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URBIS

PLANNING SCHEME AMENDMENT C278GGEE

Marshall Precinct Structure Plan
City of Greater Geelong

Statement of Evidence
Prepared by Rhys Matthew Quick

URBIS STAFF RESPONSIBLE FOR THIS REPORT WERE:

Director	Rhys Quick
Senior Consultant	Kanwal Singh
Research Analyst	Yasmine McKibbin
Project Code	P0056257
Report Number	Final



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

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

Title: Sacred River Dreaming
Artist Hayley Pigram
Darug Nation
Sydney, NSW

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CONTENTS

Acknowledgement of Country	2
Introduction & Declaration	1
Summary of Opinions.....	3
Key Sources of Information.....	5
1. Marshall Precinct Context	6
1.1. Marshall Precinct Structure Plan Location.....	6
1.2. Subject Land & Surrounding Uses.....	7
2. Evolution of Marshall PSP	9
2.1. Armstrong Creek Urban Growth Plan – Framework Plan (2008, 2012, 2015).....	9
2.2. Draft Marshall PSP (2019).....	10
2.3. Marshall Precinct Structure Plan (2023, Amended March 2024)	11
2.4. Council’s Revised Plan	13
2.5. Summary & Implications	15
3. Commercial 2 Land	16
3.1. Purpose & Use of Commercial 2 Zone Land	16
3.2. Attributes of Commercial 2 Zoned land	17
3.3. Potential Use of the Commercial / Bulky Goods Land.....	18
4. Commercial Locations in Southern Geelong	20
4.1. Activity Centres	20
4.1.1. Armstrong Creek Town Centre.....	20
4.1.2. Other Activity Centres	20
4.2. Commercial 2 Zoned (C2Z) Land	23
4.3. Summary & Implications	26
5. Need for Commercial 2 Zoned Land	27
5.1. Strong Population Growth.....	27
5.2. Commercial 2 Zoned Land Demand.....	28
5.2.1. More land to service population growth	28
5.2.2. Capacity for NEIP & Marshall Commercial Areas	29
5.3. Retail Strategy Demand Estimates.....	29
5.3.1. Retail Growth Projections.....	29
5.3.2. Restricted Retail Growth Projections.....	30
5.4. Summary & Implications	31
6. Secondary Location for Residential Use	32
7. Economic Impacts From Land Rezoning	34
Appendix A Commercial 2 Zoned Areas in Southern & Central Geelong	
Appendix B Curriculum Vitae	

FIGURES

Figure 1 - Armstrong Creek Precinct Boundaries.....	6
Figure 2 - Armstrong Creek Urban Growth Area Plan – Framework Plan	9
Figure 3 - Marshall Precinct Structure Draft Plan	10
Figure 4 - Marshall PSP Land Use Budget	12
Figure 5 - Council’s Revised Plan	14
Figure 6 - NEIP Future Urban Structure Plan.....	25

TABLES

Table 1 - Active Lease Offers for the Subject Land..... 18
Table 2 - Retail Hierarchy, Capacity Role & Function – ACUGA 22
Table 3 - C2Z Land – Existing and proposed in or near Armstrong Creek 24
Table 4 - Per Capita Provision of C2Z Land..... 28
Table 5 - C2Z Land in Southern and Central Geelong..... 36

MAPS

Map 1 - Local Context..... 8
Map 2 - Activity Centres and Commercial 2 Zoned Land – Armstrong Creek and Southern Geelong..... 21

CHARTS

Chart 1 - Armstrong Creek Growth Corridor Projected Population 27

INTRODUCTION & DECLARATION

1. This report has been prepared by Rhys Matthew Quick, Director, Economics & Property, Urbis Pty Ltd, 10th Floor, 477 Collins Street, Melbourne.
2. My qualifications and experience include a Bachelor of Economics (Honours) from Monash University, together with over 25 years' experience in Economics and Property consulting, with my specialisation being the preparation of Economic Impact and Supply and Demand Assessments relating to land use and the development of property. My Curriculum Vitae is attached as **Appendix C**.
3. Assistance in undertaking some of the analysis in this report has been provided by Kanwal Singh, Senior Consultant and Yasmine McKibbin, Research Analyst of Urbis.
4. I was engaged by Russell Kennedy Lawyers on behalf of Rich & Pure Pty Ltd in September 2024, with instructions to review Amendment C278ggee (Amendment) to the Greater Geelong Planning Scheme relating to the adoption of the Marshall Precinct Structure Plan (PSP). Specifically, I was asked to consider Council's resolve to change the designation of some of the proposed Commercial/Bulky Goods area in the draft PSP (applied Commercial 2 Zone) to Residential Growth Zone for Medium / High Density Residential. This change impacts land controlled by Rich & Pure Pty Ltd at 25 Horseshoe Bend Road, 391-399 Barwon Heads Road, and 8 Tannery Road (the Subject Land).
5. Subject to my preliminary review, I was asked to prepare and present expert evidence at the Panel hearing relating to the Amendment and Council's proposal for the Subject Land to be designated for residential use, rather than commercial/bulky goods.
6. Subsequent instructions were provided in a letter of engagement indicating my witness statement should have regard to:
 - *Conduct a review of the Brief of Materials as necessary and relevant to your expertise;*
 - *Prepare a report within the limits of your expertise with respect to supply and demand for potential Commercial 2 zoned and residential zoned land having regard to the proposals of our Client and any economic impacts arising from the change in the designation on the future development of the Subject Land and consequences on the PSP.*
 - *Appear as an expert witness at the Hearing commencing the week of 4 November 2024; and*
 - *Consider any other matters you deem appropriate.*
7. In preparing this statement, I have had reference to a range of documents, including background materials to the preparation of the PSP and submissions to Amendment C278ggee, along with data relating to supply of Commercial 2 zoned land in Greater Geelong and evidence of market interest for a range of uses to be developed on the Subject Land provided by Rich and Pure Pty Ltd. Key documents referenced are listed below.
8. The primary purpose of the evidence provided in this statement is to consider the role of and need for Commercial 2 zoned land within the Marshall PSP, relative to the alternative designation of the land for residential use. This informs the consideration of appropriate future land use at the subject land.
9. I have visited the subject land at Marshall and have investigated the surrounding uses in the area, along with other commercial centres and locations of relevance in the vicinity of Armstrong Creek.
10. I, Rhys Matthew Quick, hereby adopt this Expert Witness report as my evidence and state as follows:
 - the factual matters stated in this report are, as far as I know, true;
 - I have made all the inquiries that I believe are desirable and appropriate and no matters of significance which I regard as relevant have to my knowledge been withheld from the Committee;
 - the opinions stated in this statement of evidence are genuinely held by me;
 - the statement of evidence contains reference to all matters that I consider significant; and

- I understand the expert's duty to the Committee and have complied and continue to comply with that duty.



Rhys Quick
Director, Property Economics & Research
Urbis Pty Ltd

Dated: 29 October 2024

SUMMARY OF OPINIONS

11. The key findings and the summary of my opinions arising from the analysis in this statement are as follows:

Precinct & Subject Land Context

- The Marshall Precinct Structure Plan (MPSP) has been planned as a residential and employment precinct within the Armstrong Creek Urban Growth Area (ACUGA), acting as a gateway into the wider region.
- The Subject Land sits along Barwon Heads Road, with 25 Barwon Heads Road (triangular site) on the west and the other two rectangular sites (391-399 Barwon Heads Road, and 8 Tannery Road) to the east which were acquired by Rich & Pure Pty Ltd post the release of the draft Marshall PSP in 2019. That draft report, reconfirmed through the exhibited version of the PSP, nominated this land and other parcels north east of the Barwon Heads Road / Tannery Road intersection as part of a 'Commercial / Bulky Goods' precinct (with an applied Commercial 2 zone) providing access to goods, services and employment opportunities for the area.
- In response to a submission by Mesh Planning on behalf of a landowner in the adjoining North East Industrial Precinct (NEIP), Council indicated their position to support a reallocation of a significant part of the 'Commercial / Bulky Goods' precinct to a combination of medium-high density and conventional residential citing the need for more housing and noting the NEIP would provide future employment.

Commercial 2 Zoned land serves a complementary role specific to local circumstances

- The C2Z land in southern Geelong, as it is in most locations, is strategically located along key arterial roads, supporting a diversity of uses catering to the local population and businesses. These precincts appear to be in high demand, with no vacant lots identified in the established locations.
- Uses in existing C2Z locations vary depending on the local environs and site attributes. This is evident in other locations in southern Geelong. In Grovedale for example, there is a heavy focus on light industry, with only the main road frontage supporting the likes of service stations, and some limited retail uses and bulky goods. At Waurm Ponds, though, the C2Z land leverages the exposure to major roads and the adjoining activity centre to support a large bulky goods precinct.
- While both the proposed Marshall commercial precinct and part of the NEIP will have an applied C2Z, these areas are not homogenous and will suit different uses given their specific attributes. The main road frontage for most of the Marshall precinct would provide access and exposure to a large passing market, creating opportunities for convenient access to population services (e.g. service stations, fast food, commercial services). The NEIP C2Z land has a more limited main road frontage, being largely located along the internal road towards the centre of the precinct. This will likely generate demand from activity linked to the surrounding industrial activity. Both precincts can be supported, playing slightly different roles.
- Several of the potential uses that can be accommodated under C2Z (e.g. service station, quick service retail, bulky goods) require a level of exposure to significant traffic volumes. Options within the C2Z land in the NEIP are more limited. The delivery of these uses in a growth area can also act as a catalyst for future commercial development activity, which might supplement the convenience offering.
- The fact that the C2Z allows uses that are also permissible in other zones, does not mean the mere designation of land under that zone unduly competes with or undermines the role of other commercial or industrial locations. The zone can support complementary activity, providing a location for population serving uses that are not suited to, or cannot physically be accommodated centrally within an activity centre.

Population growth creates a need for more Commercial 2 zoned land

- The growing population in Greater Geelong, especially in the Armstrong Creek Urban Growth Area, will necessitate additional retail facilities and various services. C2Z land will be crucial in supplementing designated activity centres to meet these needs.
- Despite the proposed Commercial/Bulky Goods precinct in the Marshall PSP and the NEIP, the per capita provision of C2Z land in Armstrong Creek will remain below the average for the rest of Geelong in the future. There is a clear need for more C2Z land to support a diverse range of uses, complementing the expansion of designated activity centres. Reducing the designated commercial land in the Marshall PSP would further exacerbate this shortfall.
- The introduction of Commercial/Bulky Goods land in Marshall will not undermine the Greater Geelong Retail Strategy hierarchy. Key retail locations like the Armstrong Creek Activity Centre or Warralily Village, some of which are located at quite a distance from the Marshall PSP, will continue to serve their roles effectively in their respective corridors. There is significant demand for facilities being generated by growth across Armstrong Creek. The new C2Z land will complement these centres by accommodating excess demand in some use categories and providing additional services that are not well suited to core activity centre locations.

The land proposed to be converted from commercial use is a secondary location for residential development

- The land proposed for rezoning faces several challenges that make it unsuitable for residential development. It lacks convenient, walkable access to essential amenities such as activity centres, schools, and major public transport hubs, with most facilities over 1km away. Land east of Barwon Heads Road is particularly inconvenient given the need to cross this road to access any amenity provided in the PSP. This makes it a less appealing location for prospective residents relative to most other alternatives in the PSP.
- The location is adjacent to high-traffic arterial roads, raising concerns about noise and air pollution. If redesignated for residential use, the land would become an isolated pocket surrounded by industrial and commercial areas, further diminishing its appeal. Proximity to industrial activity could also impact the operations of businesses within the NEIP, as certain industrial activities require buffer distances from residential areas. The designation of residential use adjacent to NEIP may further slow its delivery.
- Additionally, the irregular shape and small size of the properties reduce the potential dwelling yield, impacting the feasibility of residential development. Overall, residential development on this land is not preferred due to its inferior location, potential operational constraints on industrial businesses, and challenging development feasibility. This could result in development of lower quality housing, or the land remaining vacant and not contributing to housing supply at all.
- The land east of Barwon Heads Road is particularly impacted by its adjacency to the industrial area and separation from amenities. 25 Horseshoe Bend Road, although slightly better connected, still faces challenges due to its shape and main road frontage.

