the retail hierarchy and identified as our preferred location for additional retail services to support residential growth within Lara.

## LOCAL ACTIVITY CENTRES

**Recommendation:** Floor space caps of 1,000 square metres retained for all local activity centres within the Armstrong Creek Growth Area.

The retail audit accounted for all local activity centres, but did not attribute growth modelling to them.

The Armstrong Creek Growth Area has been planned to accommodate a number of smaller local activity centres. Floor space caps of 1000 square metres have been applied to these, to make sure the majority of retail growth is directed to identified neighbourhood activity centres.

## ASSESSING RETAIL DEVELOPMENT APPLICATIONS

A revised planning policy aims to provide convenient access to retail services, by supporting the established retail centre hierarchy. Significant departures from the established hierarchy may be supported to address changes in development outcomes, trends in retail or supply opportunities, but only where clear merit and a net community benefit can be demonstrated.

There is also a need to ensure the design and layout of new, revitalised or expanded centres minimise amenity impacts on surrounding uses and contribute positively to the streetscape.

Where a planning permit is required for a retail use, the application must be accompanied by an economic impact assessment.

The following information should be provided:

### General

- Amount of overall retail floorspace.
- Number of retail tenancies and their floor area.
- All proposed land uses.
- The location and amount of floor space dedicated to shop uses within the development if the centre is listed in the schedule to the Commercial 1 Zone.
- Assessment of any likely impact on existing, planned or approved retail facilities.
- Description of anticipated benefits to the community (whether or not these can be monetised).
- Estimated net employment benefits (if any).

### Retail Supply

- The existing supply of retail floor space serving the catchment, by type, size, role and function.
- Details of any other proposals for new or expanded retail development in the catchment or beyond, which

could have an effect on the proposal, existing centres or planned development.

- Demonstrate how the proposed retail floorspace would fit into the Geelong retail centre hierarchy as detailed in Clause 21.19.
- Demonstrate whether the existing supply of retail floorspace is adequate to meet existing and foreseeable demand levels over a 15 year period.
- Whether there are any existing retail gaps in merchandise/services which the proposal will fill.

### Retail Demand

- The need or demand for new or expanded retail floorspace provision to serve the identified catchment, taking into consideration the objectives and strategies contained in Clause 21.19.
- The current catchment population, forecast population and retail spending growth rate for a 15 year period.
- The extent to which the proposal will draw trade from beyond the catchment, and from passing trade.
- Whether the proposed or expanded retail provision would mean an expansion in the size of the catchment of that centre.
- Impacts on the catchment of nearby centres and the effect this may have on centres within those catchments.

### Escape Spending

- Estimates of existing levels of escape spending from the catchment.
- Estimates on the share of this escape spending that could reasonably be retained by the proposal.

### Impact on Existing Retail Facilities

- Assessment of the expected trading effects on existing or planned retail facilities based on each of the following scenarios; where relevant:

- The proposal did not go ahead and existing centres in the catchment continue to trade.
- The proposal is located adjoining an existing nearby centre already identified in the retail hierarchy or
- Where an out of centre development is proposed, if the centre was approved.
- Demonstration of the extent to which the proposal is expected to lead to an overall improvement in the provision of retail facilities to the catchment population, including the potential for retaining spending that would otherwise escape to other centres.
- Demonstrate that the proposal will improve access to services by reducing travel times for residents.
- Demonstrate that a proposal which results in a development exceeding the maximum floor area specified in the schedule to the Commercial 1 Zone, does not impact on the timing, delivery and viability of other retail centres including planned centres.

The level of information to be provided in an economic impact assessment will be at the discretion of Council. Council will decide on the extent of information required on the basis of the timing and size of the retail floorspace component for which approval is sought.

Prospective developers should discuss their proposals with Council officers prior to formal lodgement of a planning permit application or rezoning request so that the extent of supporting information required by Council can be ascertained. Council reserves the right to request additional information on economic impact from the applicant, if required.

In addition to providing an economic impact assessment, out-of-centre applications must demonstrate:

- Why the proposal cannot be accommodated within an existing centre identified in the retail hierarchy.
- Why the proposal cannot be accommodated on the border of an existing centre identified in the retail hierarchy.
- That the proposal will not significantly impact on the character and amenity of the surrounding area.
- That the location of the centre will reduce travel times for the community when compared to nearby existing centres with a similar retail offer.
- That the centre has excellent connectivity to the surrounding residential area(s).
- That the proposal will not result in traffic and safety conflicts between cars, trucks and pedestrians external to the site.

Where a planning permit is required for buildings and works of new, revitalised or expanded centres, it will be policy to:

- Ensure blank walls and loading bays are not adjacent to sensitive land uses and key vehicle and pedestrian accessways to a centre.
- Ensure illuminated signage does not impact on sensitive land uses.
- Ensure new development provides visually interesting and active street frontages where buildings abut the street or a public space.
- Encourage car parking areas to be located to the side or rear of a centre.
- Ensure car parking areas do not visually dominate a centre by providing landscaping including canopy trees.
- Ensure there are safe and convenient pedestrian connections from car parking areas and the surrounding footpath network to the entrance(s) of a centre.

# CONCLUSION



**The retail sector in Greater Geelong will need to grow to meet future demand for retail services by 2036. Support to grow the retail sector within planned and existing retail centres will continue.**

A significant amount of retail planning and development has occurred in Greater Geelong over the last 10 years, to meet existing and forecast population growth. Most residents currently have access to a retail centre capable of meeting their daily retail needs, within a 20-minute drive of their home. Population growth will see existing centres increase retail turnover densities, creating demand for additional retail floor space. This strategy seeks to direct this demand for floor space to existing retail centres, supporting the established retail hierarchy and meeting a number of broader planning policy objectives, such as urban consolidation.

This may not always be possible, as demand for new centres in out-of-centre locations will continue. However, an updated planning policy will strengthen the assessment criteria for these applications, making sure the established retail hierarchy will not be undermined.

# APPENDIX 1: RETAIL METHOD

The following provides additional detail regarding the retail gravity model approach, data inputs and assumptions used for the Geelong Retail Strategy.

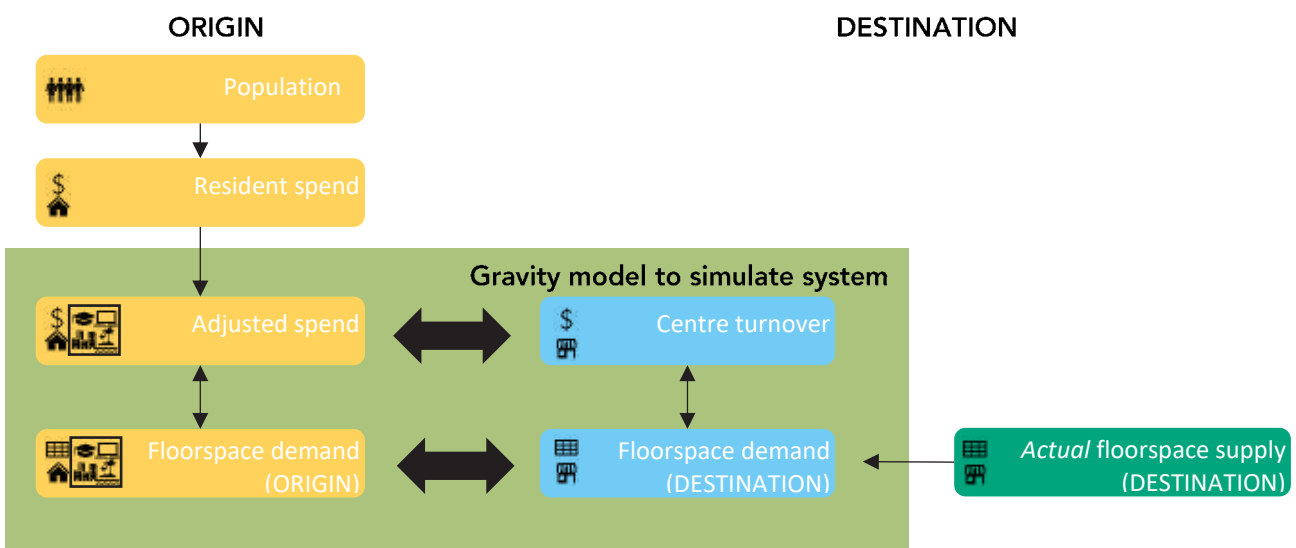
## 1.1 Retail model method overview

Forecast population, retail expenditure demand and known current and future retail floorspace was combined in a custom gravity model to simulate the Geelong retail economy. The model was used to understand how the system is currently performing and likely to perform in the future under a base case, or business as usual, scenario.

The model also forms the basis of supportable floorspace and floorspace caps across the centre hierarchy.

Figure 1 provides a high-level overview of the retail modelling process. The three coloured components (Orange, Blue and Green) are summarised below and further detailed in the remainder of this appendix.

**FIGURE 1: GEELONG RETAIL GRAVITY MODEL APPROACH OVERVIEW**



Source: SGS Economics and Planning

### RETAIL DEMAND AND EXPENDITURE (ORANGE)

Retail expenditure by small area is estimated based on population forecasts, expenditure per capita trends and escape/capture adjustments. Adjustments seek to capture the impact of online, student, worker, and tourist expenditure flows on the system.

### RETAIL SUPPLY AND TURNOVER (BLUE)

The gravity model assumes a closed system (once addressing expenditure escape/capture adjustments noted above). Therefore in 2016 (the base year) the system wide retail turnover is equal to system wide adjusted expenditure. This is allocated down to individual centres and store types based on the retail floorspace audit data, actual turnover data for selected centres and relativities in retail turnover densities for various store/commodity types.

### RETAIL ECONOMY SIMULATION (GREEN)

A gravity model is then used to simulate the flow of shoppers to different centres taking into account the ease of access (i.e. travel time) and the estimated attractiveness of the various centres. In simplest terms the model assumes:

- if all centres were identical, I would spend money at the closest,
- if all centres were at my doorstep, I would go to the biggest and most 'attractive' centre.

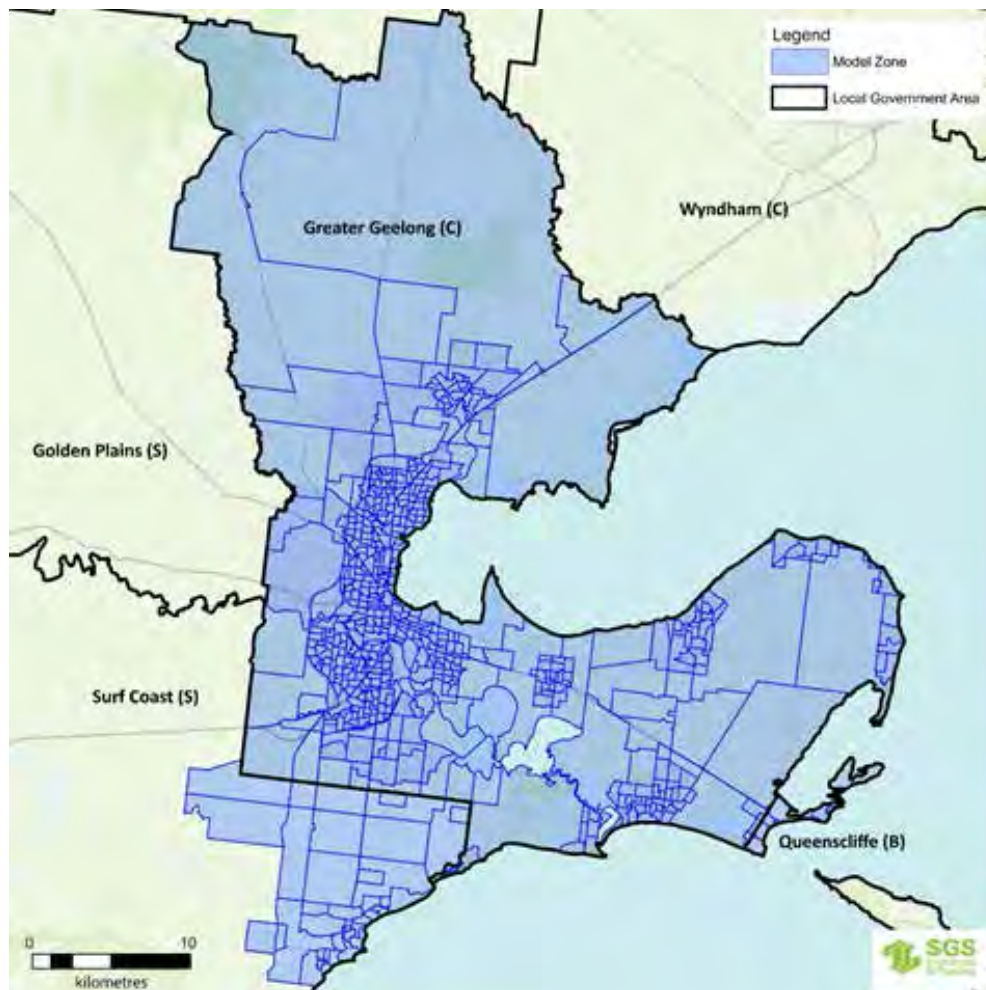
The model is calibrated for 2016, forecast expenditure and additional floorspace is then added and future flows and performance of existing/new centres are simulated.

A gravity modelling approach is well suited to a largely self-contained and complex system such as Greater Geelong because:

- all spending across the retail system is accounted for once, and only once,
- it avoids having to define individual centre catchments which may double count and/or exclude areas when considered at a system wide level, and
- catchments are dynamic, based on demand, supply, transport and retail segments.

## 1.2 Modelling scope and dimensions

To create a largely self-contained system the model includes all of the City of Greater Geelong, Queenscliff and parts of Surf Coast. From an origin perspective the model includes 606 zones (See Figure 2). Population and various expenditure (further discussed in Section 1.3) is estimated for each origin zone. From a destination perspective the model includes 151 current and future centre locations. Zones and centres have been aligned to 11 sub-regions across Greater Geelong (see Figure 3) for summary reporting purposes. These subregions broadly align with urban settlements.





- |  |  |
|--|--|
| <span style="color: #90EE90;">■</span> Geelong (Central)         | <span style="color: #90EE90;">■</span> Leopold         |
| <span style="color: #ADD8E6;">■</span> Geelong (Corio Norlane)   | <span style="color: #FFA07A;">■</span> Drysdale        |
| <span style="color: #FF0000;">■</span> Geelong (Armstrong Creek) | <span style="color: #2F4F4F;">■</span> Ocean Grove     |
| <span style="color: #FFD700;">■</span> NGGA                      | <span style="color: #800080;">■</span> NE Bellarine PE |
| <span style="color: #FFDAB9;">■</span> WGGA                      | <span style="color: #D3D3D3;">■</span> Remainder       |
| <span style="color: #008000;">■</span> Lara                      | <span style="color: #000000;">—</span> Major Roads     |



## 1.3 Retail demand and expenditure forecasting

The following section presents the approach to estimating retail expenditure demand anticipated across the Greater Geelong retail system. The two key inputs include:

- population – developed by SGS Economics and Planning in 2016 and assumes a 2 per cent population growth across Greater Geelong
- base expenditure per capita – sourced from 2016 MarketInfo MDS
- retail trends – sourced from ABS Retail Trade and IBIS World.

Several other datasets related to retail trends were used and discussed below.

### RETAIL EXPENDITURE FORECASTING OVERVIEW

SGS has forecast retail expenditure in Greater Geelong using the following steps:

- Step 1: Expenditure per capita
- Step 2: Projected expenditure per capita
- Step 3: Total resident retail expenditure
- Step 4: Total adjusted retail expenditure

As noted above Queenscliff LGA and the Torquay part of Surf Coast LGA are also included in the model and associated expenditure analysis. Results which include these areas outside the City of Greater Geelong have been clearly identified.

### STEP 1: PER CAPITA EXPENDITURE

Expenditure per capita for each ABS Statistical Area 1 and by 10 commodity types is sourced from 2016 MarketInfo - Market Data Systems (MDS). MarketInfo uses a microsimulation approach that draws on the latest ABS Household Expenditure Survey (HES), 2016 ABS Census and other datasets to create small area expenditure estimates for all of Australia. Expenditure includes all expenditure behaviour, including online and at physical stores.

The table below summarises average expenditure per capita by commodity types for Greater Geelong and comparator areas. This highlights that Geelong residents, on average, spend below the State and Metropolitan Melbourne averages and have a largely similar expenditure profile to the Regional Victorian average.

Given the diverse urban and demographic profile of Greater Geelong these average expenditure trends can vary considerably within the municipality. SA1 data from MarketInfo 2016 is mapped to the Origin zones to capture localised variations in per capita spend.

Table 2 provides a summary of this localised variation across the 11 Subregions of Geelong. Significant (greater than 5 per cent) variations above or below the Greater Geelong average has been highlighted green and red respectively. This highlights higher spend in Ocean Grove and Drysdale and lower spend in Geelong (Corio Norlane).

**TABLE 1: 2016 ANNUAL PER CAPITA SPEND BY COMMODITY TYPE, 2016 DOLLARS**

COMMODITY GROUP	GREATER GEELONG		VICTORIA	REGIONAL VICTORIA	GREATER MELBOURNE
	\$	% DIFF FROM VIC			
Food/Groceries	\$3,415	99%	\$3,432	\$3,323	\$3,470
Pharmaceutical goods	\$1,195	95%	\$1,261	\$1,179	\$1,290
Tobacco/Bottle shops	\$1,570	105%	\$1,499	\$1,606	\$1,461
Restaurants/Cafes/ Takeaway	\$1,708	89%	\$1,909	\$1,691	\$1,986
Clothing/Shoes	\$1,138	89%	\$1,277	\$1,134	\$1,327
Personal	\$1,102	89%	\$1,244	\$1,055	\$1,310
Furniture/White goods/Manchester	\$1,379	96%	\$1,430	\$1,386	\$1,445
Electronics	\$1,606	92%	\$1,754	\$1,604	\$1,806
Hardware/Gardening	\$823	92%	\$894	\$831	\$915
Newsagent/Lotto	\$650	98%	\$664	\$651	\$668

Source: MarketInfo, 2016.

**TABLE 2: VARIATION OF ANNUAL PER CAPITA SPEND BY SUB-REGION, 2016 DOLLARS**

	FOOD/ GROCERIES	PHARMA/ GOODS	TOBACCO/ BOTTLE SHOPS	RESTAURANTS/ CAFES/ TAKEAWAY	CLOTHING/ SHOES	PERSONAL	FURNITURE/ WHITE GOODS/ MANCHESTER	ELECTRONICS	HARDWARE/ GARDENING	NEWSAGENT/ LOTTO	TOTAL RETAIL
Drysdale	\$3,792	\$1,235	\$1,608	\$1,750	\$1,209	\$1,149	\$1,564	\$1,635	\$984	\$741	\$15,668
Geelong (Armstrong Creek)	\$3,451	\$1,045	\$1,632	\$1,678	\$1,189	\$949	\$1,331	\$1,553	\$834	\$609	\$14,271
Geelong (Central)	\$3,447	\$1,238	\$1,573	\$1,820	\$1,198	\$1,181	\$1,409	\$1,680	\$827	\$672	\$15,047
Geelong (Corio Norlane)	\$2,893	\$1,025	\$1,532	\$1,361	\$887	\$787	\$1,099	\$1,396	\$598	\$509	\$12,087
Lara	\$3,373	\$1,168	\$1,596	\$1,696	\$1,117	\$1,195	\$1,372	\$1,579	\$827	\$647	\$14,571
Leopold	\$3,540	\$1,182	\$1,600	\$1,685	\$1,120	\$1,199	\$1,423	\$1,613	\$870	\$654	\$14,886
NE Bellarine Pe	\$3,837	\$1,359	\$1,748	\$1,629	\$1,009	\$908	\$1,525	\$1,578	\$922	\$718	\$15,233
Northern Geelong Growth Area	\$3,501	\$1,206	\$1,557	\$1,760	\$1,217	\$1,238	\$1,396	\$1,553	\$752	\$681	\$14,863
Ocean Grove	\$3,717	\$1,216	\$1,529	\$1,810	\$1,271	\$1,267	\$1,541	\$1,677	\$999	\$717	\$15,744
Remainder	\$3,653	\$1,328	\$1,469	\$1,729	\$1,229	\$1,095	\$1,509	\$1,547	\$999	\$695	\$15,255
Western Geelong Growth Area	\$4,225	\$1,471	\$1,903	\$2,267	\$1,436	\$1,315	\$1,632	\$1,826	\$1,156	\$879	\$18,110

Note figures over +/- 5% of the Greater Geelong Average have been highlighted Green (above) or Red (below)

Source: Market Info, 2016

## STEP 2: PROJECTED PER CAPITA EXPENDITURE

Per capita expenditure by commodity group is then projected to 2036 using trends in the ABS Retail Trade Survey (Cat. 8501.0) and broad retail industry trends evident in IBIS World and other industry publications. These commodity type growth rates are then applied to each zone within Greater Geelong to retain local variation in spending behaviour.

Table 3 shows projected growth in per capita expenditure by commodity group out to 2036. From this we can observe that Pharmaceutical Goods, Clothing/Shoes and Electronics represent the largest increase in expenditure going forward.

**TABLE 3: PROJECTED GREATER GEELONG SPEND PER CAPITA BY COMMODITY TYPE, 2016-36, 2016 DOLLARS**

COMMODITY TYPE	2016	2026	2036	CHANGE	2016 - 36 GROWTH RATE
Food/Groceries	\$3,415	\$3,773	\$4,164	\$750	1.00%
Pharmaceutical goods	\$1,195	\$1,430	\$1,683	\$488	1.73%
Tobacco/Bottle shops	\$1,570	\$1,699	\$1,849	\$279	0.82%
Restaurants/Cafes/Takeaway	\$1,708	\$1,939	\$2,188	\$479	1.24%
Clothing/Shoes	\$1,138	\$1,349	\$1,567	\$429	1.61%
Personal	\$1,102	\$1,260	\$1,426	\$324	1.30%
Furniture/White goods/ Manchester	\$1,379	\$1,602	\$1,834	\$455	1.44%
Electronics	\$1,606	\$1,910	\$2,213	\$607	1.62%
Hardware/Gardening	\$823	\$957	\$1,091	\$268	1.42%
Newsagent/Lotto	\$650	\$368	\$86	-\$564	-9.61%
Total Spend per capita	\$14,586	\$16,289	\$18,100	\$3,515	1.09%

Source: SGS Economics and Planning based on Market Info, ABS Retail Trade and other sources

### STEP 3: TOTAL RESIDENT RETAIL EXPENDITURE

Expenditure per capita projections are then multiplied by zone level population projections to generate total resident expenditure forecasts. Results for the whole of Greater Geelong by commodity type and each subregion are presented in Table 4 and Table 5.

This highlights a total resident expenditure pool of \$3,459 million in 2016. Over the next 20 years this will increase by 3.09 per cent per annum in real terms. This is partly due to population growth (2 per cent) and partly due to increased real spend per capita (1 per cent).

Growth in resident expenditure largely follows population growth, with Armstrong Creek, NGGA, WGGA and Geelong (Central) all seeing strong growth in resident expenditure.

An additional \$354 million is also estimated in neighbouring Surf Coast (part) and Point Lonsdale LGA. These are considered when modelling escape/capture expenditure flows.

**TABLE 4: PROJECTED GREATER GEELONG RESIDENT SPEND BY COMMODITY GROUP, 2016-36 (\$ MILLION), 2016 DOLLARS**

COMMODITY TYPE	2016	2026	2036	CHANGE	2016 - 36 GROWTH RATE
Food/Groceries	\$810	\$1,060	\$1,464	\$654	3.00%
Pharmaceutical goods	\$283	\$402	\$591	\$308	3.75%
Tobacco/Bottle shops	\$372	\$477	\$650	\$278	2.83%
Restaurants/Cafes/Takeaway	\$405	\$545	\$769	\$364	3.26%
Clothing/Shoes	\$270	\$379	\$551	\$281	3.63%
Personal	\$261	\$354	\$501	\$240	3.31%
Furniture/White goods/ Manchester	\$327	\$450	\$645	\$318	3.45%
Electronics	\$381	\$537	\$778	\$397	3.64%
Hardware/Gardening	\$195	\$269	\$383	\$188	3.44%
Newsagent/Lotto	\$154	\$103	\$30	-\$124	-7.82%
Total Geelong resident spend	\$3,459	\$4,577	\$6,362	\$2,904	3.09%

Source: SGS Economics and Planning based on Market Info and ABS Retail Trade series.

**TABLE 5: PROJECTED RESIDENT SPEND BY SUB REGION, 2016-36 (\$MILLION), 2016 DOLLARS**

	2016	2026	2036	CHANGE	2016 - 36 GROWTH RATE
Lara	\$223	\$300	\$394	\$171	2.88%
Northern Geelong GA	\$16	\$18	\$259	\$243	14.84%
Geelong (Corio Norlane)	\$491	\$576	\$671	\$180	1.57%
Western Geelong GA	\$6	\$9	\$291	\$285	21.24%
Geelong (Central)	\$1,683	\$2,053	\$2,445	\$762	1.89%
Geelong (Armstrong Creek)	\$92	\$370	\$647	\$554	10.22%
Leopold	\$180	\$256	\$345	\$165	3.29%
Drysdale	\$198	\$289	\$398	\$199	3.53%
Ocean Grove	\$290	\$358	\$448	\$158	2.20%
NE Bellarine Pe	\$110	\$148	\$193	\$83	2.87%
Remainder	\$168	\$200	\$271	\$103	2.41%
<b>Total Geelong resident spend</b>	<b>\$3,459</b>	<b>\$4,577</b>	<b>\$6,362</b>	<b>\$2,904</b>	<b>3.09%</b>
<i>Surf Coast (part) and Point Lonsdale resident spend</i>	<i>\$354</i>	<i>\$493</i>	<i>\$682</i>	<i>\$328</i>	<i>3.33%</i>
<i>Total system resident spend</i>	<i>\$3,813</i>	<i>\$5,069</i>	<i>\$7,045</i>	<i>\$3,232</i>	<i>3.12%</i>

Source: SGS Economics and Planning based on Market Info and ABS Retail Trade series.

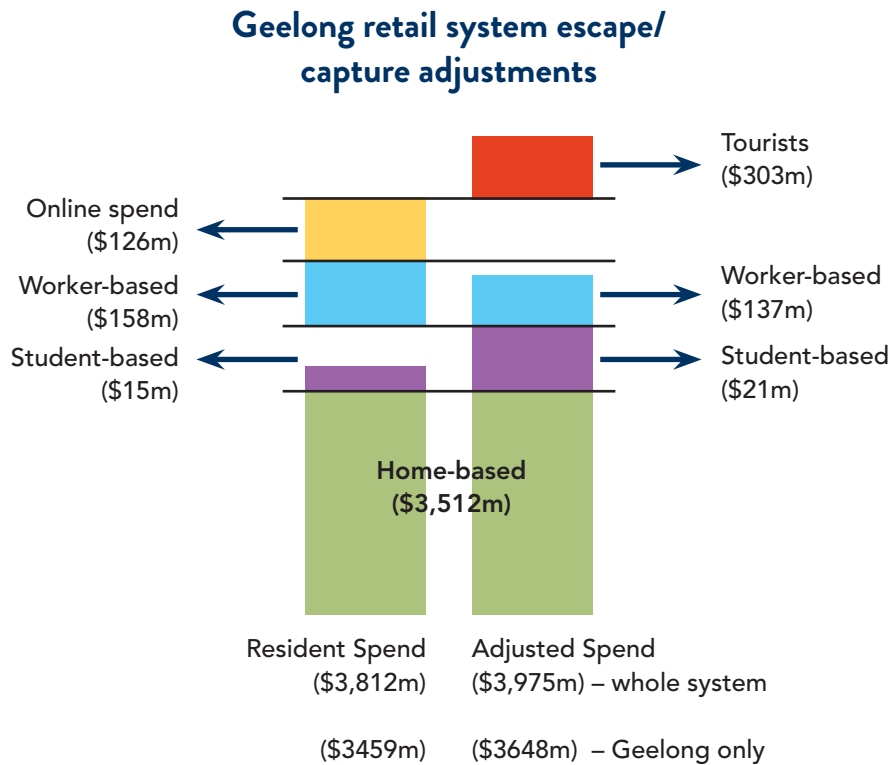
#### STEP 4: TOTAL ADJUSTED RETAIL EXPENDITURE

While a large proportion of retail spend is still linked to a person's place of residence, spending decisions are also linked to place of work, study (for tertiary students in particular) and tourism. Online retailing has also increased its role and impact on this system. These factors vary spatially and across commodity/store types and can significantly influence the actual amount and location of retail demand.

SGS has completed analysis on each factor and adjusted expenditure accordingly to estimate an adjusted origin spend. A summary of the overall effect of these adjustments is presented in Figure 4 below. These adjustments were completed at a system-wide level, including all of Greater Geelong, Surf Coast (part) and Queenscliff LGAs.

Key assumptions for each component is further discussed on next page (84).

**FIGURE 4: SYSTEM ESCAPE/ CAPTURE AND EXPENDITURE ADJUSTMENTS**



#### STEP 4A: ONLINE ESCAPE EXPENDITURE

While online retail growth is still strong, it is slowing. Consumer preferences continue to evolve and emerging trends (evident in 18 to 35 year olds) shows a focus on wanting an increasingly unique 'retail experience' rather than a homogenous product at the lowest price.

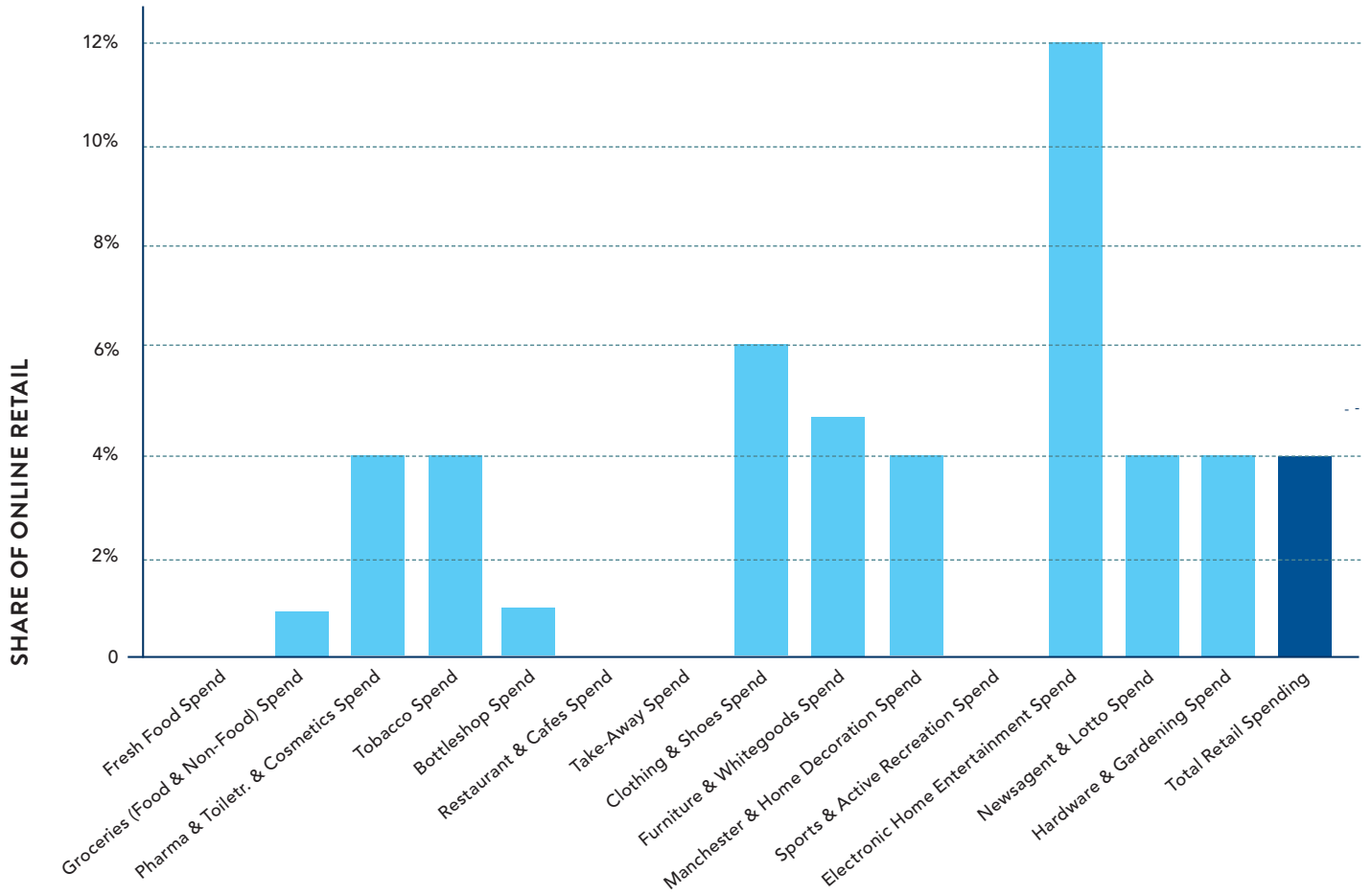
When online retailing emerged, it was initially seen as a direct competitor to physical retailing. However, multi-channel is increasingly being used in retailing, where manufacturers and physical retailers have attempted to set up online shops to complement their offer. Increasingly, retailers will invest as much in their physical store front as their online presence and gain sales from both. This will increasingly blur the lines of 'online versus physical'.

Given uncertainty about the future, SGS has not sought to estimate future trends in online retail or the role of multi-channelling. Rather, it has assumed that the online 'leaked' shares conservatively remain fixed per the latest Productivity Commission report. This is the share of expenditure that leaves the catchment entirely due to online retailing, there are further online sales which will remain in the local system due to multi-channelling of local retailers.

The figure below shows the estimated online leakage share by commodity group. Perishable commodities are assumed to lose a negligible share of turnover to online retailing. For other non-perishable commodities, the overall online share of retail sales has been applied.

<sup>1</sup>Productivity Commission, 'Economic Structure and Performance of the Australian Retail Industry', November 2011.

**FIGURE 5: ONLINE RETAIL SHARES BY COMMODITY GROUP**



Source: SGS Economics and Planning based on Productivity Commission, 2011.

### STEP 4B/C: WORKER AND STUDENT ESCAPE/ CAPTURE ADJUSTMENTS

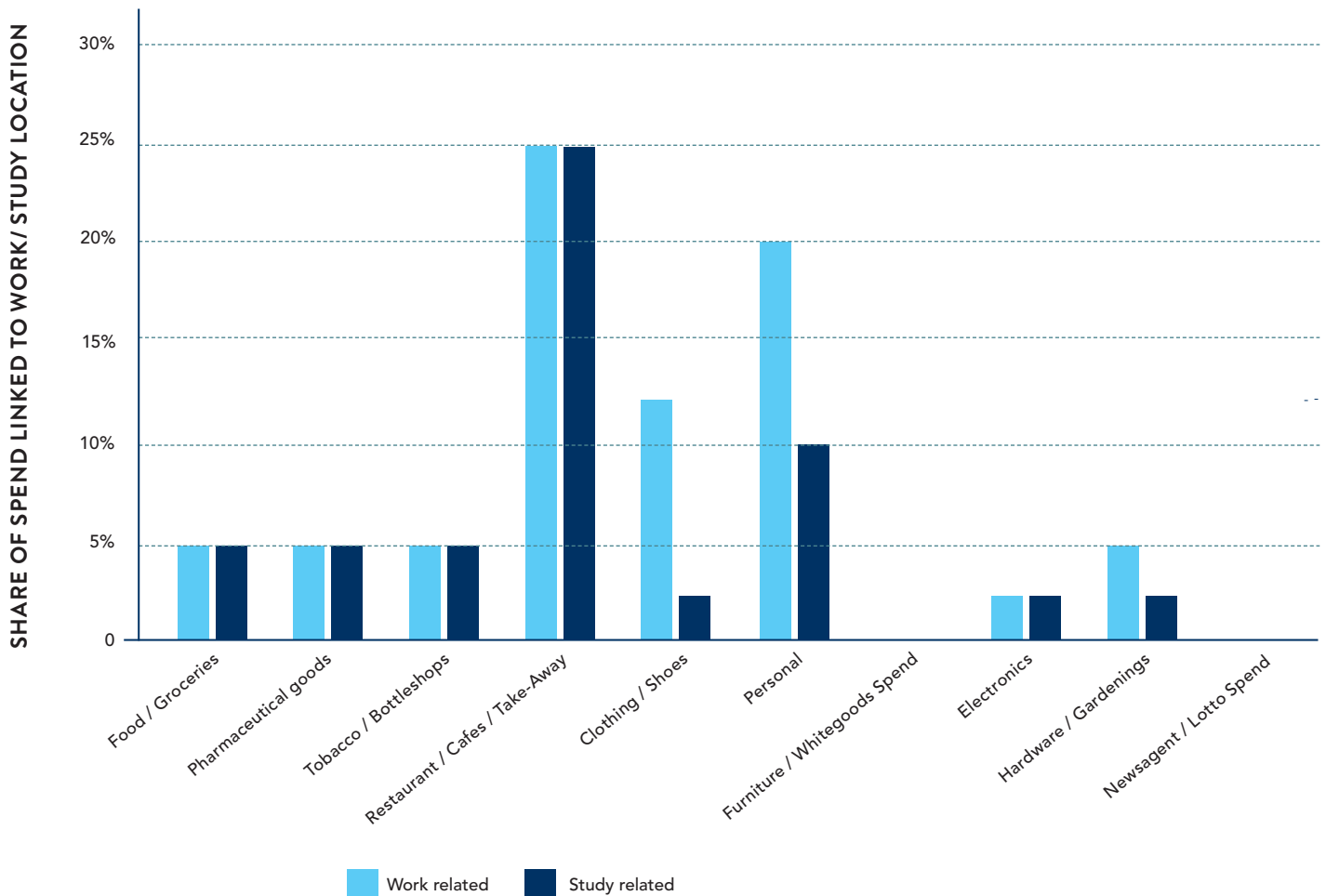
Resident expenditure is spatially reallocated to account for retail spending linked to work and/or study (tertiary) locations, this factors both flows within and in/out of the Geelong system. Overall there is a net inflow of students and outflow of workers.

The redistribution of expenditure is completed as follows:

- resident workers (51 per cent of total population) and tertiary students (6 per cent of total population) are identified based on 2016 ABS Census
- a proportion of resident worker and tertiary student spend is then removed from each resident location. Spend reallocation rates are presented in Figure 6 below. This results in the removal of \$158 million based on worker expenditure and \$15 million based on student expenditure in 2016. Similar shares are removed in forecast periods

- the number of workers and tertiary students by place of work/institution within Geelong is initially estimated from 2016 ABS Census (with adjustments to account for undercount) and uCube Higher Education Statistics. Worker and tertiary student estimates are forecast out to 2036 based on SGS zone level employment and student forecasts
- expenditure per worker and tertiary student is then added back into the system. The expenditure profile for workers and students is based on the average estimated in dot point two above. This expenditure is then added back into the system based on the location of jobs and tertiary institutions. This results in the addition of \$137 million based on worker expenditure and \$21 million based on student expenditure. Similar shares are added in forecast periods.

**FIGURE 6: STUDENT AND WORKER SPEND REALLOCATION SHARES**



Source: SGS Economics and Planning based on review of general literature and research.

- the number of workers and tertiary students by place of work/institution within Geelong is initially estimated from 2016 ABS Census (with adjustments to account for undercount) and uCube Higher Education Statistics. Worker and tertiary student estimates are forecast out to 2036 based on SGS zone level employment and student forecasts
- expenditure per worker and tertiary student is then added back into the system. The expenditure profile for workers and students is based on the average estimated in dot point two above. This expenditure is then added back into the system based on the location of jobs and tertiary institutions. This results in the addition of \$137 million based on worker expenditure and \$21 million based on student expenditure. Similar shares are added in forecast periods.

#### STEP 4D: TOURISM CAPTURE OF EXPENDITURE

Expenditure is adjusted to account for visitor expenditure, which is added to the system.

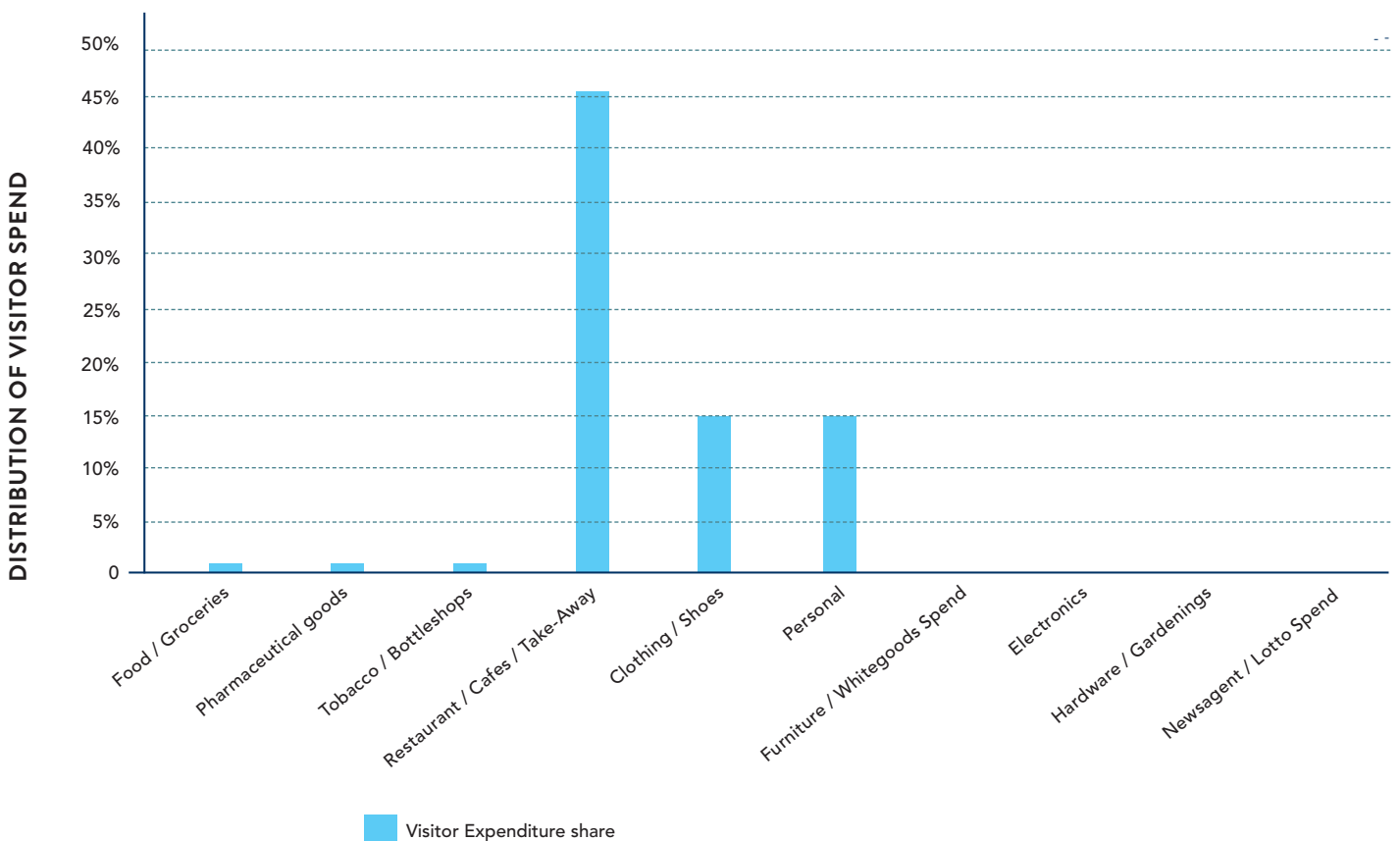
The is completed as follows:

- REMPLAN tourism data, provided by council, is used to estimate visitor total spend and numbers (incorporating domestic day, domestic overnight and international visitors). This data identifies 7.5 million visitors in 2016 with an average spend of \$40 per visitor. This represents a total expenditure pool of \$303 million in 2016. Visitor

projections are then based on Victoria wide population growth, as the largest share of visitors are from within the state

- total spend is then allocated across the commodity types based on Figure 7 assumptions
- tourism expenditure is then distributed spatially based on Arts, Recreation and Accommodation related employment as a proxy for tourism locations
- the number of workers and tertiary students by place of work/institution within Geelong is initially estimated from 2016 ABS Census (with adjustments to account for undercount) and uCube Higher Education Statistics. Worker and tertiary student estimates are forecast out to 2036 based on SGS zone level employment and student forecasts
- expenditure per worker and tertiary student is then added back into the system. The expenditure profile for workers and students is based on the average estimated in dot point two above. This expenditure is then added back into the system based on the location of jobs and tertiary institutions. This results in the addition of \$137 million based on worker expenditure and \$21 million based on student expenditure. Similar shares are added in forecast periods.

**FIGURE 7: DISTRIBUTION OF TOTAL TOURISM SPEND BY COMMODITY TYPE**



Source: SGS Economics and Planning

## STEP 4D: TOURISM CAPTURE OF EXPENDITURE

Expenditure is adjusted to account for visitor expenditure, which is added to the system.

The is completed as follows:

- REMPLAN tourism data, provided by council, is used to estimate visitor total spend and numbers (incorporating domestic day, domestic overnight and international visitors). This data identifies 7.5 million visitors in 2016 with an average spend of \$40 per visitor. This represents a total expenditure pool of \$303 million in 2016. Visitor projections are then based on Victoria wide population growth, as the largest share of visitors are from within the state
- total spend is then allocated across the commodity types based on Figure 7 assumptions.
- tourism expenditure is then distributed spatially based on Arts, Recreation and Accommodation related employment as a proxy for tourism locations.

## OTHER FORMS OF ESCAPE/CAPTURE OF EXPENDITURE

Beyond these major components of retail escape/capture of expenditure there is still likely to be a small amount of retail expenditure flowing in/out of the system for other reasons. Analysis of the 2010-11 Victorian Integrated Survey of Travel and Activity (VISTA) suggests that the net flow (-87 trips) (retail trips out of Geelong less retail trips into Geelong) represents less than 0.2% of all retail trips originating from Geelong (44,864) on an 'Average Day'. Given this, the model has ignored this small aspect of escape expenditure.

Table 6 and Table 7 present these final adjusted expenditure estimates used to determine retail floorspace requirements and flows in the gravity model. From this we can see there is an overall net inflow into the retail economy as Geelong acts as a major economic node for the broader region. This is most felt in the hospitality (Restaurants/ Cafes/ Takeaway), apparel (Clothing/ Shoes) and personal goods commodity types.

There are also spatial implications within Greater Geelong from these adjustments. Due largely to the location of employment and major education institutions we see a shift toward the Geelong (Central) sub-region. There is also a small shift to Ocean Grove and the Remainder sub-regions which contain tourist attractors that generate local retail demand.

**TABLE 6: PROJECTED ADJUSTED SPEND BY COMMODITY GROUP, 2016-36 (\$ MILLION), 2016 DOLLARS**

COMMODITY	2016	2026	2036	CHANGE	2016 - 36 GROWTH RATE
Food/Groceries	\$816	\$1,065	\$1,462	\$646	2.96%
Pharmaceutical goods	\$277	\$391	\$571	\$294	3.68%
Tobacco/Bottle shops	\$374	\$477	\$644	\$270	2.76%
Restaurants/Cafes/Takeaway	\$591	\$750	\$979	\$388	2.55%
Clothing/Shoes	\$300	\$408	\$569	\$268	3.24%
Personal	\$308	\$405	\$550	\$241	2.93%
Furniture/White goods/ Manchester	\$311	\$429	\$613	\$302	3.45%
Electronics	\$335	\$472	\$683	\$348	3.62%
Hardware/Gardening	\$187	\$257	\$366	\$179	3.41%
Newsagent/Lotto	\$148	\$99	\$29	-\$119	-7.82%
<b>Total Geelong adjusted Spend</b>	<b>\$3,648</b>	<b>\$4,753</b>	<b>\$6,465</b>	<b>\$2,817</b>	<b>2.90%</b>
<b>Surf Coast (part) and Point Lonsdale adjusted spend</b>	<b>\$326</b>	<b>\$453</b>	<b>\$627</b>	<b>\$300</b>	<b>3.32%</b>
<i>Total system adjusted spend</i>	<i>\$3,975</i>	<i>\$5,206</i>	<i>\$7,092</i>	<i>\$3,117</i>	<i>2.94%</i>
<i>Total system resident spend</i>	<i>\$3,813</i>	<i>\$5,069</i>	<i>\$7,045</i>	<i>\$3,232</i>	<i>3.12%</i>

Source: SGS Economics and Planning based on Market Info and ABS Retail Trade series.

**TABLE 7: GREATER GEELONG PROJECTED ADJUSTED SPEND BY SUB REGION, 2016-36 (\$M), 2016**

SUB-REGIONS	2016	2026	2036	CHANGE	2016 - 36 GROWTH RATE
Lara	\$216	\$289	\$377	\$161	2.82%
Northern Geelong GA	\$17	\$19	\$241	\$224	14.21%
Geelong (Corio Norlane)	\$519	\$609	\$708	\$189	1.56%
Western Geelong GA	\$7	\$10	\$269	\$262	19.91%
Geelong (Central)	\$1,816	\$2,179	\$2,545	\$729	1.70%
Geelong (Armstrong Creek)	\$95	\$373	\$667	\$572	10.23%
Leopold	\$169	\$239	\$320	\$152	3.26%
Drysdale	\$193	\$278	\$379	\$186	3.42%
Ocean Grove	\$301	\$368	\$456	\$154	2.09%
NE Bellarine Pe	\$111	\$148	\$190	\$79	2.73%
Remainder	\$204	\$240	\$313	\$109	2.16%
<b>Total Geelong adjusted spend</b>	<b>\$3,648</b>	<b>\$4,753</b>	<b>\$6,465</b>	<b>\$2,817</b>	<b>2.90%</b>

Source: SGS Economics and Planning based on Market Info and ABS Retail Trade series.

## 1.4 Retail floorspace supply and turnover

The following section presents the approach used to determining retail floorspace supply and turnover across the system. The two key inputs include:

- Centre Floorspace audit – completed by SGS in 2015 and updated by Council in 2018
- turnover per square metre – based on adjusted expenditure pool (from Section 1.3), 2015 Australian Shopping Centre Database – Property Council of Australia and 2010 Australian Retail Averages Report- Urbis.

Several other datasets related to retail trends were used and discussed below.

### FLOORSPACE AUDIT

In 2015, SGS completed a land use audit for 108 existing centres across the municipality. The audit assessed the total floorspace, predominant use and amount of vacant land/floorspace. The following use categories were record retail:

- (Shop) Retail – Supermarket
- (Shop) Retail – Department Stores
- (Shop) Retail - Speciality Food
- (Shop) Retail - Speciality Non-Food
- (non-shop) Retail – Bulky Goods or Restricted Retail

- (non-shop) Retail – Hospitality
- Non-retail - Commercial
- Non-retail - Commercial Services
- Non-retail - Industrial
- Non-retail - Entertainment
- Non-retail - Medical
- Non-retail – Education
- Non-retail - Public facilities
- Vacant land and units/floorspace.

Supplementary datasets for enclosed malls were also sourced and added to this floorspace dataset. This audit was also coupled with consultation with local retailers and centre managers to provide an in-depth local understanding of the supply of retail floorspace across the municipality.

For Local Centres no site-based visit was completed. However, floorspace estimates were created via building footprint measurements through the use of satellite imagery. These centres largely provide a local convenience role, typically with no supermarket, department store or bulky retailing. They would likely contain a range of local retail uses (such as specially – other, speciality – food or hospitality) along with non-retail based uses or vacant shops.

There is also a loose cluster of restricted retailing activities

in other dispersed locations. Council has audited these locations and SGS has incorporated this into the database.

In addition, known future retail floorspace in new or expanded centres is sourced from Council based on approved plans at the time.

In 2018, Council reviewed and updated the floorspace database including refining information on existing centres and adding and update information around new centres, particularly in the newly declared Northern and Western Geelong Growth Areas.

Based on floorspace audit it is estimated that as of 2018 Greater Geelong has 903,812 square metres of retail floorspace spread across 121 existing centres in the hierarchy.

There is an additional 55,967 square metres of vacant floorspace across the existing network. On average this represents 6% of retail floorspace, which is a reasonable level of vacancy to enable the normal churn and redevelopment of centres. However, it is not evenly distributed with some centres well above this rate (i.e. Geelong CBD at 14 per cent).

A further 149,786 square metres of known planned new or additional floorspace is also recorded across the existing plus 30 new centres in the network. This final database is detailed in full in Appendix B and forms the basis of the retail modelling.

## CENTRE TURNOVER ESTIMATES

Actual turnover data for every shop/centre across Geelong cannot be sourced directly.

However, for a strategic level study such as this, specific turnovers are not actually required. This is because the modelling is not trying to predict an individual centres exact performance in a particular year, rather the

modelling is trying to understand the general alignment, or misalignment, of the quantum and location of retail floorspace supply and demand now and in the future. For this purpose, turnovers can largely reflect the typical performance of a given centre and supportable floorspace estimates can be derived from this perspective.

In reality, individual centres will over or under perform and may draw on small or larger catchments, which both may vary significantly year to year. This actual lived performance reflects many other localised factors which can not be captured in a strategic study.

Therefore, centre turnovers for the gravity model are estimated by comparing system wide floorspace (identified as 903,812 square metres) to total system retail expenditure as summarised in Table 6 and Table 7. This is presented in columns A and B of Table 8 below.

These are combined to estimate average turnover per square meter by store types (i.e. Retail Turnover Density or RTD) for the entire system (column C). This is applied to individual centres by store and commodity floorspace profile with further adjustments for actual turnover information, where available. This system estimated RTD was found to be generally below industry averages, which reflects a general overprovision of floorspace in the Geelong Retail system currently. As such, a 'target' RTD (Column D) was developed for forecasting base case future retail floorspace demand requirements across Greater Geelong.

## 1.5 Retail economy simulation

The following section presents the gravity model approach used to align retail demand with supply to determine trade catchments, future performance and provision gaps.

**TABLE 8: SYSTEM ALIGNMENT AND RETAIL TURNOVER DENSITIES AT 2016**

STORE TYPES	A) TOTAL SYSTEM ADJUSTED SPEND / TURNOVER (\$M)	B) FLOORSPACE SUPPLY (SQM)	C= B/A) ESTIMATE RETAIL TURNOVER DENSITY (\$PSM)	D) 'TARGET' RETAIL TURNOVER DENSITY (\$PSM)
Supermarket and Grocery Stores	\$850	110,166	\$7,720	
Department Stores	\$224	63,624	\$3,524	\$3,500
Bulky Goods	\$673	267,323	\$2,519	\$3,000
Specialty – Food & Drink	\$514	65,510	\$7,843	\$9,000
Specialty – Non food	\$1,069	250,515	\$4,266	\$4,000
Hospitality	\$623	146,673	\$4,249	\$4,000
<b>Total system</b>	<b>\$3,954</b>	<b>903,812</b>	<b>\$4,374</b>	<b>\$4,632</b>
<i>Shop retail (ex. Bulky and Hospitality)</i>	<i>\$2,657</i>	<i>489,815</i>	<i>\$5,425</i>	<i>\$5,613</i>

Source: SGS Economics and Planning.

The key inputs to the gravity model include:

- adjusted retail expenditure – for (606) zones from Section 1.3
- Centre turnover estimates – for (154) current and future centre from Section 1.4
- travel Times – based on uncongested car road network travels times as of 2018. Created by SGS using VicMap road network and GIS network analysis.

### GRAVITY MODEL THEORY AND CONCEPTS.

#### Retail modelling options and alternatives

There are a range of approaches to analysing retail systems for impact analysis and planning studies. These are broadly defined as:

- **Survey based** – where detailed customer and centre based surveys are conducted to understand where shoppers go and how much they spend at various locations. These are invariably very expensive to operate and often do not fully capture all behavioural aspects and/or are skewed by various forms of survey bias. They also provide very little means for predicting changes in the retail environment such as growth areas, or new shopping centres. However, they can be effective at understanding one specific centre in detail
- **Defined trade areas (or shift-share analysis)** – where distance catchments or judgment based trade areas (using natural/physical barriers) are defined and 'market shares' assumptions are made for each area to determine how expenditure is captured by a centre. This is often coupled with in-centre/customer survey to refine market share estimates. However, this approach is generally not undertaken on a network wide approach and over simplifies the system around one/a few centres. It is also highly dependent on an individual's personal judgment regarding how these trade areas are defined and the market shares used
- **Gravity modelling** – takes a whole of network approach and seeks to use mathematics to model human behaviour. As well as being less expensive, mathematical

models are much more reliable when predicting future consequences from changes in the retail environment due to their ability to systematically adjust all catchments given changes in input data (such as extra retail floorspace or population growth).

In addition, to these models and methods some strategies take a design or place-based approach. While this can be very useful in understanding broader factors, it can be disconnected from market realities or network requirements if done in isolation.

The Geelong Retail Strategy used a gravity model approach to simulate the flow of shoppers.

#### History of Gravity Modelling for Retail Economics

The first person to create a mathematical model to analyse the retail environment was Reilly in 1929. He created Reilly's Law of Gravitation that states:

*"Two centres attract trade from intermediate places approximately in direct proportion to the size of the centres and in inverse proportion to the square of the distances from these centres to the intermediate place"*

This law was further can be rewritten as a formula:

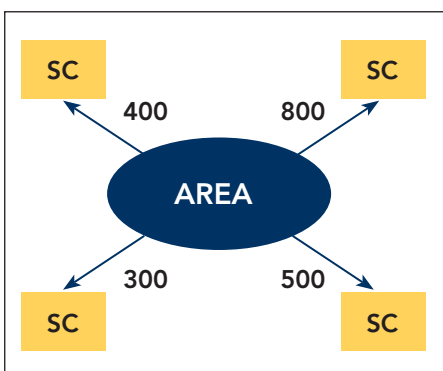
$$\text{Propensity to shop at a centre} = \frac{\text{Floor space of shopping centre}}{\text{Distance to shopping centre}}$$

Further work by Huff in 1949 added a probability-based approach to the original formula (i.e. a person can shop at multiple locations with varying probability).

This is achieved by breaking up the study area into many smaller sections. The market share in each section can then be found by dividing the propensity of the shopping centre in question by the total propensity acting on the area. By evaluating the amount of retail expenditure in each small section, it is then possible to evaluate the shopping centres turnover by adding up the market share from each section.

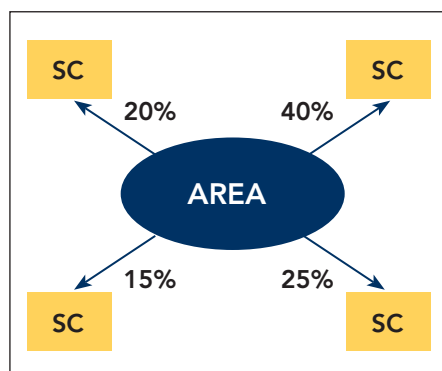
FIGURE 12: GRAVITY MODEL CONCEPT OVERVIEW

#### PROSPENSITY



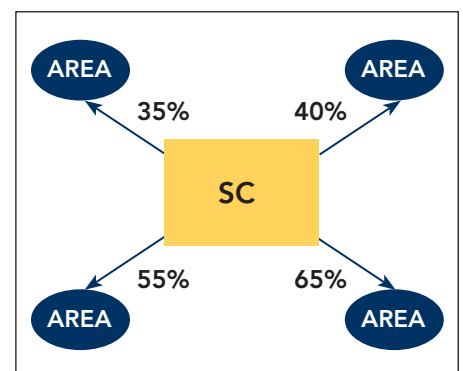
TOTAL PROSPENSITY = 2000

#### MARKET SHARE



For example, the top left shopping centre has a market share of 400 / 2000 = 20%

#### TURNOVER EXPECTATION



Total turnover = \$35 + \$40 + \$55 + \$65 = \$195

However, at this point we have assumed the only feature that is important with regards to how attractive the shopping centre is to its consumers, is the shopping centre size. Obviously, this would most likely be incorrect, as this does not take into account other attributes, such as entertainment complexes, urban design, product range, etc.

Since the original formulation of the theory there has been many variations to the core model concept and a wide variety of applications across Australia and the World. This has been supported by dramatic increases in the availability of detailed data and computational power.

### SGS Retail Gravity Model approach

The SGS Retail Model is built upon this research as well as the extensive experience SGS has gained conducting many retail studies over the past 25 years. The SGS retail model uses various aspects from the later work of Huff (1963), Lakshanan and Hansen (1965), and Bökemann (1982) among others. What makes the SGS retail model distinct from many other models is that the model modifies the above approach in the following way:

$$\text{Propensity to shop at a centre} = \frac{\text{"Attractiveness" of centre} \times \text{Floor space of shopping centre}}{\text{Travel time to shopping centre}^2}$$

The 'attractiveness' of a shopping centre is a value that represents external attributes such as the centres appearance or design layout. Another important change is that time has replaced distance as a factor. This is to account for consumers going to alternative shopping centres that are based along major freeways or to restrict others based on (natural) barriers.

Unlike other gravitational models, the SGS model does not attempt to define the effects of design layout or product mix directly. Instead, it uses typical estimated turnover data by centre to find the "attractiveness" value at the present time. This attractiveness value is then used to forecast how the shopping centre will perform in the future given an increase in floorspace or expenditure. This technique has only become possible in recent years due to the advances in computer technology and optimisation theory.

Another unique advantage of attractiveness values is the ability to forecast the viability of a new shopping centre. By assuming that the new shopping centre will be able to achieve a certain amount of turnover each year it is possible to work out how much more attractive the shopping centre will have to appear compared to the surrounding opposition. If the attractiveness value for the new centre is similar to the attractiveness of the opposition, then the centre is viable in that particular location.

A collateral benefit of the modelling approach is that it lends itself to ready estimation of some of the variables

which are likely to be crucial in any net community benefit assessment of out-of-centre development proposals. In particular, impacts on competing centres can be calculated relatively quickly to see whether they are likely to be so severe as to cause persistent vacancies and blighting. But, perhaps more importantly, the gravity modelling can be harnessed to estimate the extent to which the out-of-centre proposal will lead to additional vehicle kilometres travelled each year. To reiterate, mitigation of growth of vehicle kilometres is one of the main 'missions' of a retail hierarchy, and yet this effect tends to be ignored in the evaluation of out-of-centre proposals.

### SGS RETAIL GRAVITY MODEL DEVELOPED FOR GREATER GEELONG

The Greater Geelong gravity model includes 606 origin zones by 154 centre locations by 6 store types by 5 time periods. The model is calibrated for 2016, based on the adjusted expenditure data, floorspace/turnover data and travel time information noted previously. This forms base year 'attractiveness' factors for each centre and store type. Projected adjusted expenditure and known additional floorspace is then added into the model and, using the 'attractiveness' factors, future performance and flows are simulated.

From this simulation, every origin zone can be presented in terms of its market share by store type to every centre in the network. Conversely every centre has a continuous catchment covering all origin zones (while typically focused on those within close proximity). This ensure every dollar of demand/turnover is allocated across the system once and only once and catchments consider the full network hierarchy from local through to regional.

The gravity model approach enables results to be presented in a wide range of ways to understand various segments of the retail economy. The following seeks to systematically breakdown how results are created and linked in the model and what they represent.

#### Base case retail scenario

The gravity model detailed in the Retail Strategy reflect a base case, or business as usual scenario for the system. This is a theoretical scenario which assumes future demand will be absorbed by existing and already planned future centres via the gravity model. This helps understand the level of trade that these centres will attract if no further development occurs. This provides an important starting point from which future changes to the retail system can be assessed. It does not necessarily reflect the only or best outcome.

Increased base case trade at these existing/planned centres can then also be translated back to estimates of future supportable floorspace using the target RTDs. This is the basis of the projected floorspace demand and caps presented in the Retail Strategy.

This base case scenario can be compared to any number of alternative scenarios which may consider alternative population or expenditure trends and new/alternative

centre networks. The gravity model will then be able to output comparable performance metrics around supply/demand alignment, centre performance and vehicle kilometres travelled to enable an informed assessment as to how the alternative scenario is better or worse than the base case.

### System-wide alignment

Table 9 summarises total retail floorspace demand forecasts for Greater Geelong. Population (Row A) and known floorspace supply data from the floorspace audit (row C) is also included. Floorspace demand is essentially determined by converting expenditure/turnover data to floorspace demand using Target RTDs. This can be done based on expenditure origin as reflected by the 'Adjusted spend (from Geelong origins)' (row C), or expenditure

destination as reflected in 'Adjusted spend (at Geelong Centres)' (row F). The difference between row C and row F reflects flows within the system but between Geelong and Queenscliff/Surf Coast and is further discussed at the subregional alignment stage.

It should be noted current floorspace demand (853,599 sqm) is below actual levels (903,812 occupied + 55,967 vacant = 959,779 sqm) due to the higher 'Target RTDs' used in the modelling and further discussed in Table 8.

Row G (highlighted light blue) is the basis of the projected floorspace demand presented in the Retail Strategy. This reflects demand allocated to centres based on the gravity model.

**TABLE 9 TOTAL RETAIL FLOORSPACE DEMAND, 2016 TO 36**

		2016	2026	2036	2016-2036
A	Population	237,129	280,975	351,499	114,370
B	Floorspace supply (audited at centres) Existing and planned to 2036 (March 2018)	959,779	1,030,855	1,109,564	149,786
C	Adjusted spend (\$m) (from Geelong origins)	\$3,648	\$4,753	\$6,465	\$2,817
D	Floorspace demand (from Geelong origins) based on adjusted spend and \$4,632 RTD	787,685	1,026,121	1,395,821	608,136
E	Floorspace per capita	3.3	3.7	4.0	
F	Adjusted spend (\$m) (at Geelong centres)	\$3,954	\$5,183	\$7,066	\$3,112
G	Floorspace demand (at Geelong centres) based on gravity model base case assignment and \$4,632 RTD	853,599	1,120,759	1,527,750	674,151
H	Floorspace per capita	3.6	4.0	4.3	\$3,112
G	Floorspace demand (at Geelong centres) based on gravity model base case assignment and \$4,632 RTD	853,599	1,120,759	1,527,750	674,151
H	Floorspace per capita	3.6	4.0	4.3	

Floorspace Supply includes all retail types plus 55,967 sqm of vacant retail floorspace.

Source: SGS Economics and Planning

Table 10 presents the same analysis for just shop retail (excluding Bulky goods and Hospitality). Row F (highlighted light blue) aligns with shop retail demand projections included in the Retail Strategy and used to inform floorspace caps. This indicates current shop retail provision of 2.0 square metres per person, increasing to 2.4 by 2036.

### Subregional alignment

Row B, D and G from Table 9 and Table 10 can then be further disaggregated into subregions to understand the spatial distribution of supply origin and destination demand. This is summarised in Table 11 and Table 12 for Total retail and Shop retail respectively.

- **Floorspace Supply** simply reflects results of the floorspace audit and identifies the spatial distribution of current and future floorspace that has already been planned. This highlights the significant amount of floorspace already within Geelong (Central) which captures the Geelong CBD along with 1 Specialised, 2 Sub Regional centres and 12 Neighbourhood centres. The additional floorspace planned for the growth areas (NGGA, WGGA, Armstrong Creek) can also be observed, along with small increase elsewhere.
- **Floorspace demand from Geelong origins** aligns with the spatial distribution of population plus the adjustments for students, worker and tourism. It does not consider where this demand might be realised as modelled in the gravity model. The results reflect a more dispersed distribution of demand consistent with general settlement patterns, rather than the established centre

hierarchy and location of supply. Strong growth in the established Central subregion and Growth Areas can also be observed.

- **Floorspace demand at Geelong centres** allocates origin demand to centres based on the gravity model. In 2016 this deliberately more closely aligns to actual floorspace supply due to the calibration process. This process, therefore, accounts for the established retail centre hierarchy and overall supply network. This means each subregion is not seen as a self-contained 'island', where all demand must only be provided for locally. Rather a clear established hierarchy of local convenience through to high-order centres is reflected in the modelled results. Central Geelong (which includes the Geelong CBD, one Specialised and two Sub-regional Centres, plus many other small centres) sees a considerable net inflow given its large established population and higher order functions in the overall network. Other Subregions see varying flows that reflect their local network and proximity to other established/high-order aspects of the hierarchy. Additional demand at Geelong centres as modelled via the gravity model is then a reflection of the established supply and hierarchy plus the location of additional origin demand. That is, additional demand will be allocated to larger, more 'attractive' centres which are also close to growing areas. This ensures the supportable floorspace demand attributes growth to high growth locations, such as Armstrong Creek, while still supports the existing established network by continuing to account for these cross subregion flows.

**TABLE 10 SHOP RETAIL FLOORSPACE DEMAND, 2016 TO 36**

		2016	2026	2036	2016-2036
A	Population	237,129	280,975	351,499	114,370
B	(SHOP) Floorspace supply (audited at centres) Existing and planned to 2036 (March 2018)	545,782	597,224	650,863	105,081
C	Adjusted spend (\$m) (from Geelong origins)	\$2,452	\$3,197	\$4,371	\$1,919
D	(SHOP) Floorspace demand (from Geelong origins) based on adjusted spend and \$5,613 RTD	436,790	569,551	778,626	341,836
E	Floorspace per capita	1.8	2.0	2.2	
F	Adjusted spend (\$m) (at Geelong centres)	\$2,657	\$3,487	\$4,777	\$2,120
G	(SHOP) Floorspace demand (at Geelong centres) based on gravity model base case assignment and \$5,613 RTD	473,340	621,638	851,824	378,484
H	Floorspace per capita	2.0	2.2	2.4	\$3,112

Floorspace Supply includes all retail types plus 55,967 sqm of vacant retail floorspace.  
Source: SGS Economics and Planning.

**TABLE 11: TOTAL RETAIL FLOORSPACE DEMAND, BY SUBREGION, 2016 TO 3**

	Floorspace SUPPLY Total retail floorspace supply Existing, vacant and planned to 2036 (as of March 2018)			Floorspace demand from Geelong origins based on adjusted spend and \$4,632 RTD			Floorspace demand at Geelong centres based on gravity model base case assignment and \$4,632 RTD		
	2016	2036	2016- 2036	2016	2036	2016- 2036	2016	2036	2016- 2036
Lara	22,043	30,043	8,000	46,715	81,408	34,693	19,843	33,933	14,090
NGGA	0	12,022	12,022	3,647	51,956	48,309	0	9,302	9,302
Geelong (Corio Norlane)	163,103	163,103	0	112,076	152,855	40,779	142,881	249,331	106,451
WGGA	0	23,202	23,202	1,539	58,161	56,622	0	24,800	24,800
Geelong (Central)	648,488	657,988	9,500	392,043	549,490	157,447	576,409	914,606	338,197
Geelong (Armstrong Creek)	7,257	91,620	84,363	20,533	144,045	123,512	5,540	109,554	104,014
Leopold	36,518	36,518	0	36,439	69,150	32,711	33,563	66,928	33,365
Drysdale	25,353	25,353	0	41,747	81,844	40,097	22,096	37,307	15,211
Ocean Grove	42,716	55,415	12,699	65,021	98,370	33,349	40,383	61,404	21,021
NE Bellarine Pe	14,299	14,299	0	23,913	40,996	17,083	12,884	20,585	7,701
Remainder	0	0	0	44,013	67,548	23,534	0	0	0
<b>Total</b>	<b>959,779</b>	<b>1,109,564</b>	<b>149,785</b>	<b>787,685</b>	<b>1,395,821</b>	<b>608,136</b>	<b>853,599</b>	<b>1,527,750</b>	<b>674,151</b>

Source: SGS Economics and Planning

**TABLE 12: SHOP RETAIL FLOORSPACE DEMAND, BY SUBREGION, 2016 TO 36**

	Floorspace SUPPLY Total retail floorspace supply Existing, vacant and planned to 2036 (as of March 2018)			Floorspace demand from Geelong origins based on adjusted spend and \$4,632 RTD			Floorspace demand at Geelong centres based on gravity model base case assignment and \$4,632 RTD		
	2016	2036	2016- 2036	2016	2036	2016- 2036	2016	2036	2016- 2036
Lara	15,921	22,631	6,710	25,905	45,411	19,507	13,643	23,166	9,522
NGGA	0	8,898	8,898	2,022	28,983	26,960	0	6,006	6,006
Geelong (Corio Norlane)	74,940	74,940	0	62,149	85,267	23,118	66,212	106,247	40,034
WGGA	0	19,245	19,245	854	32,444	31,590	0	20,813	20,813
Geelong (Central)	371,317	379,077	7,760	217,397	306,520	89,123	320,072	516,673	196,601
Geelong (Armstrong Creek)	6,117	57,740	51,623	11,386	80,352	68,966	4,329	64,903	60,574
Leopold	20,791	20,791	0	20,206	38,574	18,367	19,746	35,925	16,179
Drysdale	19,700	19,700	0	23,150	45,655	22,505	16,460	27,181	10,722
Ocean Grove	27,485	38,330	10,845	36,056	54,873	18,818	25,081	38,641	13,561
NE Bellarine Pe	9,510	9,510	0	13,260	22,868	9,608	7,797	12,270	4,473
Remainder	0	0	0	24,406	37,680	13,273	0	0	0
<b>Total</b>	<b>545,782</b>	<b>650,863</b>	<b>105,081</b>	<b>436,790</b>	<b>778,626</b>	<b>341,836</b>	<b>473,340</b>	<b>851,824</b>	<b>378,484</b>

Source: SGS Economics and Planning

**TABLE 13: BASE CASE SCENARIO TOTAL RETAIL FLOORSPACE PROVISION, 2016 TO 36**

PRECINCT	Existing and planned to 2036 (as of March 2018) total retail floorspace supply				Base case scenario total retail floorspace demand projections				Total supply less demand		
	A) EXISTING FLOORSPACE	B) VACANT FLOORSPACE	C) PLANNED NEW/ ADD	D = A+B+C) TOTAL	E) 2016	F) 2026	G) 2036	H = G - E) 2016-36	I = E - D) 2016	J = F - D) 2026	K = G - D) 2036
GREATER GEELONG	903,812	55,967	149,786	1,109,564	853,599	1,120,759	1,527,750	674,151	255,965	-11,194	-418,186
Regional	187,304	25,985	0	213,289	189,091	253,737	345,803	156,712	24,198	-40,448	-132,514
Central Geelong	187,304	25,985	0	213,289	189,091	253,737	345,803	156,712	24,198	-40,448	-132,514
Sub-Regional	132,416	1,370	61,924	195,710	125,759	180,747	281,484	155,725	69,951	14,963	-85,774
Belmont	42,590	1,370	0	43,960	40,209	51,635	64,809	24,600	3,751	-7,675	-20,849
Waurm Ponds	41,760	0	0	41,760	39,556	51,541	64,455	24,899	2,204	-9,781	-22,695
Corio SC	27,463	0	0	27,463	26,136	33,002	44,081	17,945	1,327	-5,539	-16,618
Leopold Gateway Plaza	20,604	0	0	20,604	19,858	26,930	36,376	16,518	746	-6,326	-15,772
Armstrong Creek Town Centre	0	0	40,000	40,000	0	17,640	49,574	49,574	40,000	22,360	-9,574
Sub-regional Centre - WGGA	0	0	16,552	16,552	0	0	17,569	17,569	16,552	16,552	-1,017
Sub-regional Centre - NGGA	0	0	5,372	5,372	0	0	4,619	4,619	5,372	5,372	753
Specialised	38,145	5,015	0	43,160	38,243	47,306	61,124	22,882	4,917	-4,146	-17,964
Pakington Street (Geelong West)	38,145	5,015	0	43,160	38,243	47,306	61,124	22,882	4,917	-4,146	-17,964
Specialised Centre - WGGA	0	0	0	0	0	0	0	0	0	0	0
Town	64,460	2,653	522	67,634	61,128	74,744	91,271	30,143	6,506	-7,109	-23,637
Ocean Grove	16,293	408	0	16,701	16,095	17,807	20,231	4,136	606	-1,106	-3,530
Drysdale	14,886	187	0	15,073	13,372	18,035	23,193	9,821	1,701	-2,963	-8,120
Lara	14,952	98	0	15,050	13,249	16,392	20,847	7,597	1,800	-1,343	-5,797
Barwon Heads	8,735	1,066	522	10,323	9,115	10,389	11,853	2,738	1,208	-66	-1,530
Portarlington	6,408	774	0	7,182	6,200	7,797	9,708	3,508	983	-615	-2,526
St Leonards (Murradoc Road)	3,185	120	0	3,306	3,098	4,323	5,440	2,343	208	-1,017	-2,135
Neighbourhood	101,504	2,953	50,540	154,997	93,767	134,283	188,299	94,532	61,230	20,714	-33,303
Shannon Avenue (Geelong West)	12,948	0	0	12,948	12,184	14,571	18,109	5,925	763	-1,623	-5,162
Separation St	5,572	409	0	5,981	5,754	7,124	9,545	3,791	228	-1,143	-3,563
Pakington Street (Newtown)	9,151	301	0	9,452	9,655	12,045	14,848	5,193	-204	-2,593	-5,396
Highton	6,972	77	0	7,049	6,463	7,973	9,852	3,388	586	-924	-2,803
Newcomb Central	7,390	0	0	7,390	6,210	7,741	9,900	3,690	1,180	-352	-2,510
Ormond Road	5,917	165	0	6,083	6,023	7,606	9,624	3,601	60	-1,524	-3,541
Bellarine Village	6,929	0	0	6,929	5,967	7,443	9,495	3,528	962	-514	-2,566
Bell Post SC	5,562	0	0	5,562	4,811	5,845	8,270	3,459	751	-283	-2,708
Barrabool Hills Neighbourhood Shopping Centre	4,227	0	0	4,227	3,508	4,511	5,646	2,138	719	-284	-1,419
Shannon Avenue (Newtown)	4,495	363	0	4,858	4,178	5,089	6,307	2,129	680	-231	-1,449
Ocean Grove (Marketplace)	5,748	72	0	5,820	5,020	5,754	6,862	1,842	800	66	-1,042
Vines Road	3,110	136	0	3,245	2,983	3,597	4,885	1,902	263	-352	-1,640
Hyland Street	2,346	0	9,500	11,846	2,429	7,877	11,327	8,898	9,417	3,969	520
Grovedale Central	2,479	248	0	2,726	2,313	2,812	3,400	1,087	413	-86	-674
Dorothy Street	1,803	0	0	1,803	1,734	2,211	2,851	1,118	69	-409	-1,049
Ash Road	1,578	191	0	1,769	1,608	2,372	3,220	1,612	161	-603	-1,451
Rosewall	1,740	0	0	1,740	1,344	1,658	2,193	849	397	82	-452
Jetty Road	4,147	95	0	4,242	3,422	4,127	5,559	2,137	820	115	-1,317
The Village Warralily	6,000	897	1,863	8,760	5,201	11,059	16,600	11,399	3,559	-2,299	-7,840

PRECINCT	Existing and planned to 2036 (as of March 2018) total retail floorspace supply				Base case scenario total retail floorspace demand projections				Total supply less demand		
	A) EXISTING FLOORSPACE	B) VACANT FLOORSPACE	C) PLANNED NEW/ ADD	D = A+B+C) TOTAL	E) 2016	F) 2026	G) 2036	H = G - E) 2016-36	I = E - D) 2016	J = F - D) 2026	K = G - D) 2036
Surf Coast Highway NAC	3,390	0	0	3,390	2,961	3,905	4,812	1,850	429	-515	-1,422
Kingston Downs	0	0	11,177	11,177	0	4,385	6,257	6,257	11,177	6,792	4,920
Lara West NAC	0	0	4,700	4,700	0	565	829	829	4,700	4,135	3,871
Armstrong Creek West NAC	0	0	3,000	3,000	0	1,146	1,572	1,572	3,000	1,854	1,428
Armstrong Creek Horseshoe Bend Precinct North East NAC	0	0	7,000	7,000	0	2,864	4,424	4,424	7,000	4,136	2,576
Elcho Rd East-NGGA	0	0	6,650	6,650	0	0	4,683	4,683	6,650	6,650	1,967
Elcho Rd West -NGGA	0	0	0	0	0	0	0	0	0	0	0
Heales Rd West -NGGA	0	0	0	0	0	0	0	0	0	0	0
Northern Centre -WGGA	0	0	6,650	6,650	0	0	7,231	7,231	6,650	6,650	-581
Midland Hwy -WGGA	0	0	0	0	0	0	0	0	0	0	0
Lakeside West -WGGA	0	0	0	0	0	0	0	0	0	0	0
Lakeside South -WGGA	0	0	0	0	0	0	0	0	0	0	0
Western Centre -WGGA	0	0	0	0	0	0	0	0	0	0	0
Local (82 centres)	69,459	5,863	11,800	87,122	69,371	85,603	114,764	45,392	17,751	1,519	-27,642
Homemaker	136,021	2,904	25,000	163,925	121,584	189,682	290,349	168,765	42,340	-25,758	-126,425
Geelong Gateway Homemaker precinct	31,463	2,121	0	33,584	27,346	39,950	59,746	32,400	6,238	-6,367	-26,162
Waurrn Ponds Homemaker Retail	46,972	333	0	47,305	42,876	64,564	90,913	48,037	4,428	-17,259	-43,608
Melbourne Road (Norlane)	23,652	92	0	23,744	20,644	29,802	43,474	22,830	3,101	-6,058	-19,729
Melbourne Road (North Geelong)	14,322	0	0	14,322	13,211	18,411	26,131	12,920	1,111	-4,089	-11,809
Sinclair Street	4,095	0	0	4,095	4,200	6,146	8,851	4,650	-105	-2,051	-4,756
Drysdale Homemaker	3,174	358	0	3,532	2,944	4,252	5,586	2,643	588	-720	-2,055
Leopold Homemaker	12,343	0	0	12,343	10,363	16,428	24,480	14,117	1,980	-4,085	-12,137
Armstrong Creek	0	0	25,000	25,000	0	10,129	31,168	31,168	25,000	14,871	-6,168
Central Restricted Retail Centre -WGGA	0	0	0	0	0	0	0	0	0	0	0
Dispersed Bulky Goods	174,502	9,226	0	183,728	154,655	154,655	154,655	0	29,072	29,072	29,072
Bellarine Highway (Newcomb)	19,234	1,332	0	20,566	17,661	17,661	17,661	0	2,905	2,905	2,905
Settlement and Breakwater Road Belmont - Spotlight centre	32,959	210	0	33,169	28,179	28,179	28,179	0	4,989	4,989	4,989
Smithton Grove	4,277	0	0	4,277	3,988	3,988	3,988	0	289	289	289

PRECINCT	Existing and planned to 2036 (as of March 2018) total retail floorspace supply				Base case scenario total retail floorspace demand projections				Total supply less demand		
	A) EXISTING FLOORSPACE	B) VACANT FLOORSPACE	C) PLANNED NEW/ ADD	D = A+B+C) TOTAL	E) 2016	F) 2026	G) 2036	H = G - E) 2016-36	I = E - D) 2016	J = F - D) 2026	K = G - D) 2036
North Geelong - Mackey Street	11,199	0	0	11,199	9,403	9,403	9,403	0	1,796	1,796	1,796
Sharon Court	10,519	0	0	10,519	8,832	8,832	8,832	0	1,687	1,687	1,687
Princess Hwy Auto Centre	290	0	0	290	243	243	243	0	47	47	47
Gordon Avenue Precinct (Geelong West)	20,302	1,825	0	22,127	17,850	17,850	17,850	0	4,277	4,277	4,277
Moorabool-Fyans Dispersed	42,460	3,121	0	45,582	38,084	38,084	38,084	0	7,498	7,498	7,498
Anakie Road	3,909	339	0	4,248	3,658	3,658	3,658	0	590	590	590
Gregory Avenue	2,509	0	0	2,509	2,284	2,284	2,284	0	225	225	225
West Fyans Street	13,316	384	0	13,700	12,389	12,389	12,389	0	1,310	1,310	1,310
Surf Coast Highway	13,528	2,015	0	15,543	12,083	12,083	12,083	0	3,460	3,460	3,460
Bacchus Marsh Road (Corio)	0	0	0	0	0	0	0	0	0	0	0

Source: SGS Economics and Planning.

The following table presents the same information for just shop retail (excluding bulky goods and hospitality). This is the basis of floorspace caps under a base case scenario.

**TABLE 14: BASE CASE SCENARIO SHOP RETAIL FLOORSPACE PROVISION, 2016 TO 36**

PRECINCT	Existing and planned to 2036 (as of March 2018) total shop retail floorspace supply				Base case scenario total shop retail floorspace demand projections				Total supply less demand		
	A) EXISTING FLOORSPACE IN 2016	B) VACANT FLOORSPACE	C) PLANNED NEW/ ADD FLOORSPACE	D = A+B+C) TOTAL	E) 2016	F) 2026	G) 2036	H = G - E) 2016-36	I = E - D) 2016	J = F - D) 2026	K = G - D) 2036
<b>GREATER GEELONG</b>	489,815	55,967	105,081	650,863	473,340	621,638	851,824	378,484	177,522	29,224	-200,962
Regional	105,407	25,985	0	131,392	108,580	143,360	193,942	85,362	22,812	-11,968	-62,550
Central Geelong	105,407	25,985	0	131,392	108,580	143,360	193,942	85,362	22,812	-11,968	-62,550
Sub-Regional	113,772	1,370	53,596	168,739	107,041	154,053	239,666	132,625	61,698	14,686	-70,927
Belmont	31,071	1,370	0	32,441	28,918	36,740	46,076	17,159	3,523	-4,299	-13,635
Waurm Ponds	38,268	0	0	38,268	35,847	46,999	59,224	23,377	2,421	-8,731	-20,956
Corio SC	26,420	0	0	26,420	25,028	31,624	42,369	17,342	1,392	-5,204	-15,950
Leopold Gateway Plaza	18,014	0	0	18,014	17,249	23,338	31,454	14,205	765	-5,324	-13,440
Armstrong Creek Town Centre	0	0	35,500	35,500	0	15,353	42,677	42,677	35,500	20,147	-7,177
Sub-regional Centre - WGGA	0	0	14,222	14,222	0	0	15,329	15,329	14,222	14,222	-1,108
Sub-regional - NGGA	0	0	3,875	3,875	0	0	2,536	2,536	3,875	3,875	1,339
Specialised	24,222	5,015	0	29,237	23,879	29,135	37,578	13,699	5,358	102	-8,341
Pakington Street (Geelong West)	24,222	5,015	0	29,237	23,879	29,135	37,578	13,699	5,358	102	-8,341
Town	46,499	2,653	522	49,674	42,205	51,205	62,485	20,280	7,469	-1,531	-12,811
Ocean Grove	12,013	408	0	12,421	11,705	12,676	14,221	2,516	716	-255	-1,800
Drysdale	11,981	187	0	12,168	10,286	13,868	17,825	7,540	1,882	-1,700	-5,657
Lara	13,107	98	0	13,205	11,290	13,897	17,725	6,435	1,915	-692	-4,520
Barwon Heads	3,747	1,066	522	5,335	3,816	4,108	4,452	636	1,518	1,227	882
Portarlington	3,612	774	0	4,386	3,229	4,010	4,948	1,719	1,157	376	-562
St Leonards (Murradoc Road)	2,039	120	0	2,160	1,880	2,646	3,313	1,433	279	-487	-1,154

PRECINCT	Existing and planned to 2036 (as of March 2018) total shop retail floorspace supply				Base case scenario total shop retail floorspace demand projections				Total supply less demand		
	A) EXISTING FLOORSPACE IN 2016	B) VACANT FLOORSPACE	C) PLANNED NEW/ ADD FLOORSPACE	D = A+B+C) TOTAL	E) 2016	F) 2026	G) 2036	H = G - E) 2016-36	I = E - D) 2016	J = F - D) 2026	K = G - D) 2036
Neighbourhood	81,262	2,953	42,702	126,916	72,327	103,696	145,299	72,972	54,589	23,221	-18,383
Shannon Avenue (Geelong West)	10,970	0	0	10,970	10,084	12,007	14,927	4,844	886	-1,037	-3,957
Separation St	2,806	409	0	3,215	2,815	3,464	4,715	1,900	400	-249	-1,500
Pakington Street (Newtown)	5,205	301	0	5,506	5,464	6,844	8,530	3,066	42	-1,339	-3,024
Highton	6,006	77	0	6,083	5,437	6,713	8,343	2,906	646	-630	-2,260
Newcomb Central	7,075	0	0	7,075	5,876	7,316	9,365	3,489	1,199	-241	-2,290
Ormond Road	5,398	165	0	5,563	5,471	6,909	8,751	3,280	92	-1,345	-3,188
Bellarine Village	6,133	0	0	6,133	5,121	6,368	8,146	3,025	1,012	-235	-2,013
Bell Post SC	5,196	0	0	5,196	4,422	5,367	7,634	3,212	774	-171	-2,438
Barrabool Hills Neighbourhood	3,972	0	0	3,972	3,237	4,156	5,210	1,973	735	-184	-1,238
Shopping Centre											
Shannon Avenue (Newtown)	2,858	363	0	3,221	2,439	2,927	3,616	1,177	782	294	-395
Ocean Grove (Marketplace)	4,763	72	0	4,835	3,973	4,496	5,360	1,387	862	339	-525
Vines Road	2,630	136	0	2,765	2,473	2,966	4,022	1,550	293	-200	-1,257
Hyland Street	0	0	7,760	7,760	0	3,250	4,759	4,759	7,760	4,510	3,001
Grovedale Central	2,303	248	0	2,551	2,126	2,586	3,133	1,007	424	-35	-583
Dorothy Street	1,496	0	0	1,496	1,408	1,791	2,307	899	88	-295	-811
Ash Road	1,090	191	0	1,281	1,089	1,599	2,164	1,075	191	-318	-883
Rosewall	1,740	0	0	1,740	1,344	1,658	2,193	849	397	82	-452
Jetty Road	4,047	95	0	4,142	3,315	3,994	5,375	2,060	827	148	-1,233
The Village Warralily	4,940	897	1,863	7,700	4,075	8,708	12,990	8,915	3,625	-1,008	-5,290
Surf Coast Highway NAC	2,633	0	0	2,633	2,157	2,843	3,544	1,387	476	-210	-911
Kingston Downs	0	0	9,623	9,623	0	3,729	5,311	5,311	9,623	5,894	4,312
Lara West NAC	0	0	4,400	4,400	0	516	762	762	4,400	3,884	3,638
Armstrong Creek West NAC	0	0	3,000	3,000	0	1,146	1,572	1,572	3,000	1,854	1,428
Armstrong Creek Horseshoe Bend Precinct North East NAC	0	0	6,010	6,010	0	2,344	3,614	3,614	6,010	3,666	2,396
Elcho Rd East - NGGA	0	0	5,023	5,023	0	0	3,470	3,470	5,023	5,023	1,553
Elcho Rd West - NGGA	0	0	0	0	0	0	0	0	0	0	0
Heales Rd West - NGGA	0	0	0	0	0	0	0	0	0	0	0
Northern Centre - WGGA	0	0	5,023	5,023	0	0	5,484	5,484	5,023	5,023	-461
Midland Hwy - WGGA	0	0	0	0	0	0	0	0	0	0	0
Lakeside West - WGGA	0	0	0	0	0	0	0	0	0	0	0
Lakeside South - WGGA	0	0	0	0	0	0	0	0	0	0	0
Western Centre - WGGA	0	0	0	0	0	0	0	0	0	0	0
Local (82 centres)	49,757	5,863	8,260	63,880	48,854	59,774	79,950	31,096	15,026	4,105	-16,070
Homemaker	32,016	2,904	0	34,920	33,412	43,373	55,861	22,449	1,508	-8,452	-20,941
Geelong Gateway Homemaker precinct	4,315	2,121	0	6,436	4,302	5,398	7,045	2,743	2,134	1,038	-609

PRECINCT	Existing and planned to 2036 (as of March 2018) total shop retail floorspace supply				Base case scenario total shop retail floorspace demand projections				Total supply less demand		
	A) EXISTING FLOORSPACE IN 2016	B) VACANT FLOORSPACE	C) PLANNED NEW/ ADD FLOORSPACE	D = A+B+C) TOTAL	E) 2016	F) 2026	G) 2036	H = G- E) 2016-36	I = E - D) 2016	J = F - D) 2026	K = G - D) 2036
Waurm Ponds Homemaker Retail	15,294	333	0	15,627	16,217	21,438	27,253	11,037	-590	-5,811	-11,627
Melbourne Road (Norlane)	3,686	92	0	3,778	3,658	4,492	5,716	2,059	121	-714	-1,938
Melbourne Road (North Geelong)	4,802	0	0	4,802	5,121	6,344	8,115	2,994	-319	-1,542	-3,313
Sinclair Street	2,836	0	0	2,836	3,024	4,255	5,938	2,914	-188	-1,419	-3,102
Drysdale Homemaker	1,083	358	0	1,441	1,091	1,446	1,794	703	350	-5	-353
Leopold Homemaker	0	0	0	0	0	0	0	0	0	0	0
Armstrong Creek	0	0	0	0	0	0	0	0	0	0	0
Central Restricted Retail Centre - WGGGA	0	0	0	0	0	0	0	0	0	0	0
Dispersed Bulky Goods	36,879	9,226	0	46,105	37,042	37,042	37,042	0	9,062	9,062	9,062
Bellarine Highway (Newcomb)	7,632	1,332	0	8,964	7,409	7,409	7,409	0	1,554	1,554	1,554
Settlement and Breakwater Road Belmont - Spotlight centre	2,882	210	0	3,092	2,908	2,908	2,908	0	184	184	184
Smithton Grove	1,396	0	0	1,396	1,489	1,489	1,489	0	-93	-93	-93
North Geelong - Mackey Street	0	0	0	0	0	0	0	0	0	0	0
Sharon Court	0	0	0	0	0	0	0	0	0	0	0
Princess Hwy Auto Centre	0	0	0	0	0	0	0	0	0	0	0
Gordon Avenue Precinct (Geelong West)	3,507	1,825	0	5,332	3,717	3,717	3,717	0	1,615	1,615	1,615
Moorabool-Fyans Dispersed	7,567	3,121	0	10,688	7,986	7,986	7,986	0	2,702	2,702	2,702
Anakie Road	3,721	339	0	4,060	3,458	3,458	3,458	0	602	602	602
Gregory Avenue	686	0	0	686	732	732	732	0	-46	-46	-46
West Fyans Street	3,059	384	0	3,443	3,262	3,262	3,262	0	181	181	181
Surf Coast Highway	6,429	2,015	0	8,444	6,082	6,082	6,082	0	2,362	2,362	2,362
Bacchus Marsh Road (Corio)	0	0	0	0	0	0	0	0	0	0	0

# APPENDIX 2

## REGIONAL CENTRES

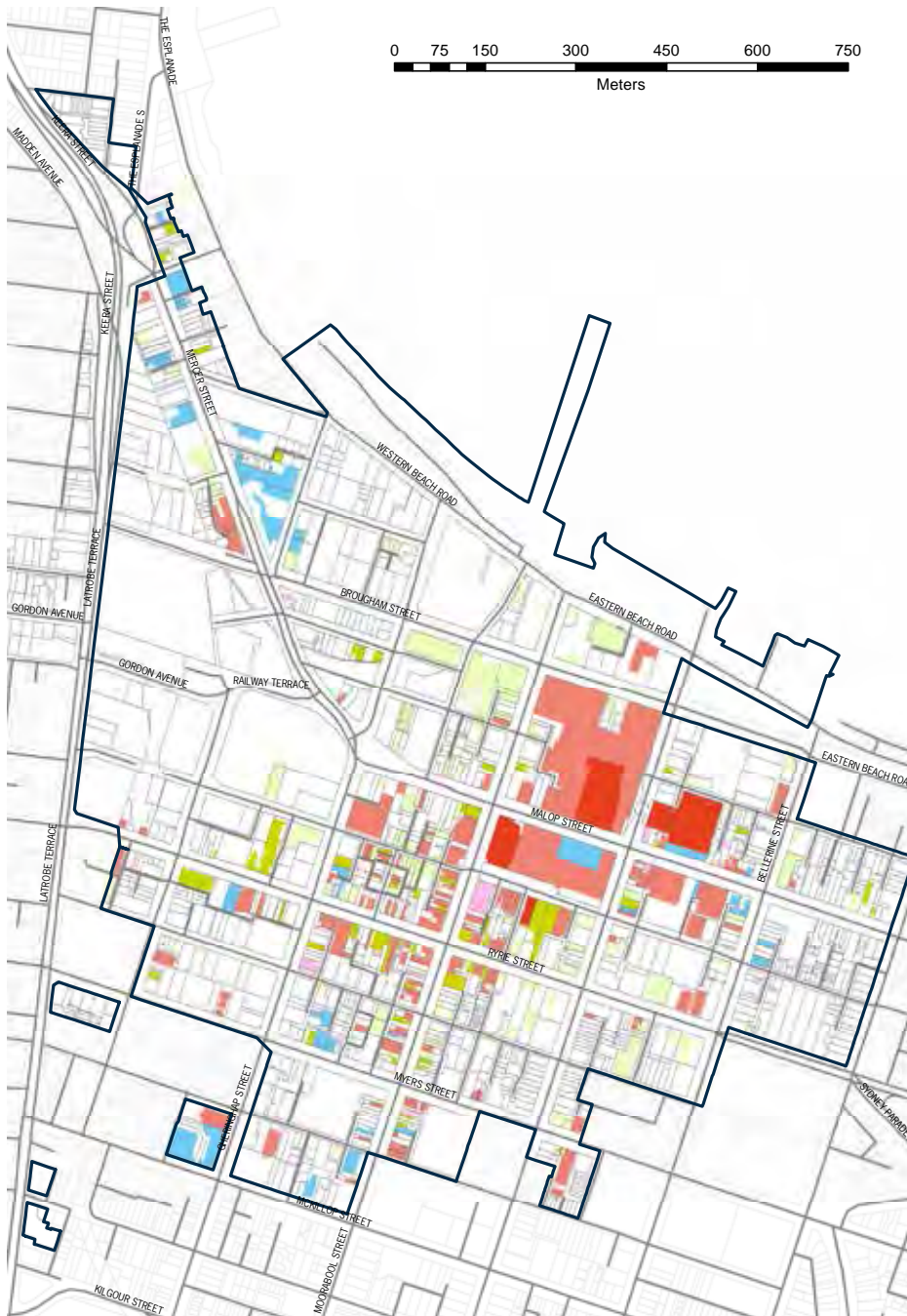
### 1.1 CENTRAL GEELONG

CENTRE NAME: CENTRAL GEELONG																			
Hierarchy status:	Regional																		
Location:	Geelong																		
Key characteristics:	Large retail and commercial precinct with two shopping centres (Westfield Geelong and Market Square Geelong). There is limited on-street pedestrian activity and high vacancy levels in parts of the precinct.																		
Current role:	Strong retail and business focus but is faced with strong competition from surrounding centres including Pakington Street (Geelong West), Belmont and Waurm Ponds.																		
Zoning (sqm):	<table border="1"> <thead> <tr> <th>ACZ</th> <th>C1Z</th> <th>C2Z</th> <th>MUZ</th> <th>Other</th> </tr> </thead> <tbody> <tr> <td>974,206</td> <td>1,481</td> <td>0</td> <td>44,280</td> <td>186,164</td> </tr> </tbody> </table>	ACZ	C1Z	C2Z	MUZ	Other	974,206	1,481	0	44,280	186,164								
	ACZ	C1Z	C2Z	MUZ	Other														
974,206	1,481	0	44,280	186,164															
Retail and commercial floor space* (sqm):	<table border="1"> <thead> <tr> <th>Super market</th> <th>Depart' Store</th> <th>Restricted Retail</th> <th>Specialty Food</th> <th>Specialty Other</th> <th>Hospitality</th> <th>Total Retail</th> <th>Other Employ'</th> <th>Vacant</th> </tr> </thead> <tbody> <tr> <td>3,242</td> <td>32,959</td> <td>29,133</td> <td>4,670</td> <td>64,536</td> <td>52,764</td> <td>187,304</td> <td>-</td> <td>25,985</td> </tr> </tbody> </table>	Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant	3,242	32,959	29,133	4,670	64,536	52,764	187,304	-	25,985
Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant											
3,242	32,959	29,133	4,670	64,536	52,764	187,304	-	25,985											
Retail anchors:	1 DS (Myer), 3 DDS (Big W, Dimmeys, Harris Scarfe, Target), 1 supermarket (2,542sqm Coles)																		
Transport connections:	<table border="1"> <thead> <tr> <th>Public</th> <th>Private</th> </tr> </thead> <tbody> <tr> <td>Geelong Railway Station (approx. 400m), South Geelong Railway Station (approx. 1.1km), bus service (several bus routes)</td> <td>Several blocks on either side of Ryrie Street, accessible via Princes Highway, Hamilton Highway, Bellarine Highway and Portarlington Road</td> </tr> </tbody> </table>	Public	Private	Geelong Railway Station (approx. 400m), South Geelong Railway Station (approx. 1.1km), bus service (several bus routes)	Several blocks on either side of Ryrie Street, accessible via Princes Highway, Hamilton Highway, Bellarine Highway and Portarlington Road														
	Public	Private																	
Geelong Railway Station (approx. 400m), South Geelong Railway Station (approx. 1.1km), bus service (several bus routes)	Several blocks on either side of Ryrie Street, accessible via Princes Highway, Hamilton Highway, Bellarine Highway and Portarlington Road																		
Future role and opportunities:	<p>Recent public realm, residential and office investment within Central Geelong has resulted in more people working and living within the precinct. The number of people living and working in Central Geelong is expected to increase overtime.</p> <p>The City of Greater Geelong is committed to promoting a strong arts and cultural precinct focused around the Geelong Gallery and Geelong Performing Arts Centre located in Little Malop Street.</p> <p>The development of Central Geelong is guided by the <i>Central Geelong Structure Plan</i>, <i>Central Geelong Action Plan</i> and the <i>Revitalising Central Geelong Action Plan</i>. Council in partnership with the State Government will continue to promote economic productivity and pedestrian activity in the precinct by implementing the recommendations of these plans.</p> <p>Whilst there is currently a strong retail and business focus in Central Geelong there is strong competition from surrounding centres including Pakington St (Geelong West), Belmont and Waurm Ponds.</p> <p>An additional 132,500 square metres of floor space could be supported within Central Geelong by 2036. It is considered that this growth could be accommodated within existing zoned land with support for higher and more dense development.</p>																		
Action required:	Nil																		
Growth Opportunities	<table border="1"> <thead> <tr> <th>Forecast supportable floor space 2016-2036 sqm (difference from total floor space)</th> <th>Potential to grow within current zoned land</th> <th>Sub precinct planning required</th> <th>Potential for rezoning to align with centre boundary</th> </tr> </thead> <tbody> <tr> <td>132,500</td> <td>Yes</td> <td>No</td> <td>No</td> </tr> </tbody> </table>	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)	Potential to grow within current zoned land	Sub precinct planning required	Potential for rezoning to align with centre boundary	132,500	Yes	No	No										
	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)	Potential to grow within current zoned land	Sub precinct planning required	Potential for rezoning to align with centre boundary															
132,500	Yes	No	No																

\* Excludes non employment uses such as residential, car parking and sites under construction.