Economic impacts from reallocating commercial land to residential

- While the new housing generated will be minimal, reallocating a large share of the proposed commercial land to residential use in the Marshall PSP will have economic implications. It estimated the employment capacity of the PSP would be reduced by 145 jobs, a reduction of 38% from the job estimates in the exhibited PSP. This would leave the PSP job provision well below the VPA guideline of providing a minimum of 1 job per household.
- Additionally, converting C2Z land to residential would eliminate opportunities to develop essential community services and amenities, reducing choice and competition. The need for residents to travel further for goods, services, and employment would increase, adding to the economic burden. Maintaining the current zoning is important for sustaining local employment opportunities and supporting broader economic objectives.
- Ultimately, a reallocation of land use of this scale would alter the vision and outcome for the PSP, resulting in a loss of employment opportunities and important services for the future residents of Marshall as well as the wider ACUGA.

KEY SOURCES OF INFORMATION

- Armstrong Creek East Precinct Structure Plan, May 2010.
- North East Industrial Precinct Structure Plan, May 2010.
- Armstrong Creek West Precinct Structure Plan, September 2012.
- Armstrong Creek Town Centre Precinct Structure Plan, March 2014.
- Armstrong Creek Horseshoe Bend Precinct Structure Plan, September 2014.
- Armstrong Creek Urban Growth Plan – Framework Plan, 2015.
- Initial Draft Marshall Precinct Structure Plan, City of Greater Geelong, 2019.
- City of Greater Geelong Retail Strategy 2020-2036.
- Population and household forecasts, 2021 to 2041, prepared by .id (informed decisions), January 2023.
- Amendment C278GGEE Marshall Precinct Structure Plan, September 2023.
- Marshall Precinct Structure Plan, City of Greater Geelong, September 2023 (Amended March 2024).
- Marshall Precinct Structure Plan Background Report, March 2024.
- Victorian Planning Authority, Vicplan Maps.

ABBREVIATIONS

ACUGA	Armstrong Creek Urban Growth Area
C2Z	Commercial 2 Zone
LCC	Local Activity Centre
MPSP	Marshall Precinct Structure Plan
MUZ	Mixed Use Zone
NDA	Net Developable Area
NEIP	North East Industrial Precinct
PSP	Precinct Structure Plan
UGZ	Urban Growth Zone
VIF	Victoria in Future

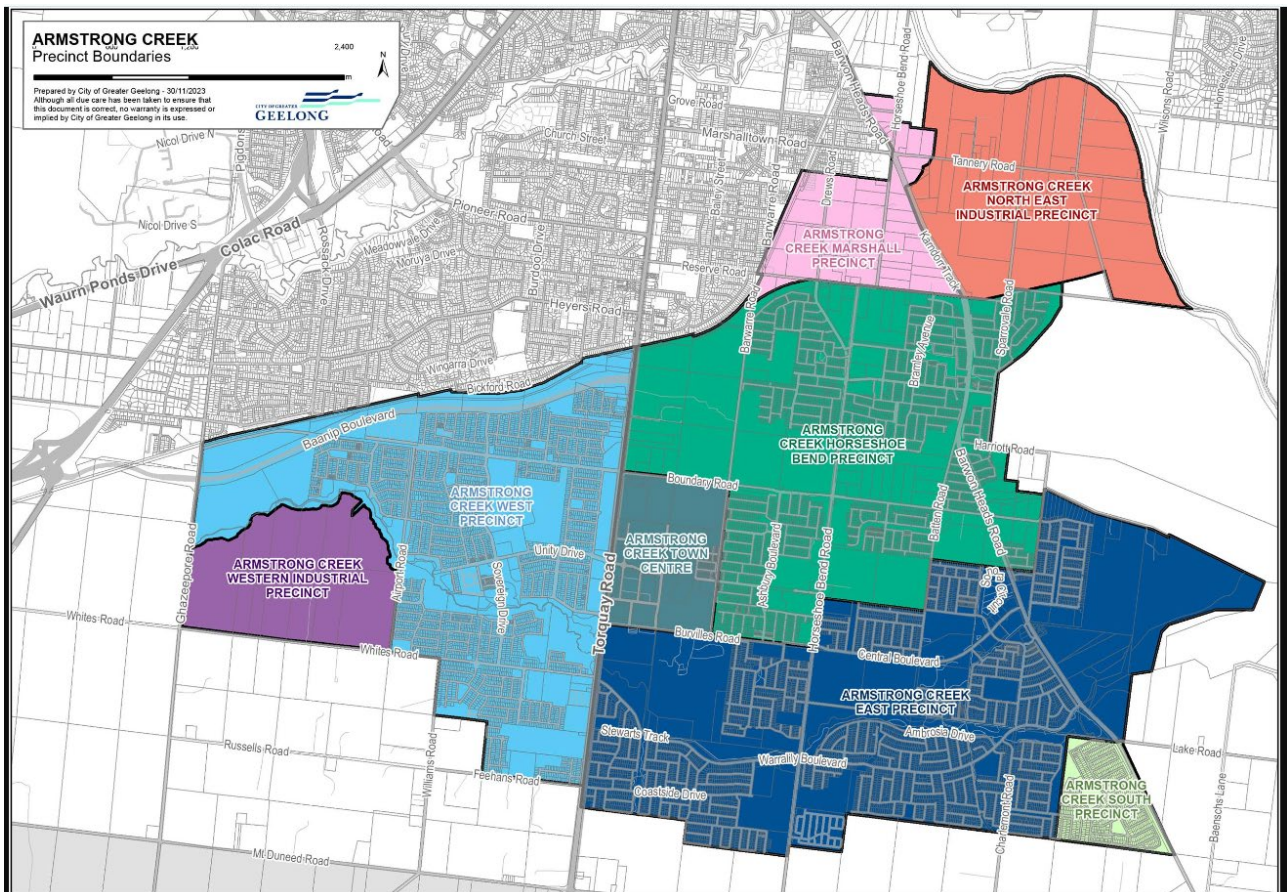
1. MARSHALL PRECINCT CONTEXT

12. In this section, I present an overview of the local area, surrounding land uses, and strategic context as well as current infrastructure and transport connectivity. The section also includes details relating to the Subject Land.

1.1. MARSHALL PRECINCT STRUCTURE PLAN LOCATION

13. Figure 1 below shows the location of the Marshall Precinct Structure Plan (MPSP), located in the wider ACUGA.
14. The ACUGA is located in the south of the City of Greater Geelong local government area (LGA), approximately 8 kms from Central Geelong via Barwon Heads Road. The Marshall Precinct is located at the north eastern edge of the ACUGA. Marshall is therefore a gateway to the growth area, with significant traffic movements through the precinct from those living further south, particularly the eastern corridor along Barwon Heads Road.
15. The Marshall Precinct is envisioned to accommodate approximately 3,500 people when fully developed, according to the MPSP, with significant land provisioned for medium/high density residential. There is also provisioning for commercial development with frontage to Barwon Heads Road (C2Z), bordering the Nort East Industrial precinct.

Figure 1 - Armstrong Creek Precinct Boundaries



Source: City of Greater Geelong

1.2. SUBJECT LAND & SURROUNDING USES

16. Map 1 below shows the Subject Land in context of the Marshall Precinct. The three properties controlled by Rich & Pure Pty Ltd are described as follows:
- **25 Horseshoe Bend Road** – a wedge-shaped parcel of land abutting the major road through the area (Barwon Heads Road) along its eastern edge, with an existing retirement village to the west across Horseshoe Bend Road (which will be upgraded in due course). The northern tip of the site is close to the major intersection of Barwon Heads Road and Marshalltown Road/Tannery Road. The site is 1.7ha in size, with the PSP indicating a net developable area (NDA) of 1ha.
 - **391-399 Barwon Heads Road** – located on the eastern side of Barwon Heads Road, this 1.7ha site (1.3ha NDA) sits immediately north of the designated North East Industrial Precinct (NEIP) and an existing caravan storage facility.
 - **8 Tannery Road** – sited directly north of 391-399 Barwon Heads Road, this property has a frontage to Barwon Heads Road and Tannery Road which will be upgraded to support traffic movements to and from the NEIP which is located immediately east of the property. It is 2.1ha in size (1.6ha NDA).
17. Rich & Pure Pty Ltd purchased 25 Horseshoe Bend Road in 2021 and the other two sites in 2022, following the release of the draft Marshall PSP in 2019, which, as discussed in the following section, designated all three properties as part of a Commercial/Bulky Goods area.
18. Although the North East Industrial Precinct (NEIP) PSP was approved in 2010, the precinct still remains largely undeveloped, with farming properties remaining, along with some long-established commercial and industrial operations such as the caravan storage facility and Marshall Pine Products along Tannery Road.
19. The other employment use nearby is a recently developed 7-Eleven petrol station and convenience store further north along Barwon Heads Road, west of Horseshoe Bend Road.
20. The Marshall Train Station is situated to the west of the Subject Land, south of Marshalltown Road. The centre of the wedge site on Horseshoe Bend Road will be approximately 850-900 metres from the station via the shortest walking distance (assuming proposed PSP east-west connections).
21. The properties to the east of Barwon Heads Road are a similar distance from the station along Marshalltown Road from the nearest point (Barwon Heads Road/Tannery Road intersection), although parts of those sites are more than 1km walking distance from the station. Connection from these sites to the station is further hampered by the barrier created by busy Barwon Heads Road which is currently a 4-lane road plus slip lanes at the main intersection which must be crossed. Barriers on the median strip in the middle of the road prevent crossing anywhere other than the intersection in this area.
22. The MPSP also designates a local activity centre (LCC) within the 'Station Precinct', located south of Marshall Station. The station precinct is expected to accommodate medium-high density residential that include multi-unit apartments and multi-unit villas, while the local activity centre is anticipated to deliver a mix of retail (supermarket, speciality shops) and non-retail uses (medical, small-offices, childcare) to complement the surrounding high density uses and effective transport linkages. Given the LCC is proposed south of the station carpark, the walking distance from the Subject Land will be around a further 100-200 metres beyond the distance to station.

2. EVOLUTION OF MARSHALL PSP

23. This section details the strategic context outlined through the preparation of the policy documents, background studies and supplementary reports that have defined the land use designations in various iterations of the Marshall PSP.

2.1. ARMSTRONG CREEK URBAN GROWTH PLAN – FRAMEWORK PLAN (2008, 2012, 2015)

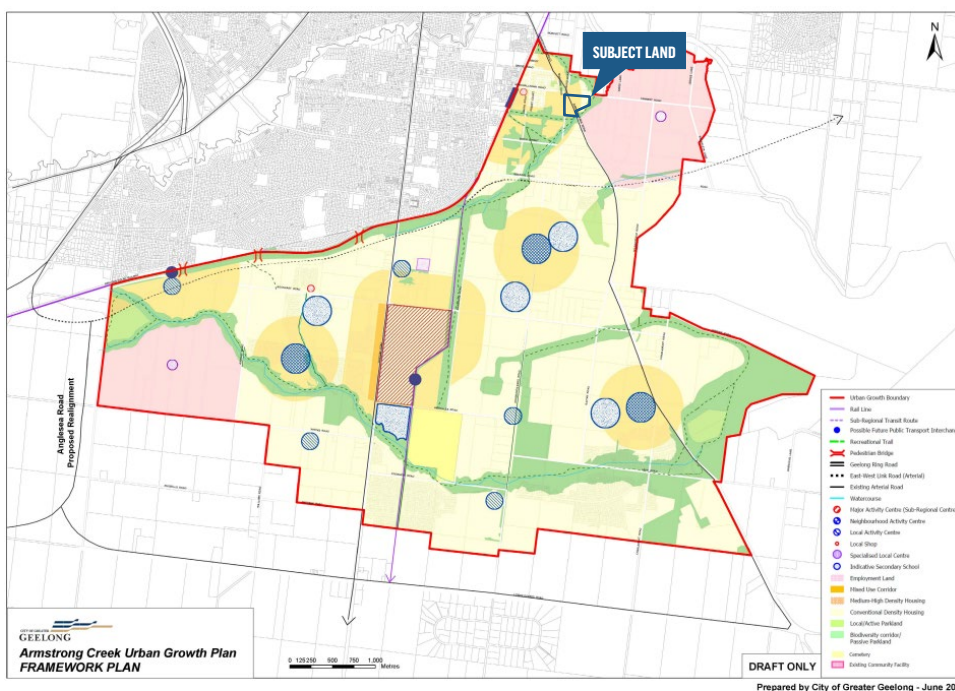
24. The ACUGA, as depicted in the Armstrong Creek Urban Growth Plan - Framework Plan as schedule to Clause 81.01 of the Greater Geelong Planning Scheme, provides for the urban growth planning of the City of Greater Geelong and the broader region. The Framework Plan was first released in 2008 (updated 2012 and 2015) and identified the following uses along with prospective locations to accommodate them:

- **Population and Job Growth:** The ACUGA includes the communities of Marshall, Connewarre and Mt Duneed. The growth area is anticipated to provide housing for 54,000 people and provide employment for 22,000 people in industries and local businesses.
- **Housing:** Providing medium and higher density housing (30 dwellings per hectare) proximate to activity centres, open space, the existing Marshall train station, the proposed new Rossack Drive train station and other areas of high amenity.
- **Employment:** The plan provides economic and employment growth by encouraging development of an employment precinct (industrial) in the Tannery Road, Marshall area, which provides a service business location. An employment precinct in the western part of the growth area close to Geelong Ring Road, and a mix of employment opportunities within the new activity centres.