## 1.1 CENTRAL GEELONG

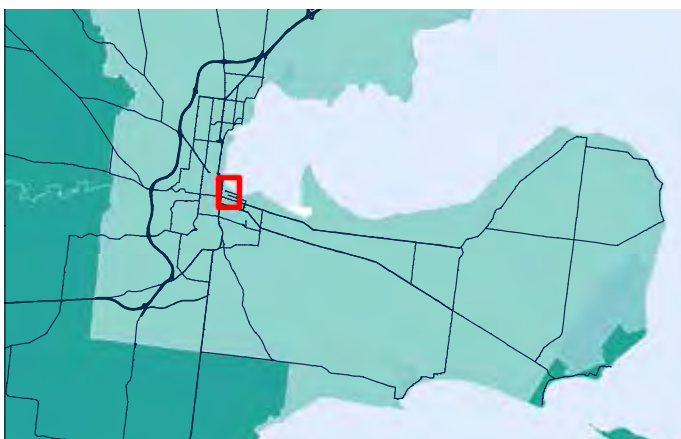
### CENTRE BOUNDARY AND EXISTING FLOOR SPACE USES



#### LEGEND

- Bulky Goods
- Car park
- Commercial
- Commercial Services
- Department Stores
- Education
- Enclosed Mall
- Entertainment
- Hospitality
- Industrial
- Medical
- Non-leasable Retail
- Public Facility
- Residential
- Specialty Food
- Specialty Other
- Supermarket
- Unclassified Shop
- Under Construction
- Vacant

#### CENTRE LOCATION MAP



# SUB-REGIONAL CENTRES

## 1.2 BELMONT

<b>CENTRE NAME: BELMONT</b>																			
Hierarchy status:	Sub-Regional																		
Location:	Belmont																		
Key characteristics:	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 and a kmart (DDS).																		
Current role:	This precinct contains a range of specialty shops, office, retail and hospitality services, and is particularly active at the southern end.																		
Zoning (sqm):	<table border="1"> <thead> <tr> <th>ACZ</th> <th>C1Z</th> <th>C2Z</th> <th>MUZ</th> <th>Other</th> </tr> </thead> <tbody> <tr> <td>0</td> <td>156,570</td> <td>0</td> <td>1,000</td> <td>0</td> </tr> </tbody> </table>	ACZ	C1Z	C2Z	MUZ	Other	0	156,570	0	1,000	0								
	ACZ	C1Z	C2Z	MUZ	Other														
0	156,570	0	1,000	0															
Retail and commercial floor space* (sqm):	<table border="1"> <thead> <tr> <th>Super market</th> <th>Depart' Store</th> <th>Restricted Retail</th> <th>Specialty Food</th> <th>Specialty Other</th> <th>Hospitality</th> <th>Total Retail</th> <th>Other Employ'</th> <th>Vacant</th> </tr> </thead> <tbody> <tr> <td>9,597</td> <td>6,108</td> <td>4,244</td> <td>5,267</td> <td>10,098</td> <td>7,275</td> <td>42,590</td> <td>5,780</td> <td>1,370</td> </tr> </tbody> </table>	Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant	9,597	6,108	4,244	5,267	10,098	7,275	42,590	5,780	1,370
Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant											
9,597	6,108	4,244	5,267	10,098	7,275	42,590	5,780	1,370											
Retail anchors:	1 DDS (6,108sqm Kmart), 3 supermarkets (6,027sqm Coles, 1,927sqm Coles, 1,643sqm Aldi)																		
Transport connections:	<table border="1"> <thead> <tr> <th>Public</th> <th>Private</th> </tr> </thead> <tbody> <tr> <td>South Geelong Railway Station (approx. 2km), bus service along High Street (routes 14, 15, 16, 17, 19, 20 and 74)</td> <td>High Street, Belmont from Barwon Heads Road to Roslyn Road</td> </tr> </tbody> </table>	Public	Private	South Geelong Railway Station (approx. 2km), bus service along High Street (routes 14, 15, 16, 17, 19, 20 and 74)	High Street, Belmont from Barwon Heads Road to Roslyn Road														
	Public	Private																	
South Geelong Railway Station (approx. 2km), bus service along High Street (routes 14, 15, 16, 17, 19, 20 and 74)	High Street, Belmont from Barwon Heads Road to Roslyn Road																		
Future role and opportunities:	<p>There is demand for an additional 20,800 square metres of floor space within this centre by 2036. Council should prepare an Urban Design Framework (UDF) or Structure Plan to guide the growth and development of the centre, investigating how additional floor space could be accommodated within existing zoned land. The plan should also include the surrounding residential land identified as an increased housing diversity area, identifying opportunities to increase housing densities around the sub-regional centre to help promote increased activity within the centre.</p> <p>The precinct is likely to continue to thrive, playing a continued retail, service and employment role in the local Belmont and wider Geelong area.</p>																		
Action required:	Develop an UDF or Structure Plan for Belmont. The plan should consider among other things; how to accommodate additional floor space, housing options, built form, car parking and streetscape improvements.																		
Growth Opportunities	<table border="1"> <thead> <tr> <th>Forecast supportable floor space 2016-2036 sqm (difference from total floor space)</th> <th>Potential to grow within current zoned land</th> <th>Sub precinct planning required</th> <th>Potential for rezoning to align with centre boundary</th> </tr> </thead> <tbody> <tr> <td>20,800</td> <td>Yes</td> <td>Yes</td> <td>No</td> </tr> </tbody> </table>	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)	Potential to grow within current zoned land	Sub precinct planning required	Potential for rezoning to align with centre boundary	20,800	Yes	Yes	No										
	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)	Potential to grow within current zoned land	Sub precinct planning required	Potential for rezoning to align with centre boundary															
20,800	Yes	Yes	No																

\* Excludes non employment uses such as residential, car parking and sites under construction.

## 1.2 BELMONT

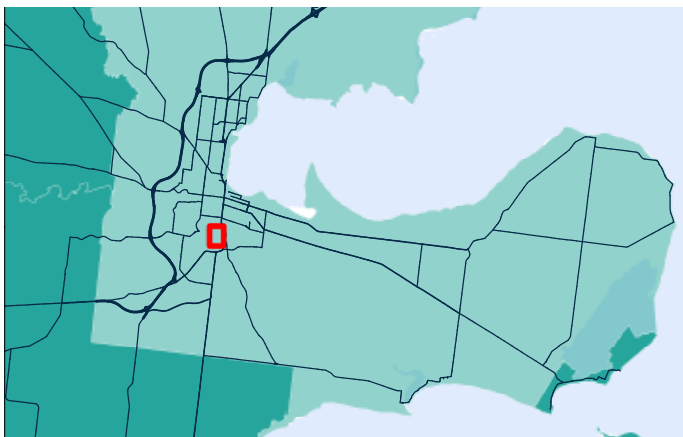
### CENTRE BOUNDARY AND EXISTING FLOOR SPACE USES



#### LEGEND

- Bulky Goods
- Car park
- Commercial
- Commercial Services
- Department Stores
- Education
- Enclosed Mall
- Entertainment
- Hospitality
- Industrial
- Medical
- Non-leasable Retail
- Public Facility
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- Supermarket
- Unclassified Shop
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- Vacant

### CENTRE LOCATION MAP



# SUB-REGIONAL CENTRES

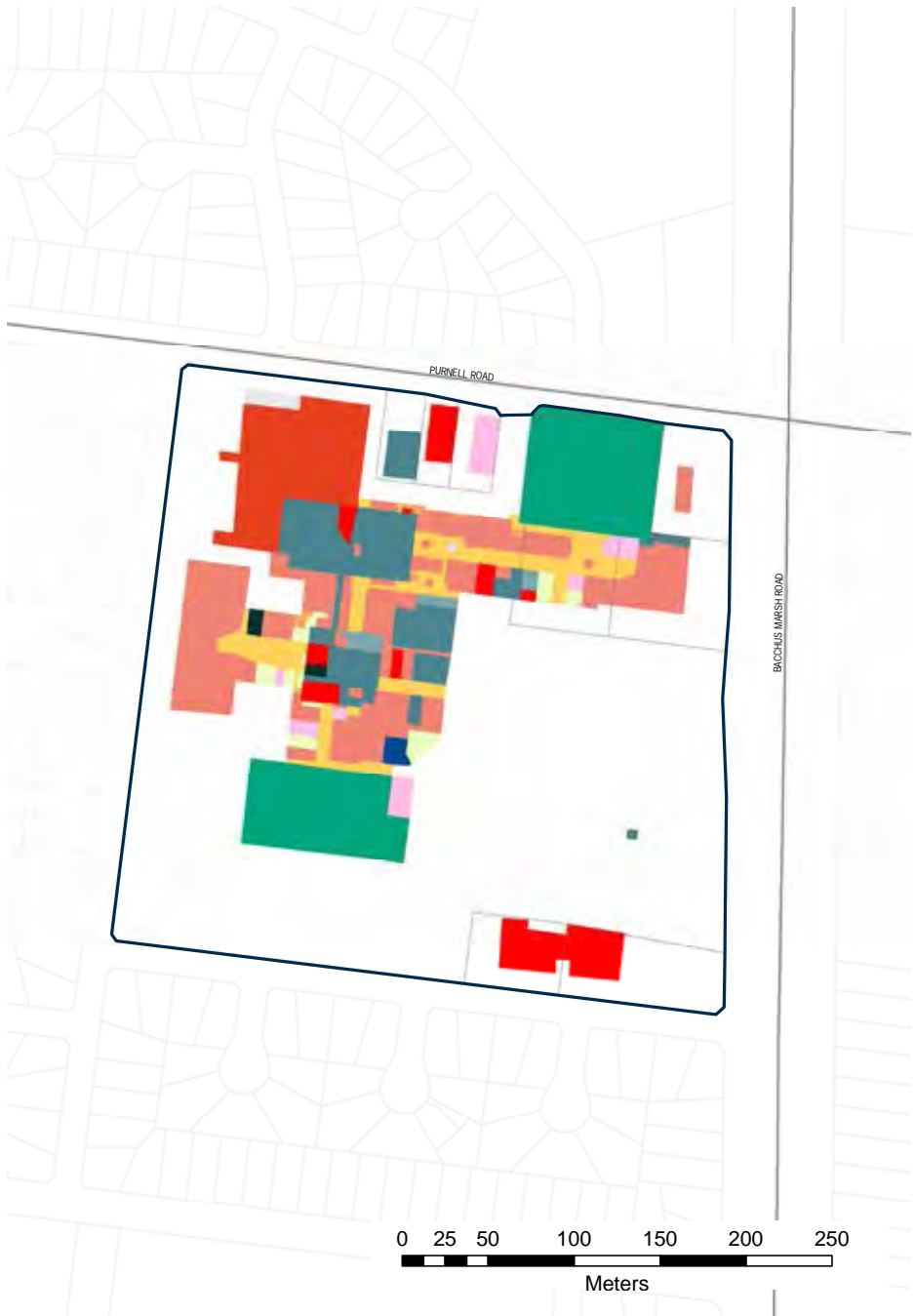
## 1.3 CORIO SC

CENTRE NAME: CORIO									
Hierarchy status:	Sub-Regional								
Location:	Corio								
Key characteristics:	Major, double storey shopping centre (Corio Shopping Centre) with over 95 stores and services, including a Geelong Council customer service centre.								
Current role:	The centre plays a central role in the provision of retail and services in the wider Corio area.								
Zoning (sqm):	ACZ	C1Z	C2Z	MUZ	Other				
	0	100,860	0	0	0				
Retail and commercial floor space* (sqm):	Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant
	8,695	5,772	0	1,245	10,708	1,043	27,463	3,500	0
Retail anchors:	1 DDS (6156sqm Kmart), 2 supermarkets (3634sqm Coles, 3655sqm Woolworths)								
Transport connections:	Public	Bus service (routes 10, 11, 12, 30 and 45)							
	Private	Corner of Bacchus Marsh Road and Purnell Road, accessed via the Geelong Ring Road and Princes Highway.							
Future role and opportunities:	<p>The residential area surrounding the centre is part of a large increased housing diversity area which supports higher density housing.</p> <p>The <i>Corio-Norlane Structure Plan 2012</i> supports the development of a mixed use precinct on the residential land directly opposite the shopping centre. This precinct could be a focus for community activity in the area.</p> <p>A number of different initiatives to provide housing choice and services for the community are underway which may help to encourage growth in this area.</p> <p>There is demand for an additional 16,600 square metres of floor space within this centre by 2036. It is likely that given surrounding site constraints, any further expansion of this centre will occur within the existing boundaries of the site. New development should be encouraged over existing car parking or buildings.</p>								
Action required:	Nil								
Growth Opportunities	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)		Potential to grow within current zoned land		Sub precinct planning required		Potential for rezoning to align with centre boundary		
	16,600		Yes – but with constraints		No		No		

\* Excludes non employment uses such as residential, car parking and sites under construction.

### 1.3 CORIO SC

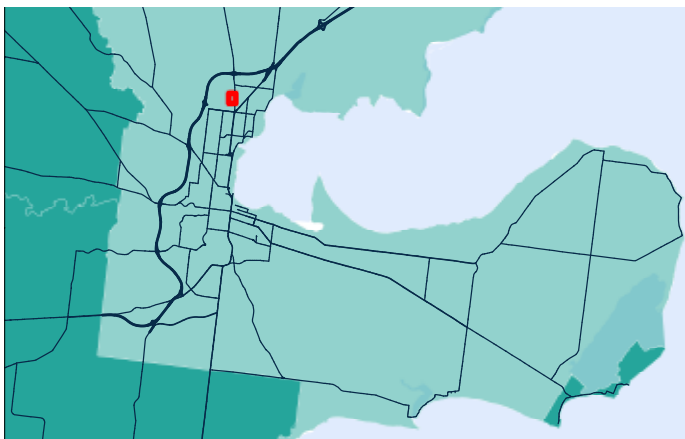
#### CENTRE BOUNDARY AND EXISTING FLOOR SPACE USES



#### LEGEND

- Bulky Goods
- Car park
- Commercial
- Commercial Services
- Department Stores
- Education
- Enclosed Mall
- Entertainment
- Hospitality
- Industrial
- Medical
- Non-leasable Retail
- Public Facility
- Residential
- Specialty Food
- Specialty Other
- Supermarket
- Unclassified Shop
- Under Construction
- Vacant

#### CENTRE LOCATION MAP



# SUB-REGIONAL CENTRES

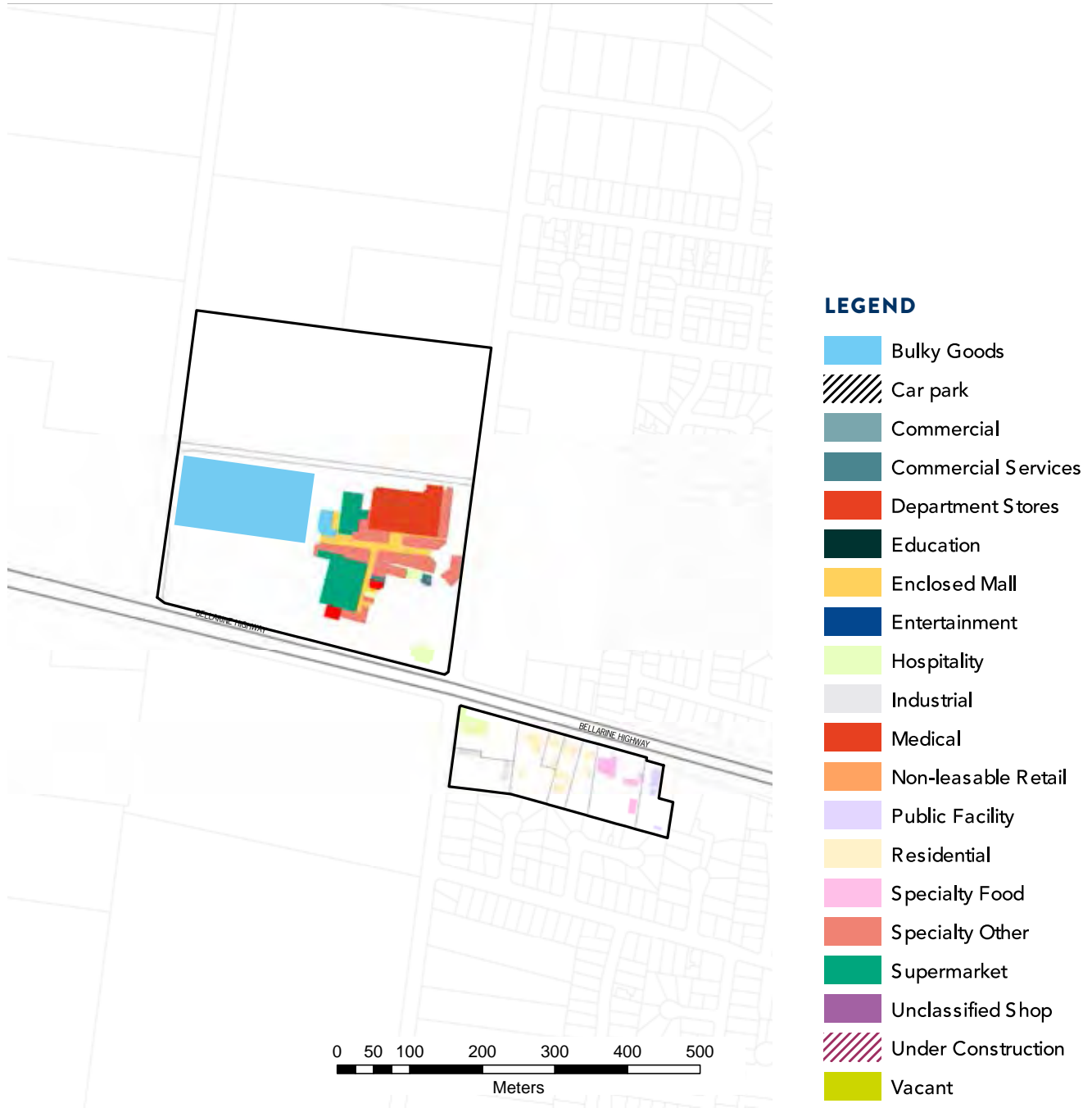
## 1.4 LEOPOLD

CENTRE NAME: LEOPOLD																			
Hierarchy status:	Sub-Regional																		
Location:	Leopold																		
Key characteristics:	Gateway Plaza is a sub-regional centre located along the Bellarine Highway. It contains Coles and Aldi Supermarkets, Kmart and a number of specialty stores.																		
Current role:	This centre largely serves the township of Leopold and commuters to and from the western region of Greater Geelong and the Bellarine Peninsula. It is complemented by small, local retail shopping strips found at Dorothy Street and Ash Road and the mixed use precinct diagonally opposite the site.																		
Zoning (sqm):	<table border="1"> <thead> <tr> <th>ACZ</th> <th>C1Z</th> <th>C2Z</th> <th>MUZ</th> <th>Other</th> </tr> </thead> <tbody> <tr> <td>0</td> <td>89,750</td> <td>0</td> <td>29,130</td> <td>0</td> </tr> </tbody> </table>	ACZ	C1Z	C2Z	MUZ	Other	0	89,750	0	29,130	0								
ACZ	C1Z	C2Z	MUZ	Other															
0	89,750	0	29,130	0															
Retail and commercial floor space* (sqm):	<table border="1"> <thead> <tr> <th>Super market</th> <th>Depart' Store</th> <th>Restricted Retail</th> <th>Specialty Food</th> <th>Specialty Other</th> <th>Hospitality</th> <th>Total Retail</th> <th>Other Employ'</th> <th>Vacant</th> </tr> </thead> <tbody> <tr> <td>4,959</td> <td>5,293</td> <td>12,343</td> <td>957</td> <td>6,805</td> <td>1,952</td> <td>32,309</td> <td>660</td> <td>0</td> </tr> </tbody> </table>	Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant	4,959	5,293	12,343	957	6,805	1,952	32,309	660	0
Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant											
4,959	5,293	12,343	957	6,805	1,952	32,309	660	0											
Planned Floor space sqm (additional)	Nil																		
Retail anchors:	2 supermarkets (3,018sqm Coles, 1,900sqm Aldi), 1 DDS (5,293 Kmart), Bunnings 12,343																		
Transport connections:	<table border="1"> <tbody> <tr> <td>Public</td> <td>Bus service (routes 75, 76, 77, 83)</td> </tr> <tr> <td>Private</td> <td>Corner of Bellarine Highway and Melaluka Road</td> </tr> </tbody> </table>	Public	Bus service (routes 75, 76, 77, 83)	Private	Corner of Bellarine Highway and Melaluka Road														
Public	Bus service (routes 75, 76, 77, 83)																		
Private	Corner of Bellarine Highway and Melaluka Road																		
Future role and opportunities:	<p>This centre consists of a Coles, Aldi, Kmart, Bunnings and speciality stores. The increase in the size of this centre from 6,900 square metres to 32,309 square metres completes the transition of this centre to a sub-regional centre status. With this expansion, the centre may attract consumers from the wider Bellarine Peninsula.</p> <p>This centre is also supported by a small number of retail uses, mainly hospitality, on the south east corner of the Bellarine Hwy and Melaluka Road. This area is considered part of the sub-regional centre and is zoned mixed use.</p> <p>The Leopold Urban Design Framework 2010 and the Leopold Structure Plan 2011 supported the transition of this centre from a neighbourhood centre to a sub-regional centre to service the Bellarine Peninsula. Existing planning policy (DPO30) supports the future expansion of the centre in a northerly direction along Melaluka Road.</p>																		
Action required:	Nil																		
Growth Opportunities	<table border="1"> <thead> <tr> <th>Forecast supportable floor space 2016-2036 sqm (difference from total floor space)</th> <th>Potential to grow within current zoned land</th> <th>Sub precinct planning required</th> <th>Potential for rezoning to align with centre boundary</th> </tr> </thead> <tbody> <tr> <td>15,800 (retail) 12,200 (restricted Retail)</td> <td>No</td> <td>No – already complete</td> <td>Yes – already planned</td> </tr> </tbody> </table>	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)	Potential to grow within current zoned land	Sub precinct planning required	Potential for rezoning to align with centre boundary	15,800 (retail) 12,200 (restricted Retail)	No	No – already complete	Yes – already planned										
Forecast supportable floor space 2016-2036 sqm (difference from total floor space)	Potential to grow within current zoned land	Sub precinct planning required	Potential for rezoning to align with centre boundary																
15,800 (retail) 12,200 (restricted Retail)	No	No – already complete	Yes – already planned																

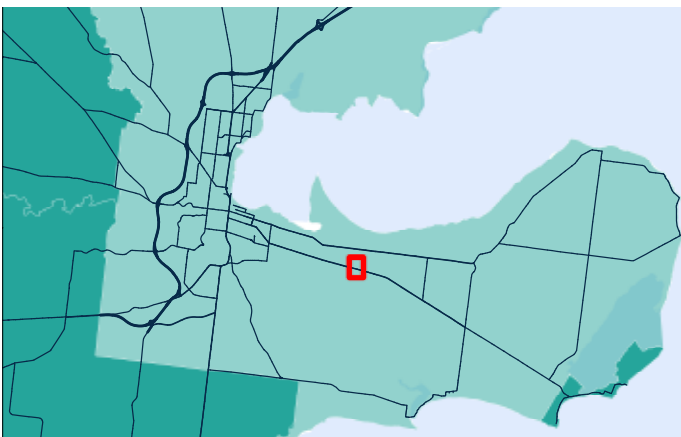
\* Excludes non employment uses such as residential, car parking and sites under construction.

## 1.4 LEOPOLD

### CENTRE BOUNDARY AND EXISTING FLOOR SPACE USES



### CENTRE LOCATION MAP



# SUB-REGIONAL CENTRES

## 1.5 WAURN PONDS

CENTRE NAME: WAURN PONDS																			
Hierarchy status:	Sub-Regional																		
Location:	Grovedale																		
Key characteristics:	Major shopping centre in the south west of Greater Geelong with over 115 stores, along with an Aldi supermarket across the Highway. In close proximity to Deakin University's Waurm Ponds campus and a municipal library.																		
Current role:	This centre serves a wide catchment, with the closest competing retail centres located in Belmont and Highton.																		
Zoning (sqm):	<table border="1"> <thead> <tr> <th>ACZ</th> <th>C1Z</th> <th>C2Z</th> <th>MUZ</th> <th>Other</th> </tr> </thead> <tbody> <tr> <td>0</td> <td>147,330</td> <td>0</td> <td>0</td> <td>14,080</td> </tr> </tbody> </table>	ACZ	C1Z	C2Z	MUZ	Other	0	147,330	0	0	14,080								
	ACZ	C1Z	C2Z	MUZ	Other														
0	147,330	0	0	14,080															
Retail and commercial floor space* (sqm):	<table border="1"> <thead> <tr> <th>Super market</th> <th>Depart' Store</th> <th>Restricted Retail</th> <th>Specialty Food</th> <th>Specialty Other</th> <th>Hospitality</th> <th>Total Retail</th> <th>Other Employ'</th> <th>Vacant</th> </tr> </thead> <tbody> <tr> <td>12 480</td> <td>11,640</td> <td>0</td> <td>2,437</td> <td>11,294</td> <td>3,492</td> <td>41,760</td> <td>2 330</td> <td>0</td> </tr> </tbody> </table>	Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant	12 480	11,640	0	2,437	11,294	3,492	41,760	2 330	0
Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant											
12 480	11,640	0	2,437	11,294	3,492	41,760	2 330	0											
Retail anchors:	2 DDS (6,155sqm Kmart, 5,488sqm Target), 3 supermarkets (6,800sqm Coles, 3,712sqm Woolworths, 1,563sqm Aldi)																		
Transport connections:	Public Bus service (14, 15, 17, 70 and 71)																		
	Private Corner of Pioneer Road and Princes Highway (Colac Road), accessed via the Geelong Ring Road and Surf Coast Highway																		
Future role and opportunities:	<p>It is recommended that the centre boundary include Aldi and the commercial properties on the north western side of Colac Road, as well as the Waurm Ponds Shopping Centre.</p> <p>Land to the south west of the centre (135-177 Colac Road) is owned by the shopping centre, but is identified as a key (residential) development area in Council's Housing Diversity Strategy and is zoned Residential Growth Schedule 1. Any future expansion of the shopping centre should occur within the existing Commercial 1 Zone land. The shopping centre should be encouraged to redevelop existing car parking areas and consider two or three storey development to achieve an increase in floor space.</p> <p>This centre is located directly to the east of the Waurm Ponds restricted retail precinct. Overtime it can be envisaged that there will be demand to grow both the sub-regional and restricted retail centres. Given the mix of land uses within the area, including some farming and residential zoned land, it is recommended that a Structure Plan for the area between Pioneer/South Valley Road and Pigdons Road be undertaken to inform future land use and built form outcomes. It is recommended this review consider the rezoning of the land at 250 South Valley Road and 126-138 Colac Road to a commercial Zone.</p>																		
Action required:	Amend the boundary of the Waurm Ponds shopping centre to include the north western side of Colac Road, to incorporate the Aldi, Apco Service Station, McDonalds and take away food premises.																		
Growth Opportunities	<table border="1"> <thead> <tr> <th>Forecast supportable floor space 2016-2036 sqm (difference from total floor space)</th> <th>Potential to grow within current zoned land</th> <th>Sub precinct planning required</th> <th>Potential for rezoning to align with centre boundary</th> </tr> </thead> <tbody> <tr> <td>22,700</td> <td>Yes – but with constraints</td> <td>Yes</td> <td>Yes</td> </tr> </tbody> </table>	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)	Potential to grow within current zoned land	Sub precinct planning required	Potential for rezoning to align with centre boundary	22,700	Yes – but with constraints	Yes	Yes										
	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)	Potential to grow within current zoned land	Sub precinct planning required	Potential for rezoning to align with centre boundary															
22,700	Yes – but with constraints	Yes	Yes																

\* Excludes non employment uses such as residential, car parking and sites under construction.

## 1.5 WAURN PONDS

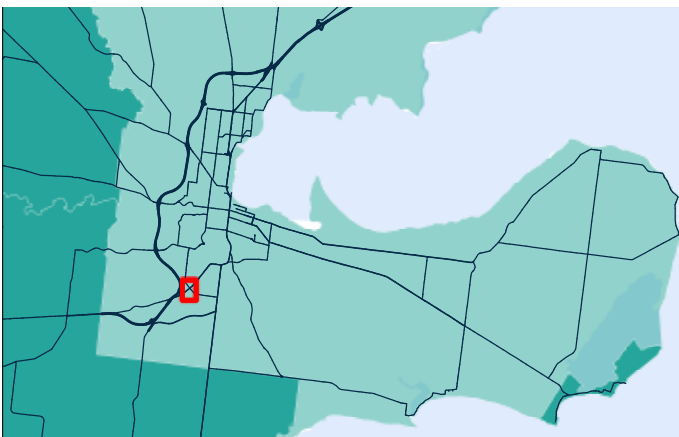
### CENTRE BOUNDARY AND EXISTING FLOOR SPACE USES



#### LEGEND

- Bulky Goods
- Car park
- Commercial
- Commercial Services
- Department Stores
- Education
- Enclosed Mall
- Entertainment
- Hospitality
- Industrial
- Medical
- Non-leasable Retail
- Public Facility
- Residential
- Specialty Food
- Specialty Other
- Supermarket
- Unclassified Shop
- Under Construction
- Vacant

### CENTRE LOCATION MAP



# SUB-REGIONAL CENTRES

## 1.6 ARMSTRONG CREEK TOWN CENTRE

CENTRE NAME: ARMSTRONG CREEK TOWN CENTRE									
Hierarchy status:	Sub-Regional								
Location:	Armstrong Creek								
Key characteristics:	Sub-regional centre, under construction.								
Current role:	Nil								
Zoning (sqm):	ACZ	C1Z	C2Z	MUZ	Other				
	0	0	0	0	0				
Retail and commercial floor space* (sqm):	Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant
	0	0	0	0	0	0	40,000	0	0
Retail anchors:	Supermarkets and Discount Department Stores								
Transport connections:	Public	Bus service (routes 50, 51)							
	Private	Surf Coast Highway							
Future role and opportunities:	<p>A sub-regional centre located on the Surf Coast Highway in Armstrong Creek. The <i>Armstrong Creek Town Centre Precinct Structure Plan</i> was approved in March 2016. This centre will be the civic, commercial and social heart of the Armstrong Creek Urban Growth Area. The centre is to include a mixture of traditional retailing, restricted retailing, offices, medical, sporting and civic facilities. Higher density housing surrounding the centre is also encouraged. This centre has been planned to support 40,000 square metres of retail floor space and 25,000 of restricted retail floor space.</p> <p>Planning permit 1338/2016 has been granted in January 2018 for the use of a supermarket, retail premises, food and drink, office and a gym. Development has recently commenced.</p> <p>Planning permit 733/2018 have also been granted in Oct 2018 for a second supermarket, more retail premises, a service station, child care facility, tavern and food and drink premises. Construction has commenced.</p> <p>If these permits were acted upon the town centre would contain a number of uses which would benefit the wider community and encourage further development within the Armstrong Creek Growth Area.</p>								
Action required:	Nil								
Growth Opportunities	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)		Potential to grow within current zoned land		Sub precinct planning required		Potential for rezoning to align with centre boundary		
	9,600 (retail) 6,168 (restricted retail)		Yes		No		No		

\* Excludes non employment uses such as residential, car parking and sites under construction.

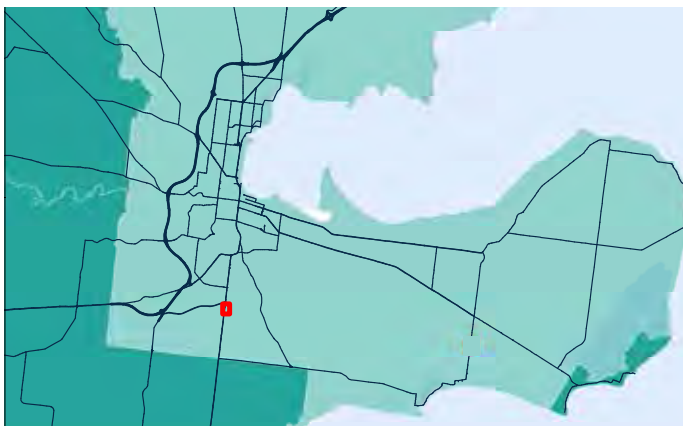
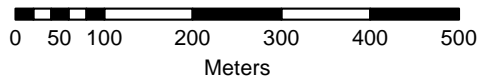
## 1.6 ARMSTRONG CREEK WESTCENTRE BOUNDARY AND EXISTING FLOOR SPACE USES



### LEGEND

- Bulky Goods
- Car park
- Commercial
- Commercial Services
- Department Stores
- Education
- Enclosed Mall
- Entertainment
- Hospitality
- Industrial
- Medical
- Non-leasable Retail
- Public Facility
- Residential
- Specialty Food
- Specialty Other
- Supermarket
- Unclassified Shop
- Under Construction
- Vacant

**CENTRE LOCATION MAP**



# SPECIALISED CENTRE

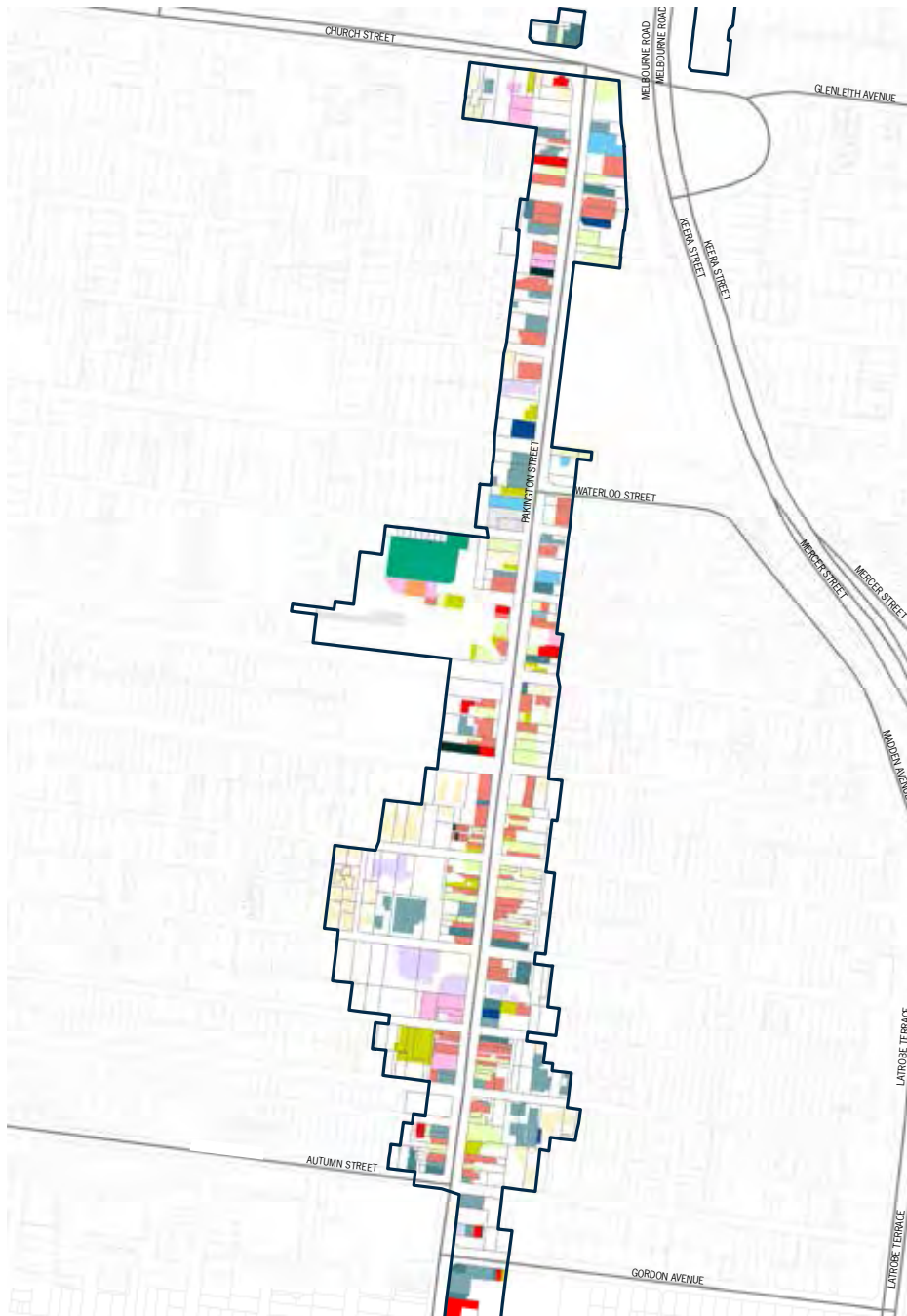
## 1.7 PAKINGTON STREET

CENTRE NAME: PAKINGTON STREET																			
Hierarchy status:	Specialised																		
Location:	Geelong West																		
Key characteristics:	Major, vibrant retail strip in close proximity to Central Geelong. Contains Pakington Strand (anchored by Woolworths) and a municipal library, and is well-serviced by bus and rail services. The southern end of the precinct has continuous street frontages and a traditional walkable shopping strip role, while the northern end has variable facades and more office and restricted retail use.																		
Current role:	Pakington Street (Geelong West) acts as a core retail, commercial and community centre in Greater Geelong, with a number of diverse retail and hospitality offers and community events. It serves both a local and wider regional role.																		
Zoning (sqm):	<table border="1"> <thead> <tr> <th>ACZ</th> <th>C1Z</th> <th>C2Z</th> <th>MUZ</th> <th>Other</th> </tr> </thead> <tbody> <tr> <td>0</td> <td>115,640</td> <td>56,280</td> <td>22,560</td> <td>0</td> </tr> </tbody> </table>	ACZ	C1Z	C2Z	MUZ	Other	0	115,640	56,280	22,560	0								
ACZ	C1Z	C2Z	MUZ	Other															
0	115,640	56,280	22,560	0															
Retail and commercial floor space* (sqm):	<table border="1"> <thead> <tr> <th>Super market</th> <th>Depart' Store</th> <th>Restricted Retail</th> <th>Specialty Food</th> <th>Specialty Other</th> <th>Hospitality</th> <th>Total Retail</th> <th>Other Employ'</th> <th>Vacant</th> </tr> </thead> <tbody> <tr> <td>3,692</td> <td>0</td> <td>1,916</td> <td>4,431</td> <td>16,099</td> <td>12,007</td> <td>38,145</td> <td>4,530</td> <td>5,000</td> </tr> </tbody> </table>	Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant	3,692	0	1,916	4,431	16,099	12,007	38,145	4,530	5,000
Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant											
3,692	0	1,916	4,431	16,099	12,007	38,145	4,530	5,000											
Retail anchors:	3,754sqm Woolworth supermarket																		
Transport connections:	<table border="1"> <thead> <tr> <th>Public</th> <th>Private</th> </tr> </thead> <tbody> <tr> <td>Geelong Railway Station (approx. 1 km), bus service (routes 10, 11, 12, 30, 45, 50 and 51)</td> <td>Pakington Street, from Church Street to Gordon Avenue, accessible via Princes Highway and Hamilton Highway</td> </tr> </tbody> </table>	Public	Private	Geelong Railway Station (approx. 1 km), bus service (routes 10, 11, 12, 30, 45, 50 and 51)	Pakington Street, from Church Street to Gordon Avenue, accessible via Princes Highway and Hamilton Highway														
Public	Private																		
Geelong Railway Station (approx. 1 km), bus service (routes 10, 11, 12, 30, 45, 50 and 51)	Pakington Street, from Church Street to Gordon Avenue, accessible via Princes Highway and Hamilton Highway																		
Future role and opportunities:	<p>Future role and opportunities: Pakington Street (Geelong West) is likely to continue to thrive as a retail hub and community centre into the future.</p> <p>Much of Pakington Street is covered by a Heritage Overlay which plays a significant role in guiding development within the area.</p> <p>Further planning work is needed to better define the role and function of the various sub-precincts within this broader centre, including the commercial 2 zone land located to the north. Attention is needed to ensure Pakington Street maintains its specialty retailing function and does not undermine the Geelong CBD.</p> <p>Council has commenced work on an Urban Design Framework for the commercial 1 zone land in Pakington Street. This project primarily seeks to identify streetscape upgrades. There is scope to broaden this piece of work to investigate re-development and re-zoning opportunities at the northern end of Pakington Street as well as along Gordon Avenue.</p>																		
Action required:	Prepare an UDF or Structure Plan for Pakington Street (Geelong West). The plan should consider development and re-zoning opportunities in Pakington Street, north of Waratah and Wellington Streets and within the dispersed restricted retail area along Gordon Ave.																		
Growth Opportunities	<table border="1"> <thead> <tr> <th>Forecast supportable floor space 2016-2036 sqm (difference from total floor space)</th> <th>Potential to grow within current zoned land</th> <th>Sub precinct planning required</th> <th>Potential for rezoning to align with centre boundary</th> </tr> </thead> <tbody> <tr> <td>18,000</td> <td>Yes</td> <td>Yes</td> <td>Yes</td> </tr> </tbody> </table>	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)	Potential to grow within current zoned land	Sub precinct planning required	Potential for rezoning to align with centre boundary	18,000	Yes	Yes	Yes										
Forecast supportable floor space 2016-2036 sqm (difference from total floor space)	Potential to grow within current zoned land	Sub precinct planning required	Potential for rezoning to align with centre boundary																
18,000	Yes	Yes	Yes																

\* Excludes non employment uses such as residential, car parking and sites under construction.

## 1.7 PAKINGTON STREET

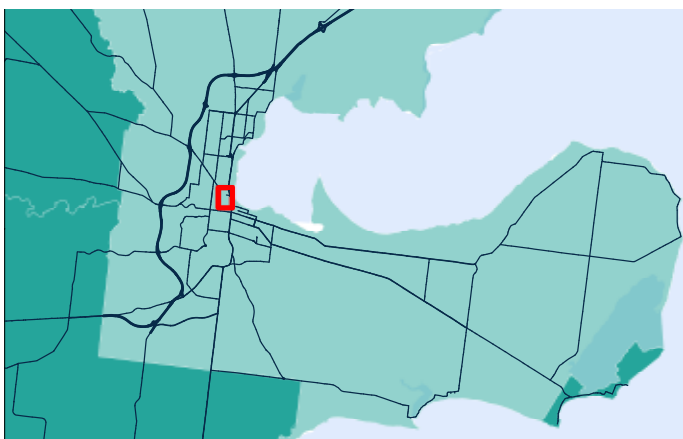
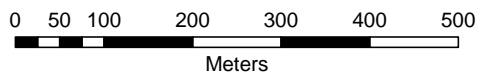
### CENTRE BOUNDARY AND EXISTING FLOOR SPACE USES



#### LEGEND

- Bulky Goods
- Car park
- Commercial
- Commercial Services
- Department Stores
- Education
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- Entertainment
- Hospitality
- Industrial
- Medical
- Non-leasable Retail
- Public Facility
- Residential
- Specialty Food
- Specialty Other
- Supermarket
- Unclassified Shop
- Under Construction
- Vacant

#### CENTRE LOCATION MAP



# TOWN CENTRES

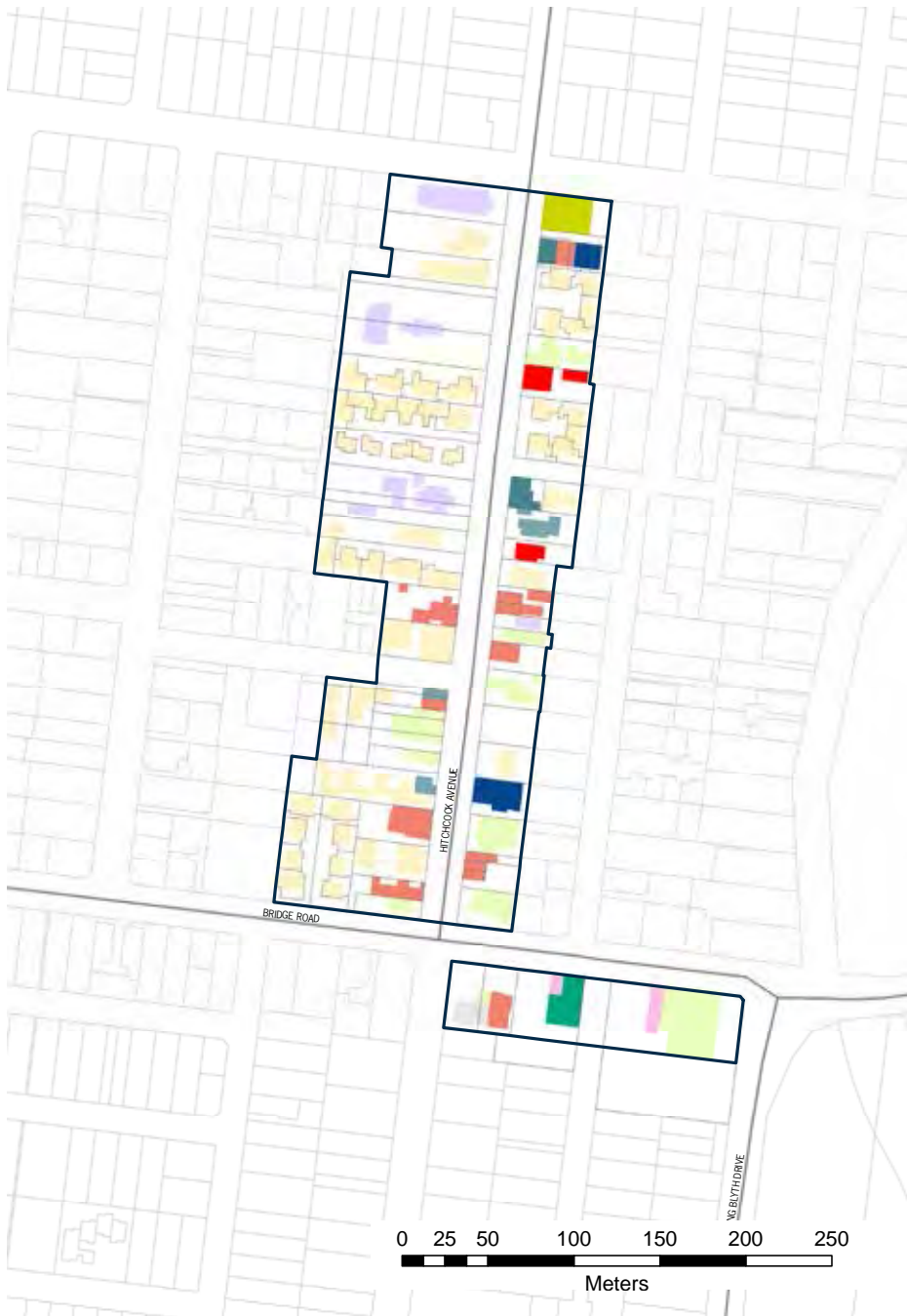
## 1.8 BARWON HEADS

CENTRE NAME: BARWON HEADS																			
Hierarchy status:	Town																		
Location:	Barwon Heads																		
Key characteristics:	Small township located on the mouth of the Barwon River. The town centre has a strong hospitality and specialty retail offer. The main street (Hitchcock Ave) comprises a mix of commercial and residential uses.																		
Current role:	This centre serves the local Barwon Heads area. It has a small supermarket anchor.																		
Zoning (sqm):	<table border="1"> <thead> <tr> <th>ACZ</th> <th>C1Z</th> <th>C2Z</th> <th>MUZ</th> <th>Other</th> </tr> </thead> <tbody> <tr> <td>0</td> <td>26,490</td> <td>0</td> <td>29,820</td> <td>0</td> </tr> </tbody> </table>	ACZ	C1Z	C2Z	MUZ	Other	0	26,490	0	29,820	0								
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Retail and commercial floor space* (sqm):	<table border="1"> <thead> <tr> <th>Super market</th> <th>Depart' Store</th> <th>Restricted Retail</th> <th>Specialty Food</th> <th>Specialty Other</th> <th>Hospitality</th> <th>Total Retail</th> <th>Other Employ'</th> <th>Vacant</th> </tr> </thead> <tbody> <tr> <td>1,100</td> <td>0</td> <td>0</td> <td>270</td> <td>3,040</td> <td>4,990</td> <td>10,300</td> <td>370</td> <td>1,100</td> </tr> </tbody> </table>	Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant	1,100	0	0	270	3,040	4,990	10,300	370	1,100
Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant											
1,100	0	0	270	3,040	4,990	10,300	370	1,100											
Retail anchors:	1 supermarket IGA (430 square meters current - 1,100 future)																		
Transport connections:	Public Bus service (route 80)																		
	Private Hitchcock Avenue and Bridge Road, accessible via Barwon Heads Road and Barwon Heads-Ocean Grove Road																		
Future role and opportunities:	<p>Barwon Heads is small township on the opposite side of the Barwon River to Ocean Grove. It has a strong hospitably and speciality retail offer but with only a small supermarket anchor. A planning permit has been granted to expand the supermarket but construction has not yet commenced. Barwon Heads relies strongly on the services within Ocean Grove to meet the daily retail needs of the township.</p> <p>With little residential growth planned for Barwon Heads and the need to protect areas of environmental and indigenous heritage value within and surrounding the town, the current role of Barwon Heads as a local town centre is likely to be maintained into the future.</p> <p>There is limited demand for additional retail floor space within Barwon Heads between 2016 and 2036.</p> <p>The <i>Barwon Heads Urban Design Framework 2003 (UDF)</i> and <i>Barwon Heads Structure Plan 2018</i> relate to the Barwon Heads Town Centre (and wider township). The recommendations of UDF have been implemented through significant streetscape upgrades. The structure plan does not identify the need for any additional commercial zoned land in the township.</p>																		
Action required:	Nil																		
Growth Opportunities	<table border="1"> <thead> <tr> <th>Forecast supportable floor space 2016-2036 sqm (difference from total floor space)</th> <th>Potential to grow within current zoned land</th> <th>Sub precinct planning required</th> <th>Potential for rezoning to align with centre boundary</th> </tr> </thead> <tbody> <tr> <td>1,600</td> <td>Yes</td> <td>No</td> <td>No</td> </tr> </tbody> </table>	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)	Potential to grow within current zoned land	Sub precinct planning required	Potential for rezoning to align with centre boundary	1,600	Yes	No	No										
	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)	Potential to grow within current zoned land	Sub precinct planning required	Potential for rezoning to align with centre boundary															
1,600	Yes	No	No																

\* Excludes non employment uses such as residential, car parking and sites under construction.

## 1.8 BARWON HEADS

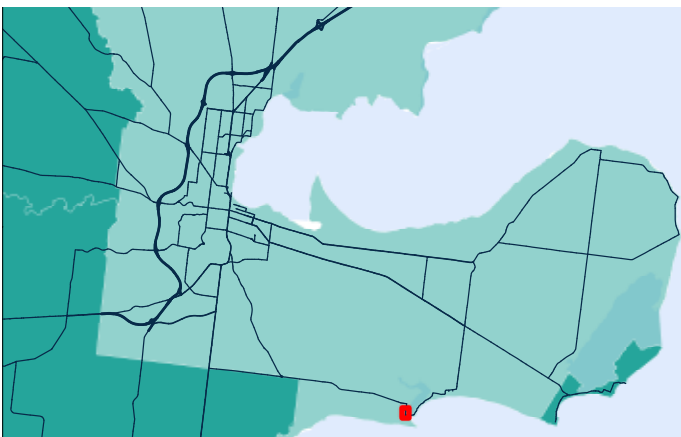
### CENTRE BOUNDARY AND EXISTING FLOOR SPACE USES



#### LEGEND

- Bulky Goods
- Car park
- Commercial
- Commercial Services
- Department Stores
- Education
- Enclosed Mall
- Entertainment
- Hospitality
- Industrial
- Medical
- Non-leasable Retail
- Public Facility
- Residential
- Specialty Food
- Specialty Other
- Supermarket
- Unclassified Shop
- Under Construction
- Vacant

#### CENTRE LOCATION MAP



# TOWN CENTRES

## 1.9 DRYSDALE

CENTRE NAME: DRYSDALE																			
Hierarchy status:	Town																		
Location:	Drysdale																		
Key characteristics:	A significant area in terms of size, the Drysdale Town Centre can be divided into two distinct areas in terms of land use and appearance. The areas are bounded by Portarlington Road to the north and Princess St to the south. The western section comprises the main Drysdale retail centre, while the eastern section is largely industrial.																		
Current role:	Anchored by three supermarkets Woolworths, Aldi and Coles, this centre is significant in both the local and sub-regional context.																		
Zoning (sqm):	<table border="1"> <thead> <tr> <th>ACZ</th> <th>C1Z</th> <th>C2Z</th> <th>MUZ</th> <th>Other</th> </tr> </thead> <tbody> <tr> <td>0</td> <td>97,140</td> <td>0</td> <td>0</td> <td>0</td> </tr> </tbody> </table>	ACZ	C1Z	C2Z	MUZ	Other	0	97,140	0	0	0								
	ACZ	C1Z	C2Z	MUZ	Other														
0	97,140	0	0	0															
Retail and commercial floor space* (sqm):	<table border="1"> <thead> <tr> <th>Super market</th> <th>Depart' Store</th> <th>Restricted Retail</th> <th>Specialty Food</th> <th>Specialty Other</th> <th>Hospitality</th> <th>Total Retail</th> <th>Other Employ'</th> <th>Vacant</th> </tr> </thead> <tbody> <tr> <td>8,013</td> <td>0</td> <td>0</td> <td>675</td> <td>3,293</td> <td>2,900</td> <td>14,886</td> <td>1,710</td> <td>200</td> </tr> </tbody> </table>	Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant	8,013	0	0	675	3,293	2,900	14,886	1,710	200
Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant											
8,013	0	0	675	3,293	2,900	14,886	1,710	200											
Retail anchors:	3 supermarkets (2,560sqm Woolworths, 1,396sqm Aldi, 4,000sqm Coles)																		
Transport connections:	Public Bus service (routes 78, 79 and 81)																		
	Private Intersection of Portarlington Road, Murradoc Road and Princess Street																		
Future role and opportunities:	<p>With Drysdale a designated Council urban growth area, there may be pressure to increase stores and services in the centre. However, with new retail development, Coles in the town centre and Woolworths in Curlewis there is likely to be no need for additional supermarkets in Drysdale and Clifton Springs</p> <p>The development of Drysdale and Clifton Springs is guided by the <i>Drysdale Urban Design Framework 2012</i> (UDF) and the <i>Drysdale/Clifton Springs Structure Plan 2010</i>. The recommendations of these documents have been implemented into the Geelong Planning Scheme through various amendments. Most recently land along Murradoc Road has been rezoned from the Farming Zone to Commercial 2.</p> <p>The Drysdale UDF identifies a number of vacant sites within the Commercial 1 Zone. Any additional demand for floor space can be achieved within existing zoned land.</p>																		
Action required:	Nil																		
Growth Opportunities	<table border="1"> <thead> <tr> <th>Forecast supportable floor space 2016-2036 sqm (difference from total floor space)</th> <th>Potential to grow within current zoned land</th> <th>Sub precinct planning required</th> <th>Potential for rezoning to align with centre boundary</th> </tr> </thead> <tbody> <tr> <td>8,100</td> <td>Yes</td> <td>No</td> <td>No</td> </tr> </tbody> </table>	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)	Potential to grow within current zoned land	Sub precinct planning required	Potential for rezoning to align with centre boundary	8,100	Yes	No	No										
	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)	Potential to grow within current zoned land	Sub precinct planning required	Potential for rezoning to align with centre boundary															
8,100	Yes	No	No																

\* Excludes non employment uses such as residential, car parking and sites under construction.

## 1.9 DRYSDALE

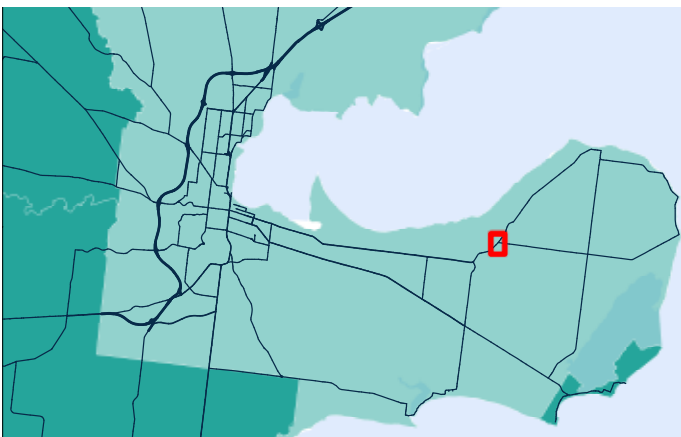
### CENTRE BOUNDARY AND EXISTING FLOOR SPACE USES



#### LEGEND

- Bulky Goods
- Car park
- Commercial
- Commercial Services
- Department Stores
- Education
- Enclosed Mall
- Entertainment
- Hospitality
- Industrial
- Medical
- Non-leasable Retail
- Public Facility
- Residential
- Specialty Food
- Specialty Other
- Supermarket
- Unclassified Shop
- Under Construction
- Vacant

#### CENTRE LOCATION MAP



# TOWN CENTRES

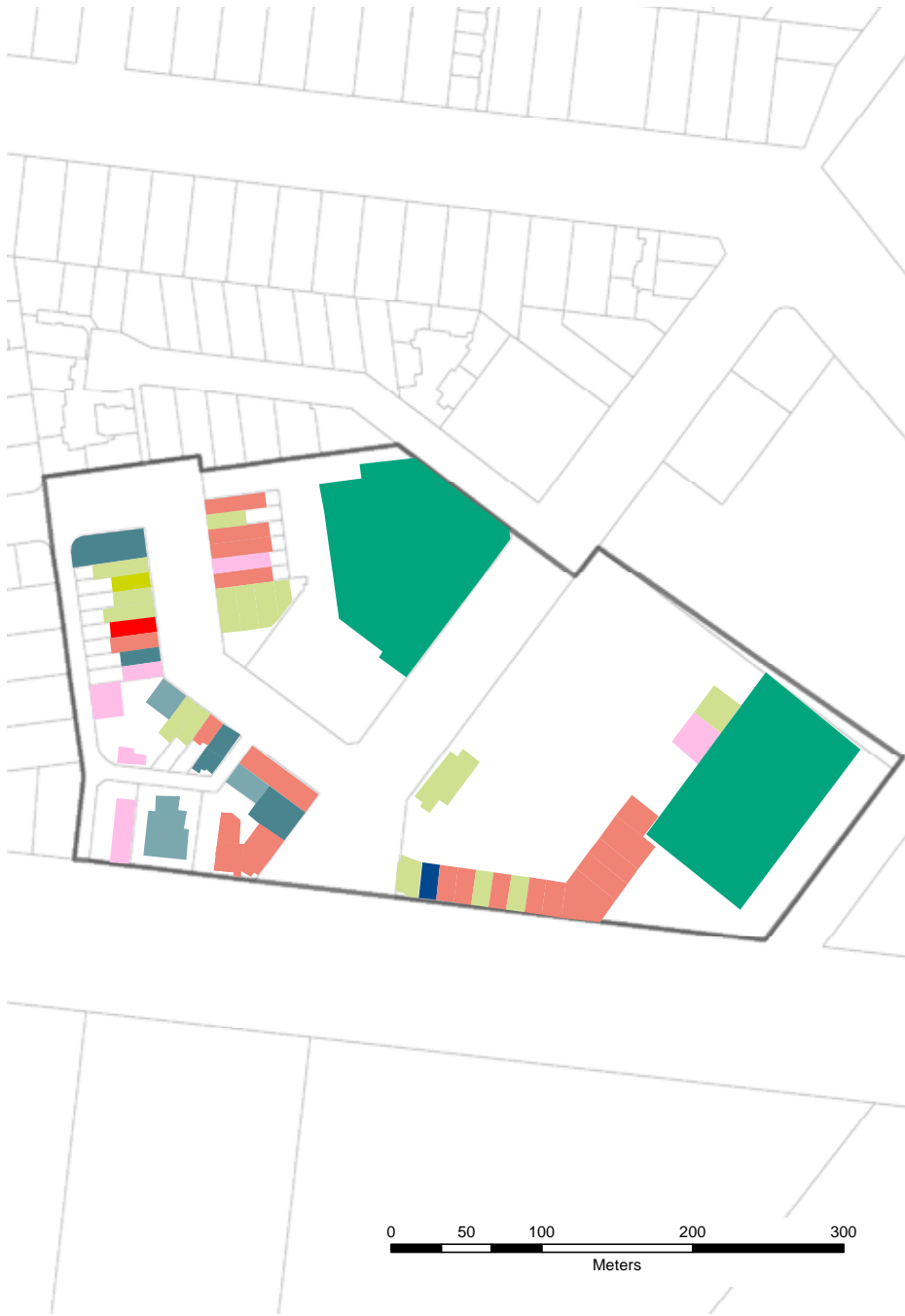
## 1.10 LARA

CENTRE NAME: LARA									
Hierarchy status:	Town								
Location:	Lara								
Key characteristics:	Lara's main, walkable retail area is anchored by Woolworths (recently redeveloped) and Coles (new). Though the Lara area has been growing in population in recent years, this centre does not appear to be performing as well as other town centres in Greater Geelong. With the township now having two full line supermarkets, spending may be more likely to be retained within the township.								
Current role:	This centre serves both the Lara area and commuter traffic.								
Zoning (sqm):	ACZ		C1Z		C2Z		MUZ		Other
	0		48,180		0		0		20
Retail and commercial floor space* (sqm):	Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant
	8,395	0	0	1,215	3,500	1,842	14,952	960	100
Retail anchors:	2 supermarkets (Woolworths expanded to 4,200sqm in June 2016 , 4,195sqm Coles)								
Transport connections:	Public	Bus service (route 12)							
	Private	Station Lake Road, accessible via Princes Freeway and Forest Road North/South							
Future role and opportunities:	<p>The <i>Lara Urban Design Framework (UDF) 2006</i> and <i>Lara Structure Plan 2011</i> relate to the Lara Town centre and the wider township. The recommendations from these documents have been implemented into the Greater Geelong Planning Scheme. Of particular note is the Lara UDF which facilitated the redevelopment of the Lara Town Centre to create additional retail floor space consisting of a Coles supermarket and speciality stores. Since the opening of the Coles Supermarket, the Woolworth store has been redeveloped.</p> <p>The further outward expansion of the Lara Town Centre may be challenging to achieve given the abutting land uses. Council would encourage increasing the height of buildings within the town centre to achieve additional floor space and land use mix.</p>								
Action required:	Nil								
Growth Opportunities	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)		Potential to grow within current zoned land		Sub precinct planning required		Potential for rezoning to align with centre boundary		
	5,700		Yes – with constraints		No		No		

\* Excludes non employment uses such as residential, car parking and sites under construction.

## 1.10 LARA

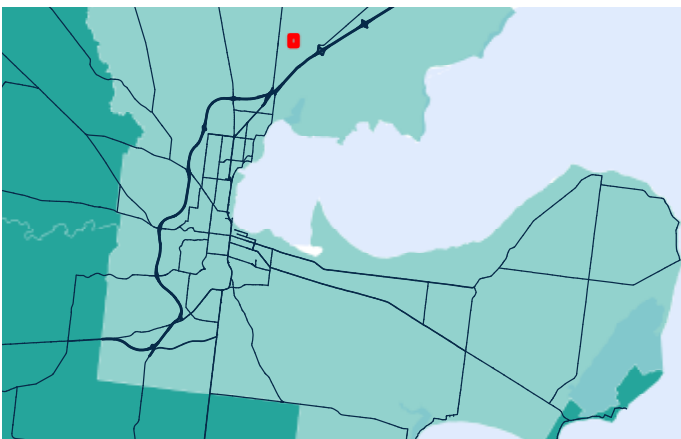
### CENTRE BOUNDARY AND EXISTING FLOOR SPACE USES



#### LEGEND

- Bulky Goods
- Car park
- Commercial
- Commercial Services
- Department Stores
- Education
- Enclosed Mall
- Entertainment
- Hospitality
- Industrial
- Medical
- Non-leasable Retail
- Public Facility
- Residential
- Specialty Food
- Specialty Other
- Supermarket
- Unclassified Shop
- Under Construction
- Vacant

### CENTRE LOCATION MAP



# TOWN CENTRES

## 1.11 OCEAN GROVE

CENTRE NAME: OCEAN GROVE																			
Hierarchy status:	Town																		
Location:	Ocean Grove																		
Key characteristics:	Thriving, beachside centre with high quality streetscape along main road (The Terrace). The precinct is to a degree disjointed by the large, centrally-located car park and the sprawling retail uses to the north, northeast and east of the fine-grain, walkable retail strip along The Terrace.																		
Current role:	This centre has a mix of retail, restricted retail, offices, services, hospitality and industrial use. As one of the larger retail offers in the southern Bellarine Peninsula sub-region, including Barwon Heads, Point Lonsdale and Queenscliff, it plays both a local and wider sub-regional role.																		
Zoning (sqm):	<table border="1"> <thead> <tr> <th>ACZ</th> <th>C1Z</th> <th>C2Z</th> <th>MUZ</th> <th>Other</th> </tr> </thead> <tbody> <tr> <td>0</td> <td>53,170</td> <td>0</td> <td>3,240</td> <td>40</td> </tr> </tbody> </table>	ACZ	C1Z	C2Z	MUZ	Other	0	53,170	0	3,240	40								
	ACZ	C1Z	C2Z	MUZ	Other														
0	53,170	0	3,240	40															
Retail and commercial floor space* (sqm):	<table border="1"> <thead> <tr> <th>Super market</th> <th>Depart' Store</th> <th>Restricted Retail</th> <th>Specialty Food</th> <th>Specialty Other</th> <th>Hospitality</th> <th>Total Retail</th> <th>Other Employ'</th> <th>Vacant</th> </tr> </thead> <tbody> <tr> <td>2,713</td> <td>1,842</td> <td>701</td> <td>1,013</td> <td>6,445</td> <td>3,579</td> <td>16,293</td> <td>2,400</td> <td>400</td> </tr> </tbody> </table>	Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant	2,713	1,842	701	1,013	6,445	3,579	16,293	2,400	400
Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant											
2,713	1,842	701	1,013	6,445	3,579	16,293	2,400	400											
Retail anchors:	1 DDS (1,840sqm Target), 1 supermarket (2,711sqm Coles)																		
Transport connections:	Public Bus service (routes 80, 81, 82 and 83)																		
	Private Hodgson Street, between The Avenue and Dare Street, accessible via Grubb Road, Shell Road and Bellarine Highway																		
Future role and opportunities:	<p>While relatively near the Ocean Grove (Marketplace) Neighbourhood Centre, the diversity and extent of the retail offer at the Ocean Grove Town Centre ensures that it will likely continue to be very competitive, even in the sub-regional context. With Ocean Grove a designated district town, there may be pressure to increase stores and services in the centre.</p> <p>The <i>Ocean Grove Urban Design Framework (UDF) 2016</i> and the <i>Ocean Grove Structure Plan 2015</i> relate to the development of the Town Centre and wider township. Recent Planning Scheme Amendment C346 has implemented the recommendations from these documents into the Planning Scheme including Design and Development Overlays to guide the development of the town centre. The UDF identifies development opportunities within the town centre which would achieve additional retail floor space.</p>																		
Action required:	Nil																		
Growth Opportunities	<table border="1"> <thead> <tr> <th>Forecast supportable floor space 2016-2036 sqm (difference from total floor space)</th> <th>Potential to grow within current zoned land</th> <th>Sub precinct planning required</th> <th>Potential for rezoning to align with centre boundary</th> </tr> </thead> <tbody> <tr> <td>3,500</td> <td>Yes</td> <td>No</td> <td>No</td> </tr> </tbody> </table>	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)	Potential to grow within current zoned land	Sub precinct planning required	Potential for rezoning to align with centre boundary	3,500	Yes	No	No										
	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)	Potential to grow within current zoned land	Sub precinct planning required	Potential for rezoning to align with centre boundary															
3,500	Yes	No	No																

\* Excludes non employment uses such as residential, car parking and sites under construction.

## 1.11 OCEAN GROVE

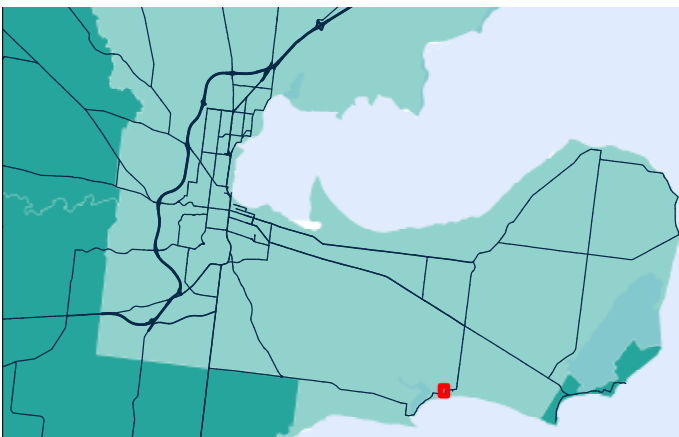
### CENTRE BOUNDARY AND EXISTING FLOOR SPACE USES



#### LEGEND

- Bulky Goods
- Car park
- Commercial
- Commercial Services
- Department Stores
- Education
- Enclosed Mall
- Entertainment
- Hospitality
- Industrial
- Medical
- Non-leasable Retail
- Public Facility
- Residential
- Specialty Food
- Specialty Other
- Supermarket
- Unclassified Shop
- Under Construction
- Vacant

### CENTRE LOCATION MAP



# TOWN CENTRES

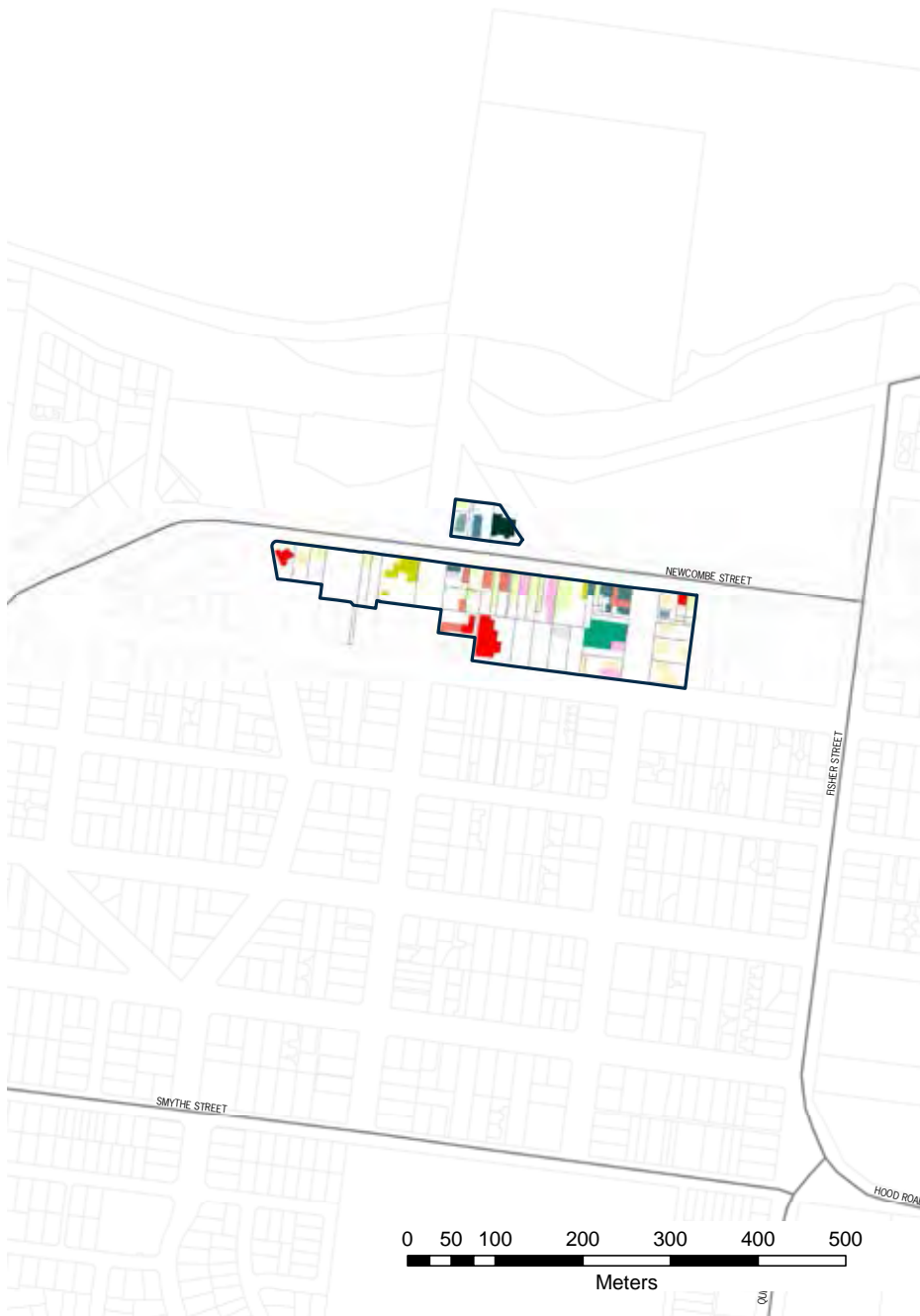
## 1.12 PORTARLINGTON

CENTRE NAME: PORTARLINGTON																			
Hierarchy status:	Town																		
Location:	Portarlington																		
Key characteristics:	Small but lively beachside retail strip with a significant hospitality component.																		
Current role:	This centre serves the local Portarlington area and its surrounds. Its beachside location and high amenity makes its tourism and hospitality offer attractive to a regional catchment.																		
Zoning (sqm):	<table border="1"> <thead> <tr> <th>ACZ</th> <th>C1Z</th> <th>C2Z</th> <th>MUZ</th> <th>Other</th> </tr> </thead> <tbody> <tr> <td>0</td> <td>38,080</td> <td>0</td> <td>0</td> <td>0</td> </tr> </tbody> </table>	ACZ	C1Z	C2Z	MUZ	Other	0	38,080	0	0	0								
	ACZ	C1Z	C2Z	MUZ	Other														
0	38,080	0	0	0															
Retail and commercial floor space* (sqm):	<table border="1"> <thead> <tr> <th>Super market</th> <th>Depart' Store</th> <th>Restricted Retail</th> <th>Specialty Food</th> <th>Specialty Other</th> <th>Hospitality</th> <th>Total Retail</th> <th>Other Employ'</th> <th>Vacant</th> </tr> </thead> <tbody> <tr> <td>1,430</td> <td>0</td> <td>0</td> <td>1,043</td> <td>1,145</td> <td>2,796</td> <td>6,408</td> <td>1,010</td> <td>800</td> </tr> </tbody> </table>	Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant	1,430	0	0	1,043	1,145	2,796	6,408	1,010	800
Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant											
1,430	0	0	1,043	1,145	2,796	6,408	1,010	800											
Retail anchors:	2 supermarkets (1,425sqm Woolworths, 501sqm IGA)																		
Transport connections:	Public Bus services (route 79)																		
	Private Newcombe Street, accessible via Geelong Road and Portarlington-Queenscliff Road																		
Future role and opportunities:	<p>With little residential growth planned for the area and a compact urban form encouraged in planning policy, the role, size and intensity of the Portarlington Town Centre is likely to continue into the future.</p> <p>The <i>Portarlington Urban Design Framework (UDF) 2011</i> and <i>Portarlington Structure Plan 2016</i> relate to the Portarlington Town Centre and wider township. The UDF introduced a number of Design and Development Overlays to guide the ongoing development of the town centre. The UDF also identified development opportunities within the town centre. A small increase in retail floor space demand has been identified by 2036, which could be accommodated within existing zoned land.</p>																		
Action required:	Nil																		
Growth Opportunities	<table border="1"> <thead> <tr> <th>Forecast supportable floor space 2016-2036 sqm (difference from total floor space)</th> <th>Potential to grow within current zoned land</th> <th>Sub precinct planning required</th> <th>Potential for rezoning to align with centre boundary</th> </tr> </thead> <tbody> <tr> <td>2,500</td> <td>Yes</td> <td>No</td> <td>No</td> </tr> </tbody> </table>	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)	Potential to grow within current zoned land	Sub precinct planning required	Potential for rezoning to align with centre boundary	2,500	Yes	No	No										
	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)	Potential to grow within current zoned land	Sub precinct planning required	Potential for rezoning to align with centre boundary															
2,500	Yes	No	No																

\* Excludes non employment uses such as residential, car parking and sites under construction.

## 1.12 PORTARLINGTON

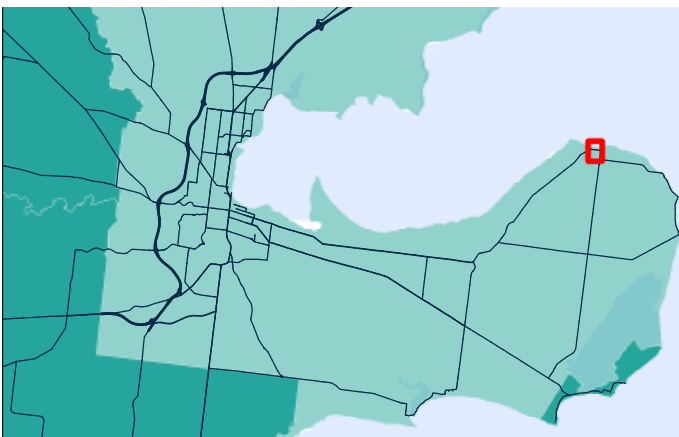
### CENTRE BOUNDARY AND EXISTING FLOOR SPACE USES



#### LEGEND

- Bulky Goods
- Car park
- Commercial
- Commercial Services
- Department Stores
- Education
- Enclosed Mall
- Entertainment
- Hospitality
- Industrial
- Medical
- Non-leasable Retail
- Public Facility
- Residential
- Specialty Food
- Specialty Other
- Supermarket
- Unclassified Shop
- Under Construction
- Vacant

#### CENTRE LOCATION MAP



# TOWN CENTRES

## 1.13 ST LEONARDS

CENTRE NAME: ST LEONARDS									
Hierarchy status:	Town								
Location:	St Leonards								
Key characteristics:	Small seaside holiday town on the northern Bellarine Peninsula, low permanent population base but grows significantly over the summer months.								
Current role:	Small town centre anchored by a small IGA and speciality retail.								
Zoning (sqm):	ACZ	C1Z	C2Z	MUZ	Other				
	0	15,440	0	0	0				
Retail and commercial floor space* (sqm):	Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant
	1,000	0	0	0	1,039	1,146	3,185	0	100
Retail anchors:	1,000 sqm IGA								
Transport connections:	Public	Bus Service (route 60)							
	Private	Murradoc Road, accessible via Drysdale-St Leonards Road (Muradoc Road) and Portarlington-Road							
Future role and opportunities:	<p>St Leonards is a popular holiday destination with a relatively low permanent population in comparison to the number of dwellings within the township.</p> <p>Since the 2006 retail strategy was completed a 1,000m2 supermarket has been constructed within the township. The township relies on Drysdale for the majority of its daily retail needs. The rezoning of land to accommodate 1500 new residential lots within the township should help to encourage additional retail investment within the Town Centre over time.</p> <p>St Leonards has been elevated in the retail hierarchy to 'Town Centre' to service the growing St Leonards population. A small increase in retail floor space demand has been identified by 2036, which could be accommodated within existing zoned land.</p> <p>The <i>St Leonards Urban Design Framework (UDF) 2006</i> made recommendation regarding improvement to the streetscape within the Town Centre. The <i>St Leonards Structure Plan 2015</i> recommended a review of the retail needs of the township in 10 years due to the potential population growth of the town but also acknowledged there were vacant sites within the centre which could accommodate growth.</p>								
Action required:	Nil								
Growth Opportunities	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)		Potential to grow within current zoned land		Sub precinct planning required		Potential for rezoning to align with centre boundary		
	2,100		Yes		No		No		

\* Excludes non employment uses such as residential, car parking and sites under construction.

### 1.13 ST LEONARDS

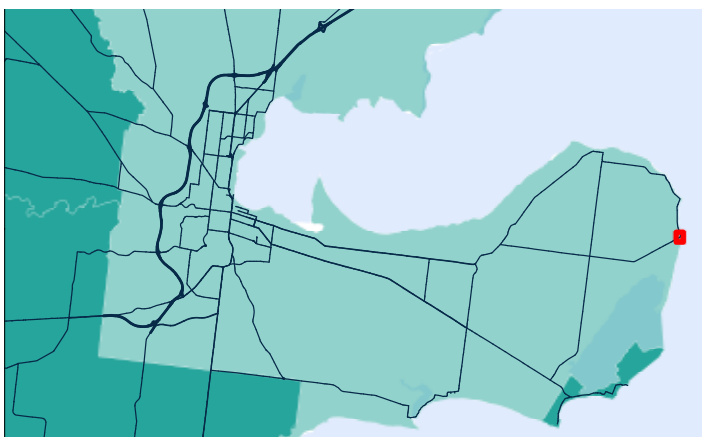
#### CENTRE BOUNDARY AND EXISTING FLOOR SPACE USES



#### LEGEND

- Bulky Goods
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- Under Construction
- Vacant

#### CENTRE LOCATION MAP



# NEIGHBOURHOOD CENTRES

## 1.14 ASH RD, LEOPOLD

CENTRE NAME: ASH RD, LEOPOLD									
Hierarchy status:	Neighbourhood								
Location:	Leopold								
Key characteristics:	Small local shopping strip in residential area with a Friendly Grocer.								
Current role:	Serves the Leopold area at a very local level.								
Zoning (sqm):	ACZ		C1Z		C2Z		MUZ		Other
	0		2,450		0		0		0
Retail and commercial floor space* (sqm):	Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant
	0	0	0	380	710	490	1,580	0	190
Retail anchors:	1 supermarket (376sqm Friendly Grocer)								
Transport connections:	Public	Bus service (route 77)							
	Private	Ash Road, between Lawrence Street and Anzac Avenue, accessible via Bellarine Highway							
Future role and opportunities:	Serves the Leopold area at a very local level. May experience changes in the future as it has been included as an IHDA in the Planning Scheme								
Action required:	Nil								
Growth Opportunities	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)		Potential to grow within current zoned land		Sub precinct planning required		Potential for rezoning to align with centre boundary		
	1,400		No		No		No		

\* Excludes non employment uses such as residential, car parking and sites under construction.

## 1.14 ASH RD, LEOPOLD

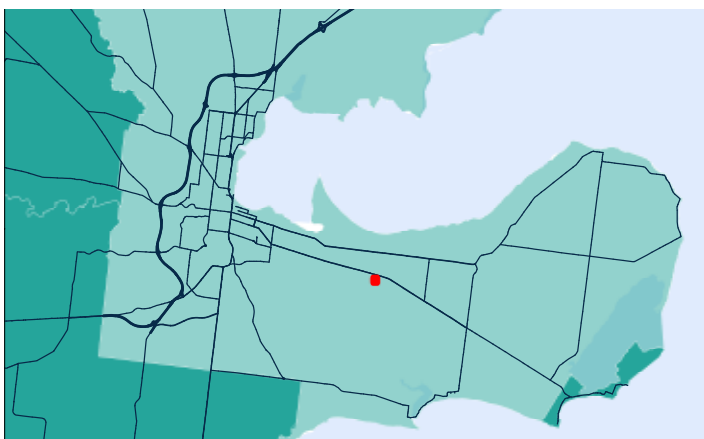
### CENTRE BOUNDARY AND EXISTING FLOOR SPACE USES



#### LEGEND

- Bulky Goods
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### CENTRE LOCATION MAP



# NEIGHBOURHOOD CENTRES

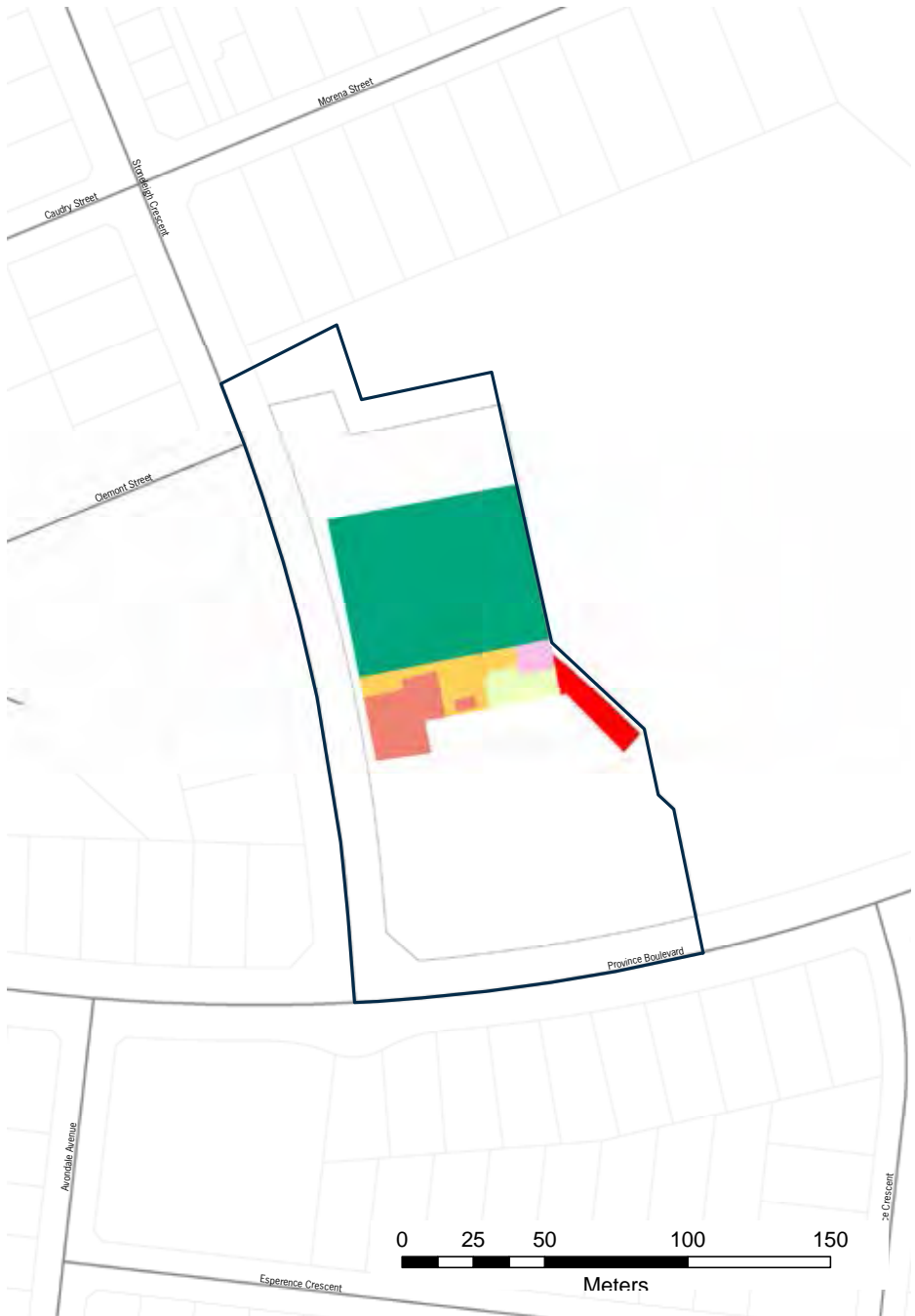
## 1.15 BARRABOOL HILLS SHOPPING CENTRE

<b>CENTRE NAME: BARRABOOL HILLS SC</b>									
Hierarchy status:	Neighbourhood								
Location:	Highton								
Key characteristics:	This centre is anchored by a Woolworth supermarket and specialty stores								
Current role:	Neighbourhood centre								
Zoning (sqm):	ACZ	C1Z	C2Z	MUZ	Other				
	0	19,410	0	0	0				
Retail and commercial floor space* (sqm):	Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant
	3,318	0	0	110	543	255	4,226	0	0
Retail anchors:	1 supermarket (3,318sqm Woolworths)								
Transport connections:	Public	Bus service (route 34)							
	Private	Corner Stoneleigh Crescent and Province Boulevard, accessible via Barrabool Road							
Future role and opportunities:	<p>The centre services Highton and Wandana Heights, an area that has a growing residential population and prior to this centre opening was strongly lacking in its retail offer.</p> <p>This centre was opened in 2015. Further expansion of this centre may be limited given land constraints.</p>								
Action required:	Nil								
Growth Opportunities	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)		Potential to grow within current zoned land		Sub precinct planning required		Potential for rezoning to align with centre boundary		
	1,400		No		No		No		

\* Excludes non employment uses such as residential, car parking and sites under construction.

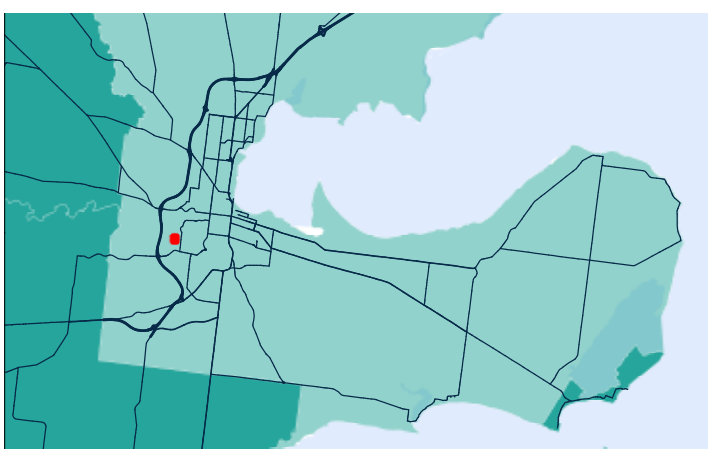
# 1.15 BARRABOOL HILLS SHOPPING CENTRE

## CENTRE BOUNDARY AND EXISTING FLOOR SPACE USES



- LEGEND**
- Bulky Goods
  - Car park
  - Commercial
  - Commercial Services
  - Department Stores
  - Education
  - Enclosed Mall
  - Entertainment
  - Hospitality
  - Industrial
  - Medical
  - Non-leasable Retail
  - Public Facility
  - Residential
  - Specialty Food
  - Specialty Other
  - Supermarket
  - Unclassified Shop
  - Under Construction
  - Vacant

## CENTRE LOCATION MAP



# NEIGHBOURHOOD CENTRES

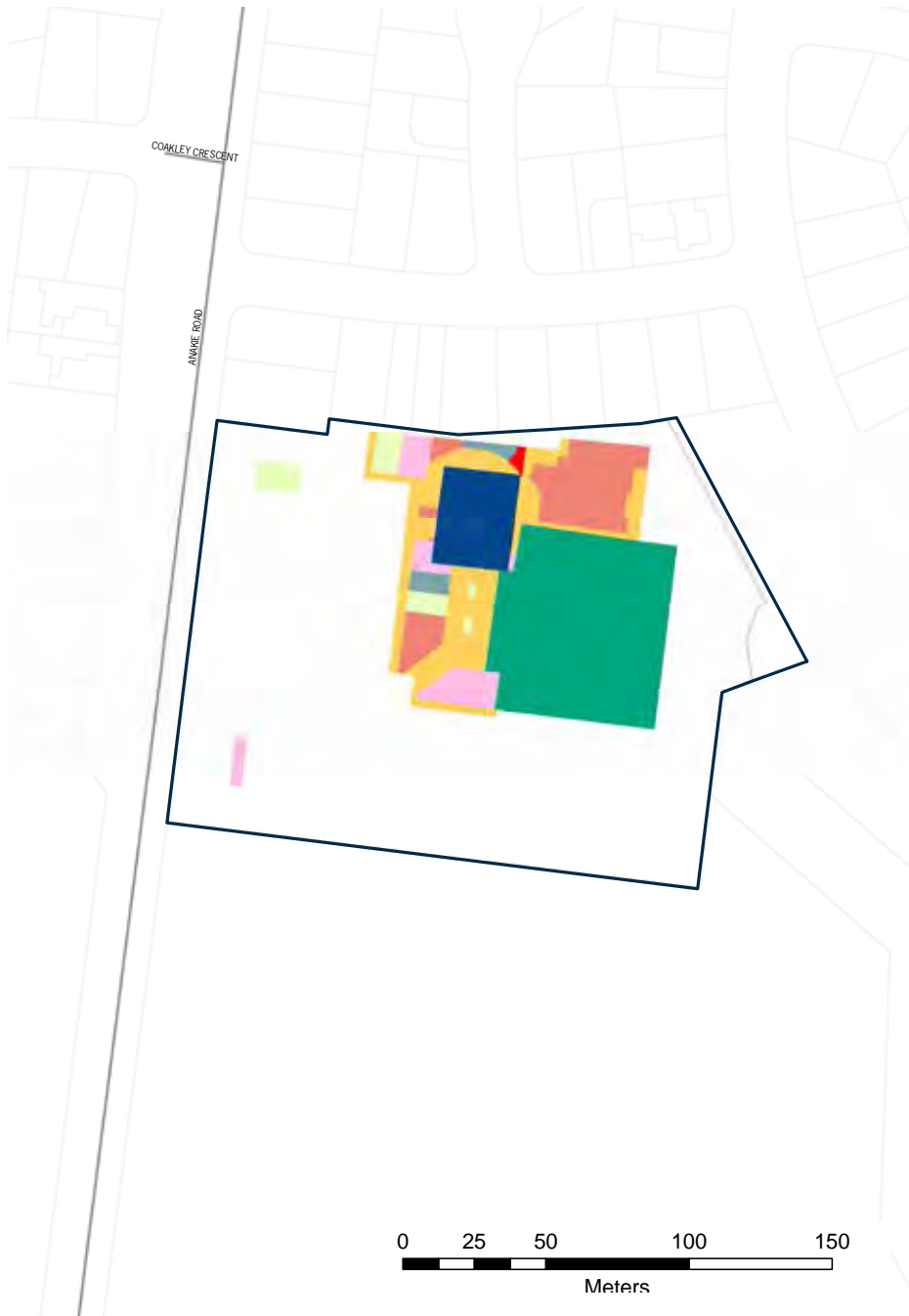
## 1.16 BELL POST SHOPPING CENTRE

<b>CENTRE NAME: BELL POST SHOPPING CENTRE</b>																			
Hierarchy status:	Neighbourhood																		
Location:	Norlane																		
Key characteristics:	Mid-sized shopping centre (anchored by Woolworths) along Anakie Road. The centre appears to have low customer activity (a trend unchanged from the 2006 Geelong Retail Strategy) and has poor accessibility due to its position north of Cowies Creek, which has limited road traffic permeability.																		
Current role:	This centre serves the local Bell Post Hill area and is complemented by several small local centres.																		
Zoning (sqm):	<table border="1"> <thead> <tr> <th>ACZ</th> <th>C1Z</th> <th>C2Z</th> <th>MUZ</th> <th>Other</th> </tr> </thead> <tbody> <tr> <td>0</td> <td>24,930</td> <td>0</td> <td>0</td> <td>0</td> </tr> </tbody> </table>	ACZ	C1Z	C2Z	MUZ	Other	0	24,930	0	0	0								
	ACZ	C1Z	C2Z	MUZ	Other														
0	24,930	0	0	0															
Retail and commercial floor space* (sqm):	<table border="1"> <thead> <tr> <th>Super market</th> <th>Depart' Store</th> <th>Restricted Retail</th> <th>Specialty Food</th> <th>Specialty Other</th> <th>Hospitality</th> <th>Total Retail</th> <th>Other Employ'</th> <th>Vacant</th> </tr> </thead> <tbody> <tr> <td>3,352</td> <td>0</td> <td>0</td> <td>675</td> <td>1,169</td> <td>366</td> <td>5,562</td> <td>390</td> <td>0</td> </tr> </tbody> </table>	Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant	3,352	0	0	675	1,169	366	5,562	390	0
Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant											
3,352	0	0	675	1,169	366	5,562	390	0											
Retail anchors:	1 supermarket (3,403sqm Woolworths)																		
Transport connections:	Public Bus service (route 45)																		
	Private Anakie Road, between Donnybrook Road and Braund Avenue/Furner Avenue																		
Future role and opportunities:	<p>With its location and anchor, there is significant potential for the performance of the shopping centre to be improved.</p> <p>An Aldi store has been constructed 800m to the south of this centre on Anakie Road. This may create competition for this centre.</p> <p>This centre could look at ways to improve the retail offer of the centre to attract more trade.</p>																		
Action required:	Nil																		
Growth Opportunities	<table border="1"> <thead> <tr> <th>Forecast supportable floor space 2016-2036 sqm (difference from total floor space)</th> <th>Potential to grow within current zoned land</th> <th>Sub precinct planning required</th> <th>Potential for rezoning to align with centre boundary</th> </tr> </thead> <tbody> <tr> <td>2,700</td> <td>Yes – with constraints</td> <td>No</td> <td>No</td> </tr> </tbody> </table>	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)	Potential to grow within current zoned land	Sub precinct planning required	Potential for rezoning to align with centre boundary	2,700	Yes – with constraints	No	No										
	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)	Potential to grow within current zoned land	Sub precinct planning required	Potential for rezoning to align with centre boundary															
2,700	Yes – with constraints	No	No																

\* Excludes non employment uses such as residential, car parking and sites under construction.