25. The Framework Plan was prepared to consider potential future uses over the wider Armstrong Creek Urban Growth Area, with further detailed land use planning to consider suitable uses in each precinct given the identification of specific issues that emerge through each respective Precinct Structure Plan. I note that even in the June 2015 update, the Framework Plan was labelled as “Draft Only”.

26. As shown in Figure 2, the Subject Land in the ACUGA plan was designated part conventional density housing, part medium-density housing, and part local/active parkland.

Figure 2 - Armstrong Creek Urban Growth Area Plan – Framework Plan



Source: Armstrong Creek Urban Growth Plan – Framework Plan July 2015, City of Greater Geelong.

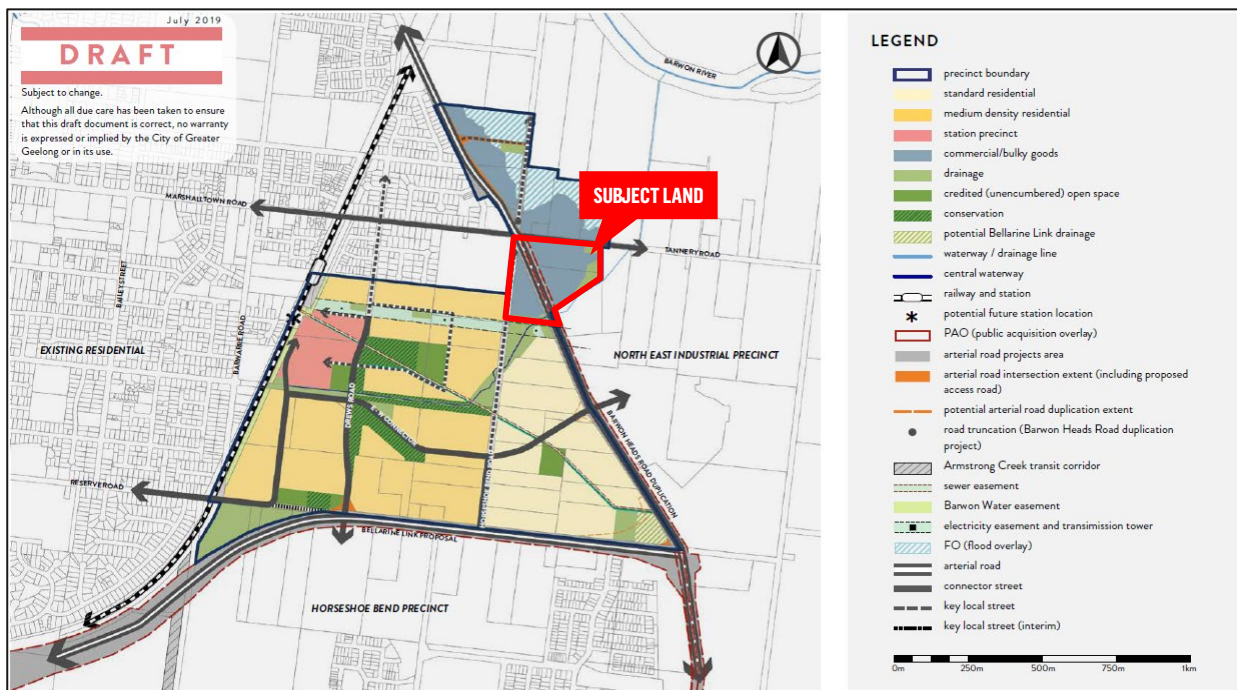
2.2. DRAFT MARSHALL PSP (2019)

27. The first detailed plan to specifically consider future urban development in the Marshall precinct as part of the Armstrong Creek Urban Growth Plan (AGUGP) was the Draft PSP (2019). The Vision for the MPSP depicted in that draft allowed for a range of housing densities that would accommodate 4,300 residents, with employment opportunities in the local activity centre, commercial development to the north and at the adjacent North East Industrial Precinct (NEIP) to support future population.
28. As part of the draft, land located to the north of the drainage reserve separating the Marshall PSP from the North East Industrial Precinct, was identified as 'Commercial/ Bulky Goods' with an underlying applied zone of Commercial 2 (C2Z). This included most of the land east of Barwon Heads Road adjoining the NEIP, as well as 25 Horseshoe Bend Road, as shown in Figure 3. The total net developable area (NDA) allocated to Commercial/Bulky Goods was around 10 hectares out of the total NDA for the PSP of 79.6ha.
29. The objective outlined in the precinct plan that guided the concept and vision for supporting employment within the Marshall precinct is noted below¹:

There will be ample employment opportunities for the residents of Marshall precinct, including in the local activity centre, commercial development to the north of the precinct and at the adjacent North East Industrial Precinct, as well as easy public and private transport access to the Geelong central business district, seven kilometres to the north.

30. It is noted that there appears to have been no publicly available economic report prepared as a background document to the PSP. The extent of Commercial/Bulky Goods land designation has not been supported by presentation of such an economic assessment. Although, equally, there has not been analysis establishing the need for residential land, or the extent of the station precinct which is proposed to include some retail facilities.
31. Following the release of Draft PSP, Rich & Pure Pty Ltd purchased the Subject Land in 2021-2022 on the understanding it was designated for commercial use. Their planning in relation to future development of the properties since that time has focussed on a range of uses aligned with the applied C2Z.

Figure 3 - Marshall Precinct Structure Draft Plan



Source: Draft Marshall Precinct Structure Plan, July 2019, City of Greater Geelong.

¹ Draft Marshall PSP, July 2019, Pg 16

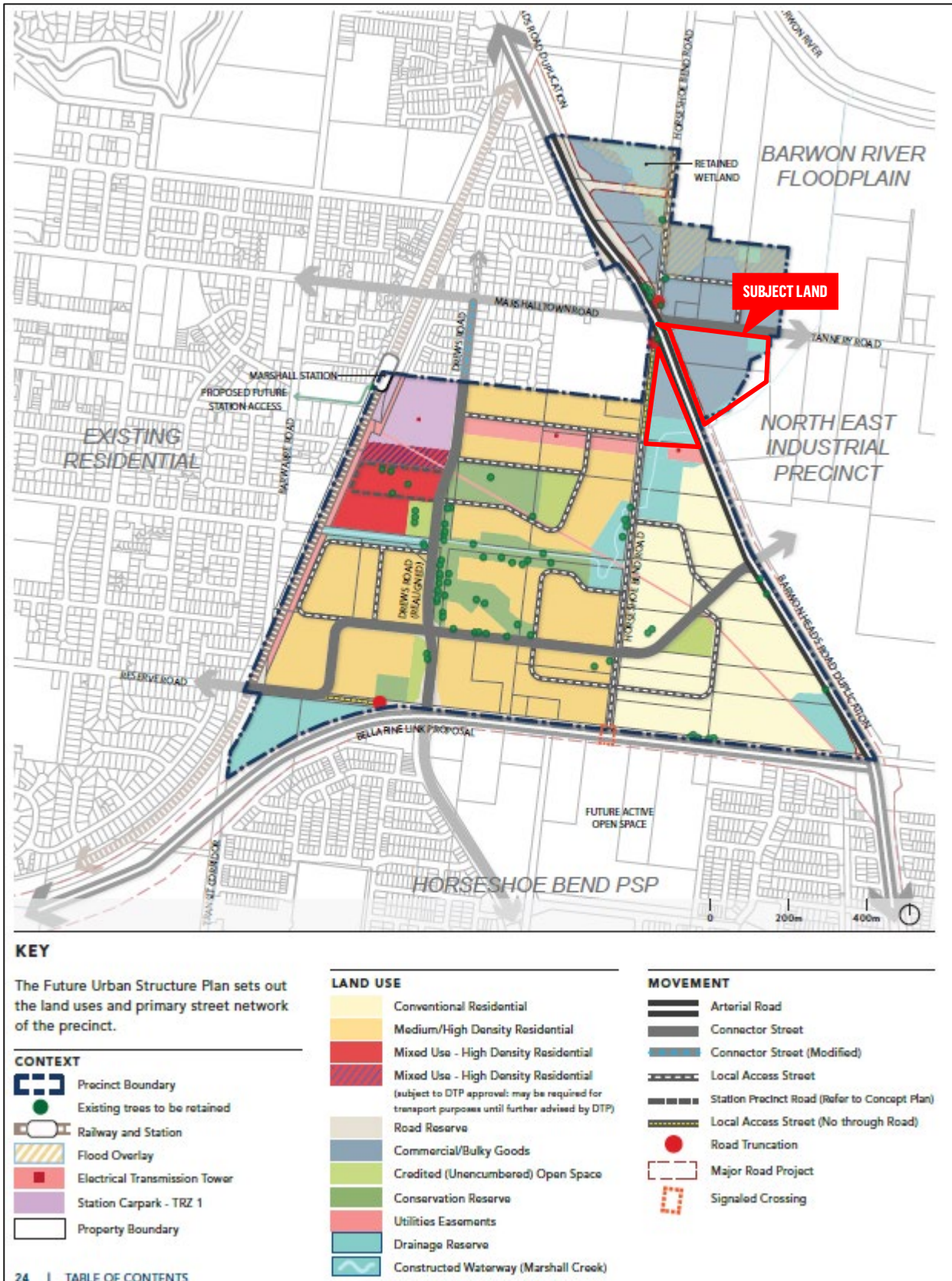
2.3. MARSHALL PRECINCT STRUCTURE PLAN (2023, AMENDED MARCH 2024)

32. The Marshall Precinct Structure Plan was adopted in September 2023 with a further amendment in March 2024. Development of the PSP has been informed by the various planning frameworks, precinct structure guidelines and environmental background studies that identified the appropriate land uses across the various parts of the precinct.
33. Figure 4 below indicates the proposed land use within the precinct allocated to residential and commercial uses. The PSP is estimated to accommodate approximately 3,000 – 5,000 new local residents on delivery. The PSP’s vision² statement identifies it as a ‘distinctive residential and commercial neighbourhood’ noted in full below:
- ‘Marshall will be a distinctive residential and commercial neighbourhood that responds to its unique location. Development will capitalise on convenient access to Marshall Station and arterial roads, as well as remnant vegetation and other open space features. Marshall will become a sustainable, connected, walkable and visually interesting place set within a semi-natural environment.’*
34. As is to be expected as a PSP is developed, the future land use plan has considered local needs, opportunities and specific use outcomes, given the nature of the area and the factors influencing development.
35. The PSP, amended as recently as March of this year, continued to maintain a ‘Commercial/ Bulky Goods’ provision around the Barwon Heads Road/Tannery Road intersection (including the Subject Land). The NDA of the Commercial/Bulky Goods area was reduced marginally from the 2019 draft to 9.8 ha. The PSP indicates employment generation of 198 jobs from development at this precinct, out of a total jobs estimate of 380 across the PSP. The PSP also details some key considerations and guidelines relating to commercial land use in Marshall³:
- *Be consistent with the general requirements of the Planning Scheme “Commercial 2” zone.*
 - *Demonstrate suitable connections and integration with surrounding lots and land uses.*
 - *Provides land uses that do not compromise the function of existing surrounding land uses, including those within the North East Industrial Precinct.*
 - *Complies with all other relevant requirements of the PSP.*
36. The connections and integration of the designated Commercial/Bulky Goods land to the surrounding lots was presumably influential in the land use designation, with a commercial outcome a logical interface with the industrial uses proposed east and south of the Subject Land.
37. The guidelines in the PSP’s land use budget also identified commercial and retail use at the ‘Station Precinct’ as the focal point of activity. The Station precinct has an implied mixed-use zone (MUZ) to support future commercial and residential development.
38. The Station precinct would include the Town Centre and given its location and proximity to the Marshall train station, will facilitate high density residential (multi-unit apartments and townhouses) as well a mix of small-scale office, medical, gym and childcare use etc. Given the land allocation to this use (2,750 sq.m retail), the anticipated job generation is estimated at 27 jobs only. It also necessitates that the range of retail and commercial land uses will not be significant and potentially not capable of supporting the full range of uses in indicated.