## 1.16 BELL POST SHOPPING CENTRE

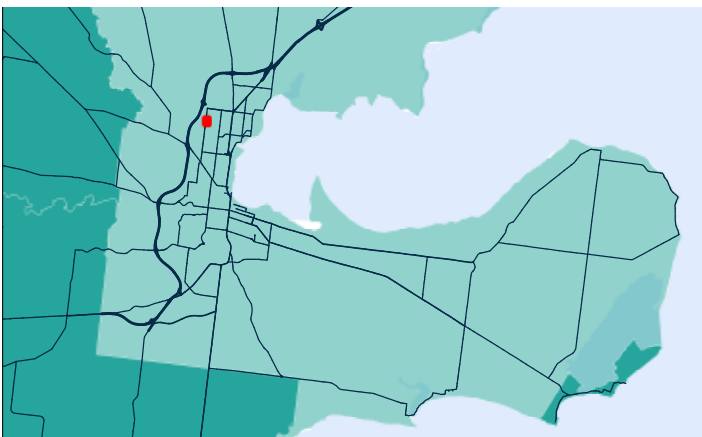
### CENTRE BOUNDARY AND EXISTING FLOOR SPACE USES



#### LEGEND

- Bulky Goods
- Car park
- Commercial
- Commercial Services
- Department Stores
- Education
- Enclosed Mall
- Entertainment
- Hospitality
- Industrial
- Medical
- Non-leasable Retail
- Public Facility
- Residential
- Specialty Food
- Specialty Other
- Supermarket
- Unclassified Shop
- Under Construction
- Vacant

### CENTRE LOCATION MAP



# NEIGHBOURHOOD CENTRES

## 1.17 BELLARINE VILLAGE

<b>CENTRE NAME: BELLARINE VILLAGE</b>																			
Hierarchy status:	Neighbourhood																		
Location:	Newcomb																		
Key characteristics:	Mid-sized shopping centre (anchored by Woolworths) along the Bellarine Highway in Newcomb. It is in very close proximity (under 400m) to the larger Newcomb Central Shopping Centre.																		
Current role:	This centre offers a mix of retail and services, with some hospitality. Along with Newcomb Central, it serves the Newcomb area, along with the wider Thomson, Whittington, Breakwater, St Albans Park and Moolap areas. These areas offer only small, local retail and no supermarkets. The centre also serves commuters travelling to and from the western region of Greater Geelong and the Bellarine Peninsula. It benefits from being located along the highway ahead of Newcomb Central for commuters travelling from Geelong.																		
Zoning (sqm):	<table border="1"> <thead> <tr> <th>ACZ</th> <th>C1Z</th> <th>C2Z</th> <th>MUZ</th> <th>Other</th> </tr> </thead> <tbody> <tr> <td>0</td> <td>20,740</td> <td>0</td> <td>0</td> <td>2,480</td> </tr> </tbody> </table>	ACZ	C1Z	C2Z	MUZ	Other	0	20,740	0	0	2,480								
ACZ	C1Z	C2Z	MUZ	Other															
0	20,740	0	0	2,480															
Retail and commercial floor space* (sqm):	<table border="1"> <thead> <tr> <th>Super market</th> <th>Depart' Store</th> <th>Restricted Retail</th> <th>Specialty Food</th> <th>Specialty Other</th> <th>Hospitality</th> <th>Total Retail</th> <th>Other Employ'</th> <th>Vacant</th> </tr> </thead> <tbody> <tr> <td>3,868</td> <td>0</td> <td>0</td> <td>1,438</td> <td>827</td> <td>796</td> <td>6,929</td> <td>430</td> <td>0</td> </tr> </tbody> </table>	Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant	3,868	0	0	1,438	827	796	6,929	430	0
Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant											
3,868	0	0	1,438	827	796	6,929	430	0											
Retail anchors:	1 supermarket (3,868sqm Woolworths)																		
Transport connections:	<table border="1"> <tbody> <tr> <td>Public</td> <td>Bus service (routes 45, 75, 76, 77 and 83)</td> </tr> <tr> <td>Private</td> <td>Bellarine Highway, between Boundary Road and Wilsons Road</td> </tr> </tbody> </table>	Public	Bus service (routes 45, 75, 76, 77 and 83)	Private	Bellarine Highway, between Boundary Road and Wilsons Road														
Public	Bus service (routes 45, 75, 76, 77 and 83)																		
Private	Bellarine Highway, between Boundary Road and Wilsons Road																		
Future role and opportunities:	A moderate amount of retail growth is forecast for this centre through to 2036. The centre is land locked but redevelopment over existing car parking or acquisition of adjacent housing could provide additional floor space in the future.																		
Action required:	Nil																		
Growth Opportunities	<table border="1"> <thead> <tr> <th>Forecast supportable floor space 2016-2036 sqm (difference from total floor space)</th> <th>Potential to grow within current zoned land</th> <th>Sub precinct planning required</th> <th>Potential for rezoning to align with centre boundary</th> </tr> </thead> <tbody> <tr> <td>2,600</td> <td>Yes – but with constraints</td> <td>No</td> <td>No</td> </tr> </tbody> </table>	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)	Potential to grow within current zoned land	Sub precinct planning required	Potential for rezoning to align with centre boundary	2,600	Yes – but with constraints	No	No										
Forecast supportable floor space 2016-2036 sqm (difference from total floor space)	Potential to grow within current zoned land	Sub precinct planning required	Potential for rezoning to align with centre boundary																
2,600	Yes – but with constraints	No	No																

\* Excludes non employment uses such as residential, car parking and sites under construction.

## 1.17 BELLARINE VILLAGE

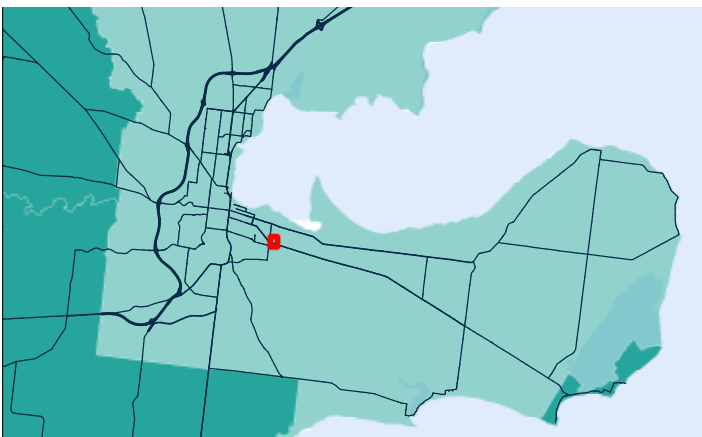
### CENTRE BOUNDARY AND EXISTING FLOOR SPACE USES



#### LEGEND

- Bulky Goods
- Car park
- Commercial
- Commercial Services
- Department Stores
- Education
- Enclosed Mall
- Entertainment
- Hospitality
- Industrial
- Medical
- Non-leasable Retail
- Public Facility
- Residential
- Specialty Food
- Specialty Other
- Supermarket
- Unclassified Shop
- Under Construction
- Vacant

### CENTRE LOCATION MAP



# NEIGHBOURHOOD CENTRES

## 1.18 DOROTHY STREET, LEOPOLD

CENTRE NAME: DOROTHY STREET, LEOPOLD									
Hierarchy status:	Neighbourhood								
Location:	Leopold								
Key characteristics:	Small local shopping strip in residential area with a Foodworks.								
Current role:	Serves the Leopold area at a very local level.								
Zoning (sqm):	ACZ		C1Z		C2Z		MUZ		Other
	0		3,030		0		0		2,480
Retail and commercial floor space* (sqm):	Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant
	636	0	0	0	860	306	1,803	240	0
Retail anchors:	1 supermarket (636sqm Foodworks)								
Transport connections:	Public	Bus service (route 77)							
	Private	Dorothy Street, between Simonds Road and Longview Avenue, accessible via Bellarine Highway and Portarlington Road							
Future role and opportunities:	This centre serves the Leopold area at a very local level. This centre may experience changes in the future as it has been included as an IHDA in the Planning Scheme.								
Action required:	Nil								
Growth Opportunities	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)		Potential to grow within current zoned land		Sub precinct planning required		Potential for rezoning to align with centre boundary		
	1,100		No		No		No		

\* Excludes non employment uses such as residential, car parking and sites under construction.

## 1.18 DOROTHY STREET, LEOPOLD

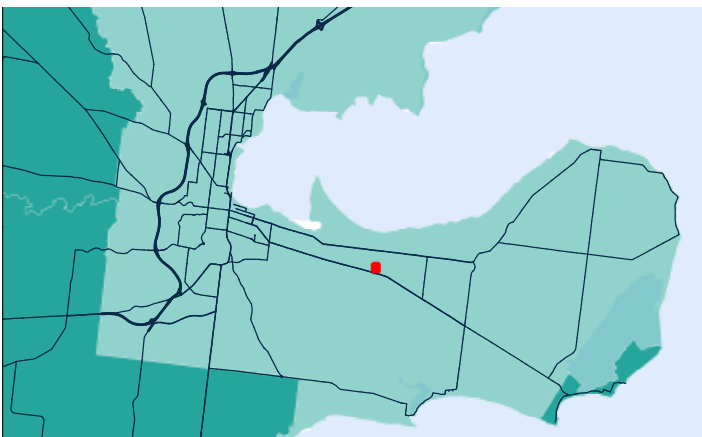
### CENTRE BOUNDARY AND EXISTING FLOOR SPACE USES



#### LEGEND

- Bulky Goods
- Car park
- Commercial
- Commercial Services
- Department Stores
- Education
- Enclosed Mall
- Entertainment
- Hospitality
- Industrial
- Medical
- Non-leasable Retail
- Public Facility
- Residential
- Specialty Food
- Specialty Other
- Supermarket
- Unclassified Shop
- Under Construction
- Vacant

### CENTRE LOCATION MAP



# NEIGHBOURHOOD CENTRES

## 1.19 HYLAND STREET, FYANSFORD

CENTRE NAME: HYLAND STREET, FYANSFORD																			
Hierarchy status:	Neighbourhood																		
Location:	Fyansford																		
Key characteristics:	Small shopping strip (under 15 shops) along the Hamilton Highway and adjacent to the Moorabool River. Contains a mix of uses, including hospitality, specialty shops, restricted retail and residential. Does not have high accessibility from the south, due to its proximity to the Barwon and Moorabool Rivers.																		
Current role:	Plays a local role within the emerging Fyansford and existing Herne Hill community.																		
Zoning (sqm):	<table border="1"> <thead> <tr> <th>ACZ</th> <th>C1Z</th> <th>C2Z</th> <th>MUZ</th> <th>Other</th> </tr> </thead> <tbody> <tr> <td>0</td> <td>63,000</td> <td>0</td> <td>18,430</td> <td>0</td> </tr> </tbody> </table>	ACZ	C1Z	C2Z	MUZ	Other	0	63,000	0	18,430	0								
	ACZ	C1Z	C2Z	MUZ	Other														
0	63,000	0	18,430	0															
Retail and commercial floor space* (sqm):	<table border="1"> <thead> <tr> <th>Super market</th> <th>Depart' Store</th> <th>Restricted Retail</th> <th>Specialty Food</th> <th>Specialty Other</th> <th>Hospitality</th> <th>Total Retail</th> <th>Other Employ'</th> <th>Vacant</th> </tr> </thead> <tbody> <tr> <td>0</td> <td>0</td> <td>290</td> <td>0</td> <td>0</td> <td>2,060</td> <td>2,350</td> <td>0</td> <td>0</td> </tr> </tbody> </table>	Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant	0	0	290	0	0	2,060	2,350	0	0
Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant											
0	0	290	0	0	2,060	2,350	0	0											
Planned Floor space sqm	11,800																		
Retail anchors:	None																		
Transport connections:	Public Bus service (route 50) approximately 900m from centre																		
	Private Hyland Street, accessible via Hamilton Highway and McCurdy Road																		
Future role and opportunities:	<p>Significant residential development is planned for the Fyansford area including a new neighbourhood centre to service the new community. Land on the southern side of Hyland Street has been rezoned to commercial 1 to accommodate a future centre. Whilst the site is large, much of it isn't able to be developed due to the steep topography of the site.</p> <p>A Development Plan was approved for this neighbourhood centre on 18 November 2019. The Development Plan supports an activity centre consisting of retail, dining, residential, community and health and wellbeing facilities. The Economic impact assessment submitted with the Development Plan suggests the centre could support 4,270 square metres of retail floor space (supermarket and speciality stores) and an overall centre of approximately 8,500 square metres by 2031. This is generally consistent with the outputs from the SGS gravity model.</p> <p>No additional retail floor space is required for this centre beyond what has been planned for. In the future this centre may be challenged by planned retail centres in the Western Geelong Growth Area.</p>																		
Action required:	Nil																		
Growth Opportunities	<table border="1"> <thead> <tr> <th>Forecast supportable floor space 2016-2036 sqm (difference from total floor space)</th> <th>Potential to grow within current zoned land</th> <th>Sub precinct planning required</th> <th>Potential for rezoning to align with centre boundary</th> </tr> </thead> <tbody> <tr> <td>-500</td> <td>Yes</td> <td>Yes – as per the DPO</td> <td>No</td> </tr> </tbody> </table>	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)	Potential to grow within current zoned land	Sub precinct planning required	Potential for rezoning to align with centre boundary	-500	Yes	Yes – as per the DPO	No										
	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)	Potential to grow within current zoned land	Sub precinct planning required	Potential for rezoning to align with centre boundary															
-500	Yes	Yes – as per the DPO	No																

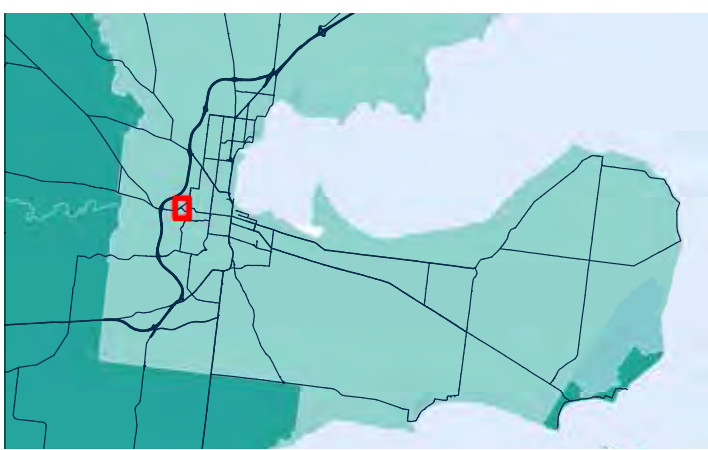
\* Excludes non employment uses such as residential, car parking and sites under construction.

# 1.19 HYLAND STREET, FYANSFORD

## CENTRE BOUNDARY AND EXISTING FLOOR SPACE USES



## CENTRE LOCATION MAP



# NEIGHBOURHOOD CENTRES

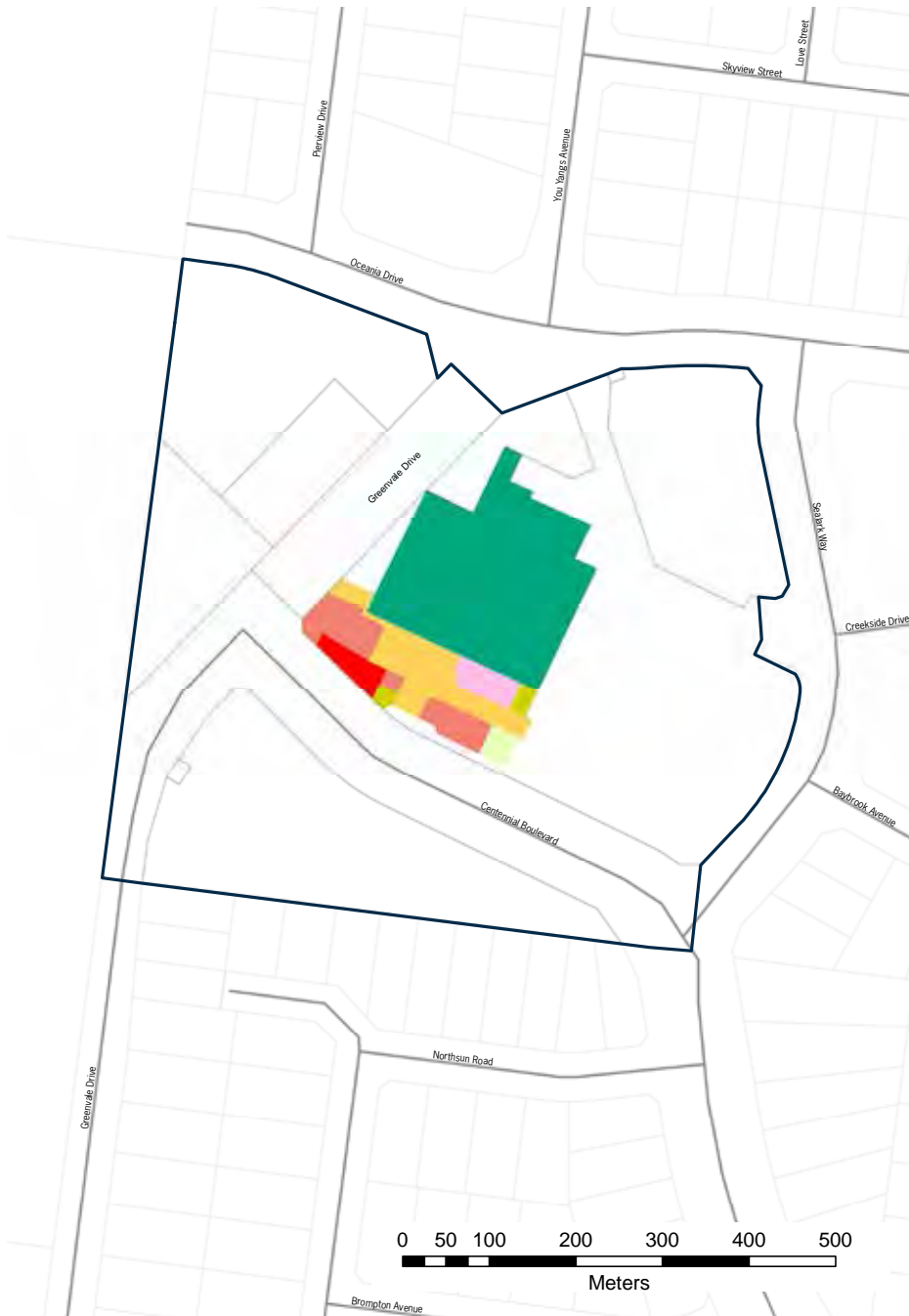
## 1.20 JETTY ROAD, CURLEWIS

<b>CENTRE NAME: JETTY ROAD, CURLEWIS</b>									
Hierarchy status:	Neighbourhood								
Location:	Curlewis (Drysdale/Clifton Springs)								
Key characteristics:	New neighbourhood centre in growth area of Drysdale-Clifton Springs, anchored by woolworths supermarket, limited existing residential growth surrounding centre.								
Current role:	Neighborhood Centre								
Zoning (sqm):	ACZ	C1Z	C2Z	MUZ	Other				
	0	0	158,470	0	0				
Retail and commercial floor space* (sqm):	Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant
	3,400	0		0	1,100	0	4,500	0	0
Retail anchors:	Woolworths Supermarket								
Transport connections:	Public	Bus Service (Route 61)							
	Private	Portarlinton Road via Jetty Road and Centennial Bvd							
Future role and opportunities:	<p>A Neighbourhood Activity centre comprising a Woolworths Supermarket and 11 speciality stores opened in August 2015. This centre will service the Jetty Road Growth Area (located in Curlewis) west of Drysdale/Clifton Springs. But may be attractive to the wider Drysdale Clifton Springs community given ease of parking and less congestions when compared to the Town Centre.</p> <p>This centre has been developed early in the life of the growth area relative to population growth. Land has been zoned around the centre to allow for the future growth of the centre. The planning for the size of this centre has taken into account the Jetty Road Growth area at completion</p>								
Action required:	Nil								
Growth Opportunities	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)		Potential to grow within current zoned land		Sub precinct planning required		Potential for rezoning to align with centre boundary		
	1320		Yes		No		No		

\* Excludes non employment uses such as residential, car parking and sites under construction.

## 1.20 JETTY ROAD, CURLEWIS

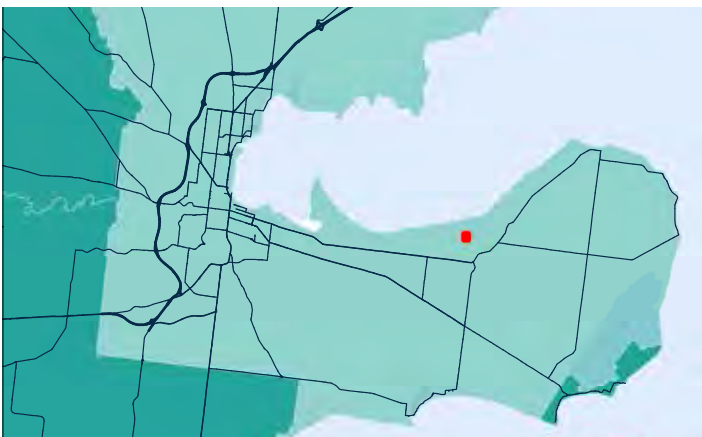
### CENTRE BOUNDARY AND EXISTING FLOOR SPACE USES



#### LEGEND

- Bulky Goods
- Car park
- Commercial
- Commercial Services
- Department Stores
- Education
- Enclosed Mall
- Entertainment
- Hospitality
- Industrial
- Medical
- Non-leasable Retail
- Public Facility
- Residential
- Specialty Food
- Specialty Other
- Supermarket
- Unclassified Shop
- Under Construction
- Vacant

### CENTRE LOCATION MAP



# NEIGHBOURHOOD CENTRES

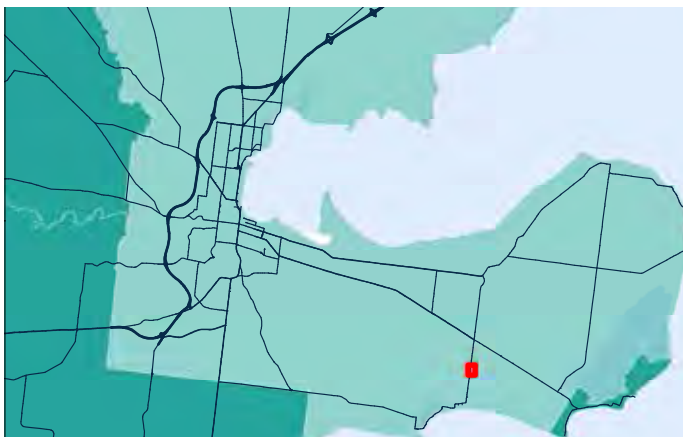
## 1.21 KINGSTON DOWNS

CENTRE NAME: KINGSTON DOWNS																			
Hierarchy status:	Neighbourhood																		
Location:	Grubb Road, part of the Kingston Downs Estate, Ocean Grove																		
Key characteristics:	Kingston Downs is a neighbourhood centre located on Grubb Road in Ocean Grove. The centre is anchored by Woolworths and Aldi Supermarkets and Dan Murphy's Liquor Store.																		
Current role:	Service the northern growth area of Ocean Grove																		
Zoning (sqm):	<table border="1"> <thead> <tr> <th>ACZ</th> <th>C1Z</th> <th>C2Z</th> <th>MUZ</th> <th>Other</th> </tr> </thead> <tbody> <tr> <td>0</td> <td>97,000</td> <td>15,000</td> <td>0</td> <td>0</td> </tr> </tbody> </table>	ACZ	C1Z	C2Z	MUZ	Other	0	97,000	15,000	0	0								
	ACZ	C1Z	C2Z	MUZ	Other														
0	97,000	15,000	0	0															
Retail and commercial floor space* (sqm):	<table border="1"> <thead> <tr> <th>Super market</th> <th>Depart' Store</th> <th>Restricted Retail</th> <th>Specialty Food</th> <th>Specialty Other</th> <th>Hospitality</th> <th>Total Retail</th> <th>Other Employ'</th> <th>Vacant</th> </tr> </thead> <tbody> <tr> <td>5,585</td> <td>0</td> <td>0</td> <td>545</td> <td>5,072</td> <td>0</td> <td>11,202</td> <td>1,570</td> <td>0</td> </tr> </tbody> </table>	Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant	5,585	0	0	545	5,072	0	11,202	1,570	0
Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant											
5,585	0	0	545	5,072	0	11,202	1,570	0											
Retail anchors:	Woolworths and Aldi Supermarkets, Dan Murphy's Liquor																		
Transport connections:	<table border="1"> <thead> <tr> <th>Public</th> <th>Private</th> </tr> </thead> <tbody> <tr> <td>Bus Service (Route 56)</td> <td>Grubb Road</td> </tr> </tbody> </table>	Public	Private	Bus Service (Route 56)	Grubb Road														
	Public	Private																	
Bus Service (Route 56)	Grubb Road																		
Future role and opportunities:	<p>A Neighbourhood Activity Centre in the northern growth area in Ocean Grove. The Ocean Grove Structure Plan 2007 supported the rezoning of 9.7 hectares of land on the corner of Grubb Road and Coastal Blvd to what is now a Commercial 1 Zone.</p> <p>The Kingston Down NAC and restricted retail precinct, which form part of the north-east growth area, will provide for the needs of the growing population but also the needs of the broader town population, surrounding rural areas and the seasonal population influx.</p> <p>Planning permits have been granted for the construction of Woolworths and Aldi supermarkets, Dan Murphy's Liquor Store, McDonalds and specialty retail. Planning permits also allow for a medical centre, gym and office space. The proposal provides for 12,772sqm of floor space of which approximately 11,202sqm is retail floor space (8,700 shop uses).</p> <p>The retail strategy indicates that between 2016 and 2036 this centre could support approximately 6,300sqm of retail floor space. A large amount of commercially zoned land is available within the Kingston Down neighbourhood centre, which is considered sufficient to support the growth of this centre. The potential size of the neighborhood centre may compete strongly with Ocean Grove Market Place, the Ocean Grove Town Centre and the Leopold Sub Regional centre.</p>																		
Action required:	Apply a floor space cap for this centre based on current planning approvals for shop use																		
Growth Opportunities	<table border="1"> <thead> <tr> <th>Forecast supportable floor space 2016-2036 sqm (difference from total floor space)</th> <th>Potential to grow within current zoned land</th> <th>Sub precinct planning required</th> <th>Potential for rezoning to align with centre boundary</th> </tr> </thead> <tbody> <tr> <td>-4,900</td> <td>Yes</td> <td>No</td> <td>No</td> </tr> </tbody> </table>	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)	Potential to grow within current zoned land	Sub precinct planning required	Potential for rezoning to align with centre boundary	-4,900	Yes	No	No										
	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)	Potential to grow within current zoned land	Sub precinct planning required	Potential for rezoning to align with centre boundary															
-4,900	Yes	No	No																

\* Excludes non employment uses such as residential, car parking and sites under construction.

## 1.21 KINGSTON DOWNS

### CENTRE BOUNDARY AND EXISTING FLOOR SPACE USES



# NEIGHBOURHOOD CENTRES

## 1.22 ORMOND ROAD, GEELONG EAST

CENTRE NAME: ORMOND ROAD, GEELONG EAST									
Hierarchy status:	Neighbourhood								
Location:	East Geelong								
Key characteristics:	Sprawling retail precinct. While individual strip sections have good visual and pedestrian amenity, walkability between sections is restricted by the busy and wide Ormond Road/Garden Street/Myers Street intersection.								
Current role:	This centre plays a local, day-to-day role in the East Geelong community, and to a smaller degree serves commuters travelling to and from the eastern region of Greater Geelong and the Bellarine Peninsula.								
Zoning (sqm):	ACZ		C1Z		C2Z		MUZ		Other
	0		13,690		0		0		1,230
Retail and commercial floor space* (sqm):	Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant
	627	0	0	516	4,256	519	5,917	880	200
Retail anchors:	1 supermarket (627sqm Foodworks)								
Transport connections:	Public	Bus service (routes 45, 75, 76, 77 and 83)							
	Private	Intersection of Ormond Road, Myers Street and Garden Street							
Future role and opportunities:	The neighbourhood role of Ormond Road is likely to be maintained into the future. There are significant constraints in growing the size of this centre given the proximity to major roads, central Geelong and the Newcomb centres. Some streetscape upgrades have been undertaken by Council, but given the disjointed nature of the centre there may be opportunities to investigate ways to better integrate the centre.								
Action required:	Nil								
Growth Opportunities	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)		Potential to grow within current zoned land			Sub precinct planning required		Potential for rezoning to align with centre boundary	
	3,500		Yes – but with constraints			No		No	

\* Excludes non employment uses such as residential, car parking and sites under construction.

## 1.22 ORMOND ROAD, GEELONG EAST

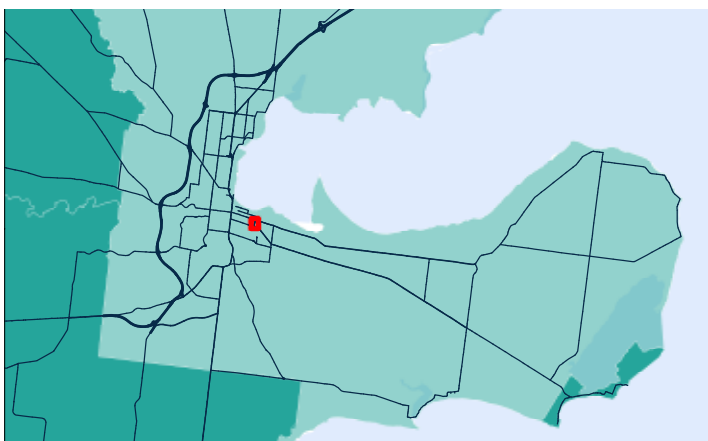
### CENTRE BOUNDARY AND EXISTING FLOOR SPACE USES



#### LEGEND

- Bulky Goods
- Car park
- Commercial
- Commercial Services
- Department Stores
- Education
- Enclosed Mall
- Entertainment
- Hospitality
- Industrial
- Medical
- Non-leasable Retail
- Public Facility
- Residential
- Specialty Food
- Specialty Other
- Supermarket
- Unclassified Shop
- Under Construction
- Vacant

### CENTRE LOCATION MAP



# NEIGHBOURHOOD CENTRES

## 1.23 GROVEDALE CENTRAL

CENTRE NAME: GROVEDALE CENTRAL									
Hierarchy status:	Neighbourhood								
Location:	Grovedale								
Key characteristics:	Small local shopping centre with IGA and medical centre. Adjacent to primary school and high school.								
Current role:	While the centres key outer stores and services, such as the medical centre, pharmacy and IGA attract a sufficient number of customers, the internal plaza area is relatively empty, with two vacancies and an unwelcoming character.								
Zoning (sqm):	ACZ		C1Z		C2Z		MUZ		Other
	0		10,870		0		0		0
Retail and commercial floor space* (sqm):	Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant
	866	0	0	382	1,055	176	2,479	0	200
Retail anchors:	1 supermarket (866sqm IGA)								
Transport connections:	Public	Bus service (route 19)							
	Private	Corner Heyers Road and Burdoo Drive, accessible via Pioneer Road and Surf Coast Highway							
Future role and opportunities:	Several new hospitality businesses have recently established within this centre, occupying shops that appear to have been vacant for some time. With revitalisation, this centre has the potential to fulfill a neighbourhood centre role for the Grovedale area, though it is limited by its proximity to the Waurm Ponds Sub-Regional Centre.								
Action required:	Nil								
Growth Opportunities	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)		Potential to grow within current zoned land		Sub precinct planning required		Potential for rezoning to align with centre boundary		
	700		Yes – but with constraints		No		No		

\* Excludes non employment uses such as residential, car parking and sites under construction.

## 1.23 GROVEDALE CENTRAL

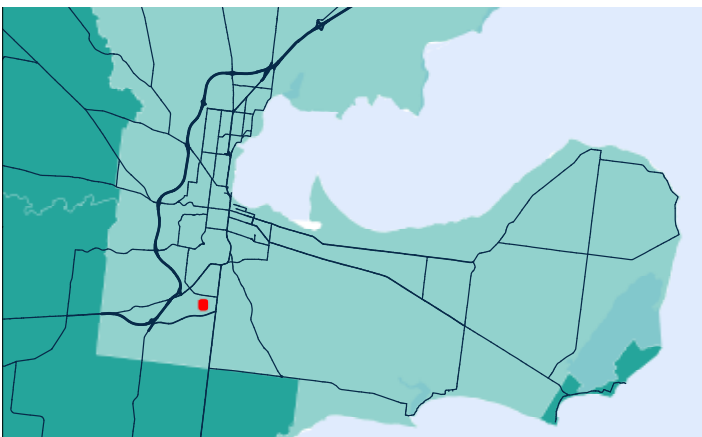
### CENTRE BOUNDARY AND EXISTING FLOOR SPACE USES



#### LEGEND

- Bulky Goods
- Car park
- Commercial
- Commercial Services
- Department Stores
- Education
- Enclosed Mall
- Entertainment
- Hospitality
- Industrial
- Medical
- Non-leasable Retail
- Public Facility
- Residential
- Specialty Food
- Specialty Other
- Supermarket
- Unclassified Shop
- Under Construction
- Vacant

### CENTRE LOCATION MAP



# NEIGHBOURHOOD CENTRES

## 1.24 HIGHTON

<b>CENTRE NAME: HIGHTON</b>																			
Hierarchy status:	Neighbourhood																		
Location:	Highton																		
Key characteristics:	Strong performing neighbourhood centre in Highton with significant amounts of office and community/public use.																		
Current role:	This thriving centre plays a local day-to-day retail and hospitality role within Highton.																		
Zoning (sqm):	<table border="1"> <thead> <tr> <th>ACZ</th> <th>C1Z</th> <th>C2Z</th> <th>MUZ</th> <th>Other</th> </tr> </thead> <tbody> <tr> <td>0</td> <td>16,960</td> <td>0</td> <td>0</td> <td>3,690</td> </tr> </tbody> </table>	ACZ	C1Z	C2Z	MUZ	Other	0	16,960	0	0	3,690								
	ACZ	C1Z	C2Z	MUZ	Other														
0	16,960	0	0	3,690															
Retail and commercial floor space* (sqm):	<table border="1"> <thead> <tr> <th>Super market</th> <th>Depart' Store</th> <th>Restricted Retail</th> <th>Specialty Food</th> <th>Specialty Other</th> <th>Hospitality</th> <th>Total Retail</th> <th>Other Employ'</th> <th>Vacant</th> </tr> </thead> <tbody> <tr> <td>2,150</td> <td>0</td> <td>0</td> <td>1,717</td> <td>2,139</td> <td>966</td> <td>6,972</td> <td>1,140</td> <td>100</td> </tr> </tbody> </table>	Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant	2,150	0	0	1,717	2,139	966	6,972	1,140	100
Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant											
2,150	0	0	1,717	2,139	966	6,972	1,140	100											
Retail anchors:	1 supermarket (2,150sqm Woolworths)																		
Transport connections:	Public Bus service (routes 16 and 34)																		
	Private Belle Vue Avenue, between Barrabool Road and Roslyn Road																		
Future role and opportunities:	<p>This thriving centre plays a local day-to-day retail and hospitality role within Highton. Given that the nearby Waurn Ponds and Belmont centres cover the wider catchment, it is likely that Highton will continue to play a local, neighbourhood centre role.</p> <p>This centre contains a Woolworths supermarket and a large number of specialty shops. Improvements to the streetscape would help improve the appearance of the centre.</p> <p>A small amount of floor space growth is forecast for this centre between 2016-2036. Council has developed a draft UDF for this centre. The UDF has identified development opportunities which would deliver additional floor space within the centre. It also has a strong focus on streetscape upgrades, pedestrian and traffic movements.</p>																		
Action required:	Finalise the draft UDF																		
Growth Opportunities	<table border="1"> <thead> <tr> <th>Forecast supportable floor space 2016-2036 sqm (difference from total floor space)</th> <th>Potential to grow within current zoned land</th> <th>Sub precinct planning required</th> <th>Potential for rezoning to align with centre boundary</th> </tr> </thead> <tbody> <tr> <td>2,800</td> <td>Yes – with constraints</td> <td>Yes</td> <td>Yes</td> </tr> </tbody> </table>	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)	Potential to grow within current zoned land	Sub precinct planning required	Potential for rezoning to align with centre boundary	2,800	Yes – with constraints	Yes	Yes										
	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)	Potential to grow within current zoned land	Sub precinct planning required	Potential for rezoning to align with centre boundary															
2,800	Yes – with constraints	Yes	Yes																

\* Excludes non employment uses such as residential, car parking and sites under construction.

## 1.24 HIGHTON

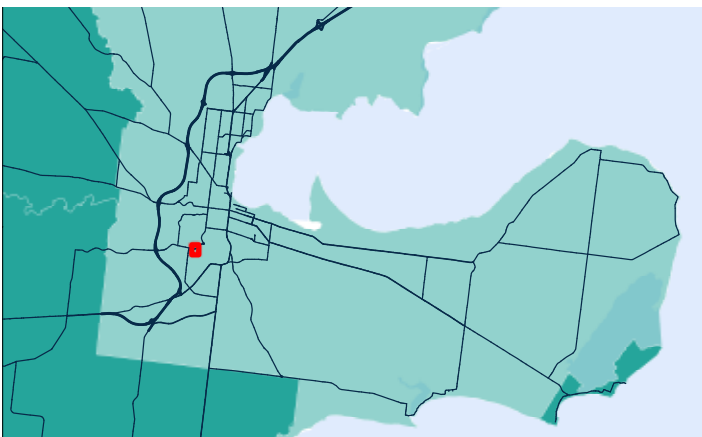
### CENTRE BOUNDARY AND EXISTING FLOOR SPACE USES



#### LEGEND

- Bulky Goods
- Car park
- Commercial
- Commercial Services
- Department Stores
- Education
- Enclosed Mall
- Entertainment
- Hospitality
- Industrial
- Medical
- Non-leasable Retail
- Public Facility
- Residential
- Specialty Food
- Specialty Other
- Supermarket
- Unclassified Shop
- Under Construction
- Vacant

### CENTRE LOCATION MAP



# NEIGHBOURHOOD CENTRES

## 1.25 NEWCOMB CENTRAL

<b>CENTRE NAME: NEWCOMB CENTRAL</b>																			
Hierarchy status:	Neighbourhood																		
Location:	Newcomb																		
Key characteristics:	Mid-sized shopping centre (anchored by Woolworths and Aldi) along the Bellarine Highway in Newcomb. It is in very close proximity (under 400m) to the smaller Bellarine Village Shopping Centre. It contains a municipal library and adjoins Newcomb Secondary College to the east.																		
Current role:	This centre offers a mix of retail, offices, medical services and hospitality. Along with Bellarine Village, it serves the Newcomb area, along with the wider Thomson, Whittington, Breakwater, St Albans Park and Moolap areas, which largely offer only small, local retail and no supermarkets. The centre also serves commuters travelling to and from the western region of Greater Geelong and the Bellarine Peninsula.																		
Zoning (sqm):	<table border="1"> <thead> <tr> <th>ACZ</th> <th>C1Z</th> <th>C2Z</th> <th>MUZ</th> <th>Other</th> </tr> </thead> <tbody> <tr> <td>0</td> <td>24,730</td> <td>0</td> <td>0</td> <td>0</td> </tr> </tbody> </table>	ACZ	C1Z	C2Z	MUZ	Other	0	24,730	0	0	0								
ACZ	C1Z	C2Z	MUZ	Other															
0	24,730	0	0	0															
Retail and commercial floor space* (sqm):	<table border="1"> <thead> <tr> <th>Super market</th> <th>Depart' Store</th> <th>Restricted Retail</th> <th>Specialty Food</th> <th>Specialty Other</th> <th>Hospitality</th> <th>Total Retail</th> <th>Other Employ'</th> <th>Vacant</th> </tr> </thead> <tbody> <tr> <td>4,691</td> <td>0</td> <td>0</td> <td>630</td> <td>1,194</td> <td>315</td> <td>6,820</td> <td>430</td> <td>0</td> </tr> </tbody> </table>	Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant	4,691	0	0	630	1,194	315	6,820	430	0
Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant											
4,691	0	0	630	1,194	315	6,820	430	0											
Retail anchors:	2 supermarkets (3,533sqm Woolworths, 1158sqm Aldi)																		
Transport connections:	<table border="1"> <thead> <tr> <th>Public</th> <th>Private</th> </tr> </thead> <tbody> <tr> <td>Bus service (routes 45, 55, 75, 76, 77 and 83)</td> <td>Corner of Bellarine Highway and Wilsons Road</td> </tr> </tbody> </table>	Public	Private	Bus service (routes 45, 55, 75, 76, 77 and 83)	Corner of Bellarine Highway and Wilsons Road														
Public	Private																		
Bus service (routes 45, 55, 75, 76, 77 and 83)	Corner of Bellarine Highway and Wilsons Road																		
Future role and opportunities:	<p>A moderate amount of retail growth is forecast for this centre through to 2036. The centre is land locked but could redevelop over existing car parking or through acquisition of adjacent housing to provide additional floor space in the future.</p> <p>Given the lack of retail offers in surrounding suburbs and the relatively uncompetitive nature of Bellarine Village, Newcomb Central is likely to continue to thrive.</p>																		
Action required:	Nil																		
Growth Opportunities	<table border="1"> <thead> <tr> <th>Forecast supportable floor space 2016-2036 sqm (difference from total floor space)</th> <th>Potential to grow within current zoned land</th> <th>Sub precinct planning required</th> <th>Potential for rezoning to align with centre boundary</th> </tr> </thead> <tbody> <tr> <td>2,500</td> <td>Yes – With constraints</td> <td>No</td> <td>No</td> </tr> </tbody> </table>	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)	Potential to grow within current zoned land	Sub precinct planning required	Potential for rezoning to align with centre boundary	2,500	Yes – With constraints	No	No										
Forecast supportable floor space 2016-2036 sqm (difference from total floor space)	Potential to grow within current zoned land	Sub precinct planning required	Potential for rezoning to align with centre boundary																
2,500	Yes – With constraints	No	No																

\* Excludes non employment uses such as residential, car parking and sites under construction.

## 1.25 NEWCOMB CENTRAL

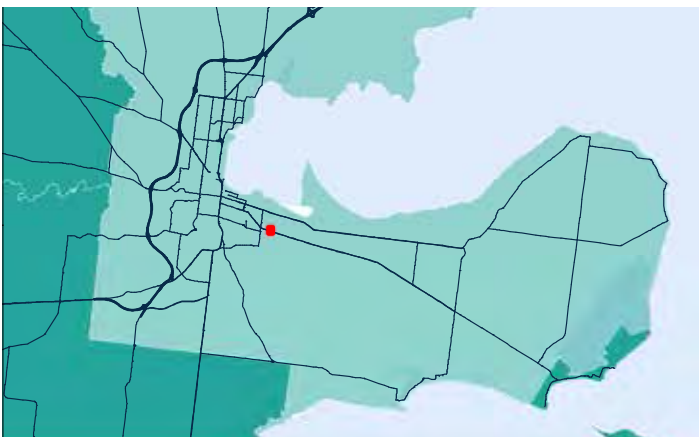
### CENTRE BOUNDARY AND EXISTING FLOOR SPACE USES



#### LEGEND

- Bulky Goods
- Car park
- Commercial
- Commercial Services
- Department Stores
- Education
- Enclosed Mall
- Entertainment
- Hospitality
- Industrial
- Medical
- Non-leasable Retail
- Public Facility
- Residential
- Specialty Food
- Specialty Other
- Supermarket
- Unclassified Shop
- Under Construction
- Vacant

### CENTRE LOCATION MAP



# NEIGHBOURHOOD CENTRES

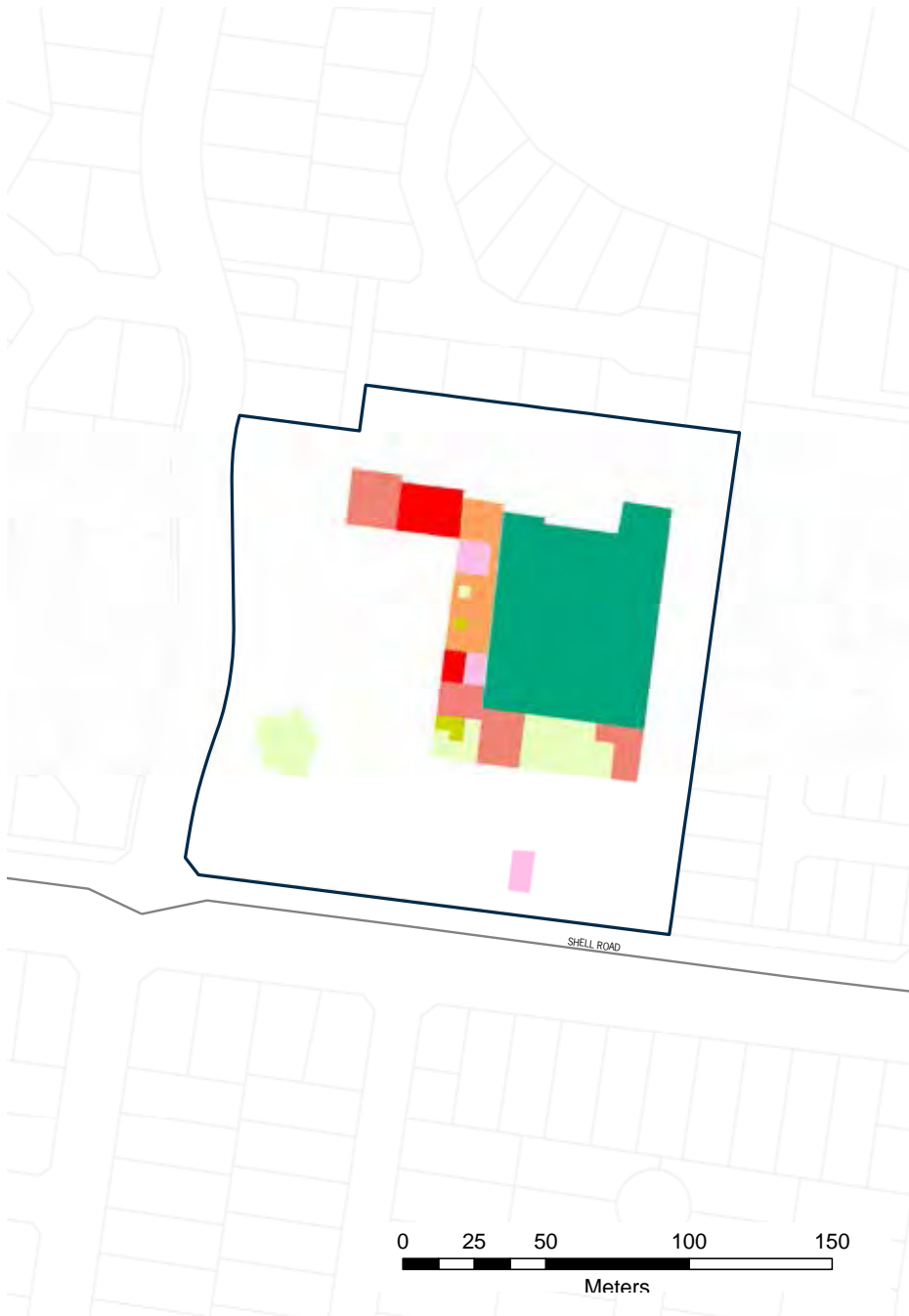
## 1.26 OCEAN GROVE (MARKETPLACE)

<b>CENTRE NAME: OCEAN GROVE (MARKETPLACE)</b>																			
Hierarchy status:	Neighbourhood																		
Location:	Ocean Grove																		
Key characteristics:	Mid-sized shopping centre (anchored by Woolworths) along Shell Road. Strong hospitality base, along with specialty and food retail.																		
Current role:	This centre serves the local community and the wider southern region of the Bellarine Peninsula.																		
Zoning (sqm):	<table border="1"> <thead> <tr> <th>ACZ</th> <th>C1Z</th> <th>C2Z</th> <th>MUZ</th> <th>Other</th> </tr> </thead> <tbody> <tr> <td>0</td> <td>25,720</td> <td>0</td> <td>0</td> <td>0</td> </tr> </tbody> </table>	ACZ	C1Z	C2Z	MUZ	Other	0	25,720	0	0	0								
	ACZ	C1Z	C2Z	MUZ	Other														
0	25,720	0	0	0															
Retail and commercial floor space* (sqm):	<table border="1"> <thead> <tr> <th>Super market</th> <th>Depart' Store</th> <th>Restricted Retail</th> <th>Specialty Food</th> <th>Specialty Other</th> <th>Hospitality</th> <th>Total Retail</th> <th>Other Employ'</th> <th>Vacant</th> </tr> </thead> <tbody> <tr> <td>3,566</td> <td>0</td> <td>0</td> <td>287</td> <td>910</td> <td>985</td> <td>5,748</td> <td>90</td> <td>100</td> </tr> </tbody> </table>	Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant	3,566	0	0	287	910	985	5,748	90	100
Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant											
3,566	0	0	287	910	985	5,748	90	100											
Retail anchors:	Expired planning permit for additional 1,500 sqm																		
Transport connections:	<table border="1"> <thead> <tr> <th>Public</th> <th>Private</th> </tr> </thead> <tbody> <tr> <td>Bus service (routes 76, 80, 81, 82 and 83)</td> <td>Corner of Shell Road and Kingston Downs Drive, accessible via Grubb Road and Bellarine Highway</td> </tr> </tbody> </table>	Public	Private	Bus service (routes 76, 80, 81, 82 and 83)	Corner of Shell Road and Kingston Downs Drive, accessible via Grubb Road and Bellarine Highway														
	Public	Private																	
Bus service (routes 76, 80, 81, 82 and 83)	Corner of Shell Road and Kingston Downs Drive, accessible via Grubb Road and Bellarine Highway																		
Future role and opportunities:	<p>While the larger and nearby Ocean Grove town centre is more well-rounded in its offer of shops and services, the presence of a supermarket anchor in this centre helps to ensure its attractiveness into the future.</p> <p>An expired planning permit (PP399/2010/A) allowed the centre to expand to the north of the site. This would have increased the floor space from 5,670m<sup>2</sup> to 7,085m<sup>2</sup>. This development could still occur subject to a new planning permit being approved.</p>																		
Action required:	Nil																		
Growth Opportunities	<table border="1"> <thead> <tr> <th>Forecast supportable floor space 2016-2036 sqm (difference from total floor space)</th> <th>Potential to grow within current zoned land</th> <th>Sub precinct planning required</th> <th>Potential for rezoning to align with centre boundary</th> </tr> </thead> <tbody> <tr> <td>1,100</td> <td>Yes</td> <td>No</td> <td>No</td> </tr> </tbody> </table>	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)	Potential to grow within current zoned land	Sub precinct planning required	Potential for rezoning to align with centre boundary	1,100	Yes	No	No										
	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)	Potential to grow within current zoned land	Sub precinct planning required	Potential for rezoning to align with centre boundary															
1,100	Yes	No	No																

\* Excludes non employment uses such as residential, car parking and sites under construction.