² Marshall Precinct Structure Plan, Pg 22

³ Marshall Precinct Structure Plan, Pg 74

Figure 4 - Marshall PSP Land Use Budget

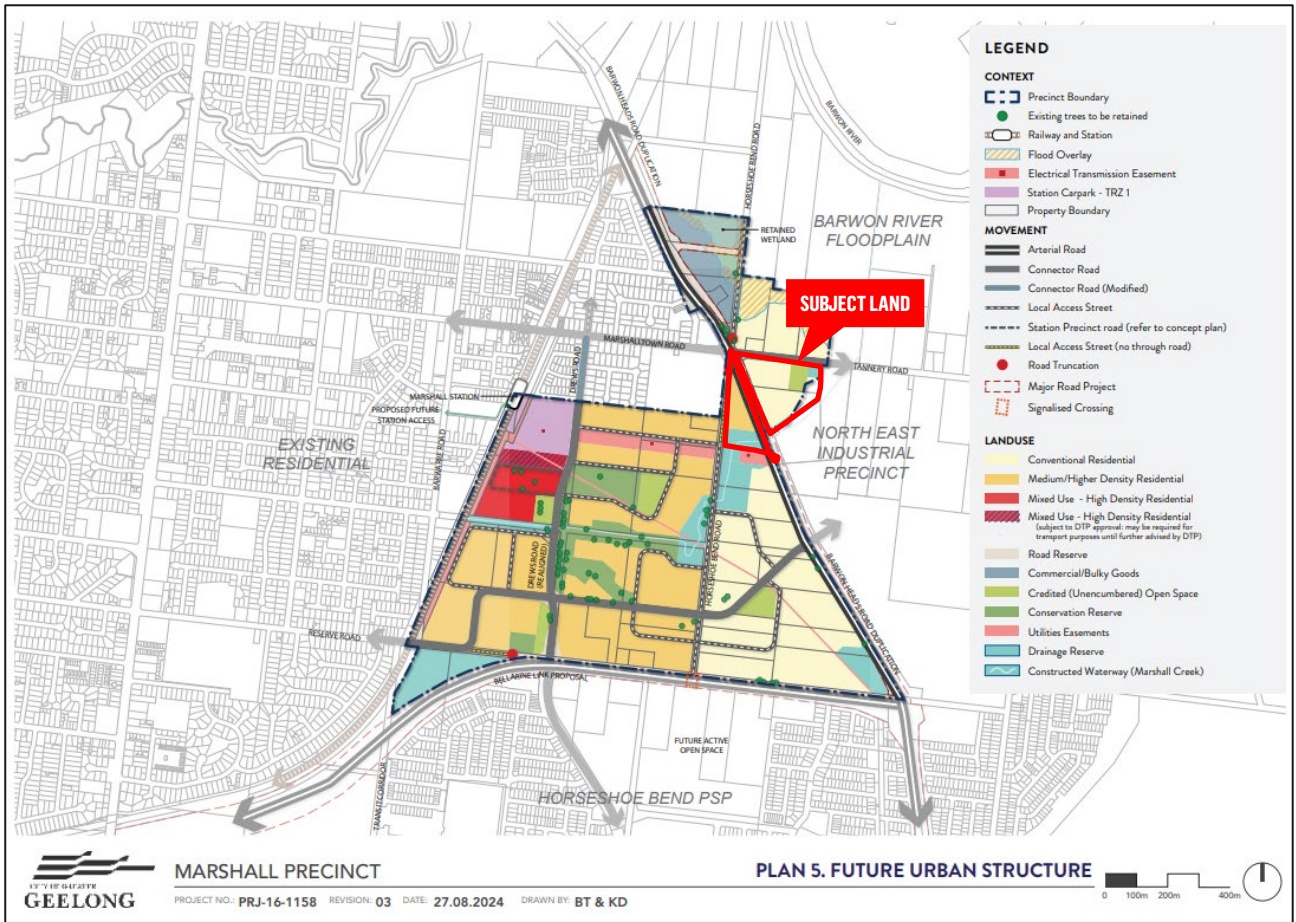


Source: Marshall Precinct Structure Plan, City of Greater Geelong; Urbis (addition of Subject Land indication)

2.4. COUNCIL'S REVISED PLAN

39. Following exhibition of the Marshall PSP in April-June 2024, a submission was received by the Council from Mesh Planning on behalf of a landowner in the NEIP. This submission called for the redesignation of the Commercial/Bulky Goods area as a residential use area.
40. In their response to submissions received, the Council recognised the position put in this submission and have now indicated their intention to support a change to the PSP that would see a large part of the exhibited 'Commercial/ Bulky Goods' land use area reallocated to a combination of 'Medium/ High Density Residential' and 'Conventional Residential'. This change impacts the Subject Land owned by Rich & Pure Pty Ltd.
41. Figure 5 below shows the extent of the Commercial/Bulky Goods land to be reallocated for residential use. It includes the wedge land west of Barwon Heads Road, and the land either side of Tannery Road to the east of Barwon Heads Road which is immediately adjacent to the future NEIP.
42. The reallocation of this land leaves just 2.6ha of Commercial/Bulky Goods land in the area east of Barwon Heads Road but west of Horseshoe Bend Road.
43. Council cites their reasons for making this change as being the following:
 - Policy objective to facilitate more housing consistent with the Victoria's Housing Statement, with a target to build 425,600 regional homes.
 - NEIP is already planned for employment and industry.
 - The commercial designation is contrary to the Armstrong Creek Urban Growth Plan – Framework Plan, which is an incorporated document in the planning scheme.
44. It does not appear there have been any specific background studies that informed the alteration from commercial land use to medium/high density residential along Barwon Heads Road. This also indicates a shift from the vision of the Precinct that involved providing commercially developable land to deliver population servicing businesses that would support the future residents of Marshall, along with supporting 198 jobs anticipated from the delivery of this commercial land.

Figure 5 - Council's Revised Plan



Source: City of Greater Geelong; Urbis (addition of Subject Land indication).

2.5. SUMMARY & IMPLICATIONS

45. The analysis in this section identifies the following:

- The Armstrong Creek Urban Growth Area – Framework Plan (2008 – 2015) represented a draft of where various uses might be accommodated across the broader ACUGA with further detailed planning through the PSP process to determine the final outcomes at a local level. The Subject Land and all the surrounding land within the Marshall PSP were indicated for residential use. There appears to be no detailed economic analysis, at least available publicly, underpinning the land use allocation in the high-level Framework Plan.
- The Draft for the Marshall PSP first released in 2019 involved the first detailed planning of the precinct. Noting the location of the future NEIP had been well-established by this time, the draft plan designated a 'Commercial / Bulky Goods' area along Barwon Heads Road adjoining the NEIP, with an applied 'Commercial 2' zone. The employment generation from this precinct was noted as providing job opportunities for future residents. Rich & Pure Pty Ltd purchased land under the commercial designation after the release of the draft, with the intention of developing their preferred commercial outcome.
- The Marshall PSP exhibited in mid-2024, envisioned the Marshall precinct as a 'distinctive residential and commercial neighbourhood'. It designated the areas around the Barwon Heads Road/Tannery Road intersection as 'Commercial / Bulky Goods' use, with the precinct having an NDA of 9.8ha anticipated to contribute 198 jobs to the PSP.
- Following exhibition and upon receipt of a submission on behalf of a landowner outside of the PSP, Council indicated a preference to convert most of the 'Commercial/ Bulky Goods' land use identified in the precinct plan to a combination of medium-high density and conventional residential.
- There has been no further economic analysis supporting this change, although I note there appears to have been no publicly available economic study prepared at all in relation to the Marshall PSP to establish the need for various land uses.

3. COMMERCIAL 2 LAND

46. This section outlines the purpose of Commercial 2 zone land as defined in the Greater Geelong Planning Scheme, along with typical uses accommodated within, and the attributes of, C2Z land.

3.1. PURPOSE & USE OF COMMERCIAL 2 ZONE LAND

47. The Greater Geelong Planning Scheme outlines the purpose of the commercial 2 zoned (C2Z) land:

To encourage commercial areas for offices, appropriate manufacturing and industries, bulky goods retailing, other retail uses, and associated business and commercial services.

To ensure that uses do not affect the safety and amenity of adjacent, more sensitive uses.

48. The range of uses permissible in a C2Z is consequently quite broad, although there are limitations on the scale and conditions for many uses. For example, while retail uses such as shop or supermarket are permissible, there are conditions around size of tenancies or total shop space. This prevents undermining activity centres or other locations which might have a Commercial 1 zone applied.
49. Restricted retail premises are typically an as-of-right use, recognising the particular circumstances necessary for such retailers such as access, exposure and space for display, parking and loading/unloading of goods.
50. Office uses are permitted as they are under a C1Z that might apply to a defined activity centre. However, the nature of the office use, given the typical locations and conditions of C2Z land, is typically quite distinct from an activity centre.
51. Some uses that might be found in industrial areas can be accommodated including industry and warehouses, although with specific conditions.
52. Given the wide range of uses permissible, the characteristics of the final land use in the zone can differ greatly from location to location. This is evident in the varying nature of the C2Z precincts in Geelong, as discussed in the following section. Some precincts will be largely light industrial, some will support major bulky goods centres, while others will provide critical population services for surrounding residential areas.
53. The characteristics of the land where the C2Z applies influence the final outcome. Typically, uses under a C2Z are population serving. These uses require access and exposure to the surrounding residential population or businesses they serve. This means appropriate locations are typically along main roads where businesses benefit from easy access for, and exposure to, their customers (e.g. bulky goods retailing in Waurn Ponds or car supplies in South Geelong). Where land under the C2Z does not have main road frontage, uses tend towards light industrial outcomes (e.g. areas away from Torquay Road in Grovedale).
54. The C2Z is also often used as a transition between sensitive uses. It can be a buffer between residential and industrial uses where conflict is higher, or to manage an interface with a major arterial road which is not a preferred location for residential use.
55. The fact that the C2Z allows uses that are also permissible in other zones, does not mean the mere designation of land under that zone unduly competes with or undermines the role of other commercial or industrial locations. The zone can support complementary activity, providing a location for population serving uses that are not suited to, or cannot physically be accommodated centrally within an activity centre.

3.2. ATTRIBUTES OF COMMERCIAL 2 ZONED LAND

56. Given purpose, use and nature of C2Z land precincts identified above, I have noted below key attributes that support the demand for commercial land, and in turn influence the strategic designation of C2Z precincts. I have then considered the originally designated Commercial / Bulky Goods land in the Marshall PSP against these attributes.

- **Proximity to a residential catchment** – The land’s proximity to a substantial residential catchment ensures precinct occupiers will have access to a significant catchment of potential customers and clients. This catchment will not be limited to the Marshall PSP. As a gateway location to the broader ACUGA (particularly the eastern side), businesses and services in a future precinct here could serve residents from further south along the Barwon Heads Road corridor, potentially including coastal areas near Barwon Heads. I note this corridor is distinct from the western side of Armstrong Creek where the Surf Coast Highway is the main north-south route which the Armstrong Creek Activity Centre is central to. The population base available to be served from the proposed Marshall commercial area can support a variety of commercial activities, including convenience retail, and commercial and professional services.

While the location is attractive to potential businesses, development of commercial uses on the land would generate benefits for residents of the region also. The connectivity would make this a convenient location for residents to access goods and services.

- **Accessibility & connectivity** – The designated precinct benefits from excellent accessibility and connectivity, being well-served by major roads, and to some extent, public transport links. This ease of access makes it convenient for both customers and workers, thereby increasing the attractiveness of the land for commercial tenants. The connectivity also facilitates efficient logistics and supply chain operations.
- **Visibility & exposure** – Commercial land requires high visibility and exposure, with frontage to a major arterial road or freeway a desirable characteristic. The prominent positioning of the proposed land on Barwon Heads Road is ideal for businesses seeking to maximize their public presence and attract passing trade. High visibility can significantly enhance brand recognition and customer footfall. As noted earlier, in some locations, C2Z land does not have high exposure to major roads. For example,
- **Separation & buffers** – Commercial uses such as those typically found on C2Z land, provide an appropriate interface with more sensitive locations such as residential which are not appropriate abutting traditional industrial locations.

The C2Z land, specifically the land east of Barwon Heads Road and either side of Tannery Road, acts as a buffer between industrial zones and other areas, mitigating potential conflicts. Not only is this important for residents seeking to live in an area without the noise, emissions or traffic generated by an industrial area, but also operators in the industrial area looking to conduct their business without the constraint of having residents too close. Various industrial uses have buffer distances applied in planning schemes, meaning having residential use nearby can limit the range of activity that is permissible or suitable. Main road frontages also need to be managed, with residential use not always preferred.

The commercial land proposed in the exhibited PSP was an appropriate response for the land abutting the NEIP and along Barwon Heads Road. As discussed later in this statement, residential land adjoining an industrial area is not a preferred outcome from a market perspective.

57. In my opinion, the originally proposed commercial land designation in the vicinity of the Barwon Heads Road/Tannery Road intersection was an appropriate outcome that balanced managing the interfaces with major roads and a future industrial area, with recognising the market appeal of such a location for commercial activity given the exposure and access afforded. As considered below, the owners of the land have seen strong market interest in various commercial uses on the land.

3.3. POTENTIAL USE OF THE COMMERCIAL / BULKY GOODS LAND

58. Recognising the strong attributes of the Subject Land as a mixed commercial location, Rich & Pure Pty Ltd purchased the land following the release of the draft PSP which indicated the Commercial / Bulky Goods areas.
59. Since that time, they have actively sought interest from market participants to occupy the land. They have received strong interest and commitment from several potential operators interested in being part of development on site. With this commitment, development could proceed on some of the land shortly after gazettal of the PSP.
60. Some of the uses where there has been market interest have included service stations, childcare operators, quick service restaurants (i.e. fast-food operators with drive through requirements), recreation facilities and small warehouse or storage facilities. Other uses that might also be complementary to this type of mix include secondary office space (e.g. medical centre) or showroom facilities (e.g. trade supply outlets). Table 1 below lists the active lease offers that have been made with various potential tenants.

Table 1 - Active Lease Offers for the Subject Land

Site	Tenant	Intended Use
8 Tannery Road, Charlemont	Guzman Y Gomez	Food and beverage with drive thru
	Funtopia	Indoor climbing and play centre
	Caltex	Petrol station
	Arrow Petroleum	Petrol station, drive thru café and car wash
	Subway	Food and beverage
	McDonald's	Food and beverage with drive thru
	Carewell Diagnostic Centre	Medical centre
25 Horseshoe Bend Road, Marshall	BP	Petrol station and car wash
	Bright Steps Academy	116 place childcare centre

Source: Rich & Pure Pty Ltd

61. While some of these uses are possible (and indeed are being developed) in other commercial locations such as activity centres, there is still market demand for more facilities in this location. Growth of this corridor in Armstrong Creek can support multiple operators in various categories. The types of convenience uses proposed are also the uses that precede broader commercial development in an area. Earlier development of such facilities can act as an impetus to growth in other locations in the region.
62. The proposed mix of uses currently sought by Rich & Pure Pty Ltd for the Subject Land will provide residents with greater choice and convenience, but will also be largely complementary to core activity centre locations which have a different core focus. I will discuss the distinction between the proposed uses and other commercial locations in the following section.
63. Rich & Pure Pty Ltd have indicated that their focus for the land is not to develop a major bulky goods presence. Of course, that cannot account for other land not under their ownership. However, I do not expect this will be a location for a major bulky goods centre. The area is already well served in this regard by the centre at Waurm Ponds, other established supplementary areas nearby in southern Geelong, and in time, Armstrong Creek Town Centre. A small number of outlets of showrooms may be supportable.
64. I also note that the option for bulky goods development remains under the Council's revised plan anyway. As land north of the Barwon Heads Road/Horseshoe Bend Road intersection is proposed to remain as a Commercial / Bulky Goods land area, the full range of potential outcomes under the C2Z are still possible.
65. Similarly, the owners of the Subject Land do not intend on developing core retail uses such as supermarkets or specialty shops, beyond potentially some limited peripheral retail-related uses such as take-away food. I believe that development of core retail uses is not a preferred outcome in a commercial location such as this, and it would have potential to impact the viability of a convenience retail offer near Marshall Station. However, that possibility is not a reason to remove the Commercial

/ Bulky Goods land. I understand there remains the option to control certain uses under the schedule to the Urban Growth Zone applying to the PSP.

66. In the following section, I consider the range of other commercial locations in Armstrong Creek and surrounds, identifying their role and subsequently the effect of the proposed commercial land designation on that role.

4. COMMERCIAL LOCATIONS IN SOUTHERN GEELONG

67. This section identifies the location of current and future activity centres and other C2Z precincts in the Armstrong Creek and southern Geelong. This establishes the network of commercial centres and precincts, identifying the distinction from the role of a proposed Commercial / Bulky Goods land in the Marshall PSP.
68. Map 2 on the following page indicates the location of activity centres as defined in the Greater Geelong Retail Strategy 2020-2036, along with Commercial 2 zoned land across the southern parts of Geelong.

4.1. ACTIVITY CENTRES

69. The Geelong Retail Strategy, 2020-2036, recognises the need for commercial land to meet future demand for retail services and potentially the additional jobs in the wider region. The Strategy outlines a well-established hierarchy of retail centres to support the community's daily needs, along with future centres servicing the growing population.
70. The ACUGA is planned to feature a major activity centre at its core (Armstrong Creek Town Centre), along with several neighbourhood and local activity centres situated in the Horseshoe Bend Precinct, as well as the West and East precincts.
71. Retail hierarchy of centres proposed for the ACUGA as detailed in Table 2 below. The table also outlines the major uses across these centres and the differing nature of demand based on surrounding uses being met at these centres.

4.1.1. Armstrong Creek Town Centre

72. The ACUGA is currently serviced by a developing Town Centre, intended to reach a sub-regional activity centre level as outlined in the Armstrong Creek Town Centre PSP. The precinct plan identifies a range of uses including convenience services, speciality stores, bulky goods stores, community and recreational services.
73. Currently, the sub-regional centre includes at this time, a full line Coles supermarket, specialty shops, a library, and along the Surf Coast Highway frontage, stores including a Dan Murphy's large format liquor store, quick service restaurants (QSRs) like Carl's Junior, McDonalds, a service station, and a small provision of office space.
74. The centre is ultimately planned to support 40,000 sq.m of retail floor space and 25,000 sq.m of restricted retail floor space.
75. In my opinion, the Armstrong Creek Town Centre will continue to grow in line with population growth in the region, ultimately serving its sub-regional purpose for the ACUGA. The designation of Commercial / Bulky Goods land as originally proposed in the exhibited Marshall PSP 5.5km away will not impact the role of the Town Centre, nor the ability to support the projected floorspace growth. My reasoning for this view is discussed further in the following section.

4.1.2. Other Activity Centres

76. The ACUGA is also served by an existing neighbourhood activity centre, **Warralily Village**, located in the Armstrong Creek East Precinct. It is located around 3.8km south of the proposed Marshall commercial land, along Barwon Heads Road.
77. The centre is anchored by two supermarkets (Aldi & Woolworths), and also provides retail specialty stores, QSRs, a service station and is located along Barwon Heads Road and a planned capacity of 7,700 sq.m retail floorspace.
78. Two future neighbourhood activity centres are also earmarked in Armstrong Creek West Precinct and Horseshoe Bend Precinct with a total planned retail floorspace of just 10,000 sq.m by 2036⁴ (3,000 sq.m at Armstrong Creek NAC & 7,000 sq.m at Horseshoe Bend Precinct North).

⁴ Greater Geelong Retail Strategy, Pg 82.

Table 2 - Retail Hierarchy, Capacity Role & Function – ACUGA

Centre in Armstrong Creek	Distance from Subject Land (km) [^]	Indicative Floor Space Cap (sq.m) [*]	Role/Function
Sub-Regional Centre			
Armstrong Creek Town Centre, Armstrong Creek	5.5	40,000 (retail) 25,000 (restricted retail)	Retail - 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. 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.
Neighbourhood Centre			
Warralily Village, Armstrong Creek	3.8	7,700	A retail centre that serves a neighbourhood catchment and is anchored by one or more supermarkets, plus speciality stores.
Armstrong Creek West, Mount Duneed (Future)	6.1	3,000	
Horseshoe Bend North East, Charlemont (Future)	2.0	7,000	
Local Activity Centre			
Armstrong Creek East Precinct, Armstrong Creek (Future)	5.0		
Armstrong Creek West Precinct, Whites Road (Future)	6.5		
Armstrong Creek West Precinct, Boundary Road (Future)	5.2	-	-
Armstrong Creek Horseshoe Bend Precinct Western (Future)	3.6		
Armstrong Creek Horseshoe Bend Precinct Southern (Future)	3.5		

[^]Via most optimal future roads; ^{*}Existing and planned to 2036

Source: The City of Geelong Retail Strategy 2020-2036.

80. Although not identified specifically within the Retail Strategy, a Local Activity Centre is proposed as part of the Marshall PSP, within the vicinity of Marshall Station. The PSP indicates a maximum of 5,000 sq.m of floorspace, with 2,750 sq.m of that being retail space.
81. Again, although not detailed in the Retail Strategy, another local activity (convenience) centre is proposed to be located further east within the North East Industrial Precinct (NEIP). This will likely service the future worker population employed in the industrial area.
82. Except for the two LACs noted above in Marshall and the NEIP, the rest of the activity centres within Armstrong Creek are some considerable distance from the proposed Marshall commercial land area.

4.2. COMMERCIAL 2 ZONED (C2Z) LAND

83. Table 2 below presents details of the existing and proposed Commercial 2 zoned land within or close to the Armstrong Creek Urban Growth Area. Further details of other C2Z land across Greater Geelong is included in the Appendix A. The table identifies major uses within existing precincts and current land lot vacancies that could support future capacity, as determined through a site visit and an aerial assessment.
84. The analysis of C2Z land highlights the following key points around the location and use of these precincts:
- C2Z land in the southern parts of Geelong, as it is in most situations, is strategically positioned along key arterial roads.
 - Uses in these locations include a mix of food & beverage and non-food retail, medical and childcare facilities, gyms and other recreation facilities, bulky goods, trade supplies, and light industrial activity.
 - Most of the uses are providing local services, catering to the population base in the surrounding area, leveraging the exposure to passing traffic along the main roads.
 - There appears to be virtually no vacant land lots in the established C2Z locations, indicating the high-level of demand for such locations.
 - The restricted retail (bulky goods) centres are spread across Geelong, with larger centres in the north (Corio) and south (Wauran Ponds) supplemented by smaller bulky goods concentrations or a mix of trade supply showrooms in other locations like Latrobe Terrace, Fyans Street or Newcomb (Bellarine Highway). The facilities therefore serve different population corridors.
 - The two areas with a proposed applied C2Z within the ACUGA are the Marshall commercial area, and the area within the NEIP which includes a limited frontage to Barwon Heads Road, with most of the land extending along the internal access road within the industrial estate (see Figure 6 - NEIP Future Urban Structure Plan)