## 1.26 OCEAN GROVE (MARKETPLACE)

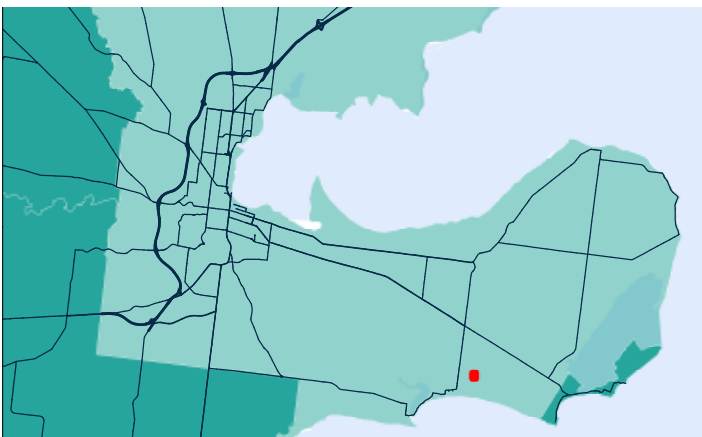
### CENTRE BOUNDARY AND EXISTING FLOOR SPACE USES



#### LEGEND

- Bulky Goods
- Car park
- Commercial
- Commercial Services
- Department Stores
- Education
- Enclosed Mall
- Entertainment
- Hospitality
- Industrial
- Medical
- Non-leasable Retail
- Public Facility
- Residential
- Specialty Food
- Specialty Other
- Supermarket
- Unclassified Shop
- Under Construction
- Vacant

### CENTRE LOCATION MAP



# NEIGHBOURHOOD CENTRES

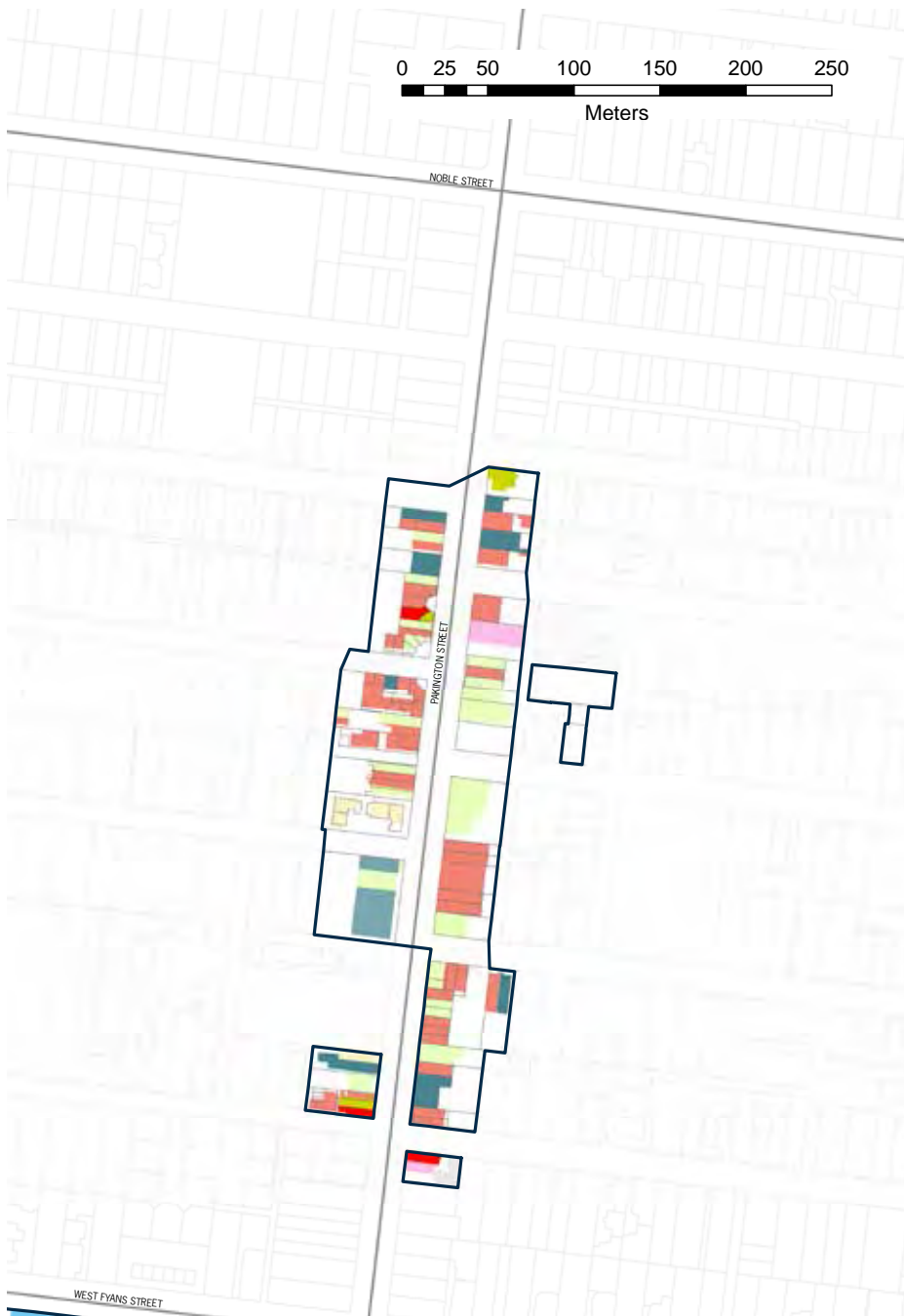
## 1.27 PAKINGTON STREET (NEWTOWN)

CENTRE NAME: PAKINGTON STREET (NEWTOWN)									
Hierarchy status:	Neighbourhood								
Location:	Newtown								
Key characteristics:	Mid-sized, lively retail strip near southern end of Pakington Street. South of Russell Street the western side of the strip is largely residential, which dilutes activity at this end. With fine-grain, active frontages and outdoor cafes, the northern end of the precinct resembles the Geelong West Pakington Street precinct, while amenity is less high at the southern end of the precinct.								
Current role:	While this centre has no anchors, it offers a high quality, attractive and walkable environment with several cafes, and contains higher end stores that are not commonly found in other activity centres in the municipality.								
Zoning (sqm):	ACZ	C1Z	C2Z	MUZ	Other				
	0	29,670	0	0	0				
Retail and commercial floor space* (sqm):	Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant
	0	0	0	446	4,759	3,946	9,151	1,130	300
Retail anchors:	None								
Transport connections:	Public	Bus service (34, 35 and 36)							
	Private	Pakington Street, from Noble Street to West Fyans Street							
Future role and opportunities:	<p>This centre is likely to continue to thrive, and development and activity may continue to spread south with higher density housing supported closer to the river end of Pakington Street through the implementation of the West Fyans-Fyans Street Precinct Structure Plan 2009.</p> <p>A re-zoning of land (C204) along Pakington Street adjoining the Commercial 1 Zone in 2012 has created additional retail space. The Independent Panel considering the re-zoning suggested a parking precinct plan for the area should be considered given limited parking in the area. Given the types of land uses occurring in the centre (as of right uses), the limited amount of new development and high land values it is unlikely that a parking precinct plan would be successful in delivering a significant amount of additional car parking.</p> <p>Whilst the centre does not currently have a supermarket anchor, there is sufficient floor space demand over the next 20 years to support a supermarket establishing in this centre. However high land values and a lack of large land parcels may make establishing a supermarket in this location difficult. If a supermarket based development was proposed, it should directly adjoin the existing centre and have frontage to Pakington Street.</p>								
Action required:	Nil								
Growth Opportunities	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)		Potential to grow within current zoned land		Sub precinct planning required		Potential for rezoning to align with centre boundary		
	5,300		No		No		No		

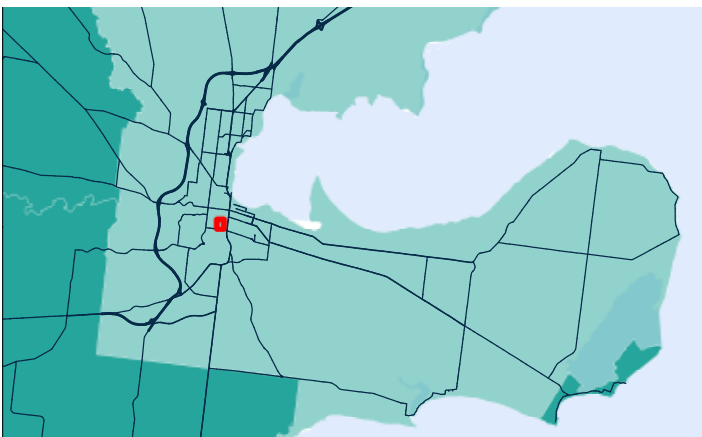
\* Excludes non employment uses such as residential, car parking and sites under construction.

## 1.27 PAKINGTON STREET (NEWTOWN)

### CENTRE BOUNDARY AND EXISTING FLOOR SPACE USES



### CENTRE LOCATION MAP



# NEIGHBOURHOOD CENTRES

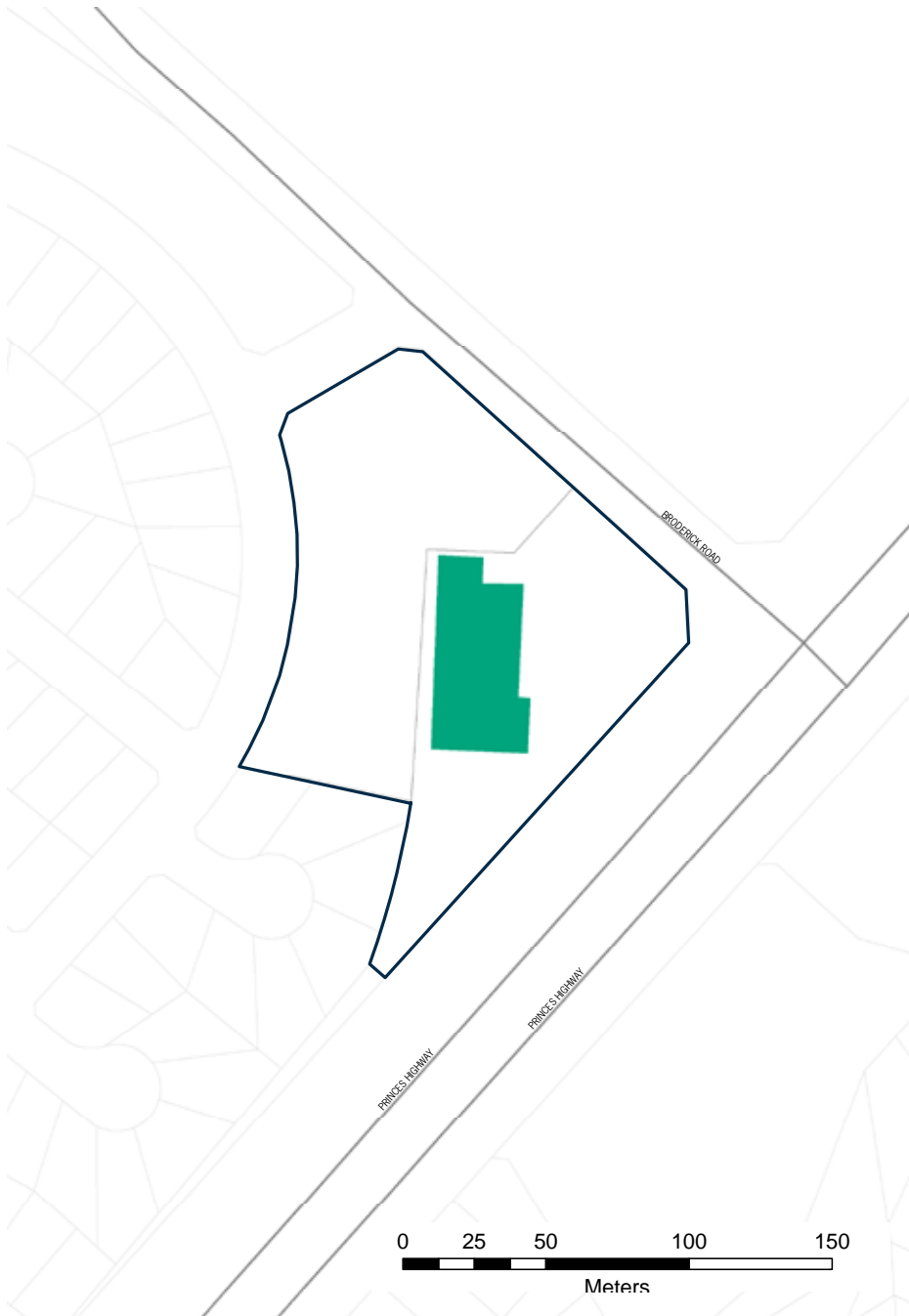
## 1.28 ROSEWALL

<b>CENTRE NAME: ROSEWALL</b>																			
Hierarchy status:	Neighbourhood																		
Location:	Corio																		
Key characteristics:	Comprises a single Aldi store and a vacant, adjacent site at Fairbairn Drive which is also zoned commercial 1.																		
Current role:	This centre serves the local community with a supermarket.																		
Zoning (sqm):	<table border="1"> <thead> <tr> <th>ACZ</th> <th>C1Z</th> <th>C2Z</th> <th>MUZ</th> <th>Other</th> </tr> </thead> <tbody> <tr> <td>0</td> <td>15,710</td> <td>0</td> <td>0</td> <td>20</td> </tr> </tbody> </table>	ACZ	C1Z	C2Z	MUZ	Other	0	15,710	0	0	20								
	ACZ	C1Z	C2Z	MUZ	Other														
0	15,710	0	0	20															
Retail and commercial floor space* (sqm):	<table border="1"> <thead> <tr> <th>Super market</th> <th>Depart' Store</th> <th>Restricted Retail</th> <th>Specialty Food</th> <th>Specialty Other</th> <th>Hospitality</th> <th>Total Retail</th> <th>Other Employ'</th> <th>Vacant</th> </tr> </thead> <tbody> <tr> <td>1,740</td> <td>0</td> <td>0</td> <td>0</td> <td>0</td> <td>0</td> <td>1,740</td> <td>0</td> <td>0</td> </tr> </tbody> </table>	Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant	1,740	0	0	0	0	0	1,740	0	0
Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant											
1,740	0	0	0	0	0	1,740	0	0											
Retail anchors:	1 supermarket (1,740sqm Aldi)																		
Transport connections:	<table border="1"> <thead> <tr> <th>Public</th> <th>Private</th> </tr> </thead> <tbody> <tr> <td>Corio Railway Station (approx. 1.2km), bus service (route 12)</td> <td>Intersection of Princess Highway and Broderick Road</td> </tr> </tbody> </table>	Public	Private	Corio Railway Station (approx. 1.2km), bus service (route 12)	Intersection of Princess Highway and Broderick Road														
	Public	Private																	
Corio Railway Station (approx. 1.2km), bus service (route 12)	Intersection of Princess Highway and Broderick Road																		
Future role and opportunities:	<p>Comprises a single Aldi store and a 0.8ha site at 12-20 Fairbairn Drive which is zoned commercial 1. Planning approval (pp366-2011) for a medical centre and 4 speciality retail stores at the Fairbairn Drive site has expired and the site remains vacant.</p> <p>Even though the planning permit has expired, there is still support to maintain the centre as a neighbourhood centre within the retail hierarchy. The future development of additional retail floor space adjacent to the established supermarket anchor, would help to provide additional retail and other services for the nearby community. This centre would continue to service a local catchment and would be unlikely to have any trade impacts on the Corio shopping centre which is approximately 2km away.</p>																		
Action required:	Nil																		
Growth Opportunities	<table border="1"> <thead> <tr> <th>Forecast supportable floor space 2016-2036 sqm (difference from total floor space)</th> <th>Potential to grow within current zoned land</th> <th>Sub precinct planning required</th> <th>Potential for rezoning to align with centre boundary</th> </tr> </thead> <tbody> <tr> <td>500</td> <td>Yes</td> <td>No</td> <td>No</td> </tr> </tbody> </table>	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)	Potential to grow within current zoned land	Sub precinct planning required	Potential for rezoning to align with centre boundary	500	Yes	No	No										
	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)	Potential to grow within current zoned land	Sub precinct planning required	Potential for rezoning to align with centre boundary															
500	Yes	No	No																

\* Excludes non employment uses such as residential, car parking and sites under construction.

## 1.28 ROSEWALL

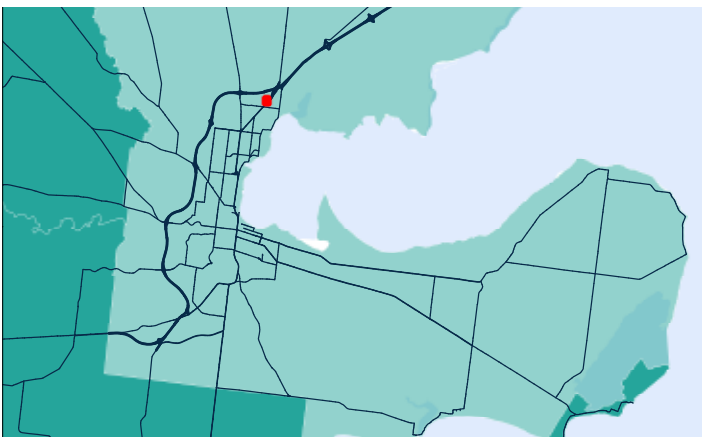
### CENTRE BOUNDARY AND EXISTING FLOOR SPACE USES



#### LEGEND

- Bulky Goods
- Car park
- Commercial
- Commercial Services
- Department Stores
- Education
- Enclosed Mall
- Entertainment
- Hospitality
- Industrial
- Medical
- Non-leasable Retail
- Public Facility
- Residential
- Specialty Food
- Specialty Other
- Supermarket
- Unclassified Shop
- Under Construction
- Vacant

#### CENTRE LOCATION MAP



# NEIGHBOURHOOD CENTRES

## 1.29 SEPARATION STREET, NORTH GEELONG

CENTRE NAME: SEPARATION STREET, NORTH GEELONG																			
Hierarchy status:	Neighbourhood																		
Location:	North Geelong																		
Key characteristics:	Neighbourhood centre with two distinct areas. The western section is a small retail strip with a mix of hospitality and specialty shops and a significant degree of shop top housing. The eastern section is predominantly comprised of one storey office floor space.																		
Current role:	This centre serves the local Bell Park and North Geelong community.																		
Zoning (sqm):	<table border="1"> <thead> <tr> <th>ACZ</th> <th>C1Z</th> <th>C2Z</th> <th>MUZ</th> <th>Other</th> </tr> </thead> <tbody> <tr> <td>0</td> <td>9,150</td> <td>20,850</td> <td>0</td> <td>20</td> </tr> </tbody> </table>	ACZ	C1Z	C2Z	MUZ	Other	0	9,150	20,850	0	20								
	ACZ	C1Z	C2Z	MUZ	Other														
0	9,150	20,850	0	20															
Retail and commercial floor space* (sqm):	<table border="1"> <thead> <tr> <th>Super market</th> <th>Depart' Store</th> <th>Restricted Retail</th> <th>Specialty Food</th> <th>Specialty Other</th> <th>Hospitality</th> <th>Total Retail</th> <th>Other Employ'</th> <th>Vacant</th> </tr> </thead> <tbody> <tr> <td>0</td> <td>0</td> <td>0</td> <td>908</td> <td>1,898</td> <td>2,766</td> <td>5,572</td> <td>1,130</td> <td>400</td> </tr> </tbody> </table>	Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant	0	0	0	908	1,898	2,766	5,572	1,130	400
Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant											
0	0	0	908	1,898	2,766	5,572	1,130	400											
Retail anchors:	None																		
Transport connections:	Public Bus service (12 and 30)																		
	Private Separation Street from Tallin Street to Mina Place, accessible via Anakie Road, Thompson Road and Princes Highway																		
Future role and opportunities:	<p>The neighbourhood role of Separation Street is likely to be maintained into the future.</p> <p>This centre was identified as a small neighbourhood centre in the 2006 strategy. This centre does not contain a supermarket but contains a large proportion of hospitality. This centre could benefit from the presence of a small supermarket. Streetscape improvement could also improve the appearance of the centre. There is demand for additional retail floor space within this centre by 2036.</p> <p>A natural extension of the centre would be to the east, along Separation Street, in the location of the existing commercial 2 zoned land at 35-57 Separation Street. These sites combined, would be large enough to support a future supermarket and additional speciality retail. A planning permit can be sought, for a full line supermarket within the commercial 2 zone.</p> <p>For this reason the commercial 2 zone land has been included within the centre boundary.</p> <p>A UDF or Structure Plan should be developed for this centre. It should investigate streetscape upgrades and identify a preferred supermarket site.</p>																		
Action required:	Develop a UDF or Structure Plan for this centre and investigate streetscape upgrades and a preferred location for a supermarket.																		
Growth Opportunities	<table border="1"> <thead> <tr> <th>Forecast supportable floor space 2016-2036 sqm (difference from total floor space)</th> <th>Potential to grow within current zoned land</th> <th>Sub precinct planning required</th> <th>Potential for rezoning to align with centre boundary</th> </tr> </thead> <tbody> <tr> <td>3,500</td> <td>Yes</td> <td>Yes</td> <td>No</td> </tr> </tbody> </table>	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)	Potential to grow within current zoned land	Sub precinct planning required	Potential for rezoning to align with centre boundary	3,500	Yes	Yes	No										
	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)	Potential to grow within current zoned land	Sub precinct planning required	Potential for rezoning to align with centre boundary															
3,500	Yes	Yes	No																

\* Excludes non employment uses such as residential, car parking and sites under construction.

## 1.29 SEPARATION STREET, NORTH GEELONG

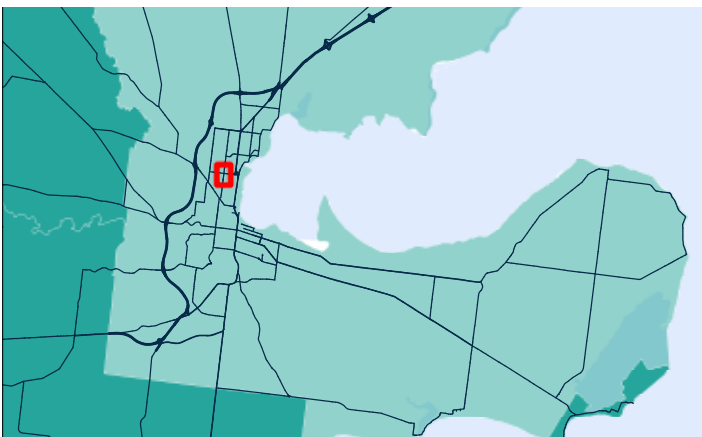
### CENTRE BOUNDARY AND EXISTING FLOOR SPACE USES



#### LEGEND

- Bulky Goods
- Car park
- Commercial
- Commercial Services
- Department Stores
- Education
- Enclosed Mall
- Entertainment
- Hospitality
- Industrial
- Medical
- Non-leasable Retail
- Public Facility
- Residential
- Specialty Food
- Specialty Other
- Supermarket
- Unclassified Shop
- Under Construction
- Vacant

### CENTRE LOCATION MAP



# NEIGHBOURHOOD CENTRES

## 1.30 SHANNON AVENUE (NEWTOWN)

CENTRE NAME: SHANNON AVENUE (NEWTOWN)									
Hierarchy status:	Neighbourhood								
Location:	Newtown								
Key characteristics:	The southern Shannon Avenue precinct is a very small retail strip anchored by Woolworths. It has strong representation from the medical industry, with medical practices comprising over 20% of total floor space, and a pharmacy also available in the precinct.								
Current role:	This centre plays a local role in the community, with a significant role in catering to medical needs. The presence of a drive-through coffee service indicates that a large proportion of its customer base is also derived from road traffic.								
Zoning (sqm):	ACZ		C1Z		C2Z		MUZ		Other
	0		11,960		0		2,660		3,000
Retail and commercial floor space* (sqm):	Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant
	1,967	0	0	151	740	1,637	4,495	0	400
Retail anchors:	1 supermarket (1,967sqm Woolworths)								
Transport connections:	Public	Bus service (35 and 36)							
	Private	Intersection of Shannon Avenue and Aberdeen Street							
Future role and opportunities:	<p>A new service station has opened on the north west corner of Aberdeen Street and Shannon Avenue. There may be opportunities to redevelop car parking areas to provide additional retail floor space in the future.</p> <p>The Great Western Hotel, on the corner of Shannon Avenue and Aberdeen Street is located in the Neighbourhood Residential Zone and forms part of this retail centre. This zone could restrict the future use of the site for other commercial purposes. Rezoning of the site to a commercial zone could be considered if the site were to be re-developed.</p> <p>The role of the southern Shannon Avenue precinct is likely to be maintained into the future.</p>								
Action required:	Nil								
Growth Opportunities	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)		Potential to grow within current zoned land		Sub precinct planning required		Potential for rezoning to align with centre boundary		
	1,400		Yes – with constraints		No		Yes		

\* Excludes non employment uses such as residential, car parking and sites under construction.

### 1.30 SHANNON AVENUE (NEWTOWN)

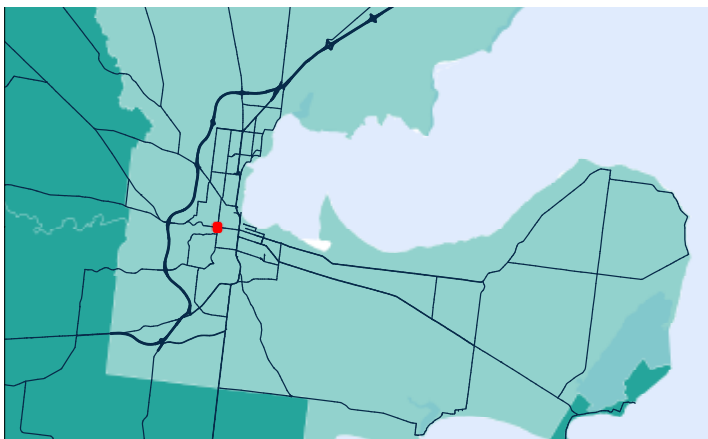
#### CENTRE BOUNDARY AND EXISTING FLOOR SPACE USES



#### LEGEND

- Bulky Goods
- Car park
- Commercial
- Commercial Services
- Department Stores
- Education
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- Entertainment
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- Industrial
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- Public Facility
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- Specialty Food
- Specialty Other
- Supermarket
- Unclassified Shop
- Under Construction
- Vacant

#### CENTRE LOCATION MAP



# NEIGHBOURHOOD CENTRES

## 1.31 SURF COAST HIGHWAY

CENTRE NAME: SURF COAST HIGHWAY									
Hierarchy status:	Neighbourhood								
Location:	Grovedale								
Key characteristics:	A small neighbourhood centre anchored by an Aldi Supermarket, take away stores, a chemist, butcher, subway, bakery, and an opportunity shop. Located on the Surfcoast Highway frontage								
Current role:	This centre mainly services a local catchment, given the presence of other Aldi supermarkets at Waurrn Ponds/Highton and Belmont. The centre benefits from commuters travelling to and from the Surf Coast. The hospitality offer also benefit from the workers in the adjacent industrial estate and passing traffic.								
Zoning (sqm):	ACZ		C1Z		C2Z		MUZ		Other
	0		23,850		0		0		0
Retail and commercial floor space* (sqm):	Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant
	1,781	0	0	648	204	757	3,390	0	0
Retail anchors:	1 supermarket (1,778sqm Aldi,)								
Transport connections:	Public	Marshall Railway Station (approx. 1.6km), bus service (routes 17, 19, 20, 72 and 74)							
	Private	Intersection of Surf Coast Highway and Grove Road							
Future role and opportunities:	<p>The Surfcoast Highway serves as a physical barrier, disconnecting the west and east sides of Grovedale. This centre whilst separated provides access to essential every day supermarket based needs for the east Grovedale community.</p> <p>There is also a medium sized IGA supermarket (2,157sqm) located in the adjacent industrial estate, opposite the Grovedale Primary School. Whilst this supermarket is separated from the Aldi based centre, it plays a role in contributing to the supermarket based retail offer for the surrounding community.</p> <p>This centre may benefit from a wider residential catchment in the future with the development of the Marshall residential precinct further to the east.</p>								
Action required:	Nil								
Growth Opportunities	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)		Potential to grow within current zoned land		Sub precinct planning required			Potential for rezoning to align with centre boundary	
	1,400		Yes		No			No	

\* Excludes non employment uses such as residential, car parking and sites under construction.

## 1.31 SURF COAST HIGHWAY

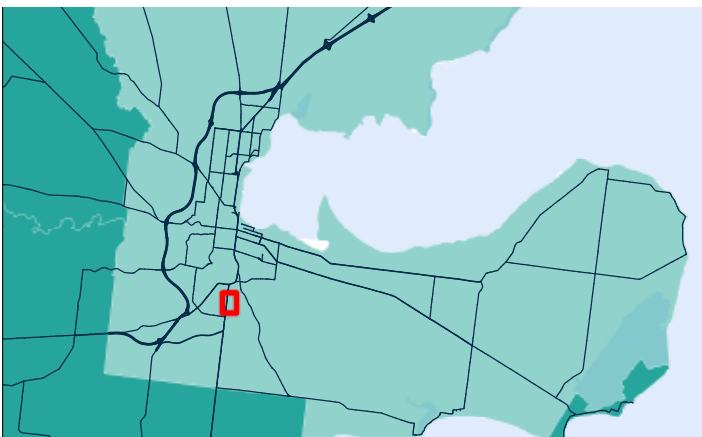
### CENTRE BOUNDARY AND EXISTING FLOOR SPACE USES



#### LEGEND

- Bulky Goods
- Car park
- Commercial
- Commercial Services
- Department Stores
- Education
- Enclosed Mall
- Entertainment
- Hospitality
- Industrial
- Medical
- Non-leasable Retail
- Public Facility
- Residential
- Specialty Food
- Specialty Other
- Supermarket
- Unclassified Shop
- Under Construction
- Vacant

#### CENTRE LOCATION MAP



# NEIGHBOURHOOD CENTRES

## 1.32 VINES ROAD, HAMLYN HEIGHTS

CENTRE NAME: VINES ROAD, HAMLYN HEIGHTS									
Hierarchy status:	Neighbourhood								
Location:	Hamlyn Heights								
Key characteristics:	Local retail strip adjacent to a municipal library, senior citizens home and high school. Contains a mix of specialty shops and an IGA.								
Current role:	Plays a local role within the Hamlyn Heights community.								
Zoning (sqm):	ACZ		C1Z		C2Z		MUZ		Other
	0		7,940		0		0		0
Retail and commercial floor space* (sqm):	Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant
	862	0	0	399	1,368	480	3,110	250	100
Retail anchors:	1 supermarket (862sqm IGA)								
Transport connections:	Public	Bus service (routes 50 and 51)							
	Private	Vines Road, between Olive Street/Kalimna Street and Sycamore Street/Waymouth Street, accessible via Ballarat Road and Church Street							
Future role and opportunities:	A small amount of floor space growth is forecast for this centre by 2036. But demand for services may increase over time given the areas is identified as an IHDA in the Planning Scheme.								
Action required:	Nil								
Growth Opportunities	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)		Potential to grow within current zoned land		Sub precinct planning required		Potential for rezoning to align with centre boundary		
	1,700		Yes- with constraints – Council car park site		No		No		

\* Excludes non employment uses such as residential, car parking and sites under construction.

### 1.32 VINES ROAD, HAMLYN HEIGHTS

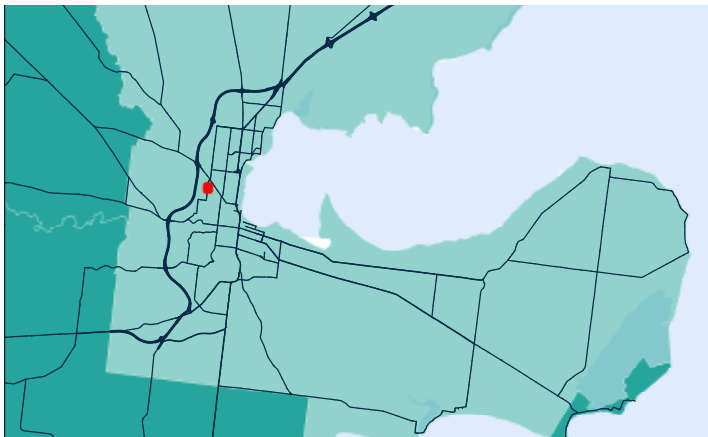
#### CENTRE BOUNDARY AND EXISTING FLOOR SPACE USES



#### LEGEND

-  Bulky Goods
-  Car park
-  Commercial
-  Commercial Services
-  Department Stores
-  Education
-  Enclosed Mall
-  Entertainment
-  Hospitality
-  Industrial
-  Medical
-  Non-leasable Retail
-  Public Facility
-  Residential
-  Specialty Food
-  Specialty Other
-  Supermarket
-  Unclassified Shop
-  Under Construction
-  Vacant

#### CENTRE LOCATION MAP



# NEIGHBOURHOOD CENTRES

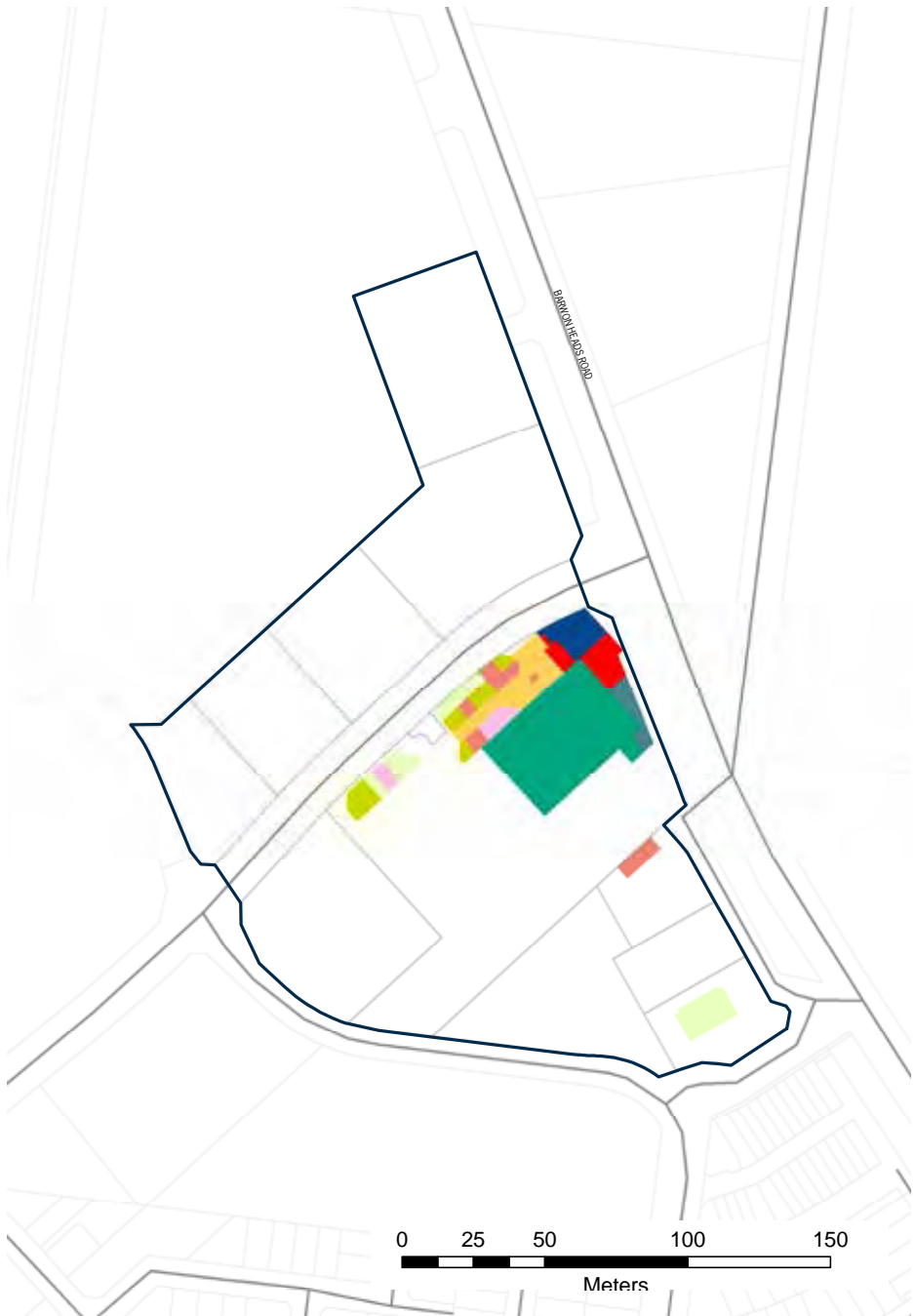
## 1.33 WARRALILY

CENTRE NAME: WARRALILY									
Hierarchy status:	Neighbourhood Centre								
Location:	Barwon Heads Road, Armstrong Creek								
Key characteristics:	New supermarket base centre with several speciality stores, cafes, liquor store, medical centre and dentist. Several stores are still vacant.								
Current role:	Service the local area of Armstrong Creek (Warralily Estate) and potentially commuters to Geelong from Barwon Heads and Ocean Grove								
Zoning (sqm):	ACZ	C1Z	C2Z	MUZ	Other				
	0	0	0	0	Unknown				
Retail and commercial floor space* (sqm):	Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant
	3,826	0	0	341	773	1,060	6,000	650	897
Retail anchors:	Woolworths and Aldi Supermarkets								
Transport connections:	Public	Bus Service (Route 61)							
	Private	Portarlington Road via Jetty Road and Centennial Bvd							
Future role and opportunities:	<p>A neighbourhood centre located within the Armstrong Creek Growth Area south of Geelong, on Barwon Heads Road. Known as the Warralily Village, this centre contain a full line Woolworths supermarket and 14 specialty stores totaling 4,000sqm of floor space. There is a medical centre, pharmacy, office space, gym and cafes with 400 car parking spaces. The centre opened in 2017.</p> <p>A recent planning permit 722/2016 has been granted which allows an Aldi supermarket (1,600sqm) and specialty retail 250sqm. Construction is yet to commence. This would bring the total size of the centre to 8,100 sqm.</p> <p>A significant amount of land has been identified for retail and community purposes to form part of the Warralily NAC and is identified in the Armstrong Creek East Precinct Structure Plan. Future development applications will need to consider the timing and demand for additional retail uses above what has been approved. Council should ensure that the centre provides for a range of other uses, not just retail uses.</p>								
Action required:	Nil								
Growth Opportunities	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)		Potential to grow within current zoned land		Sub precinct planning required		Potential for rezoning to align with centre boundary		
	7,800		Yes		No		No		

\* Excludes non employment uses such as residential, car parking and sites under construction.

### 1.33 WARRALILY

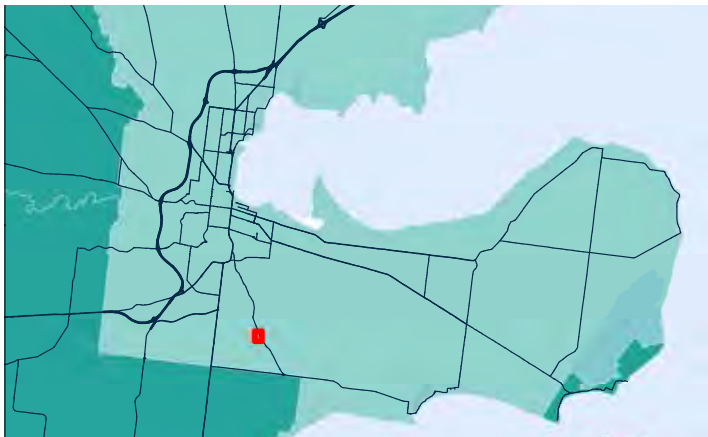
#### CENTRE BOUNDARY AND EXISTING FLOOR SPACE USES



#### LEGEND

-  Bulky Goods
-  Car park
-  Commercial
-  Commercial Services
-  Department Stores
-  Education
-  Enclosed Mall
-  Entertainment
-  Hospitality
-  Industrial
-  Medical
-  Non-leasable Retail
-  Public Facility
-  Residential
-  Specialty Food
-  Specialty Other
-  Supermarket
-  Unclassified Shop
-  Under Construction
-  Vacant

#### CENTRE LOCATION MAP



# RESTRICTED RETAIL

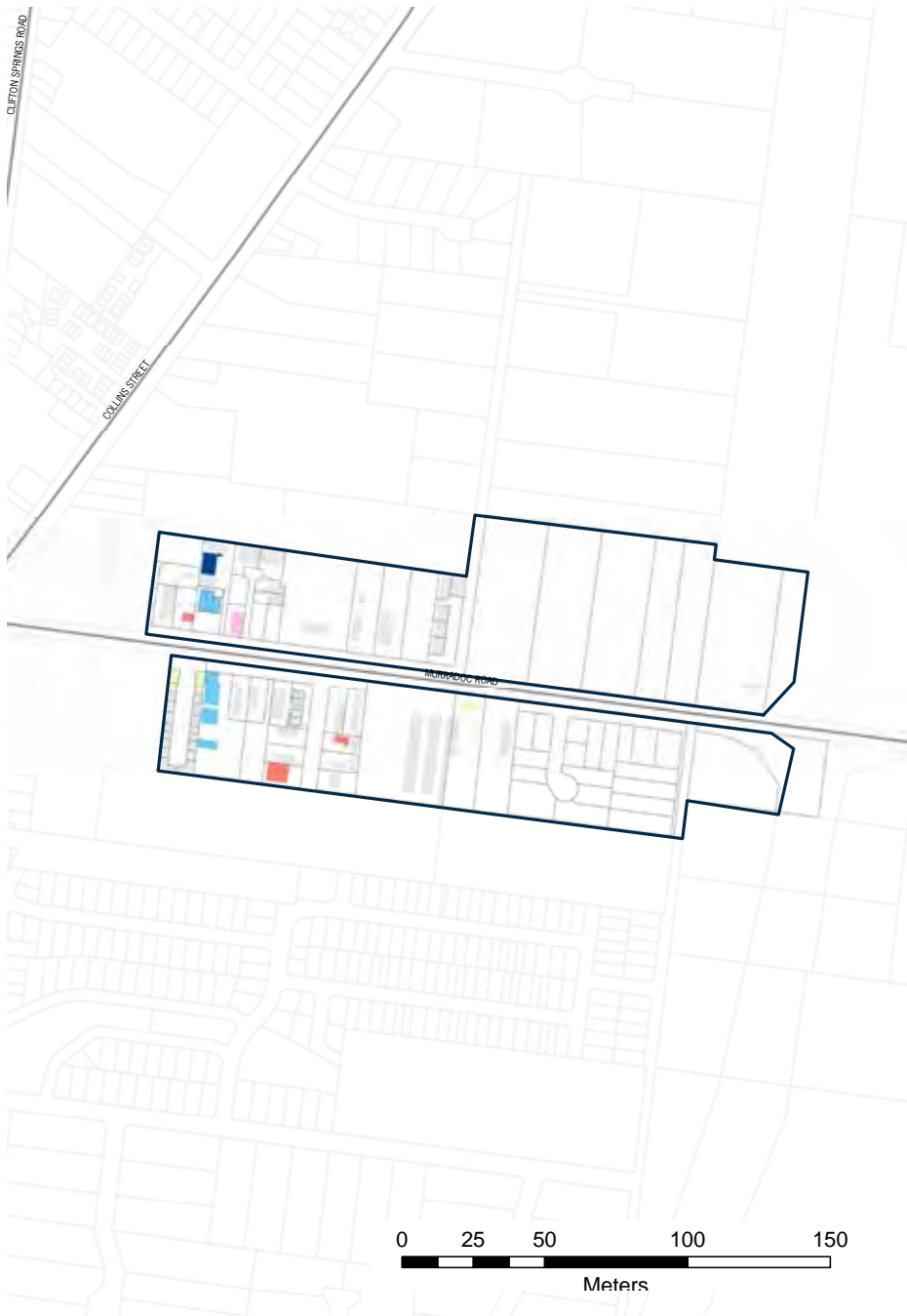
## 1.34 DRYSDALE

CENTRE NAME: DRYSDALE									
Hierarchy status:	Restricted retail								
Location:	Drysdale								
Key characteristics:	Largely undeveloped commercial/industrial estate on the eastern edge of the Drysdale Town Centre.								
Current role:	Restricted retail precinct								
Zoning (sqm):	ACZ		C1Z		C2Z		MUZ		Other
	0		0		200,000		0		0
Retail and commercial floor space* (sqm):	Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant
	0	0	1,655	328	755	436	3,174	0	0
Retail anchors:	Nil								
Transport connections:	Public	Bus service (routes 60)							
	Private	Murradoc Road							
Future role and opportunities:	<p>A significant area in terms of size, the Drysdale restricted retail precinct is located directly to the west of the Town Centre. Much of the land is vacant. Land uses along Murradoc Road are generally industrial in nature, however with recent rezoning of additional Commercial 2 zoned land it is likely that the area will over time increase its retail offer.</p> <p>The development of Drysdale and Clifton Springs is guided by the <i>Drysdale Urban Design Framework (UDF) 2012</i> and the <i>Drysdale/Clifton Springs Structure Plan 2010</i>. The recommendations of these documents have been implemented into the Geelong Planning Scheme through various amendments. Most recently land along Murradoc Road has been rezoned from the Farming Zone to Commercial 2 to join up with the future Drysdale bypass.</p> <p>There is demand for restricted retailing in the Northern Bellarine and on the Bellarine more generally by 2036. There is approximately 19 hectares of developable Commercial 2 Zoned land in Drysdale, which is considered more than sufficient to meet the future restricted retail retailing needs of the Northern Bellarine until 2036.</p>								
Action required:	Nil								
Growth Opportunities	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)		Potential to grow within current zoned land		Sub precinct planning required		Potential for rezoning to align with centre boundary		
	2,000		Yes		No		No		

\* Excludes non employment uses such as residential, car parking and sites under construction.

### 1.34 DRYSDALE

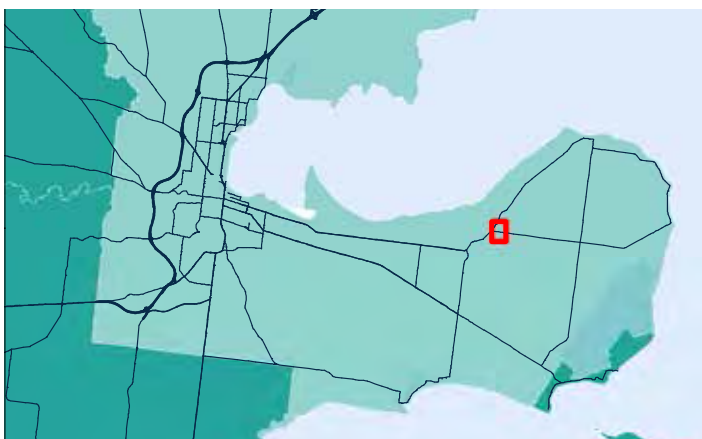
#### CENTRE BOUNDARY AND EXISTING FLOOR SPACE USES



#### LEGEND

- Bulky Goods
- Car park
- Commercial
- Commercial Services
- Department Stores
- Education
- Enclosed Mall
- Entertainment
- Hospitality
- Industrial
- Medical
- Non-leasable Retail
- Public Facility
- Residential
- Specialty Food
- Specialty Other
- Supermarket
- Unclassified Shop
- Under Construction
- Vacant

#### CENTRE LOCATION MAP



# RESTRICTED RETAIL

## 1.35 GEELONG GATEWAY

<b>CENTRE NAME: GEELONG GATEWAY</b>																			
Hierarchy status:	Restricted retail																		
Location:	Corio																		
Key characteristics:	Mid-sized restricted retail precinct located along the Princes Highway, across from Rosewall Activity Centre. Comprises Geelong Gate Restricted retail centre and land south of Broderick Road. Major stores include Fantastic Furniture and Harvey Norman.																		
Current role:	Acts as the gateway to the central Geelong region.																		
Zoning (sqm):	<table border="1"> <thead> <tr> <th>ACZ</th> <th>C1Z</th> <th>C2Z</th> <th>MUZ</th> <th>Other</th> </tr> </thead> <tbody> <tr> <td>0</td> <td>0</td> <td>194,810</td> <td>0</td> <td>0</td> </tr> </tbody> </table>	ACZ	C1Z	C2Z	MUZ	Other	0	0	194,810	0	0								
	ACZ	C1Z	C2Z	MUZ	Other														
0	0	194,810	0	0															
Retail and commercial floor space* (sqm):	<table border="1"> <thead> <tr> <th>Super market</th> <th>Depart' Store</th> <th>Restricted Retail</th> <th>Specialty Food</th> <th>Specialty Other</th> <th>Hospitality</th> <th>Total Retail</th> <th>Other Employ'</th> <th>Vacant</th> </tr> </thead> <tbody> <tr> <td>0</td> <td>0</td> <td>26,022</td> <td>1,540</td> <td>2,775</td> <td>1,125</td> <td>31,463</td> <td>0</td> <td>2,120</td> </tr> </tbody> </table>	Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant	0	0	26,022	1,540	2,775	1,125	31,463	0	2,120
Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant											
0	0	26,022	1,540	2,775	1,125	31,463	0	2,120											
Retail anchors:	Multiple large format chain stores such as Fantastic Furniture, Plush etc includes a large gymnasium																		
Transport connections:	Public Corio Railway Station (approx. 1.2km), bus service (route 12)																		
	Private Princes Highway, between Princes Freeway and School Road																		
Future role and opportunities:	Amendment C282 to the Geelong Planning scheme rezoned this area from the Industrial 1 and Industrial 3 Zone to the Commercial 2 Zone and included the area as a restricted retail precinct in the retail hierarchy. This amendment was approved on 16 October 2016. There is still vacant land within this centre that could be developed for future restricted retailing uses.																		
Action required:	Nil																		
Growth Opportunities	<table border="1"> <thead> <tr> <th>Forecast supportable floor space 2016-2036 sqm (difference from total floor space)</th> <th>Potential to grow within current zoned land</th> <th>Sub precinct planning required</th> <th>Potential for rezoning to align with centre boundary</th> </tr> </thead> <tbody> <tr> <td>26,100</td> <td>Yes</td> <td>No</td> <td>No</td> </tr> </tbody> </table>	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)	Potential to grow within current zoned land	Sub precinct planning required	Potential for rezoning to align with centre boundary	26,100	Yes	No	No										
	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)	Potential to grow within current zoned land	Sub precinct planning required	Potential for rezoning to align with centre boundary															
26,100	Yes	No	No																

\* Excludes non employment uses such as residential, car parking and sites under construction.

### 1.35 GEELONG GATEWAY

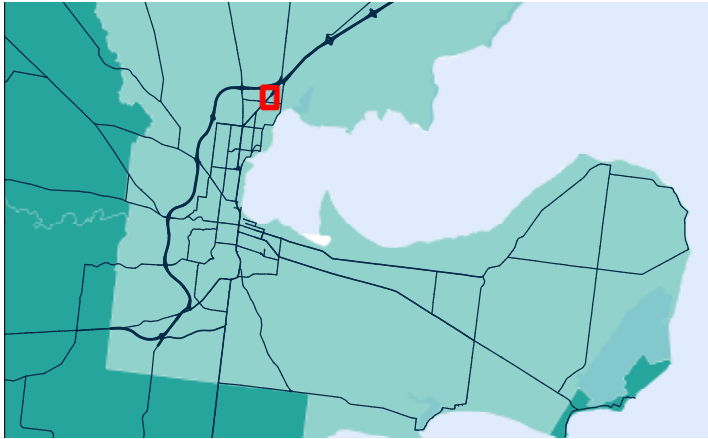
#### CENTRE BOUNDARY AND EXISTING FLOOR SPACE USES



#### LEGEND

- Bulky Goods
- Car park
- Commercial
- Commercial Services
- Department Stores
- Education
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- Industrial
- Medical
- Non-leasable Retail
- Public Facility
- Residential
- Specialty Food
- Specialty Other
- Supermarket
- Unclassified Shop
- Under Construction
- Vacant

#### CENTRE LOCATION MAP



# RESTRICTED RETAIL

## 1.36 MELBOURNE RD (NORLANE)

<b>CENTRE NAME: MELBOURNE RD (NORLANE)</b>																			
Hierarchy status:	Restricted retail																		
Location:	Norlane																		
Key characteristics:	Low density restricted retail precinct with several fast food restaurants and services located along the Princes Highway.																		
Current role:	With a significant proportion of low density restricted retail (including Bunnings), this precinct serves the northern Greater Geelong area with restricted retail needs, as well as commuters along the highway.																		
Zoning (sqm):	<table border="1"> <thead> <tr> <th>ACZ</th> <th>C1Z</th> <th>C2Z</th> <th>MUZ</th> <th>Other</th> </tr> </thead> <tbody> <tr> <td>0</td> <td>7,680</td> <td>85,460</td> <td>0</td> <td>2,860</td> </tr> </tbody> </table>	ACZ	C1Z	C2Z	MUZ	Other	0	7,680	85,460	0	2,860								
	ACZ	C1Z	C2Z	MUZ	Other														
0	7,680	85,460	0	2,860															
Retail and commercial floor space* (sqm):	<table border="1"> <thead> <tr> <th>Super market</th> <th>Depart' Store</th> <th>Restricted Retail</th> <th>Specialty Food</th> <th>Specialty Other</th> <th>Hospitality</th> <th>Total Retail</th> <th>Other Employ'</th> <th>Vacant</th> </tr> </thead> <tbody> <tr> <td>0</td> <td>0</td> <td>18,968</td> <td>1,400</td> <td>2,286</td> <td>988</td> <td>23,652</td> <td>0</td> <td>92</td> </tr> </tbody> </table>	Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant	0	0	18,968	1,400	2,286	988	23,652	0	92
Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant											
0	0	18,968	1,400	2,286	988	23,652	0	92											
Retail anchors:	Bunnings																		
Transport connections:	Public North Shore Railway Station (approx. 1.4km), bus service (routes 10 and 11)																		
	Private Princes Highway, at North Shore Road intersection																		
Future role and opportunities:	<p>Given the presence of a Bunnings store, this precinct is likely to continue to play this role into the future.</p> <p>There are several sites in the Commercial 2 zone which have development potential and could accommodate the additional demand for restricted retail floor space in this location.</p>																		
Action required:	Nil																		
Growth Opportunities	<table border="1"> <thead> <tr> <th>Forecast supportable floor space 2016-2036 sqm (difference from total floor space)</th> <th>Potential to grow within current zoned land</th> <th>Sub precinct planning required</th> <th>Potential for rezoning to align with centre boundary</th> </tr> </thead> <tbody> <tr> <td>19,700</td> <td>Yes</td> <td>No</td> <td>No</td> </tr> </tbody> </table>	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)	Potential to grow within current zoned land	Sub precinct planning required	Potential for rezoning to align with centre boundary	19,700	Yes	No	No										
	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)	Potential to grow within current zoned land	Sub precinct planning required	Potential for rezoning to align with centre boundary															
19,700	Yes	No	No																

\* Excludes non employment uses such as residential, car parking and sites under construction.