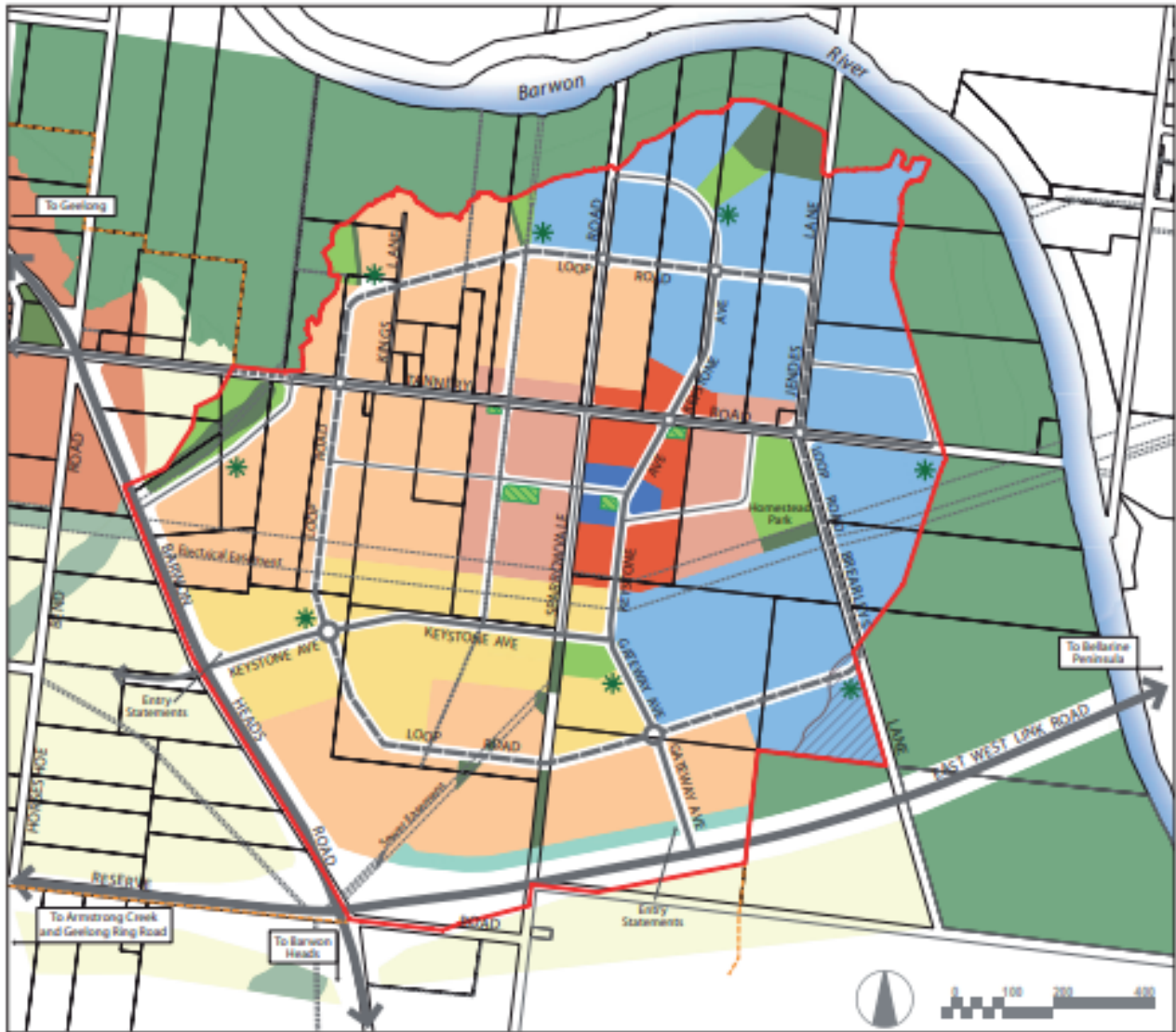
Table 3 - C2Z Land – Existing and proposed in or near Armstrong Creek

Suburb / Precinct	Location	Gross C2Z land (in ha)	Vacant Land (Indicative)	Major Uses	Attributes and surrounding land use
Existing C2Z Land Close to Armstrong Creek					
Grovedale	Torquay Rd	16.6	No Vacancy	Light industrial, take-away food, mid-sized supermarket, limited bulky goods (furniture) stores	<ul style="list-style-type: none"> • Main road frontage for western edge only. • Adjacent to larger industrial area, supporting demand for light industrial uses.
Waurm Ponds	Colac Rd	15.8	No Vacancy	Key bulky goods centre, food catering, some non-food retail.	<ul style="list-style-type: none"> • Higher accessibility and exposure via Freeway access. • Adjacent to with Waurm Ponds Sub-Regional Activity Centre.
Proposed C2Z in ACUGA					
NEIP	Keystone & Gateway Ave	14.1*	-	TBC	<ul style="list-style-type: none"> • Limited main road frontage with majority of land along a road internal to the industrial area. • Will likely support greater weighting to light industrial uses, developing in line with the broader industrial offer.
Marshall	Barwon Heads Rd	9.9*	-	Mixed commercial activity.	<ul style="list-style-type: none"> • Main road frontage. • Access to residential catchment to the south. • Likely support for convenience, recreational and business services.

*Net Developable Area as per the precinct plan for NEIP & Marshall PSP.

Source: Vicplan, Nearmap, Precinct Structure Plans, Greater Geelong Planning Scheme; Urbis

Figure 6 - NEIP Future Urban Structure Plan



LEGEND

- NEIP Boundary
- Adjoining Precinct Boundaries
- Area subject to 100 Year Flood Event
Development of area is subject to offset. Flood storage to be determined subject to detailed design

ROAD NETWORK

- Proposed East West Link Road & Barwon Heads Road
- Major Access and Circulation Route (Loop Road)
- Primary Road Network
- Local Access Only (Buses Accepted)
- Secondary Road Network

PRECINCTS

- Precinct 1 - Industry North & South
- Precinct 2 - Campus Business
- Precinct 3 - Industry and Mixed Business
- Precinct 4 - Village Frame East and West
- Precinct 5 - Village
- Precinct 6 - Retail Centre (Specialised Activity Centre)

OPEN SPACE

- NEIP Parks
- NEIP Urban Park/Plazas
- ✱ Local Node/Private Plaza
- Barwon River Riparian
- East-West Link Drainage/ Biodiversity Corridor
- Drainage/Encumbered Parks

Source: NEIP Precinct Structure Plan, City of Greater Geelong 2010.

85. As discussed in Section 3, C2Z precincts can serve differing roles depending on the local circumstances. For example, the existing C2Z precincts in Grovedale and Waurm Ponds cater to differing markets and needs. With more of the land in Grovedale set back from Torquay Road, uses there are more light industrial in nature. However, the frontage to Torquay Road still supports uses leveraging passing traffic such as service stations, trade showrooms, furniture stores, fast food outlets, and an Aldi supermarket.
86. In contrast, Waurm Ponds C2Z precinct builds on the adjoining Waurm Ponds sub-regional centre along with a higher level of exposure and accessibility to accommodate a significant cluster of bulky goods retailing.
87. Similarly, the differing attributes of Marshall and the NEIP land are likely to result in the two areas, although nearby, serving different roles and attracting different uses.
88. The proposed precinct in the NEIP, with limited main road frontage, offers only a small area of land for occupiers who require exposure to high levels of passing traffic. Most of the land is along the internal road leading to the centre of the industrial precinct. Consequently, most of the future C2Z land is likely to have limited appeal to the likes of service stations, fast food outlets, or bulky goods. Rather, the internalised location off the main road will likely support light industrial activity and services catering to the demand generated by industrial businesses within NEIP.
89. The Marshall C2Z precinct (as exhibited) has a more extensive main road frontage, resulting in demand from the types of uses that can leverage the passing traffic, like those already identified by Rich & Pure Pty Ltd, such as fast food, service stations and childcare, among other uses.
90. As noted and evident from the Map 2, C2Z precincts within the City of Greater Geelong are quite separated from other C2Z precincts and relatively isolated from activity centre precincts which results in limited competition from potential uses accommodated in these precincts. The inclusion of higher capacity within the Armstrong Creek Growth Corridor will have limited impact on other activity centres.

4.3. SUMMARY & IMPLICATIONS

91. The analysis in this section highlights the following:
 - There are several activity centres proposed across the ACUGA, dispersed to serve local catchments in each precinct.
 - The largest centre is the developing sub-regional centre (Armstrong Creek Town Centre), with planned capacity of around 40,000 sq.m for retail space and 25,000 sq.m for restricted retail. This centre is developing in line with the increasing population across the growth area.
 - Most of the existing C2Z zoned land is concentrated along major arterial roads, providing the required access and exposure required to support convenience uses or those larger-format facilities that are not always suited to the core of activity centres.
 - The C2Z precincts in Grovedale and Waurm Ponds highlight how C2Z precincts can develop very differently given respective characteristics, and not replicate each other. Grovedale has a greater weighting to light industrial uses with larger areas away from the main road, while Waurm Ponds has developed as one of Geelong's key bulky goods locations, benefiting from main road access and proximity to the Waurm Ponds sub-regional activity centre.
 - The characteristics of the proposed Marshall commercial area (focussed along the Barwon Road frontage) will likely see it support a different mix of uses to the C2Z land applied within the NEIP (less main road frontage, being internalised to the industrial precinct). The two precincts are therefore not likely to be directly competitive and each can serve a role in meeting the needs of future residents and businesses in Armstrong Creek.

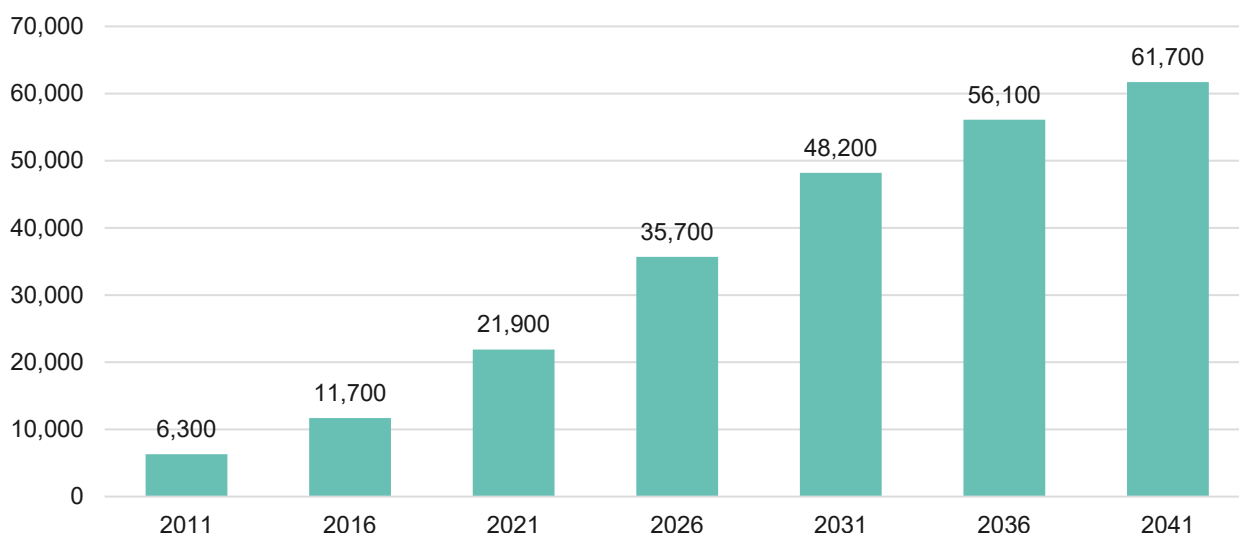
5. NEED FOR COMMERCIAL 2 ZONED LAND

92. This section considers the potential further need for C2Z land provision within the Marshall PSP by outlining key economic growth indicators. I have also considered the indication of the need for growth in retail, particularly restricted retail, floorspace in the City of Greater Geelong Retail Strategy.
93. As discussed in Section 3, C2Z land supports a variety of land uses, although typically population serving businesses that meet the needs of residents and businesses in the surrounding area. The uses in C2Z land areas, while often permissible in other zones that might apply in activity centres, have specific locational requirements such as exposure and access to high traffic volumes, the need for large or loading/unloading arrangements, large site requirements, or the cost of accommodation is a consideration. Therefore, just as population growth requires new activity centres or expansion of those that exist, growth also increases the need for the complementary uses found in C2Z precincts.

5.1. STRONG POPULATION GROWTH

94. In January 2023, informed decisions (.id) prepared its latest population and household forecasts for small areas within the City of Greater Geelong to 2041. The data indicates that the Armstrong Creek Growth Corridor is expected to experience a 182% increase in population between 2021 and 2041, reaching nearly 62,000 residents. This growth includes a 10% annual increase from 2021 to 2026, followed by a 6% annual increase from 2026 to 2031, and then a 3% annual increase to 2036. The growth then slows to 2% p.a. to 2041. This follows a 248% increase (+15,600) in population between 2011 and 2021. Chart 1 below portrays this substantial growth in the area to 2041.

Chart 1 - Armstrong Creek Growth Corridor Projected Population



Note – Armstrong Creek Growth Corridor includes Marshall – Charlemont, Armstrong Creek SA2 and Mount Duneed small areas as defined by .id forecast.