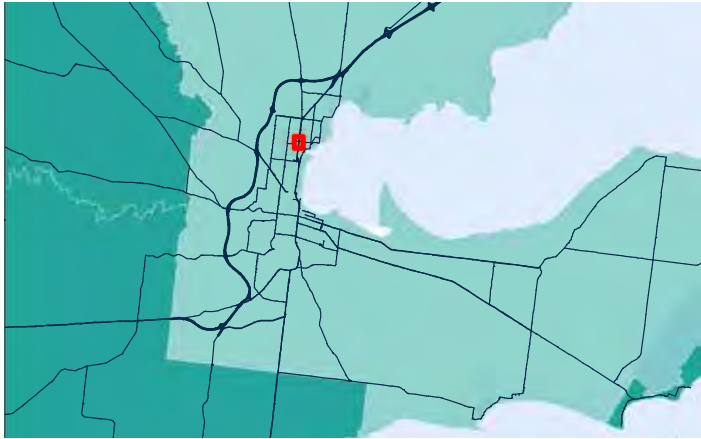
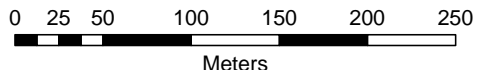
# 1.36 MELBOURNE RD (NORLANE)

## CENTRE BOUNDARY AND EXISTING FLOOR SPACE USES



- LEGEND**
- Bulky Goods
  - Car park
  - Commercial
  - Commercial Services
  - Department Stores
  - Education
  - Enclosed Mall
  - Entertainment
  - Hospitality
  - Industrial
  - Medical
  - Non-leasable Retail
  - Public Facility
  - Residential
  - Specialty Food
  - Specialty Other
  - Supermarket
  - Unclassified Shop
  - Under Construction
  - Vacant

**CENTRE LOCATION MAP**



# RESTRICTED RETAIL

## 1.37 MELBOURNE RD (NORTH GEELONG)

CENTRE NAME: MELBOURNE RD (NORTH GEELONG)									
Hierarchy status:	Restricted retail								
Location:	North Geelong								
Key characteristics:	Mid-sized, low density restricted retail precinct with under 25 stores and services. Has high exposure along the Princes Highway.								
Current role:	With a mix of uses including fire place sales, bakery, furniture sales, post office (depot) and beacon lighting. This precinct largely serves the northern Greater Geelong area with restricted retail and industrial service needs.								
Zoning (sqm):	ACZ		C1Z		C2Z		MUZ		Other
	0	0	0	0	42,640	0	0	0	0
Retail and commercial floor space* (sqm):	Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant
	0	0	9,080	0	4,800	440	14,320	3,620	0
Retail anchors:	None								
Transport connections:	Public	North Geelong Station (approx. 1.7km), bus service (routes 10 and 11)							
	Private	Princes Highway, at Dunne Street intersection, near Separation Street							
Future role and opportunities:	<p>This precinct is likely to continue to play this role into the future.</p> <p>The recent closure of Rays Outdoors a key anchor in the area may have an impact on the trading of this centre. There may be some redevelopment opportunities within the existing zoned area to accommodate the forecast demand for retail in the centre. A new showroom has been developed at 346 Melbourne Road, which may attract new uses in the area.</p>								
Action required:	Nil								
Growth Opportunities	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)		Potential to grow within current zoned land		Sub precinct planning required		Potential for rezoning to align with centre boundary		
	11,800		Yes		No		No		

\* Excludes non employment uses such as residential, car parking and sites under construction.

# 1.37 MELBOURNE RD (NORTH GEELONG)

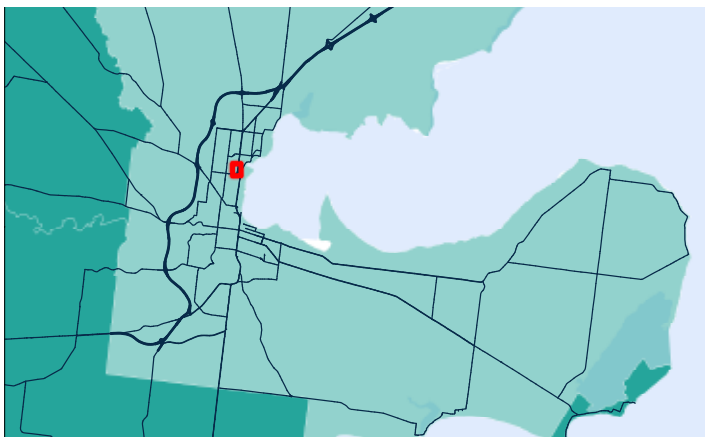
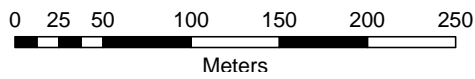
## CENTRE BOUNDARY AND EXISTING FLOOR SPACE USES



### LEGEND

- Bulky Goods
- Car park
- Commercial
- Commercial Services
- Department Stores
- Education
- Enclosed Mall
- Entertainment
- Hospitality
- Industrial
- Medical
- Non-leasable Retail
- Public Facility
- Residential
- Specialty Food
- Specialty Other
- Supermarket
- Unclassified Shop
- Under Construction
- Vacant

### CENTRE LOCATION MAP



# RESTRICTED RETAIL

## 1.38 SINCLAIR STREET, OCEAN GROVE

<b>CENTRE NAME: SINCLAIR STREET, OCEAN GROVE</b>																			
Hierarchy status:	Restricted retail																		
Location:	Ocean Grove																		
Key characteristics:	Small existing restricted retail centre located in the north of Ocean Grove recently expanded to cater for the long term growth of the town.																		
Current role:	Meets the retail and industrial needs of Ocean Grove																		
Zoning (sqm):	<table border="1"> <thead> <tr> <th>ACZ</th> <th>C1Z</th> <th>C2Z</th> <th>MUZ</th> <th>Other</th> </tr> </thead> <tbody> <tr> <td>0</td> <td>0</td> <td>187,500</td> <td>0</td> <td>0</td> </tr> </tbody> </table>	ACZ	C1Z	C2Z	MUZ	Other	0	0	187,500	0	0								
	ACZ	C1Z	C2Z	MUZ	Other														
0	0	187,500	0	0															
Retail and commercial floor space* (sqm):	<table border="1"> <thead> <tr> <th>Super market</th> <th>Depart' Store</th> <th>Restricted Retail</th> <th>Specialty Food</th> <th>Specialty Other</th> <th>Hospitality</th> <th>Total Retail</th> <th>Other Employ'</th> <th>Vacant</th> </tr> </thead> <tbody> <tr> <td>0</td> <td>0</td> <td>724</td> <td>0</td> <td>2,836</td> <td>998</td> <td>4,095</td> <td>9,500</td> <td>0</td> </tr> </tbody> </table>	Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant	0	0	724	0	2,836	998	4,095	9,500	0
Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant											
0	0	724	0	2,836	998	4,095	9,500	0											
Retail anchors:	None																		
Transport connections:	Public Bus service (routes 56)																		
	Private Grubb Road via Bellarine Highway, Grubb Road Via Shell Road																		
Future role and opportunities:	<p>An existing restricted retail precinct in Ocean Grove. This centre has a minimum of restricted retail industrial and retail use. The area consists of mechanics, furniture sales, plumbing supplies, opportunity shop and other retail uses. In the past this commercial area was the only location for service business and large format retail uses to locate..</p> <p>An expanded Commercial 2 Zone located to the north of Sinclair Street has been added to this existing restricted retail precinct to accommodate demand from the northern residential growth area of Ocean Grove. A Development Plan has been approved for this area but development of this area has not yet occurred.</p> <p>The rezoning of 7 hectares of land to the east of the Commercial 2 Zone to an Industrial 3 Zone may also encourage light industrial uses to establish in this new precinct, allowing for more restricted retail type uses to establish in the Commercial 2 zone.</p> <p>With the large amount of commercial 2 zone land available, It is highly likely that any forecast demand for additional retail will be able to be met.</p>																		
Action required:	Nil																		
Growth Opportunities	<table border="1"> <thead> <tr> <th>Forecast supportable floor space 2016-2036 sqm (difference from total floor space)</th> <th>Potential to grow within current zoned land</th> <th>Sub precinct planning required</th> <th>Potential for rezoning to align with centre boundary</th> </tr> </thead> <tbody> <tr> <td>4,800</td> <td>Yes</td> <td>No</td> <td>No</td> </tr> </tbody> </table>	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)	Potential to grow within current zoned land	Sub precinct planning required	Potential for rezoning to align with centre boundary	4,800	Yes	No	No										
	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)	Potential to grow within current zoned land	Sub precinct planning required	Potential for rezoning to align with centre boundary															
4,800	Yes	No	No																

\* Excludes non employment uses such as residential, car parking and sites under construction.

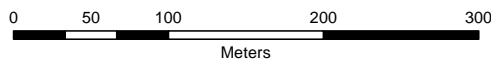
# 1.38 SINCLAIR STREET, OCEAN GROVE

## CENTRE BOUNDARY AND EXISTING FLOOR SPACE USES

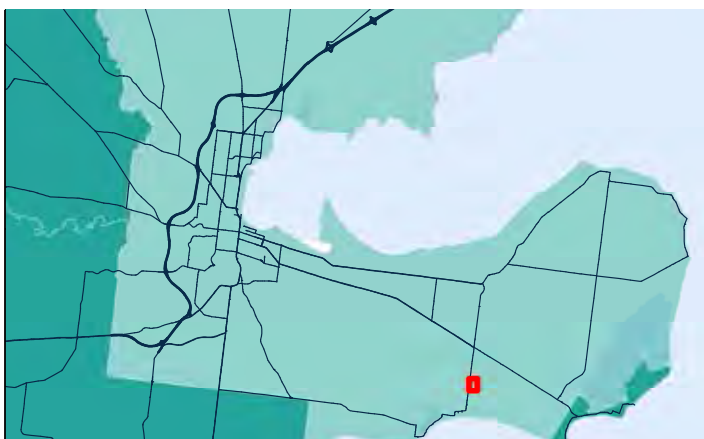


### LEGEND

- Bulky Goods
- Car park
- Commercial
- Commercial Services
- Department Stores
- Education
- Enclosed Mall
- Entertainment
- Hospitality
- Industrial
- Medical
- Non-leasable Retail
- Public Facility
- Residential
- Specialty Food
- Specialty Other
- Supermarket
- Unclassified Shop
- Under Construction
- Vacant



### CENTRE LOCATION MAP



# RESTRICTED RETAIL

## 1.39 WAURN PONDS

<b>CENTRE NAME: WAURN PONDS</b>																			
Hierarchy status:	Restricted retail																		
Location:	Waurn Ponds																		
Key characteristics:	Large low density restricted retail precinct on Princes Highway, close to Waurn Ponds Shopping Centre and Deakin University Waurn Ponds campus. Includes the Geelong Homemaker Centre.																		
Current role:	This centre is a large restricted retail precinct in the south-west area of Greater Geelong. It contains a significant proportion of low density restricted retail, including a Bunnings and Harvey Norman.																		
Zoning (sqm):	<table border="1"> <thead> <tr> <th>ACZ</th> <th>C1Z</th> <th>C2Z</th> <th>MUZ</th> <th>Other</th> </tr> </thead> <tbody> <tr> <td>0</td> <td>0</td> <td>158,470</td> <td>0</td> <td>0</td> </tr> </tbody> </table>	ACZ	C1Z	C2Z	MUZ	Other	0	0	158,470	0	0								
	ACZ	C1Z	C2Z	MUZ	Other														
0	0	158,470	0	0															
Retail and commercial floor space* (sqm):	<table border="1"> <thead> <tr> <th>Super market</th> <th>Depart' Store</th> <th>Restricted Retail</th> <th>Specialty Food</th> <th>Specialty Other</th> <th>Hospitality</th> <th>Total Retail</th> <th>Other Employ'</th> <th>Vacant</th> </tr> </thead> <tbody> <tr> <td>0</td> <td>0</td> <td>31,398</td> <td>473</td> <td>14,821</td> <td>280</td> <td>46,972</td> <td>0</td> <td>333</td> </tr> </tbody> </table>	Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant	0	0	31,398	473	14,821	280	46,972	0	333
Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant											
0	0	31,398	473	14,821	280	46,972	0	333											
Retail anchors:	Bunnings, Harvey Norman, SuperAmart																		
Transport connections:	Public Bus service (routes 14, 18, 19 and 20)																		
	Private Intersection of Princes Highway and Pigdons Road, accessible via Princes Freeway, Pioneer Road and Surf Coast Highway																		
Future role and opportunities:	<p>The Waurn Ponds restricted retail precinct provides a genuine restricted retail offer to the southern suburbs of Geelong. Whilst slightly disjointed in nature there are sufficient retail anchors to make this centre attractive for consumers. The centre also benefits from its location at the Grovedale on/off ramp of the Geelong Ring Road.</p> <p>This centre has synergies with the Waurn Ponds sub-regional precinct in terms of its location along Colac Road. There may be opportunities to visually connect the two centres and promote the area as major retail, employment and residential hub in Geelong.</p> <p>As per the recommendations from the Waurn Pond sub-regional centre, a structure plan for the broader area should be developed.</p>																		
Action required:	Prepare a structure plan for the broader Waurn Ponds area between South Valley/Pioneer Road and Pigdons Road.																		
Growth Opportunities	<table border="1"> <thead> <tr> <th>Forecast supportable floor space 2016-2036 sqm (difference from total floor space)</th> <th>Potential to grow within current zoned land</th> <th>Sub precinct planning required</th> <th>Potential for rezoning to align with centre boundary</th> </tr> </thead> <tbody> <tr> <td>43,600</td> <td>No</td> <td>Yes</td> <td>No</td> </tr> </tbody> </table>	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)	Potential to grow within current zoned land	Sub precinct planning required	Potential for rezoning to align with centre boundary	43,600	No	Yes	No										
	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)	Potential to grow within current zoned land	Sub precinct planning required	Potential for rezoning to align with centre boundary															
43,600	No	Yes	No																

\* Excludes non employment uses such as residential, car parking and sites under construction.

## 1.39 WAURN PONDS

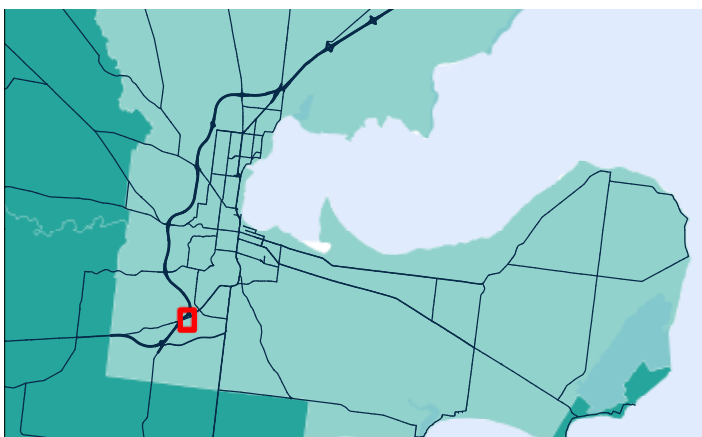
### CENTRE BOUNDARY AND EXISTING FLOOR SPACE USES



#### LEGEND

- Bulky Goods
- Car park
- Commercial
- Commercial Services
- Department Stores
- Education
- Enclosed Mall
- Entertainment
- Hospitality
- Industrial
- Medical
- Non-leasable Retail
- Public Facility
- Residential
- Specialty Food
- Specialty Other
- Supermarket
- Unclassified Shop
- Under Construction
- Vacant

### CENTRE LOCATION MAP



# PLANNED CENTRES

## 1.40 ARMSTRONG CREEK WEST

CENTRE NAME: ARMSTRONG CREEK WEST										
Hierarchy status:	Neighbourhood Centre									
Location:	Armstrong Creek West Growth Area									
Key characteristics:	Planned Neighbourhood Centre yet to be developed.									
Current role:	Service the local area of Armstrong Creek									
Zoning (sqm):	ACZ		C1Z		C2Z		MUZ		Other	
	0	0	0	0	0	0	Unknown			
Retail and commercial floor space* (sqm):	Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant	
	0	0	0	0	0	0	3,000		0	
Retail anchors:	Future Supermarket									
Transport connections:	Public	Nil								
	Private	Surf Coast Highway								
Future role and opportunities:	A planned neighbourhood centre within the Armstrong Creek Growth Area south of Geelong. The Armstrong Creek Neighbourhood Activity Centre, will form part of the Armstrong Creek West Precinct. An approved Precinct Structure Plan for this area has identified approximately 3000 square metres of retail floor space is needed to service this future community. A planning permit will be required for this Activity Centre.									
Action required:	Nil									
Growth Opportunities	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)		Potential to grow within current zoned land			Sub precinct planning required		Potential for rezoning to align with centre boundary		
	-1,600		Yes			No		No		

# PLANNED CENTRES

## 1.41 HORSESHOE BEND NORTH EAST

CENTRE NAME: HORSESHOE BEND NORTH EAST										
Hierarchy status:	Neighbourhood Centre									
Location:	Horseshoe Bend North East Precinct									
Key characteristics:	Planned Neighbourhood Centre yet to be developed.									
Current role:	Service the Horseshoe Bend North East precinct									
Zoning (sqm):	ACZ		C1Z		C2Z		MUZ		Other	
	0		0		0		0		0	
Retail and commercial floor space* (sqm):	Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant	
	0	0	0	0	0	0	7,000	0	0	
Retail anchors:	Nil									
Transport connections:	Public	Bus Service (Route 61)								
	Private	Horseshoe Bend Road								
Future role and opportunities:	A planned neighbourhood centre within the Armstrong Creek Growth Area south of Geelong. The Horseshoe Bend Neighbourhood Activity Centre, will form part of the Horseshoe Bend Precinct. An approved Precinct Structure Plan for this area has identified approximately 7,000 square metres of retail floor space is needed to service this future community. A planning permit will be required for this Activity Centre.									
Action required:	Nil									
Growth Opportunities	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)		Potential to grow within current zoned land			Sub precinct planning required		Potential for rezoning to align with centre boundary		
	-2,600		Yes			No		No		

\* Excludes non employment uses such as residential, car parking and sites under construction.

# PLANNED CENTRES

## 1.42 LARA WEST

CENTRE NAME: LARA WEST									
Hierarchy status:	Neighbourhood Centre								
Location:	Lara West Growth Area								
Key characteristics:	Planned Neighbourhood Centre yet to be developed.								
Current role:	Will service the Lara West Growth Area								
Zoning (sqm):	ACZ		C1Z		C2Z		MUZ		Other
	0	0	0	0	0	0	Unknown		
Retail and commercial floor space* (sqm):	Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant
	3,600	0		0	1,100	0	4,700	0	0
Retail anchors:	Supermarket based centre								
Transport connections:	Public	Bus Service (Route 12)							
	Private	Bacchus Marsh Road, Forest Road North via Elcho or Windermere Roads							
Future role and opportunities:	<p>The Lara West Neighbourhood Activity Centre, will form part of the Lara West Growth Area. A Precinct Structure Plan has been approved for this area which identified the need for approximately 4700 square metres of retail floor space to service the future community. The Lara West Precinct Structure Plan requires an urban design framework to be approved prior to the development of the neighbourhood centre.</p> <p>Council is currently considering two planning applications for subdivision, 496/2018 and 588/2018 for approx. 2500 lots.</p>								
Action required:	Nil								
Growth Opportunities	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)		Potential to grow within current zoned land		Sub precinct planning required		Potential for rezoning to align with centre boundary		
	-800		Yes		No		No		

\* Excludes non employment uses such as residential, car parking and sites under construction.

# INDICATIVE CENTRES

## 1.43 SUB-REGIONAL CENTRE - WGGA

CENTRE NAME: SUB-REGIONAL CENTRE - WGGA									
Hierarchy status:	Sub-Regional								
Location:	Western Geelong Growth Area – Batesford								
Key characteristics:	Indicative Sub-Regional Centre yet to be developed.								
Current role:	Service the western growth area in Batesford								
Zoning (sqm):	ACZ	C1Z	C2Z	MUZ	Other				
	0	0	0	0	0				
Retail and commercial floor space* (sqm):	Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant
	0	0	0	0	0	0	16,552	0	0
Retail anchors:	Nil								
Transport connections:	Public	unknown							
	Private	unknown							
Future role and opportunities:	An indicative Sub-Regional Centre in the Western Geelong Growth Area in Batesford. It is anticipated that this centre would be constructed in the forecast period.								
Action required:	Consider applying floor space caps during preparation of PSP								
Growth Opportunities	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)		Potential to grow within current zoned land		Sub precinct planning required		Potential for rezoning to align with centre boundary		
	1,017		N/A		N/A		N/A		

\* Excludes non employment uses such as residential, car parking and sites under construction.

# INDICATIVE CENTRES CENTRES

## 1.44 SUB-REGIONAL CENTRE - NGGA

CENTRE NAME: SUB-REGIONAL CENTRE - NGGA									
Hierarchy status:	Sub-Regional								
Location:	Northern Geelong Growth Area – Lovely Banks								
Key characteristics:	Indicative Sub-Regional Centre yet to be developed.								
Current role:	Service the northern growth area in Lovely Banks								
Zoning (sqm):	ACZ	C1Z	C2Z	MUZ	Other				
	0	0	0	0	0				
Retail and commercial floor space* (sqm):	Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant
	0	0	0	0	0	0	5,372		0
Retail anchors:	Nil								
Transport connections:	Public	unknown							
	Private	unknown							
Future role and opportunities:	An indicative Sub-Regional Centre in the Northern Geelong Growth Area in Lovely Banks. It is anticipated that this centre would be constructed in the forecast period.								
Action required:	Consider applying floor space caps during preparation of PSP								
Growth Opportunities	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)		Potential to grow within current zoned land		Sub precinct planning required		Potential for rezoning to align with centre boundary		
	-753		N/A		N/A		N/A		

# INDICATIVE CENTRES

## 1.45 SPECIALISED CENTRE - WGGA

CENTRE NAME: SPECIALISED CENTRE - WGGA									
Hierarchy status:	Neighbourhood Centre								
Location:	Western Geelong Growth Area – Batesford								
Key characteristics:	Indicative Specialised Centre yet to be developed.								
Current role:	Service the western growth area in Batesford								
Zoning (sqm):	ACZ		C1Z		C2Z		MUZ		Other
	0		0		0		0		0
Retail and commercial floor space* (sqm):	Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant
	0	0	0	0	0	0	0		0
Retail anchors:	Nil								
Transport connections:	Public	unknown							
	Private	unknown							
Future role and opportunities:	An indicative Specialised Centre in the Western Geelong Growth Area in Batesford. It is anticipated that this centre would not be constructed in the forecast period.								
Action required:	Nil								
Growth Opportunities	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)		Potential to grow within current zoned land			Sub precinct planning required		Potential for rezoning to align with centre boundary	
	0		N/A			N/A		N/A	

# INDICATIVE CENTRES

## 1.46 ELCHO ROAD EAST - NGGA

CENTRE NAME: ELCHO ROAD EAST - NGGA									
Hierarchy status:	Neighbourhood Centre								
Location:	Northern Geelong Growth Area – Lovely Banks								
Key characteristics:	Indicative Neighbourhood Centre yet to be developed.								
Current role:	Service the northern growth area in Lovely Banks								
Zoning (sqm):	ACZ		C1Z		C2Z		MUZ		Other
	0		0		0		0		0
Retail and commercial floor space* (sqm):	Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant
	0	0		0	0	0	6,650	0	0
Retail anchors:	Nil								
Transport connections:	Public	unknown							
	Private	unknown							
Future role and opportunities:	An indicative Neighbourhood Centre in the Northern Geelong Growth Area in Lovely Banks. It is anticipated that this centre would not be constructed during the forecast period.								
Action required:	Consider applying floor space caps during preparation of PSP								
Growth Opportunities	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)		Potential to grow within current zoned land		Sub precinct planning required		Potential for rezoning to align with centre boundary		
	1,967		N/A		N/A		N/A		

\* Excludes non employment uses such as residential, car parking and sites under construction.

# INDICATIVE CENTRES

## 1.47 ELCHO ROAD WEST - NGGA

CENTRE NAME: ELCHO ROAD WEST - NGGA									
Hierarchy status:	Neighbourhood Centre								
Location:	Northern Geelong Growth Area – Lovely Banks								
Key characteristics:	Indicative Neighbourhood Centre yet to be developed.								
Current role:	Service the northern growth area in Lovely Banks								
Zoning (sqm):	ACZ		C1Z		C2Z		MUZ		Other
	0		0		0		0		0
Retail and commercial floor space* (sqm):	Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant
	0	0	0	0	0	0	0		0
Retail anchors:	Nil								
Transport connections:	Public	unknown							
	Private	unknown							
Future role and opportunities:	An indicative Neighbourhood Centre in the Northern Geelong Growth Area in Lovely Banks. It is anticipated that this centre would not be constructed during the forecast period.								
Action required:	Consider applying floor space caps during preparation of PSP								
Growth Opportunities	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)		Potential to grow within current zoned land			Sub precinct planning required		Potential for rezoning to align with centre boundary	
	N/A		N/A			N/A		N/A	

# INDICATIVE CENTRES

## 1.48 HEALES ROAD WEST - NGGA

CENTRE NAME: HEALES ROAD WEST - NGGA									
Hierarchy status:	Neighbourhood Centre								
Location:	Northern Geelong Growth Area – Lovely Banks								
Key characteristics:	Indicative Neighbourhood Centre yet to be developed.								
Current role:	Service the northern growth area in Lovely Banks								
Zoning (sqm):	ACZ		C1Z		C2Z		MUZ		Other
	0		0		0		0		0
Retail and commercial floor space* (sqm):	Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant
	0	0		0	0	0	6,600	0	0
Retail anchors:	Nil								
Transport connections:	Public	unknown							
	Private	unknown							
Future role and opportunities:	An indicative Neighbourhood Centre in the Western Geelong Growth Area in Lovely Banks. It is anticipated that this centre would be constructed late in the forecast period.								
Action required:	Consider applying floor space caps during preparation of PSP								
Growth Opportunities	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)		Potential to grow within current zoned land		Sub precinct planning required			Potential for rezoning to align with centre boundary	
	N/A		N/A		N/A			N/A	

\* Excludes non employment uses such as residential, car parking and sites under construction.

# INDICATIVE CENTRES

## 1.49 NORTHERN CENTRE - WGGA

CENTRE NAME: NORTHERN CENTRE - WGGA									
Hierarchy status:	Neighbourhood Centre								
Location:	Western Geelong Growth Area – Batesford								
Key characteristics:	Indicative Neighbourhood Centre yet to be developed.								
Current role:	Service the western growth area in Batesford								
Zoning (sqm):	ACZ		C1Z		C2Z		MUZ		Other
	0		0		0		0		0
Retail and commercial floor space* (sqm):	Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant
	0	0	0	0	0	0	6,650	0	0
Retail anchors:	Nil								
Transport connections:	Public	unknown							
	Private	unknown							
Future role and opportunities:	An indicative Neighbourhood Centre in the Western Geelong Growth Area in Batesford. It is anticipated that this centre would not be constructed in the forecast period.								
Action required:	Consider applying floor space caps during preparation of PSP								
Growth Opportunities	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)		Potential to grow within current zoned land			Sub precinct planning required		Potential for rezoning to align with centre boundary	
	581		N/A			N/A		N/A	

# INDICATIVE CENTRES

## 1.50 MIDLAND HWY - WGGA

CENTRE NAME: MIDLAND HWY - WGGA									
Hierarchy status:	Neighbourhood Centre								
Location:	Western Geelong Growth Area – Batesford								
Key characteristics:	Indicative Neighbourhood Centre yet to be developed.								
Current role:	Service the western growth area in Batesford								
Zoning (sqm):	ACZ		C1Z		C2Z		MUZ		Other
	0	0	0	0	0	0	0	0	0
Retail and commercial floor space* (sqm):	Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant
	0	0	0	0	0	0	0	0	0
Retail anchors:	Nil								
Transport connections:	Public	unknown							
	Private	unknown							
Future role and opportunities:	An indicative Neighbourhood Centre in the Western Geelong Growth Area in Batesford. It is anticipated that this centre would not be constructed in the forecast period.								
Action required:	Consider applying floor space caps during preparation of PSP								
Growth Opportunities	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)		Potential to grow within current zoned land		Sub precinct planning required		Potential for rezoning to align with centre boundary		
	N/A		N/A		N/A		N/A		

\* Excludes non employment uses such as residential, car parking and sites under construction.

# INDICATIVE CENTRES

## 1.51 LAKESIDE WEST - WGGA

CENTRE NAME: LAKESIDE WEST - WGGA									
Hierarchy status:	Neighbourhood Centre								
Location:	Western Geelong Growth Area – Batesford								
Key characteristics:	Indicative Neighbourhood Centre yet to be developed.								
Current role:	Service the western growth area in Batesford								
Zoning (sqm):	ACZ		C1Z		C2Z		MUZ		Other
	0		0		0		0		0
Retail and commercial floor space* (sqm):	Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant
	0	0		0	0	0	0	0	0
Retail anchors:	Nil								
Transport connections:	Public	unknown							
	Private	unknown							
Future role and opportunities:	An indicative Neighbourhood Centre in the Western Geelong Growth Area in Batesford. It is anticipated that this centre would not be constructed in the forecast period.								
Action required:	Consider applying floor space caps during preparation of PSP								
Growth Opportunities	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)		Potential to grow within current zoned land			Sub precinct planning required		Potential for rezoning to align with centre boundary	
	N/A		N/A			N/A		N/A	

\* Excludes non employment uses such as residential, car parking and sites under construction.

# INDICATIVE CENTRES

## 1.52 LAKESIDE SOUTH - WGGA

CENTRE NAME: LAKESIDE SOUTH - WGGA									
Hierarchy status:	Neighbourhood Centre								
Location:	Western Geelong Growth Area – Batesford								
Key characteristics:	Indicative Neighbourhood Centre yet to be developed.								
Current role:	Service the western growth area in Batesford								
Zoning (sqm):	ACZ	C1Z	C2Z	MUZ	Other				
	0	0	0	0	0				
Retail and commercial floor space* (sqm):	Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant
	0	0		0	0	0	0	0	0
Retail anchors:	Nil								
Transport connections:	Public	unknown							
	Private	unknown							
Future role and opportunities:	An indicative Neighbourhood Centre in the Western Geelong Growth Area in Batesford. It is anticipated that this centre would not be constructed in the forecast period.								
Action required:	Consider applying floor space caps during preparation of PSP								
Growth Opportunities	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)		Potential to grow within current zoned land		Sub precinct planning required		Potential for rezoning to align with centre boundary		
	N/A		N/A		N/A		N/A		

\* Excludes non employment uses such as residential, car parking and sites under construction.

# INDICATIVE CENTRES

## 1.53 WESTERN CENTRE - WGGA

CENTRE NAME: WESTERN CENTRE - WGGA									
Hierarchy status:	Neighbourhood Centre								
Location:	Western Geelong Growth Area – Batesford								
Key characteristics:	Indicative Neighbourhood Centre yet to be developed.								
Current role:	Service the western growth area in Batesford								
Zoning (sqm):	ACZ	C1Z	C2Z	MUZ	Other				
	0	0	0	0	0				
Retail and commercial floor space* (sqm):	Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant
	0	0		0	0	0	0	0	0
Retail anchors:	Nil								
Transport connections:	Public	unknown							
	Private	unknown							
Future role and opportunities:	An indicative Neighbourhood Centre in the Western Geelong Growth Area in Batesford. It is anticipated that this centre would not be constructed in the forecast period.								
Action required:	Consider applying floor space caps during preparation of PSP								
Growth Opportunities	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)		Potential to grow within current zoned land		Sub precinct planning required		Potential for rezoning to align with centre boundary		
	N/A		N/A		N/A		N/A		

\* Excludes non employment uses such as residential, car parking and sites under construction.

# INDICATIVE CENTRES

## 1.54 CENTRAL RESTRICTED RETAIL CENTRE - WGGA

CENTRE NAME: CENTRAL RESTRICTED RETAIL CENTRE - WGGA									
Hierarchy status:	Neighbourhood Centre								
Location:	Western Geelong Growth Area – Batesford								
Key characteristics:	Indicative Restricted Retail Centre yet to be developed.								
Current role:	Service the western growth area in Batesford								
Zoning (sqm):	ACZ		C1Z		C2Z		MUZ		Other
	0		0		0		0		0
Retail and commercial floor space* (sqm):	Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant
	0	0		0	0	0	0	0	0
Retail anchors:	Nil								
Transport connections:	Public	unknown							
	Private	unknown							
Future role and opportunities:	An indicative Restricted Retail Centre in the Western Geelong Growth Area in Batesford. It is anticipated that this centre would not be constructed in the forecast period.								
Action required:	N/A								
Growth Opportunities	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)		Potential to grow within current zoned land			Sub precinct planning required		Potential for rezoning to align with centre boundary	
	N/A		N/A			N/A		N/A	

\* Excludes non employment uses such as residential, car parking and sites under construction.

# DISPERSED CENTRES

## 1.55 BACCHUS MARSH ROAD, CORIO

CENTRE NAME: BACCHUS MARSH ROAD, CORIO									
Hierarchy status:	Dispersed restricted retail								
Location:	Corio								
Key characteristics:	Large vacant commercial 2 zoned land with good access to and from the Geelong Ring Road and the Geelong Employment Precinct. Approximately 1km north of the Corio Shopping Centre								
Current role:	None								
Zoning (sqm):	ACZ		C1Z		C2Z		MUZ		Other
	0	0	0	0	100,000	0	0	0	0
Retail and commercial floor space* (sqm):	Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant
	0	0	0	0	0	0	0	0	0
Retail anchors:	None								
Transport connections:	Public	Bus service on Bacchus Marsh Road (route 10)							
	Private	Bacchus Marsh Road							
Future role and opportunities:	The site was re zoned from residential to commercial 2 to support the development of a Master Homemaker store. The store was never developed and the site remains vacant. The centre has not been identified as a restricted retail centre given the site is vacant.								
Action required:	Nil								
Growth Opportunities	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)		Potential to grow within current zoned land		Sub precinct planning required		Potential for rezoning to align with centre boundary		
	0		Yes		No		No		

\* Excludes non employment uses such as residential, car parking and sites under construction.

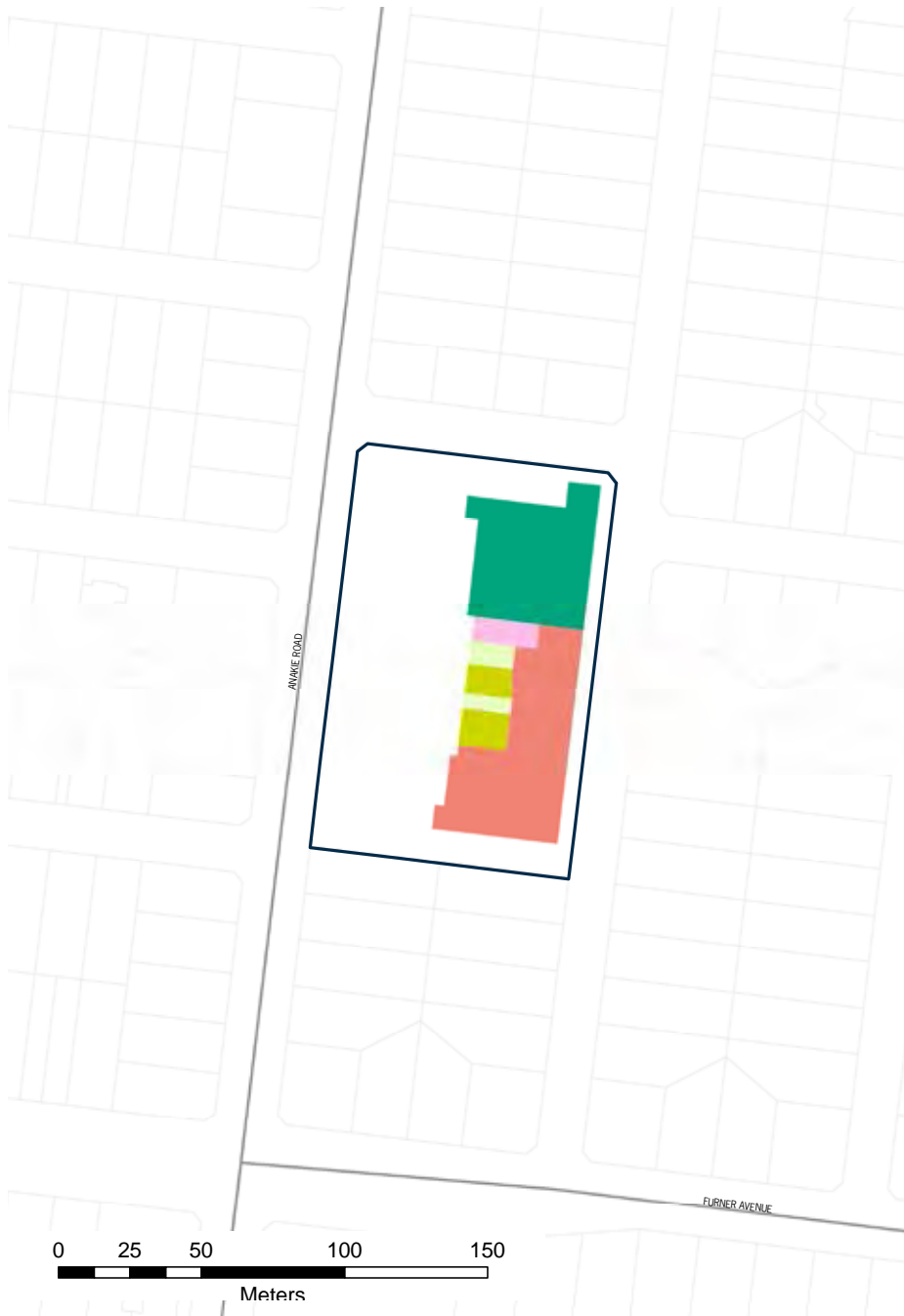
# DISPERSED CENTRES

## 1.56 ANAKIE ROAD, BELL PARK

CENTRE NAME: ANAKIE ROAD, BELL PARK									
Hierarchy status:	Dispersed retail								
Location:	Bell Park								
Key characteristics:	Known as the Bell Park Plaza, this supermarket based centre is 800m south of the Bell Post Hill Shopping Centre. The centre contains an Aldi, cheap as chips, liquor store, café and fish and chip shop. Recently opened, this centre replaces a previous Mitre 10 that was located on this site.								
Current role:	Retail								
Zoning (sqm):	Retail		C1Z		C2Z		MUZ		Other
	0		1,725		9,500		0		0
Retail and commercial floor space* (sqm):	Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant
	1,619	0	0	170	1,932	188	3,909	0	0
Retail anchors:	Aldi, Cheap as Chips								
Transport connections:	Public	Bus service on Station Street (route 22)							
	Private	Anakie Road							
Future role and opportunities:	<p>This centre was previously occupied by a Mitre 10 store. Changes in 2013 to the provisions of the Commercial 2 Zone, facilitated the development of small supermarkets (up to 1800m2) and 500m2 of shop uses. A planning permit was only required to develop the site.</p> <p>This site is located close to the Bell Post Hill Shopping centre. Council has not had the opportunity to assess the impact of this development on the retail hierarchy or the Bell Post Hill centre. Therefore this centre has not been included in the retail hierarchy to support the viability of Bell Post Hill Shopping Centre and other smaller surrounding centre's.</p> <p>In the future, this centre may be included as a neighbourhood centre in the hierarchy if it can be demonstrated that it does not impact on the viability of nearby centres.</p>								
Action required:	Nil								
Growth Opportunities	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)		Potential to grow within current zoned land		Sub precinct planning required		Potential for rezoning to align with centre boundary		
	-500		No		No		No		

## 1.56 ANAKIE ROAD, BELL PARK

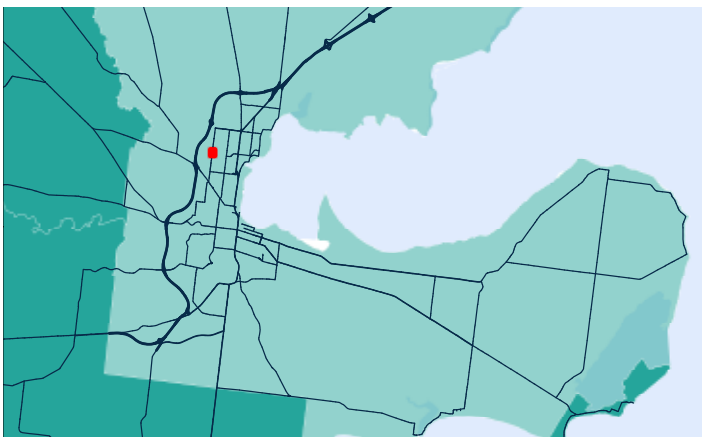
### CENTRE BOUNDARY AND EXISTING FLOOR SPACE USES



#### LEGEND

- Bulky Goods
- Car park
- Commercial
- Commercial Services
- Department Stores
- Education
- Enclosed Mall
- Entertainment
- Hospitality
- Industrial
- Medical
- Non-leasable Retail
- Public Facility
- Residential
- Specialty Food
- Specialty Other
- Supermarket
- Unclassified Shop
- Under Construction
- Vacant

### CENTRE LOCATION MAP



# DISPERSED CENTRES

## 1.57 BELLARINE HIGHWAY, NEWCOMB

<b>CENTRE NAME: BELLARINE HIGHWAY, NEWCOMB</b>																			
Hierarchy status:	Dispersed restricted retail																		
Location:	Newcomb																		
Key characteristics:	Land on the southern side of the Highway consists of low density retailing in the form of caravan sales as well as a McDonalds, KFC, car wash and light industrial uses. The northern side of the highway includes take away food premises, shops, a petrol station and hotel. Caravan Sales are a prominent feature of this centre.																		
Current role:	Nil																		
Zoning (sqm):	<table border="1"> <thead> <tr> <th>Retail</th> <th>C1Z</th> <th>C2Z</th> <th>MUZ</th> <th>Other</th> </tr> </thead> <tbody> <tr> <td>0</td> <td>0</td> <td>200,000</td> <td>0</td> <td>0</td> </tr> </tbody> </table>	Retail	C1Z	C2Z	MUZ	Other	0	0	200,000	0	0								
Retail	C1Z	C2Z	MUZ	Other															
0	0	200,000	0	0															
Retail and commercial floor space* (sqm):	<table border="1"> <thead> <tr> <th>Super market</th> <th>Depart' Store</th> <th>Restricted Retail</th> <th>Specialty Food</th> <th>Specialty Other</th> <th>Hospitality</th> <th>Total Retail</th> <th>Other Employ'</th> <th>Vacant</th> </tr> </thead> <tbody> <tr> <td>0</td> <td>0</td> <td>9,300</td> <td>3,740</td> <td>3,892</td> <td>2,292</td> <td>19,234</td> <td>0</td> <td>1,332</td> </tr> </tbody> </table>	Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant	0	0	9,300	3,740	3,892	2,292	19,234	0	1,332
Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant											
0	0	9,300	3,740	3,892	2,292	19,234	0	1,332											
Retail anchors:	Caravan Sales, Mill Market																		
Transport connections:	<table border="1"> <tbody> <tr> <td>Public</td> <td>Bus service (routes 30, 32, 56, 61)</td> </tr> <tr> <td>Private</td> <td>Bellarine Highway</td> </tr> </tbody> </table>	Public	Bus service (routes 30, 32, 56, 61)	Private	Bellarine Highway														
Public	Bus service (routes 30, 32, 56, 61)																		
Private	Bellarine Highway																		
Future role and opportunities:	<p>A dispersed restricted retail centre on the northern and southern sides of the Bellarine Highway located at the edge of urban Geelong, heading towards the Bellarine Peninsula. To the south of the centre is the Bellarine Rail Trail which provides a buffer to the residential and farming land further to the south.</p> <p>The Eastern Boundary Review 2009 provides policy direction around the potential to expand Geelong in an easterly direction. The report identifies an urban growth boundary for Geelong which limits development to existing residential and commercial zoned land. The review seeks to retain the rural buffers between Urban Geelong and Bellarine Peninsula due to drainage, sewerage and amenity issues.</p> <p>There are some opportunities to develop vacant and under utilised land within the existing Commercial 2 zone. The expansion of this centre is discourage and therefore the centre not been identified as a designated restricted retail centre.</p>																		
Action required:	Nil																		
Growth Opportunities	<table border="1"> <thead> <tr> <th>Forecast supportable floor space 2016-2036 sqm (difference from total floor space)</th> <th>Potential to grow within current zoned land</th> <th>Sub precinct planning required</th> <th>Potential for rezoning to align with centre boundary</th> </tr> </thead> <tbody> <tr> <td>-2,800</td> <td>Yes</td> <td>No</td> <td>No</td> </tr> </tbody> </table>	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)	Potential to grow within current zoned land	Sub precinct planning required	Potential for rezoning to align with centre boundary	-2,800	Yes	No	No										
Forecast supportable floor space 2016-2036 sqm (difference from total floor space)	Potential to grow within current zoned land	Sub precinct planning required	Potential for rezoning to align with centre boundary																
-2,800	Yes	No	No																

## 1.57 BELLARINE HIGHWAY, NEWCOMB

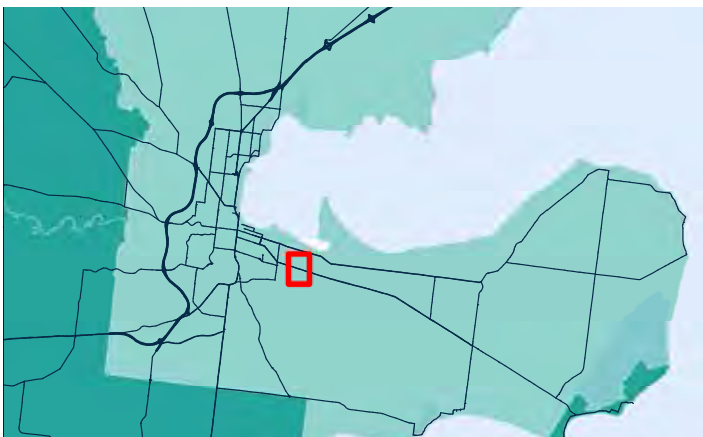
### CENTRE BOUNDARY AND EXISTING FLOOR SPACE USES



#### LEGEND

- Bulky Goods
- Car park
- Commercial
- Commercial Services
- Department Stores
- Education
- Enclosed Mall
- Entertainment
- Hospitality
- Industrial
- Medical
- Non-leasable Retail
- Public Facility
- Residential
- Specialty Food
- Specialty Other
- Supermarket
- Unclassified Shop
- Under Construction
- Vacant

### CENTRE LOCATION MAP



# DISPERSED CENTRES

## 1.58 GORDON AVE, GEELONG WEST

CENTRE NAME: GORDON AVE, GEELONG WEST									
Hierarchy status:	Dispersed restricted retail								
Location:	Geelong West								
Key characteristics:	Mid-sized restricted retail precinct located along the Princes Highway, close to Central Geelong and perpendicular to Pakington (Geelong West) Centre but very distinct from it in terms of built form, use and amenity. Stores and services are mostly located along Autumn, Gordon and Spring Streets and have low density built form.								
Current role:	This centre plays a typical restricted retail precinct role, though it also has a significant proportion of office and industrial floor space.								
Zoning (sqm):	ACZ		C1Z		C2Z		MUZ		Other
	0		0		91,200		0		0
Retail and commercial floor space* (sqm):	Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant
	0	0	16,650	120	3,390	140	20,300	0	1,800
Retail anchors:	None								
Transport connections:	Public	Geelong Railway Station (approx. 500m), bus service (12, 30, 45, 50 and 51)							
	Private	Autumn Street, Gordon Avenue and Spring Street, between Pakington Street and Princes Highway							
Future role and opportunities:	<p>This centre is directly opposite the Geelong Train Station and has excellent pedestrian connections into Central Geelong and Pakington Street. There are opportunities to transition this area into a more mixed use precinct which could incorporate retail, office and light industrial uses with residential uses particularly on the first floor.</p> <p>This area should not be identified as a restricted retail precinct in the retail hierarchy to help support the potential transition of the area over time. This area should be identified as a dispersed restricted retail centre.</p>								
Action required:	Prepare an Urban Design Framework or Structure Plan for this area. The plan should focus on transitioning this area into a mixed use precinct which would incorporate residential, office, retail and light industrial uses. The plan should also consider improving connections through to Central Geelong and Pakington Street (Geelong West) centres.								
Growth Opportunities	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)		Potential to grow within current zoned land		Sub precinct planning required		Potential for rezoning to align with centre boundary		
	-4,200		Yes		Yes		No		

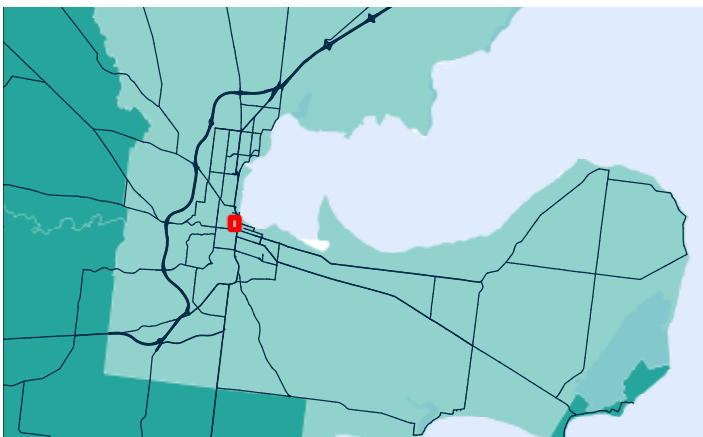
\* Excludes non employment uses such as residential, car parking and sites under construction.