Source: .id (informed decisions), January 2023; ABS ERP, March 2024

95. These growth rates significantly surpass those projected for Greater Geelong, which is anticipated to grow by a total volume of 125,600 (46%) between 2021 and 2041, or approximately 2% annually.
96. This substantial growth in future resident population in Armstrong Creek corridor underscores the critical need for population serving amenities ideally located near residential centres. This includes essential services such as medical facilities, retail outlets, childcare, and other population services, thereby minimizing the need for residents to travel extensively to access these services.
97. Strong population growth must be accompanied by potential employment opportunities, which are essential for maintaining a robust and functioning economy. As the population increases, so does the need for jobs to support the local economy and provide livelihoods for residents. Ensuring that there are sufficient employment opportunities within close proximity to residential areas is crucial for fostering economic stability and growth in the region.

5.2. COMMERCIAL 2 ZONED LAND DEMAND

5.2.1. More land to service population growth

98. Given C2Z land's role in supporting a diverse range of uses accessed by the community, it is therefore essential that a sufficient provision of C2Z land be made close to current and future communities to provide those services. Table 4 outlines the projected allocation of C2Z land within the Marshall – Charlemont small area, which includes the Marshall Precinct and the Marshall – Charlemont, Armstrong Creek, and Mount Duneed small areas which collectively represent the Armstrong Growth Corridor along with the City of Greater Geelong, as defined by .id forecast.
99. The analysis shows that the current provision of C2Z land is 6.4 sq.m per resident across the City of Greater Geelong. By 2041, this relative C2Z provision is expected to decrease to 5.3 sq.m per resident in Geelong due to a rise in population, even assuming the additional C2Z land proposed is added to supply (i.e. 9.9ha and 14.1ha at Marshall and NEIP respectively).
100. The provision across the Marshall – Charlemont small area with the Marshall C2Z land will be in line with the regional average at 5.5 sq.m per person, although across the Armstrong Creek Growth Corridor, the provision would remain well below average.
101. Should the proposed reallocation of C2Z land to residential (7.2ha converted to residential), both the Marshall – Charlemont and the Armstrong Creek Growth Corridor would see a significant under-provision of C2Z land compared to the 'Rest of Greater Geelong'.
102. This suggests that the Armstrong Creek Growth Corridor has the potential to accommodate not only the C2Z land proposed in Marshall and the NEIP, but with a smaller area in Marshall, the provision of this supplementary services zone would be well below average.

Table 4 - Per Capita Provision of C2Z Land

C2Z Provisioning Per Capita	Marshall - Charlemont	Armstrong Creek Growth Corridor	Rest of Greater Geelong	City of Greater Geelong
2024				
Resident Population	6,410	30,130	259,140	289,270
Commercial 2 Zoned Land	-	-	1,842,100 ¹	1,842,100 ¹
C2Z provision (sq.m / resident)	-	-	7.1	6.4
2041 (Projected incl. C2Z in NEIP & Marshall)				
Resident Population	17,859	61,700	334,700	396,400
Commercial 2 Zoned Land	98,640 ²	239,940 ²	1,842,100	2,082,040 ³
C2Z provision (sq.m / resident)	5.5	3.9	5.5	5.3
2041 (Projected excl. land rezoned in Marshall)				
Resident Population	17,859	61,700	334,700	396,400
Commercial 2 Zoned Land	98,640 ²	239,940 ²	1,842,100 ¹	2,082,040 ³
Less: Proposed rezoning in Marshall ²	-72,460	-72,460	-	-72,460
C2Z provision (sq.m / resident)	1.5	2.7	5.5	5.1

¹Indicative Gross Commercial 2 Zone land (includes internal roads) excluding proposed areas.

²C2Z based on Net Developable Area (NDA). PSP does not identify any internal roads in these precincts.

³Includes future C2Z land.

Source: Vicplan, .id (informed decisions), City of Greater Geelong, Marshall PSP; Urbis.

5.2.2. Capacity for NEIP & Marshall Commercial Areas

103. Although the analysis above indicates there is capacity and need for the proposed C2Z land in both the NEIP and the Marshall PSP, it is worth noting again that I do not see these two areas as homogenous. They can serve different roles due to their characteristics.
104. Some uses in C2Z land require main road frontage for optimal exposure. The Marshall PSP land offers this opportunity for most sites. The C2Z land proposed within Precinct 3 in the NEIP, although with some exposure to Barwon Heads Road, is primarily exposure to the east-west link road through the NEIP, as noted in Figure 6. This moderates its exposure to future residents in surrounding areas but is more accessible to workers and businesses located in the surrounding industrial area.
105. In addition, being situated within an industrial precinct diminishes its attractiveness for some potential commercial 2 zoned land uses, such as childcare facilities and medical centres. The industrial setting is less conducive to these types of services, which thrive in more accessible locations.
106. Therefore, the nature of occupiers in the NEIP C2Z will likely be more aligned to the industrial activity surrounding. This land would be more suited to light industrial uses like automotive repairs, non-food retailers and to some extent convenience stores to support the worker catchment and draw synergies from the surrounding industrial uses.
107. In contrast, the commercial areas at Marshall along Barwon Heads Roads have a higher level of accessibility and residential exposure which would attract more convenience and community focused uses like service stations, fast food, and childcare.
108. I note that the NEIP has been approved for around 14 years, and despite significant population growth in Armstrong Creek and the wider Geelong region in that time, no development has emerged. This indicates it is not the provision of alternative C2Z land elsewhere that is preventing development of NEIP. There is no guarantee that reducing the C2Z land provision in Marshall, which has been proposed for around five years, will see development of NEIP, particularly those uses requiring extensive main road frontage that are proposed to be delivered by Rich & Pure Pty Ltd.

5.3. RETAIL STRATEGY DEMAND ESTIMATES

109. The Greater Geelong Retail Strategy 2020-2036 indicated the future need for retail space by analysing existing and planned capacity across both existing and future activity centres to the population driven projected demand for retail floorspace.

5.3.1. Retail Growth Projections

110. The 'supportable retail floorspace by centre' within the Strategy concluded that the City of Greater Geelong had a total of 1.1 million sq.m of existing and planned retail floor space supply, with a projected retail floor space demand of 1.5 million sq.m to 2036.
111. This shortfall implies the need for more than an additional 400,000 sq.m of retail space across existing and future locations between 2020 and 2036. While most of this need will be met in core retail areas, at least some of that need is likely met in "out-of-centre" locations, including C2Z land areas as a supplementary location for some retail facilities such as fast food and bulky goods. I note that the 2018 Floorspace Audit⁵ presented in the Retail Strategy indicated that 345,000 sq.m of the 1.03 million sq.m of retail space in Greater Geelong was in "dispersed" locations outside of designated centres. This included 230,000 sq.m⁵ of dispersed restricted retail and 115,000 sq.m⁵ of dispersed other retail.
112. While city planning focusses on the need to support floorspace growth in centres, there is an important role played by these dispersed locations, many of which are C2Z precincts. Providing this land is not inconsistent with supporting the retail hierarchy established in the Retail Strategy.
113. I note that within the Armstrong Creek Town Centre (the major proposed centre in the region), the Strategy identified the planned capacity of 40,000 sq.m⁶ of retail space. However, is estimated a

⁵ Greater Geelong Retail Strategy 2020-2036, Pg 31

⁶ Greater Geelong Retail Strategy 2020-2036, Pg 43

projected retail floor space demand of 49,574 sq.m⁶. This implies the Town Centre will reach capacity prior to 2036, with a shortfall of 9,574 sq.m⁶ of retail floor space supply. Presumably this demand will need to be accommodated elsewhere in the area in future.

114. Furthermore, the analysis underpinning the quantification of retail floorspace shortfall was based on population projections that were available pre-COVID (2018) which did not account for the unprecedented surge in population growth witnessed in the period following its release.
115. The Geelong Retail Strategy projected that the population of Greater Geelong would grow to around 281,000 residents⁷ by 2026. However, the latest council-approved projection from .id anticipates the municipality will reach 301,900 residents by the same year. By 2036, the Strategy projected the population to be 351,500⁷, whereas .id forecasts a higher estimate of 364,200 residents at the same date.
116. Based on the now higher projected population growth, it would be reasonable to assume that the potential shortfall in retail floor space across the City, and particularly in growth areas like Armstrong Creek, might arise much sooner than previously anticipated, and will grow over the longer term.

5.3.2. Restricted Retail Growth Projections

117. The Retail Strategy also identified planned and existing floor space supply and floor space demand for restricted retail across supporting centres.
118. Existing and future activity centres were allocated substantial demand growth projections, far exceeding their planned capacity. For instance, Waurm Ponds, the largest restricted retail location in southern Geelong, was indicated to have a planned capacity of just over 47,000 sq.m⁸. However, the Strategy identified projected demand for that location almost 91,000 sq.m⁸. This implies there will be demand for the restricted retail offer at Waurm Ponds to almost double from its current size. I would question the capacity to support that scale of growth within the Waurm Ponds precinct, necessitating the need for excess demand to be delivered elsewhere. This is just one example, with several existing centres allocated floorspace demand that appears well in excess of capacity.
119. For restricted retail, the Retail Strategy identified the gap in planned supply capacity and projected demand for retail floorspace across existing and future activity centres at over 126,000 sq.m⁹, on the back of projected demand for floor space at 290,000 sq.m⁹.
120. All existing centres that can support restricted retail were indicated as having no planned capacity to meet this deficit. Even Armstrong Creek Town Centre, that has an allocated planned capacity, is allocated demand more than what it is planned to support. As mentioned in Section 3, the sub regional activity centre has planned capacity to accommodate 25,000 sq.m⁹ of restricted retail (bulky goods) by 2036. The projected retail floor space demand for the centre in the Retail Strategy though, was 31,168 sq.m⁹, resulting in a gap of 6,168 sq.m⁹.
121. According to the Town Centre Precinct Plan, restricted retail can only be supported in Precinct 2 & 3, located along Torquay Road. I have assessed the existing built form at Armstrong Creek Town Centre currently, illustrating its current capacity to accommodate future restricted retail development in Map 3 attached in the Appendix B. It also notes planning applications on undeveloped land that include a mix convenience, recreational, medical, childcare and commercial uses.
122. The current and planned built-form at the centre underscores the limited land availability to accommodate an additional 25,000 sq.m of restricted retail space by 2036. Much of the land allocated for bulky goods in Precinct 2 & 3 is either developed or under planning for uses other than bulky goods. Considering the large footprint and arterial road exposure required to accommodate bulky goods uses, the remaining land parcels provide limited opportunities for additional restricted retail expansion.
123. Other restricted retail locations will be required beyond the existing and nominated locations.

⁷ Greater Geelong Retail Strategy 2020-2036, Pg 12

⁸ Greater Geelong Retail Strategy 2020-2036, Pg 45

⁹ Greater Geelong Retail Strategy 2020-2036, Pg 45

5.4. SUMMARY & IMPLICATIONS

124. Continued growth in population across Greater Geelong, but particularly within the Armstrong Creek Urban Growth Area, will create need for additional retail facilities and a range of other services. C2Z land has a role to play supplementing designated activity centres.
125. Even with the proposed Commercial / Bulky Goods precinct in the Marshall PSP retained as exhibited, and allowing for the proposed land in the NEIP, the provision of C2Z land in Armstrong Creek per capita will be well below the average provision across the rest of Geelong. There is opportunity, and indeed a need, for more land that supports the broad mix of uses suited to C2Z land. Removing some of the land designated in the Marshall PSP would reduce the provision relative to the future population even further.
126. Although both having an applied C2 zone, the Marshall PSP commercial precinct is distinct from the industry and mixed business precinct proposed in the NEIP. The location of most of the land within the industrial precinct will see the NEIP C2Z land well positioned to grow to support the surrounding industrial activity. The Marshall C2Z precinct with its main road frontage and exposure to residents in the corridor will drive demand for a mix of population services.
127. The designation of Commercial / Bulky Goods land in the Marshall PSP, as per the exhibited version, will not undermine the Greater Geelong Retail Strategy hierarchy. The gap in demand for retail floor space identified in the Greater Geelong Retail Strategy indicates a significant opportunity for growth of existing and planned activity centres. It also indicates a significant proportion of retail space, particularly restricted retail, is supported outside of designated centres.
128. Considering the proposed introduction of Commercial / Bulky Goods land in Marshall in this context, I note the following in relation to the effects of this land allocation on key retail locations in the area:
- The **Armstrong Creek Activity Centre**, which I note is 5-6km from the Subject Land, has significant capacity for retail expansion that would be unaffected by the proposed Marshall C2Z land. While there is capacity identified for 25,000 sq.m of restricted retail, the Retail Strategy indicated this capacity would be outstripped by demand. This excess demand presumably needs to be accommodated elsewhere in the region, particularly given the land available for restricted retail in the Town Centre is progressively being filled by other uses.
 - **Warralily Village** is a neighbourhood centre also along the Barwon Heads Road corridor, although still almost 4km from the Subject Land. While this activity centre includes some uses that might form part of a C2Z precinct, such as service stations, fast food outlets or childcare, the core retail activity is not expected to be duplicated. It is already well-developed, with only peripheral sites to be developed. Warralily Village will continue to serve its role in the surrounding neighbourhoods towards the south of the growth area.
 - The **Marshall Station Precinct** is proposed to provide a small retail and services offer of only 5,000 sq.m in total, including allowance for a mid-sized supermarket. Activity in this precinct will be convenience driven, serving the immediate population and commuters. The scale of centre is not sufficient to support the wider range of uses that a community might require, particularly those uses requiring high levels of exposure and large sites. The designated Commercial / Bulky Goods land will be complementary, not competitive.