## 1.58 GORDON AVE, GEELONG WEST

### CENTRE BOUNDARY AND EXISTING FLOOR SPACE USES



### CENTRE LOCATION MAP



# DISPERSED CENTRES

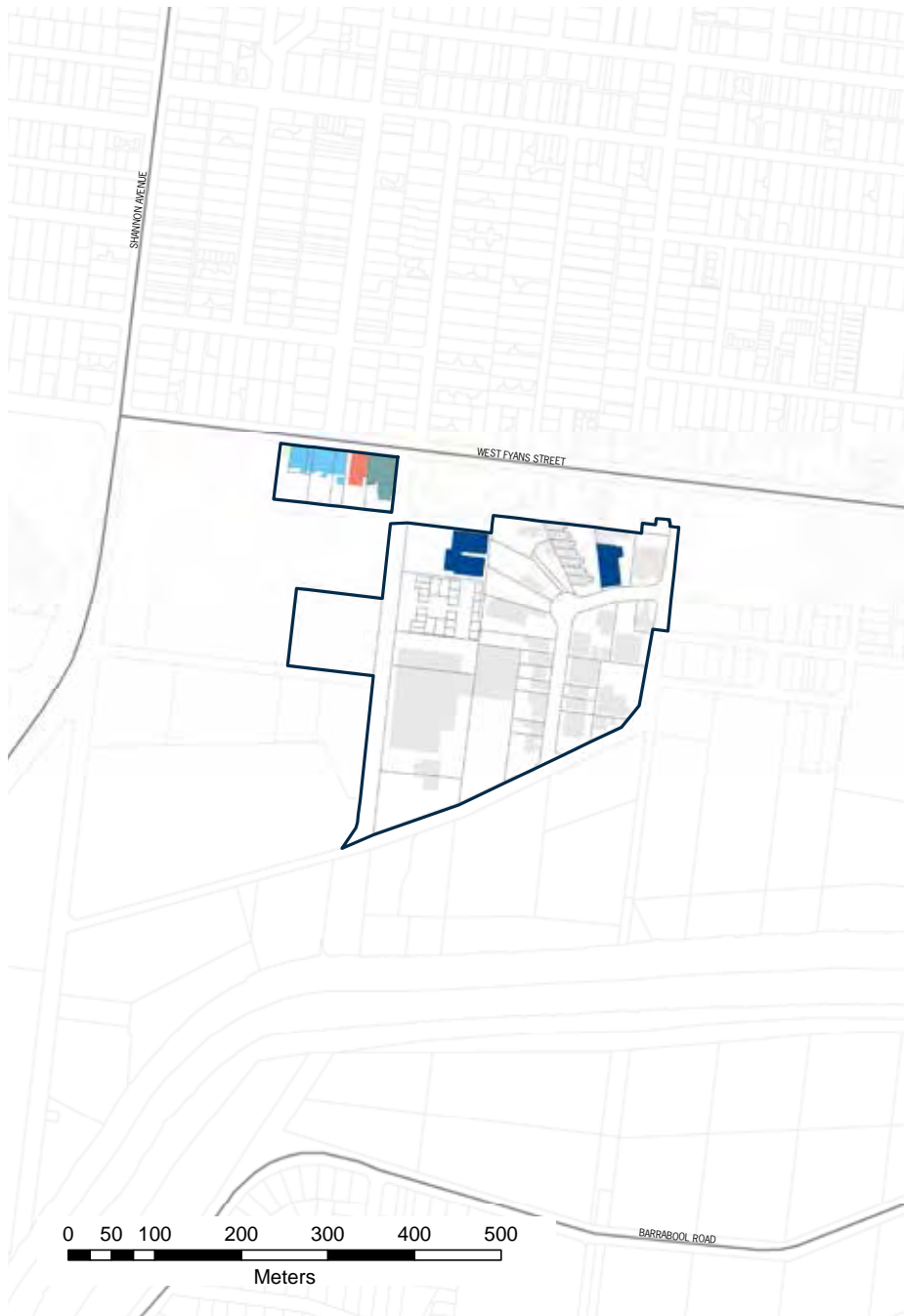
## 1.59 GREGORY AVE, NEWTOWN

CENTRE NAME: GREGORY AVE, NEWTOWN									
Hierarchy status:	Dispersed restricted retail								
Location:	Newtown								
Key characteristics:	<p>An old industrial precinct containing automotive industries such as mechanics, window tinting, window manufacturing and steel fabrication. The area also contains a roller skating rink, and in more recent times, cafes and a number of recreation uses.</p> <p>A key land use in this precinct is a wool scouring operation which has been operating in the area since the 1920's</p>								
Current role:	In very close proximity to the Pakington Street (Newtown) centre.								
Zoning (sqm):	ACZ		C1Z		C2Z		MUZ		Other
	0	0	0	0	94,120	0	7,798	0	0
Retail and commercial floor space* (sqm):	Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant
	0	0	1,725	0	686	98	2,509	28,169	0
Retail anchors:	None								
Transport connections:	Public	Bus service (24, 43)							
	Private	West Fyans/Fyans Street, Shannon Avenue, La Trobe Terrace							
Future role and opportunities:	<p>The development of this area south of Fyans and West Fyans Street is guided by the <i>Fyans-West Fyans Precinct Structure Plan 2009</i>. This Structure Plan divides the area into several precincts.</p> <p><b>Gregory Ave area</b></p> <p>This area is located in precinct 2 which seeks to support low scale business or light industrial uses with a long term transition to mixed use that maintains a business and employment focus.</p> <p>This area was rezoned from Industrial 1 to Business 3 as part of the implementation of the Structure Plan in 2009/10. State Government zone reform in 2013 then saw this area rezoned to Commercial 2. The change in zone to Commercial 2 has meant that restricted retailing and other retailing use are encouraged in the zone. This shift in zoning is not necessarily consistent with the long term objectives of the Fyans-West Fyans Street Precinct Structure Plan. This Structure Plan is due to be reviewed and consideration should be given to the continuing use of the Commercial 2 Zone in this location.</p> <p>It is recommended that the Gregory Ave area be identified as dispersed restricted retail and not be identified as a dedicated restricted retail centre to discourage restricted retail activity and to accommodate the long term vision for this area.</p>								
Action required:	Review the use of the Commercial 2 Zone in this location and any planning policies associated with the long term vision for this area.								
Growth Opportunities	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)		Potential to grow within current zoned land		Sub precinct planning required		Potential for rezoning to align with centre boundary		
	-200		No		No		No		

\* Excludes non employment uses such as residential, car parking and sites under construction.

## 1.59 GREGORY AVE, NEWTOWN

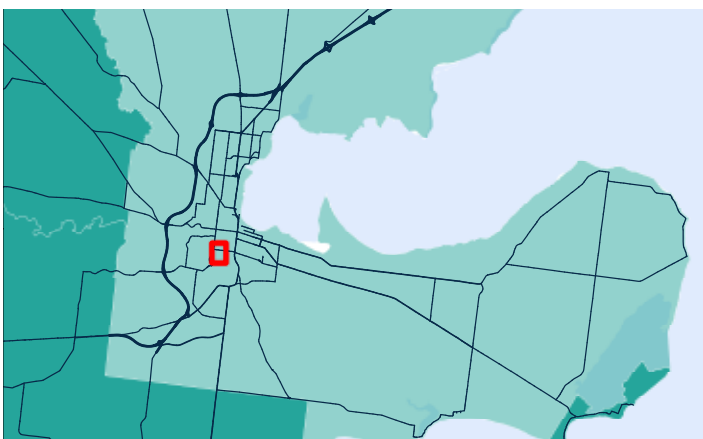
### CENTRE BOUNDARY AND EXISTING FLOOR SPACE USES



#### LEGEND

- Bulky Goods
- Car park
- Commercial
- Commercial Services
- Department Stores
- Education
- Enclosed Mall
- Entertainment
- Hospitality
- Industrial
- Medical
- Non-leasable Retail
- Public Facility
- Residential
- Specialty Food
- Specialty Other
- Supermarket
- Unclassified Shop
- Under Construction
- Vacant

### CENTRE LOCATION MAP



# DISPERSED CENTRES

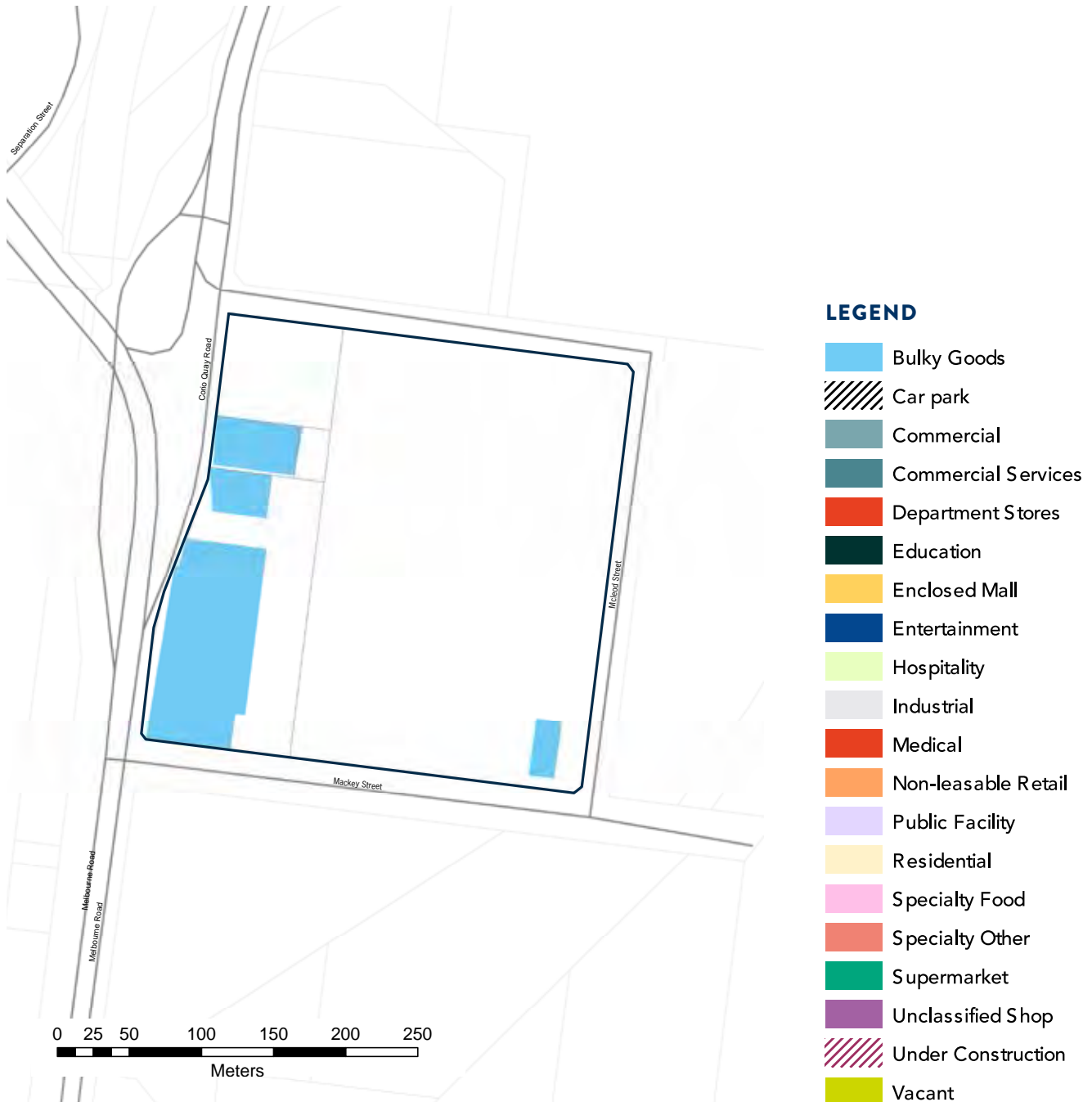
## 1.60 MACKEY STREET, NORTH GEELONG

CENTRE NAME: <b>MACKEY STREET, NORTH GEELONG</b>									
Hierarchy status:	Dispersed restricted retail								
Location:	North Geelong								
Key characteristics:	An industrial area in North Geelong, located within the Geelong port environs in an Industrial 2 Zone								
Current role:	Industrial Precinct								
Zoning (sqm):	ACZ		C1Z		C2Z		MUZ		Other
	0	0	0	0	0	0	0	77,910	
Retail and commercial floor space* (sqm):	Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant
	0	0	0	0	20	0	11,200	0	0
Retail anchors:	Mill Markets, Shots emporium								
Transport connections:	Public	Bus service (routes 20, 42, 55)							
	Private	Melbourne Road							
Future role and opportunities:	<p>The Mackey Street precinct, in North Geelong is located within the Geelong port environs in an Industrial 2 Zone. The area is occupied by offices, industry, antique markets, cafes, furniture sales and an adult superstore. A Heritage Overlay affects the majority of buildings within this precinct which has attracted a number of alternative uses such as offices to this otherwise industrial area. The Federal Mills complex is a key feature of the area.</p> <p>Land surrounding this precinct is occupied by heavy industry and uses associated with the Geelong Port. The area is accessed 24/7 by large trucks and commercial vehicles.</p> <p>Both State and Local Planning Policy support the protection of industrial land including the Geelong Port from sensitive and incompatible uses. Retail uses in close proximity to the port can pose a safety risk by encouraging more visitors and car movements in an area frequently used by heavy vehicles and noxious industries which operates 24/7.</p> <p>The centre has not been identified as a designated restricted retail centre. Whilst the area now contains a number of large format retail stores and offices the further expansion of retail and offices uses is not supported at this location.</p>								
Action required:	Nil								
Growth Opportunities	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)		Potential to grow within current zoned land			Sub precinct planning required		Potential for rezoning to align with centre boundary	
	-1,800		No			No		No	

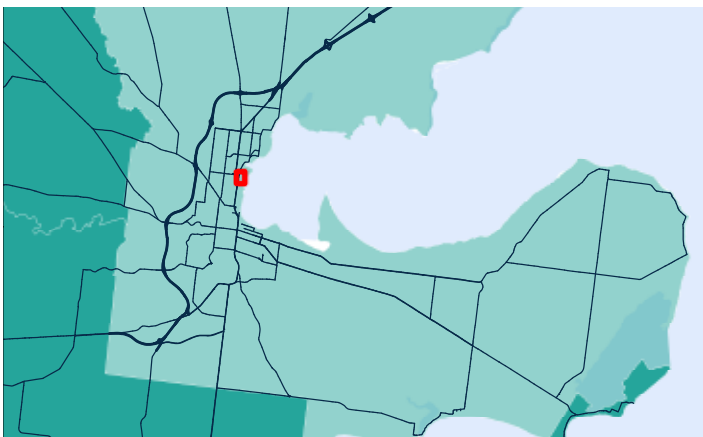
\* Excludes non employment uses such as residential, car parking and sites under construction.

## 1.60 MACKEY STREET, NORTH GEELONG

### CENTRE BOUNDARY AND EXISTING FLOOR SPACE USES



### CENTRE LOCATION MAP



# DISPERSED CENTRES

## 1.61 MOORABOOL/FYANS PRECINCT, SOUTH GEELONG

CENTRE NAME: MOORABOOL/FYANS PRECINCT, SOUTH GEELONG									
Hierarchy status:	Dispersed restricted retail								
Location:	South Geelong								
Key characteristics:	Large low density retail precinct, with low density restricted retail along Fyans Street and Moorabool Street and industrial use largely in the back streets in the southern area of the precinct. There is a significant proportion of very low density restricted retail due to the presence of several car yards. A mix of activity centre retail, office and residential use can also be found in the precinct.								
Current role:	In very close proximity to Central Geelong and Belmont centres, the Moorabool/Fyans Precinct has a diverse range of stores and services that attracts a wide catchment								
Zoning (sqm):	ACZ		C1Z		C2Z		MUZ		Other
	0	0	0	0	110,792	0	89,000	0	0
Retail and commercial floor space* (sqm):	Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant
	0	0	31,297	428	7,139	3,596	42,460	22,001	3,121
Retail anchors:	Mitre 10, E and S Trading, car yards								
Transport connections:	Public	South Geelong Railway Station (approx. 800m), Bus service (routes 1, 41, 42, 51, 50 and 55)							
	Private	West Fyans/Fyans Street and Moorabool Street, accessible via Princes Highway							
Future role and opportunities:	<p>The development of this area south of Fyans and West Fyans Street is guided by the Fyans-West Fyans Precinct Structure Plan 2009. This Structure Plan divides the area into several precincts.</p> <p><b>Moorabool/Fyans (Moorabool Street) Area</b></p> <p>The Moorabool/Fyans area is located in precincts 5 and 7. Precinct 5 (west of Moorabool Street) seeks to maintain a business focus and is zoned Commercial 2 and precinct 7 (east of Moorabool Street) a mixture of business, office and residential uses and has been zoned Mixed Use. The structure plan supports precinct 5 continuing to be used for restricted retail type activity but anticipates a shift away from this land use focus for precinct 7, acknowledging that there are some well-established restricted retail uses which are likely to remain.</p> <p>Land north of Fyans Street within the commercial 2 zone, consists mainly of speciality retail and commercial services. Some restricted retail is present but this is not a dominant land use. The small block sizes and lack of car parking makes this area unattractive as a modern restricted retail precinct.</p> <p>It is recommended that the Fyans – West Fyans Area be identified as dispersed restricted retail and not be identified as a dedicated restricted retail centre to discourage restricted retail activity and to accommodate the long term vision for this area.</p>								
Action required:	Ensure that local planning policy identifies the location of preferred restricted retail precincts and provides guidance around the future use and development of restricted retail and dispersed restricted retail precincts.								
Growth Opportunities	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)		Potential to grow within current zoned land		Sub precinct planning required		Potential for rezoning to align with centre boundary		
	-7,500		No		No		No		

## 1.61 MOORABOOL/FYANS PRECINCT, SOUTH GEELONG

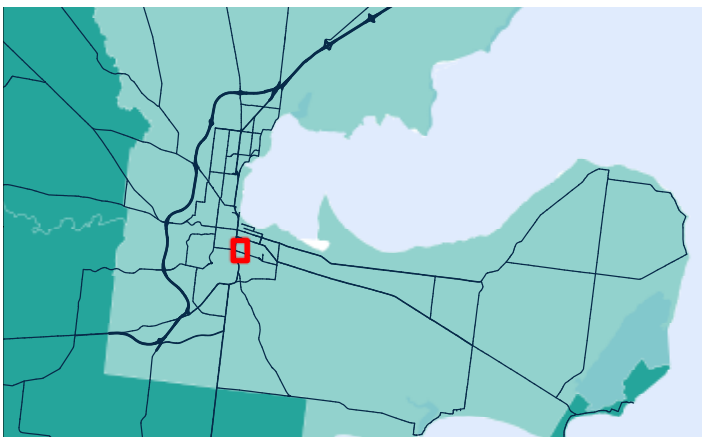
### CENTRE BOUNDARY AND EXISTING FLOOR SPACE USES



#### LEGEND

- Bulky Goods
- Car park
- Commercial
- Commercial Services
- Department Stores
- Education
- Enclosed Mall
- Entertainment
- Hospitality
- Industrial
- Medical
- Non-leasable Retail
- Public Facility
- Residential
- Specialty Food
- Specialty Other
- Supermarket
- Unclassified Shop
- Under Construction
- Vacant

#### CENTRE LOCATION MAP



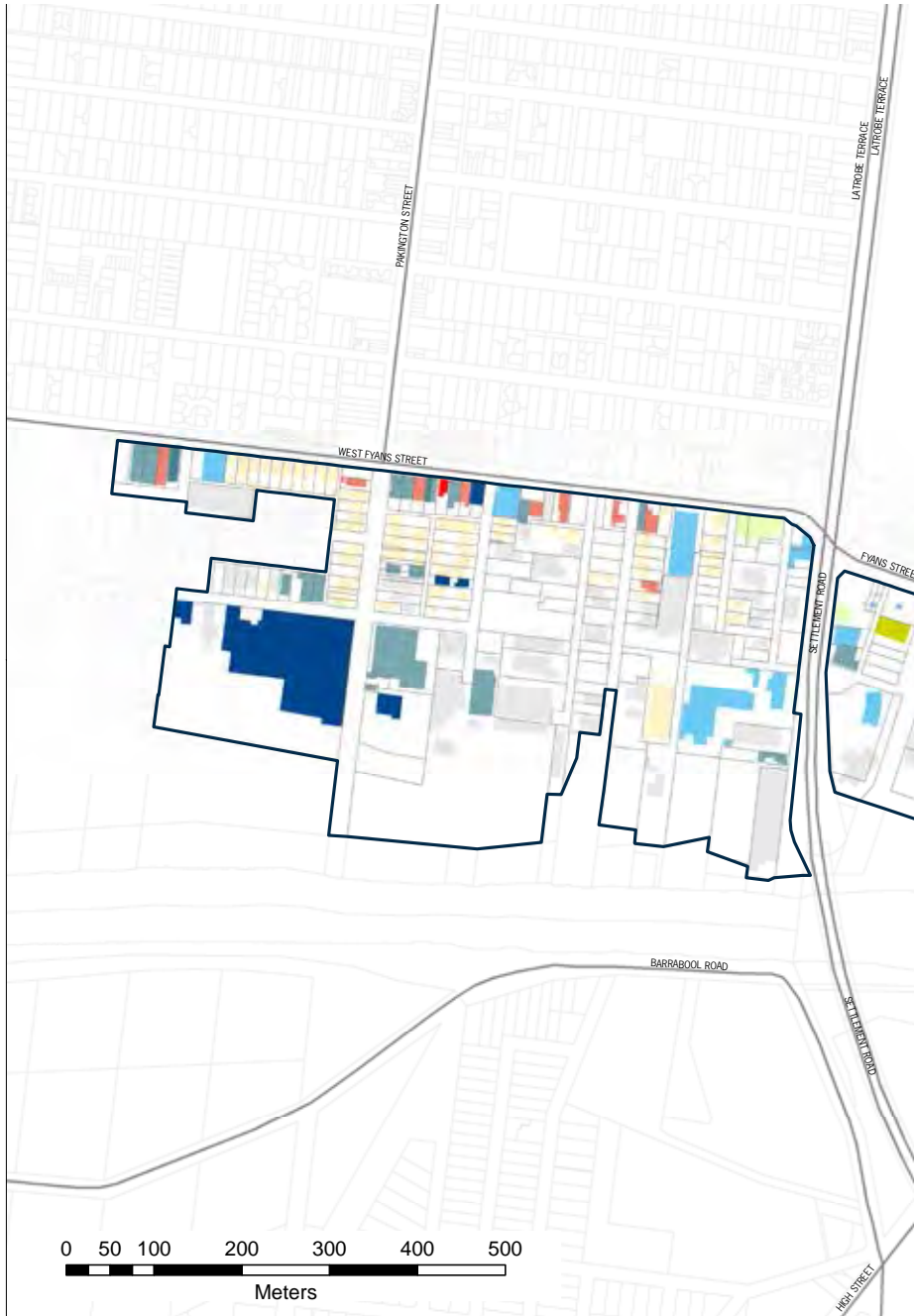
# DISPERSED CENTRES

## 1.62 MOORABOOL/WEST FYANS PRECINCTS, NEWTOWN

CENTRE NAME: MOORABOOL/WEST FYANS PRECINCTS, NEWTOWN									
Hierarchy status:	Dispersed restricted retail								
Location:	Newtown								
Key characteristics:	Large low density retail precinct. There is a significant proportion of very low density restricted retail due to the presence of land used for car storage. A mix of activity centre retail, office and residential use can also be found in the balance of the precinct. A key arts area can be found at the corner of Rutland and Pakington Streets.								
Current role:	In very close proximity to Central Geelong and the Pakington Street (Newtown) centres, the Moorabool/Fyans Precinct s currently transitioning to a mixed use environment.								
Zoning (sqm):	ACZ		C1Z		C2Z		MUZ		Other
	0	0	0	0	22,550	0	214,380	0	0
Retail and commercial floor space* (sqm):	Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant
	0	0	7,940	0	3,059	184	13,528	52,794	384
Retail anchors:	None								
Transport connections:	Public	Bus service (routes 24 and 43)							
	Private	West Fyans/Fyans Street, and Moorabool Street, accessible via Princes Highway							
Future role and opportunities:	<p>The development of this area south of Fyans and West Fyans Street is guided by the Fyans-West Fyans Precinct Structure Plan 2009. This Structure Plan divides the area into several precincts.</p> <p><b>Moorabool/West Fyans Area</b></p> <p>The Moorabool/West Fyans end of this precinct is similar to the Fyans Street end in that there is a large proportion of low density restricted retail (car yards), but unlike the Fyans Street end the area has started to evolve with a number of artistic businesses, offices and recreation uses appearing amongst older established industry.</p> <p>This area is located in precincts 3A, 3B and 4. These precincts encourage office and retail uses to front West Fyans Street with the remainder of the areas to be developed with low to high density residential uses.</p> <p>It is recommended that the Moorabool–West Fyans Area be identified as dispersed restricted retail as current planning policy supports a significant shift away from retail uses to residential uses over time.</p>								
Action required:	Ensure that local planning policy supports the transition of this area overtime to a mixed use/ residential precinct.								
Growth Opportunities	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)		Potential to grow within current zoned land		Sub precinct planning required		Potential for rezoning to align with centre boundary		
	-1,300		No		No		No		

## 1.62 MOORABOOL/WEST FYANS PRECINCTS, NEWTOWN

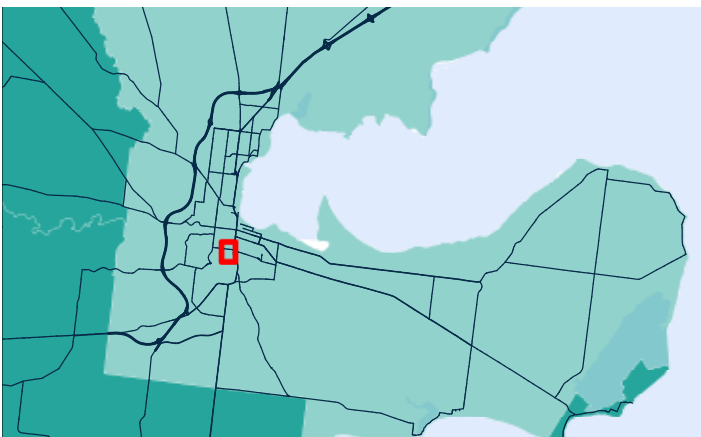
### CENTRE BOUNDARY AND EXISTING FLOOR SPACE USES



#### LEGEND

- Bulky Goods
- Car park
- Commercial
- Commercial Services
- Department Stores
- Education
- Enclosed Mall
- Entertainment
- Hospitality
- Industrial
- Medical
- Non-leasable Retail
- Public Facility
- Residential
- Specialty Food
- Specialty Other
- Supermarket
- Unclassified Shop
- Under Construction
- Vacant

#### CENTRE LOCATION MAP



# DISPERSED CENTRES

## 1.63 SETTLEMENT ROAD/BREAKWATER ROAD, BELMONT

<b>CENTRE NAME: SETTLEMENT ROAD/BREAKWATER ROAD,BELMONT</b>									
Hierarchy status:	Dispersed restricted retail								
Location:	Belmont								
Key characteristics:	Industrial precinct anchored by a large retail complex consisting of a Spotlight, Anaconda, Clarke Rubber and safety clothing store. A large timber and hardware store is located opposite this site. Car and boat sales are located in the north of the precinct. The remainder of the precinct is industrial in nature consisting mainly of light industrial uses.								
Current role:	Industrial								
Zoning (sqm):	ACZ		C1Z		C2Z		MUZ		Other
	0	0	0	0	0	0	0	200,000	
Retail and commercial floor space* (sqm):	Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant
	0	0	29,995	846	2,036	82	32,959	0	210
Retail anchors:	Spotlight, Anaconda, Clarke Rubber, Belmont Timber								
Transport connections:	Public	Bus service (routes 51, 55)							
	Private	Settlement and Barwon Heads Roads							
Future role and opportunities:	<p>A dispersed restricted retail precinct located within Industrial zoned land in the south of Geelong. The precinct is anchored by a large retail complex consisting of a Spotlight, Anaconda, Clarke Rubber and safety clothing store. This centre benefits from frontage to two key arterial roads, Settlement and Barwon Heads Roads.</p> <p>The area is zoned Industrial 1 and whilst there are a number of retail uses occurring within the area, further development of the area for retail uses should be discouraged. Retail development should be directed to existing commercial 1 and 2 zoned land. The centre has not been identified as a designated restricted retail centre.</p>								
Action required:	Nil								
Growth Opportunities	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)		Potential to grow within current zoned land		Sub precinct planning required		Potential for rezoning to align with centre boundary		
	-5,000		No		No		No		

### 1.63 SETTLEMENT ROAD/BREAKWATER ROAD, BELMONT

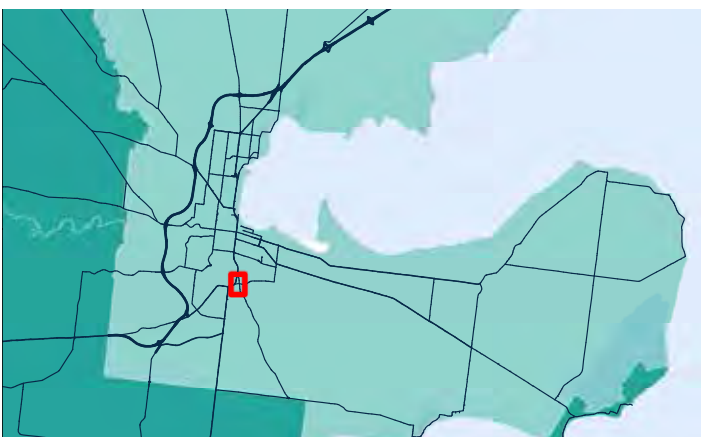
#### CENTRE BOUNDARY AND EXISTING FLOOR SPACE USES



#### LEGEND

- Bulky Goods
- Car park
- Commercial
- Commercial Services
- Department Stores
- Education
- Enclosed Mall
- Entertainment
- Hospitality
- Industrial
- Medical
- Non-leasable Retail
- Public Facility
- Residential
- Specialty Food
- Specialty Other
- Supermarket
- Unclassified Shop
- Under Construction
- Vacant

#### CENTRE LOCATION MAP



# DISPERSED CENTRES

## 1.64 SHARON COURT, BELL PARK

CENTRE NAME: SHARON COURT, BELL PARK									
Hierarchy status:	Dispersed restricted retail								
Location:	Bell Park								
Key characteristics:	Sharon Court, Bell Park is a small pocket of commercial 2 zoned land just north of the Separation Street neighbourhood centre. The precinct contains a Salvation Army store, tile sales, car wash, window manufacturer and showrooms.								
Current role:	Dispersed restricted retail								
Zoning (sqm):	ACZ		C1Z		C2Z		MUZ		Other
	0	0	0	0	19,820	0	0	0	0
Retail and commercial floor space* (sqm):	Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant
	0	0	10,519	0	0	0	10,500	0	0
Retail anchors:	None								
Transport connections:	Public	Bus service (routes 56)							
	Private	Thompson Road via Separation Street							
Future role and opportunities:	There is no room to expand this centre beyond what currently exists. There is no support to rezone surrounding industrial land to expand this centre. Given the presence of the commercial 2 zone, it is likely existing or similar uses will remain in Sharon Court in the long term.								
Action required:	Nil								
Growth Opportunities	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)		Potential to grow within current zoned land		Sub precinct planning required		Potential for rezoning to align with centre boundary		
	-1,700		Yes		No		No		

## 1.64 SHARON COURT, BELL PARK

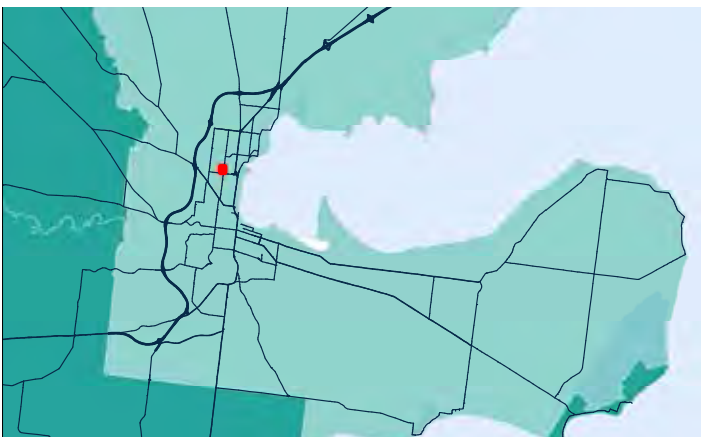
### CENTRE BOUNDARY AND EXISTING FLOOR SPACE USES



#### LEGEND

- Bulky Goods
- Car park
- Commercial
- Commercial Services
- Department Stores
- Education
- Enclosed Mall
- Entertainment
- Hospitality
- Industrial
- Medical
- Non-leasable Retail
- Public Facility
- Residential
- Specialty Food
- Specialty Other
- Supermarket
- Unclassified Shop
- Under Construction
- Vacant

### CENTRE LOCATION MAP



# DISPERSED CENTRES

## 1.65 SMITHTON GROVE, OCEAN GROVE

CENTRE NAME: SMITHTON GROVE, OCEAN GROVE									
Hierarchy status:	Dispersed restricted retail								
Location:	Ocean Grove								
Key characteristics:	Small existing restricted retail centre located in the north of Ocean Grove recently expanded to cater for the long term growth of the town.								
Current role:	Meets the retail and industrial needs of Ocean Grove								
Zoning (sqm):	ACZ		C1Z		C2Z		MUZ		Other
	0	0	0	0	0	0	191,910		
Retail and commercial floor space* (sqm):	Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant
	0	0	2,518	0	1,396	363	4,277	25,300	0
Retail anchors:	None								
Transport connections:	Public	Bus service (routes 56)							
	Private	Grubb Road via Bellarine Highway, Grubb Road via Shell Road							
Future role and opportunities:	<p>This industrial area has until recently been used to meet the service business and restricted retailing needs of Ocean Grove. Whilst the area is zoned industrial there is a large amount of restricted retail uses occurring within this centre. Given the historic use of this centre for a mix of retail and industrial uses, this centre has been included as a dispersed restricted retail centre.</p> <p>Recent planning work undertaken to develop the Kingston Downs and Oakdene residential estates in Ocean Grove resulted in the rezoning of 7 hectares of land to the east of the industrial 1 zone from farming to the Industrial 3 Zone. A further 15 hectares of land has been re-zoned to the commercial 2 zone.</p> <p>Prior to this rezoning there was limited commercial and industrial land available in Ocean Grove. Now that more land is available it is likely that retail and industrial uses will locate in the appropriate zone. Potentially overtime this industrial area will transition away from retail uses.</p> <p>Future retail uses should be directed to locate in commercial zoned land.</p>								
Action required:	Nil								
Growth Opportunities	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)		Potential to grow within current zoned land		Sub precinct planning required		Potential for rezoning to align with centre boundary		
	-300		Yes		No		No		

## 1.65 SMITHTON GROVE, OCEAN GROVE

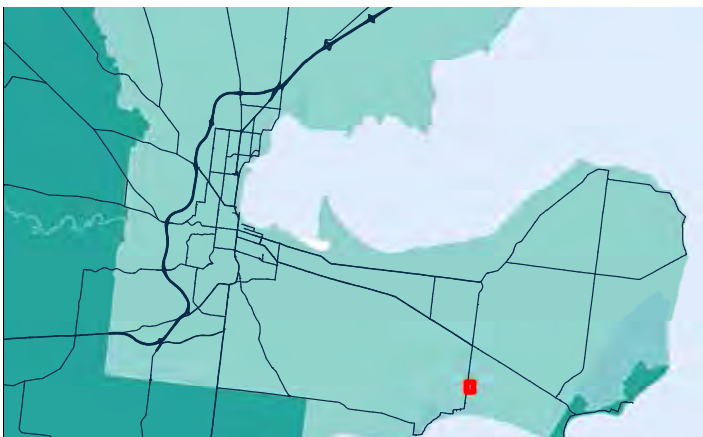
### CENTRE BOUNDARY AND EXISTING FLOOR SPACE USES



#### LEGEND

- Bulky Goods
- Car park
- Commercial
- Commercial Services
- Department Stores
- Education
- Enclosed Mall
- Entertainment
- Hospitality
- Industrial
- Medical
- Non-leasable Retail
- Public Facility
- Residential
- Specialty Food
- Specialty Other
- Supermarket
- Unclassified Shop
- Under Construction
- Vacant

### CENTRE LOCATION MAP



# DISPERSED CENTRES

## 1.66 SURF COAST HIGHWAY, GROVEDALE

CENTRE NAME: SURF COAST HIGHWAY, GROVEDALE																			
Hierarchy status:	Dispersed Restricted Retail																		
Location:	Grovedale																		
Key characteristics:	A large car-oriented precinct with a typically industrial feel, especially along streets set back from highway.																		
Current role:	<p>This precinct has a significant proportion of industrial uses. Restricted retail use is also strongly represented in the precinct, though to a far lesser extent. This precinct plays a strong manufacturing and industrial services role and is less significant from a restricted retail or wholesale retail perspective.</p> <p>This centre directly adjoins the Surf Coast Highway Neighbourhood Centre</p>																		
Zoning (sqm):	<table border="1"> <thead> <tr> <th>ACZ</th> <th>C1Z</th> <th>C2Z</th> <th>MUZ</th> <th>Other</th> </tr> </thead> <tbody> <tr> <td>0</td> <td>23,850</td> <td>165,690</td> <td>0</td> <td>0</td> </tr> </tbody> </table>	ACZ	C1Z	C2Z	MUZ	Other	0	23,850	165,690	0	0								
ACZ	C1Z	C2Z	MUZ	Other															
0	23,850	165,690	0	0															
Retail and commercial floor space* (sqm):	<table border="1"> <thead> <tr> <th>Super market</th> <th>Depart' Store</th> <th>Restricted Retail</th> <th>Specialty Food</th> <th>Specialty Other</th> <th>Hospitality</th> <th>Total Retail</th> <th>Other Employ'</th> <th>Vacant</th> </tr> </thead> <tbody> <tr> <td>2,156</td> <td>0</td> <td>6,915</td> <td>715</td> <td>3,558</td> <td>184</td> <td>13,528</td> <td>37,668</td> <td>2,015</td> </tr> </tbody> </table>	Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant	2,156	0	6,915	715	3,558	184	13,528	37,668	2,015
Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant											
2,156	0	6,915	715	3,558	184	13,528	37,668	2,015											
Retail anchors:	1 supermarkets (2,157sqm IGA)																		
Transport connections:	<table border="1"> <tbody> <tr> <td>Public</td> <td>Marshall Railway Station (approx. 1.6km), bus service (routes 17, 19, 20, 72 and 74)</td> </tr> <tr> <td>Private</td> <td>Intersection of Surf Coast Highway and Marshalltown Road</td> </tr> </tbody> </table>	Public	Marshall Railway Station (approx. 1.6km), bus service (routes 17, 19, 20, 72 and 74)	Private	Intersection of Surf Coast Highway and Marshalltown Road														
Public	Marshall Railway Station (approx. 1.6km), bus service (routes 17, 19, 20, 72 and 74)																		
Private	Intersection of Surf Coast Highway and Marshalltown Road																		
Future role and opportunities:	<p>There are a limited number of vacant sites remaining within the Commercial 2 Zoned Land, and development is now starting to take place within the adjacent Industrial 1 Zoned land. There is also pressure to develop land more generally along the Surf Coast Highway for commercial uses. With limited high quality industrial land available in the south of Geelong, this precinct has been a popular location to establish service business uses such as mechanics, cabinet makers and showroom sales rather than retail uses.</p> <p>A Supa IGA is located within this precinct, which combined with the Aldi located in the neighbourhood centre, provides a grocery offer to surrounding residents and workers.</p> <p>With the limited vacant land in restricted retail precinct and the proximity of this precinct to the Waurm Ponds Restricted Retail Precinct, there may be limited demand for additional restricted retail retailing in the area.</p> <p>There are a number of existing commercial uses in the General Residential Zone on the east side of Torquay Road between the industrial zone and Reserve Road. These uses currently consist of vacant land, a medical centre, a motel, car wash, the Grovedale hotel and 8 houses (ex-display homes), Council has received numerous verbal requests to rezone this land to a commercial zone. Given the lack of amenity in this location and the mix of existing commercial uses, Council should consider whether the development outcomes of this area would be improved if the land was zoned commercial. Whilst this would not necessarily meet council policy in terms of expanding a centre where there is demand, it may deliver an improved land use outcome for this busy road frontage without significantly adding additional retail floor space</p>																		
Action required:	Reviewing zoning controls on Surf Coast Highway between the industrial zoned land and Reserve Road.																		
Growth Opportunities	<table border="1"> <thead> <tr> <th>Forecast supportable floor space 2016-2036 sqm (difference from total floor space)</th> <th>Potential to grow within current zoned land</th> <th>Sub precinct planning required</th> <th>Potential for rezoning to align with centre boundary</th> </tr> </thead> <tbody> <tr> <td>-3,400</td> <td>Yes</td> <td>No</td> <td>No</td> </tr> </tbody> </table>	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)	Potential to grow within current zoned land	Sub precinct planning required	Potential for rezoning to align with centre boundary	-3,400	Yes	No	No										
Forecast supportable floor space 2016-2036 sqm (difference from total floor space)	Potential to grow within current zoned land	Sub precinct planning required	Potential for rezoning to align with centre boundary																
-3,400	Yes	No	No																

## 1.66 SURF COAST HIGHWAY, GROVEDALE

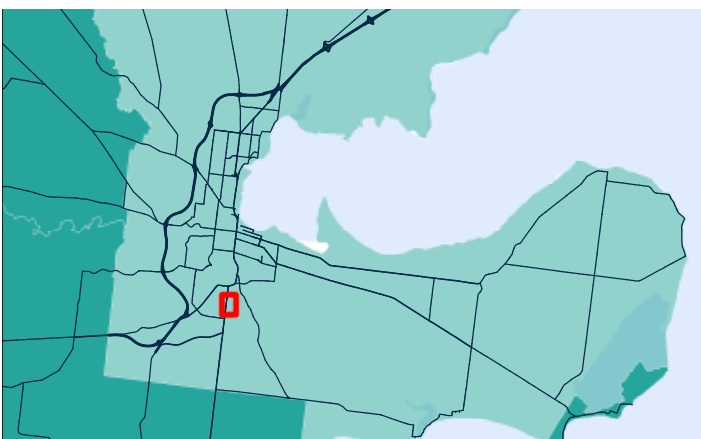
### CENTRE BOUNDARY AND EXISTING FLOOR SPACE USES



#### LEGEND

- Bulky Goods
- Car park
- Commercial
- Commercial Services
- Department Stores
- Education
- Enclosed Mall
- Entertainment
- Hospitality
- Industrial
- Medical
- Non-leasable Retail
- Public Facility
- Residential
- Specialty Food
- Specialty Other
- Supermarket
- Unclassified Shop
- Under Construction
- Vacant

### CENTRE LOCATION MAP



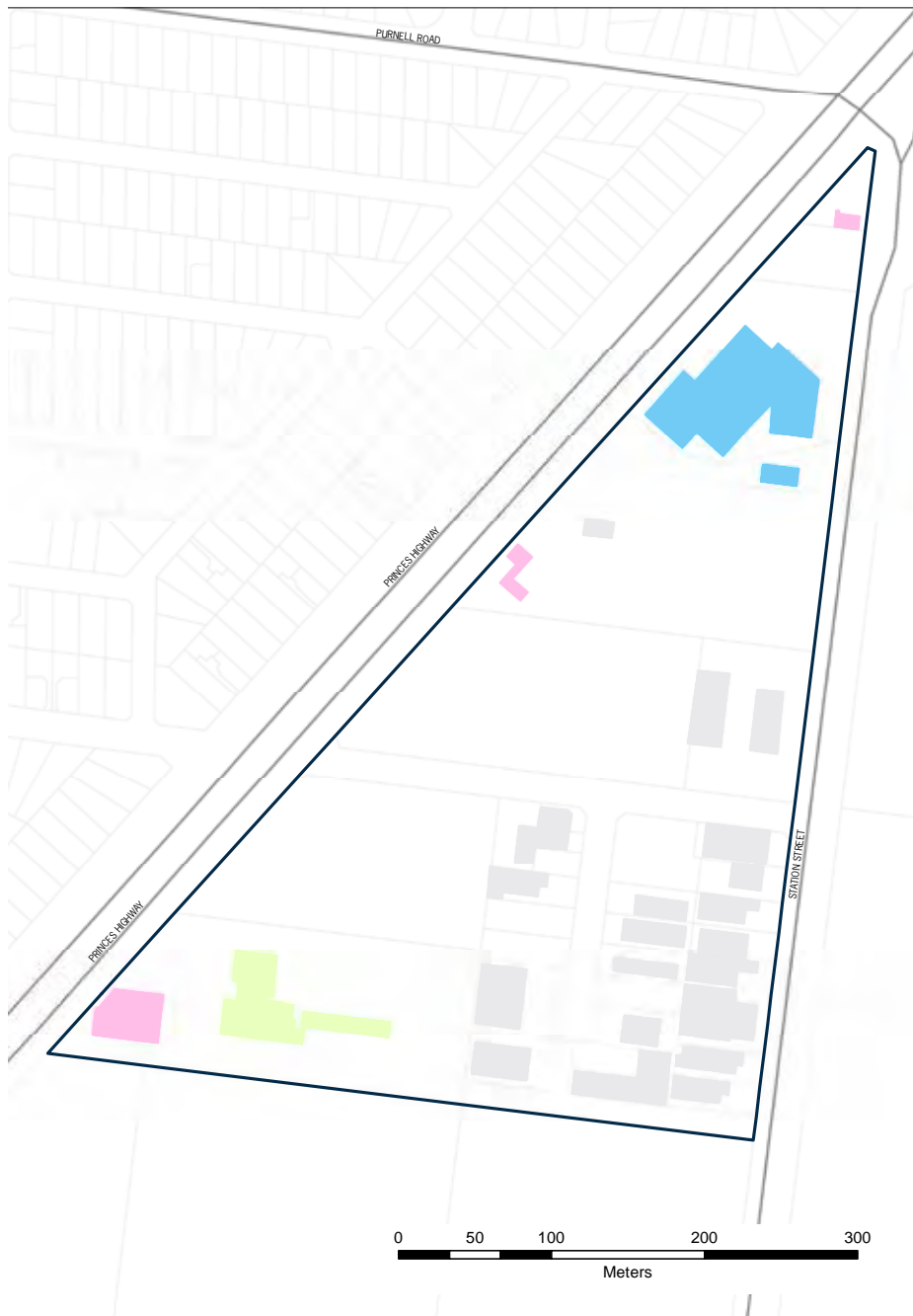
# DISPERSED CENTRES

## 1.67 PRINCESS HWY, CORIO

CENTRE NAME: PRINCESS HWY, CORIO									
Hierarchy status:	Dispersed Restricted Retail								
Location:	Corio								
Key characteristics:	Industrial 1 zoned land including Harpur Rd, Kambouris Crt and Station Street. A small number of retail uses are located in this precinct including Petstock, The Gateway Hotel, Dan Murphys bottle shop, caltex service station and car and vehicle sales. These retail uses have Highway frontage with land located away from the highway used for more traditional industrial uses.								
Current role:	Industrial								
Zoning (sqm):	ACZ		C1Z		C2Z		MUZ		Other
	0	0	0	0	0	0	150,000		
Retail and commercial floor space* (sqm):	Super market	Depart' Store	Restricted Retail	Specialty Food	Specialty Other	Hospitality	Total Retail	Other Employ'	Vacant
	0	0	5,300	0	0	0	5,300	0	0
Retail anchors:	Dan Murphy's, Gateway hotel, Petstock								
Transport connections:	Public	Bus service on Station Street (route 23)							
	Private	Princess highway, Harpur Road							
Future role and opportunities:	The centre has not been identified as a designated restricted retail centre given its industrial zoning. Existing retail uses benefit from the Highway frontage. This area should be used for industrial purposes rather than retail purposes.								
Action required:	Nil								
Growth Opportunities	Forecast supportable floor space 2016-2036 sqm (difference from total floor space)		Potential to grow within current zoned land		Sub precinct planning required		Potential for rezoning to align with centre boundary		
	-100		No		No		No		

## 1.67 PRINCESS HWY, CORIO

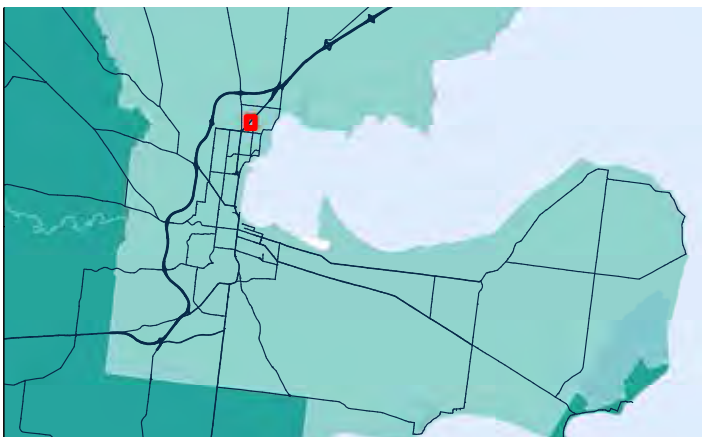
### CENTRE BOUNDARY AND EXISTING FLOOR SPACE USES



#### LEGEND

- Bulky Goods
- Car park
- Commercial
- Commercial Services
- Department Stores
- Education
- Enclosed Mall
- Entertainment
- Hospitality
- Industrial
- Medical
- Non-leasable Retail
- Public Facility
- Residential
- Specialty Food
- Specialty Other
- Supermarket
- Unclassified Shop
- Under Construction
- Vacant

### CENTRE LOCATION MAP



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**CITY OF GREATER GEELONG**

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**CUSTOMER SERVICE CENTRE**

100 Brougham Street


Geelong VIC 3220

8:00am – 5:00pm

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