6. SECONDARY LOCATION FOR RESIDENTIAL USE

73. Although not undertaking any material additional assessment to support the decision, Council has indicated a preference to change the exhibited plan from commercial use in the area around the Barwon Heads Road and Tannery Road intersection, to residential use. Having established in preceding sections that demand is likely to exist for more commercial land in Armstrong Creek and specifically in this location within the Marshall PSP, I consider here the suitability of the subject land for residential development, including medium-high density on the wedge land west of Barwon Heads Road.
129. The points below represent my assessment of whether the land proposed for a change of use is suitable or preferred for residential use:
- **Inconvenient access to essential amenities and infrastructure:** The land lacks convenient, walkable, access to essential local amenities such as activity centres, schools and major public transport hubs impacts on the appeal of the land for residential development. While these facilities exist closer to Marshall Train Station, or are proposed (small activity centre only), the land proposed to be rezoned is generally more than 1km from these areas. This is beyond the distance seen as easily walkable. While it is possible to walk this distance, with the rest of the residential areas proposed in the Marshall PSP being much closer to the station precinct, the land near Barwon Heads Road is seen as the least preferred location in terms of access to amenity. The land east of Barwon Heads Road is particularly inconvenient given the need to cross busy Barwon Heads Road.
 - **High traffic location:** The location is adjacent to high-volume arterial roads including Barwon Heads Road (2 lanes plus slip roads each way) and Tannery Road which will become a direct connection into the adjoining industrial area. The volume of traffic along these roads, including increasingly heavy vehicles as the neighbouring NEIP develops, raises concerns about noise and air pollution. This makes the land a comparatively undesirable residential location.
 - **Isolated residential pocket surrounded by industrial uses:** If redesignated for residential use, the land will be an isolated pocket of residential development abutting industrial and commercial areas. There will be limited separation of the land east of Barwon Heads Road to the NEIP which abuts to the east and south. Further, Council's revised plan would still leave Commercial 2 zoned land in the wedge west of Horseshoe Bend Road and east of Barwon Heads Road. Therefore, the land north of Tannery Road would be a residential area with C2Z land on one side, and industrial land on the other. Proximity to industrial activity further diminishes the appeal of the land for residential use. This might in part be dealt with through larger open space buffers, although that reduces the residential dwelling yield even further.
 - **Impact on industrial activity:** The other side of the equation is the impact designation of the land will have on the operations of industrial businesses within the NEIP. Various industrial activities cannot be located within a buffer zone of residential dwellings. Should residential development proceed essentially on the border of the industrial area (aside from a small drainage reserve of around 50m), parts of the NEIP will be unsuitable for occupation by those uses which have a buffer imposed. This impacts on the operation and value of the land within NEIP, further stifling economic growth and delivery of the NEIP vision.
 - **Land area and shape impact on feasible residential development:** The properties that make up the Subject Land are not large and are irregular in shape (particularly the narrow wedge of 25 Horseshoe Bend Road). Once allowances are made for other required land allocations for the likes of open space, drainage reserves, access points, setbacks and so on, the dwelling yield from these sites is likely be relatively low. This impacts on the feasibility of residential development.
130. Overall, residential development on the previously proposed commercial land would not be preferred outcome. This is a secondary residential location. This is true from various perspectives:
- Prospective residents will see this as an inferior location to most others in the PSP, with issues around distance from amenity, exposure to main roads, and abutting industrial areas.
 - Future occupiers of the NEIP may have their operations curtailed by proximity to residential dwellings.

- Developers of the land will find feasibility of residential development challenging. Not only will the lower demand from potential residents impact the price they will be able to sell properties at, but the dwelling yield will also not be significant to create the critical scale to support a feasible development.
131. The lack of feasibility due to the combination of lower prices and yields will likely result in one of two outcomes. One option might be to cut costs of construction to match lower prices, although this will only result in the delivery of lower quality housing. More likely, development will not be feasible at all in some locations, resulting on the land remaining vacant and not contributing to housing supply.
 132. The land to the east of Barwon Heads Road is most significantly impacted by the adjacency to the industrial area and the greater separation from the amenity of the Marshall Station precinct. 25 Horseshoe Bend Road (west of Barwon Heads Road) is potentially a more suitable residential location due to better connection to other residential areas, although the shape of the site and the frontage to the main road still make it less than ideal for residential development.

7. ECONOMIC IMPACTS FROM LAND REZONING

133. The proposed change of use, while notionally contributing however marginally to dwelling supply, cannot be considered in isolation from other consequences.
134. From an economic perspective, I note below are some key economic implications from the reallocation of applied Commercial 2 Zone to residential use.), which will impact how the subject land interacts with the wider MPSP as well as with the Victorian planning framework that guides land use to construct the planning scheme.

- **Loss of job opportunities in the Marshall PSP** - The Marshall PSP as exhibited was to provide for 380 additional jobs across the designated employment areas and in home-based businesses. Of these, 198 jobs (52%) are attributable to the commercial and bulky goods designated area within the precinct plan. The rezoning of commercial zoned land to residential would eliminate a large share of intended future jobs, thereby undermining the anticipated employment outcome for the PSP.

The land proposed to be reallocated to residential use from commercial use (the Subject Land plus land north of Tannery Road) has an NDA of approximately 7.2ha. Given the assumed job density of Commercial/Bulky goods use of 20 Jobs/ha, converting this land from commercial to residential would result in a loss of 145 jobs, representing a significant 38% reduction in the precinct's employment capacity.

This rezoning would not only undermine the job creation targets set for the ACUGA but also diminish the economic vitality and commercial diversity of the Marshall Precinct. Conversion to medium-high density residential might only partly mitigate this offset in employment due to the difference in job density (20 Jobs/ha in Commercial / Bulky Goods vs 0.1 Jobs/dwelling for Home Based Business). Maintaining the current zoning is important in sustaining local employment opportunities and supporting the broader economic objectives of the region.

- **Employment Target for Growth Areas not met** - The Marshall Precinct is set to deliver upwards of 1,555 dwellings, accommodating approximately 3,000 to 5,000 residents. Under the precinct structure planning guidelines prepared by the Victorian Planning Authority (VPA), there is a minimum target requirement of 1 job per household to meet the sustainability and liveability goals for residents. Based on these guidelines, this would necessitate the creation of at least 1,500 jobs to meet the standard. Currently, the precinct is set to deliver only 380 jobs, which falls significantly short of this requirement. Rezoning of employment support land use to further impact job creation in the precinct. While it is recognised the PSP is adjacent to the NEIP, diversity of employment opportunities for residents locally are still likely to be impacted.
- **Loss of convenience with reduced access to goods and services** - C2Z land can accommodate uses that go beyond traditional industrial and retail outcomes. They typically support a mix of uses that due to requirements such as lot size, logistics, exposure to customers and cost of occupation, are not otherwise suited to Commercial 1 or industrial locations. Businesses in these areas generally supply important goods and services needed by both residents and businesses in convenient locations. As such, reallocating the land to residential would eliminate the opportunity to develop these critical community services and amenities in a convenient and accessible location. It will reduce the precinct's capacity to support a diverse and vibrant local economy and meet the varied needs of its residents.
- **Reduced choice and competition** – One of the hallmarks of a successful commercial network is creating healthy competition, with the benefits including the provision of choice to consumers (including various locations, businesses, and formats) and reduced prices. Having multiple locations to access goods and services is a positive outcome that should generally be supported by the planning system. It is a concept that is a focus of the Australian Competition and Consumer Commission (ACCC). I note that the provision of C2Z land is not bound by concepts of retail hierarchies in the same way shopping or activity centres are supported through the planning system. Reducing the available C2Z land, will in turn reduce the range of goods and services and the locations they are provided, with negative effects on the choice and price paid by the community in Marshall and surrounds.

- **Related travel costs** – The loss of future employment opportunities and community services would also result in the need to travel further to access these requirements, adding to the economic toll of this land rezoning.

APPENDIX A COMMERCIAL 2 ZONED AREAS IN SOUTHERN & CENTRAL GEELONG

Table 5 - C2Z Land in Southern and Central Geelong

No.	Suburb / Precinct	Location	Gross C2Z land (in ha)	Vacant Land (Indicative)	Major Uses
Existing Centres					
1	Moolap	Bellarine Hwy	9.3	No Vacancy	Food catering, non-food retail, community services.
2	Newcomb	Bellarine Hwy	9.8	No Vacancy	Food catering, non-food retail.
3	South Geelong	Fyan St	11.2	No Vacancy	Convenience, food catering, business services.
4	Grovedale	Torquay Rd	16.6	No Vacancy	Light industrial, take-away food, mid-sized supermarket, limited bulky goods (furniture) stores
5	Waurm Ponds	Colac Rd	15.8	No Vacancy	Key bulky goods centre, food catering, some non-food retail.
6	Newtown	West Fyans St	11.7	No Vacancy	Food catering, non-food services.
7	Geelong West	La Trobe Tce / Pakington St	14.7	No Vacancy	Trade showrooms, food catering, non-food services.
Proposed C2Z in ACUGA					
1	NEIP	Keystone & Gateway Ave	14.1	-	TBC
2	Marshall	Barwon Heads Rd	9.9	-	Mixed commercial precinct

Source: Vicplan, Nearmap, Precinct Structure Plans, Greater Geelong Planning Scheme; Urbis

APPENDIX B

CURRICULUM VITAE



RHYS QUICK

DIRECTOR

“I find it exciting being involved from the early stages in significant property projects, watching as they develop and are finally delivered, ultimately changing the way people live, work and play.”

SERVICES

Economics
Research

SECTORS

Mixed Use
Office
Retail
Tourism and Leisure

QUALIFICATIONS

Bachelor Economics, Hons
(Monash University)

AFFILIATIONS

Past Committee Member,
Property Council of Australia
Retail Committee.
Member, Victorian Planning
and Environmental Law
Association.

CONTACT

T +61 3 8663 4937

M +61 413 565 571

Rhys is an economic and land use consultant specialising in economic supply and demand analyses in the retail, commercial, industrial, entertainment and leisure, tourism and mixed use sectors.

He has extensive experience working with various government authorities in delivering significant projects and community outcomes. His specialisation is providing the evidence base underpinning the development of employment, activity and residential precincts emerging from investment in infrastructure, either via private or public sector channels.

He has consulted to many of the major property groups in Australia and New Zealand, including asset owners, retailers, service providers and property developers in all sectors. He is expert at undertaking population and market demand studies, forecasting inputs to development feasibility, and assessing the economic impact of new developments.

Since he joined Urbis in 1999, Rhys has been a key consultant on the development of the Chadstone Shopping Centre; has advised the State Government in relation \$11 billion Melbourne Metro Rail Project and delivers the industry standard Urbis Shopping Centre Benchmarks on an annual basis.

Rhys also regularly acts as an expert witness in relation to social and economic impacts before planning tribunals, panels, committees, courts, and other authorities.

RELEVANT PROJECTS

Chadstone Shopping Centre Development Potential – Retail, Hotel & Office – Key commercial consultant and economic evidence

Melbourne Metro Rail Project Business Case Development & Retail Strategy

Melbourne Level Crossing Removals – Mixed use development outcomes around train stations

The Future of the Central Melbourne – a review of land use and community facility requirements

Central Geelong Framework Plan – Economic Expert Evidence

Property Impacts of Outer Metro Ring Road – Supreme Court Expert Evidence

Economic Impact Assessments/ Expert Evidence for numerous property developments and Precinct Structure Plan processes

